



ELO mobile apps

ELO app (Android)



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Basics

With the ELO app, you can access your company's ELO repository using a mobile device. The app offers quick access to your documents and all associated details. You can capture and file documents while out of the office and search for information in ELO.

The ELO app does not replace the desktop version of ELO, but is designed to complement it. To get the most out of the ELO app, you should already be familiar with the basic functions of ELO software as well as your device.

The ELO app is optimized for use on tablets in landscape mode. This manual explains how to use the app with a tablet. It may look different on your device.

Installation and getting started

Requirements

The following requirements apply for the installation and use of the ELO app:

- Android 7 or higher installed on the mobile device
- ELO Web Client 11.00.000 or higher installed on the ELO server and configured for use on the Internet. For more information, refer to the *ELO Web Client Internet Access* developer documentation.
- Active Internet connection for unrestricted functionality.

Please note

HTTPS is essential for secure communication, as sensitive data is sent over the network. Without SSL/TLS encryption, third parties could intercept this data.

Install app

You will find the ELO app in the *Google Play Store*.

Method

Tap *Install* to begin installation.

Result

The app is installed on your device automatically.

Start app

Method

To start the ELO app, tap the app icon on your device's start screen.

Result

The ELO app starts.

Create profile

When starting the app the first time, you will be asked whether you want to create a demo profile or log on with an existing profile.

You can use the demo profile to familiarize yourself with the app. The demo profile has restricted functions without write rights. To create a demo profile at a later point in time, tap the *CREATE PROFILE* button in the action bar of the *Configuration* dialog box.

To access your company repository, you need to set up your ELO account in the ELO app. Tap *Log on with existing account*. You can find more information in the section [Add profile](#).

Language

The ELO app automatically uses your device's language settings. If the ELO app does not support your language, it uses English as the default.

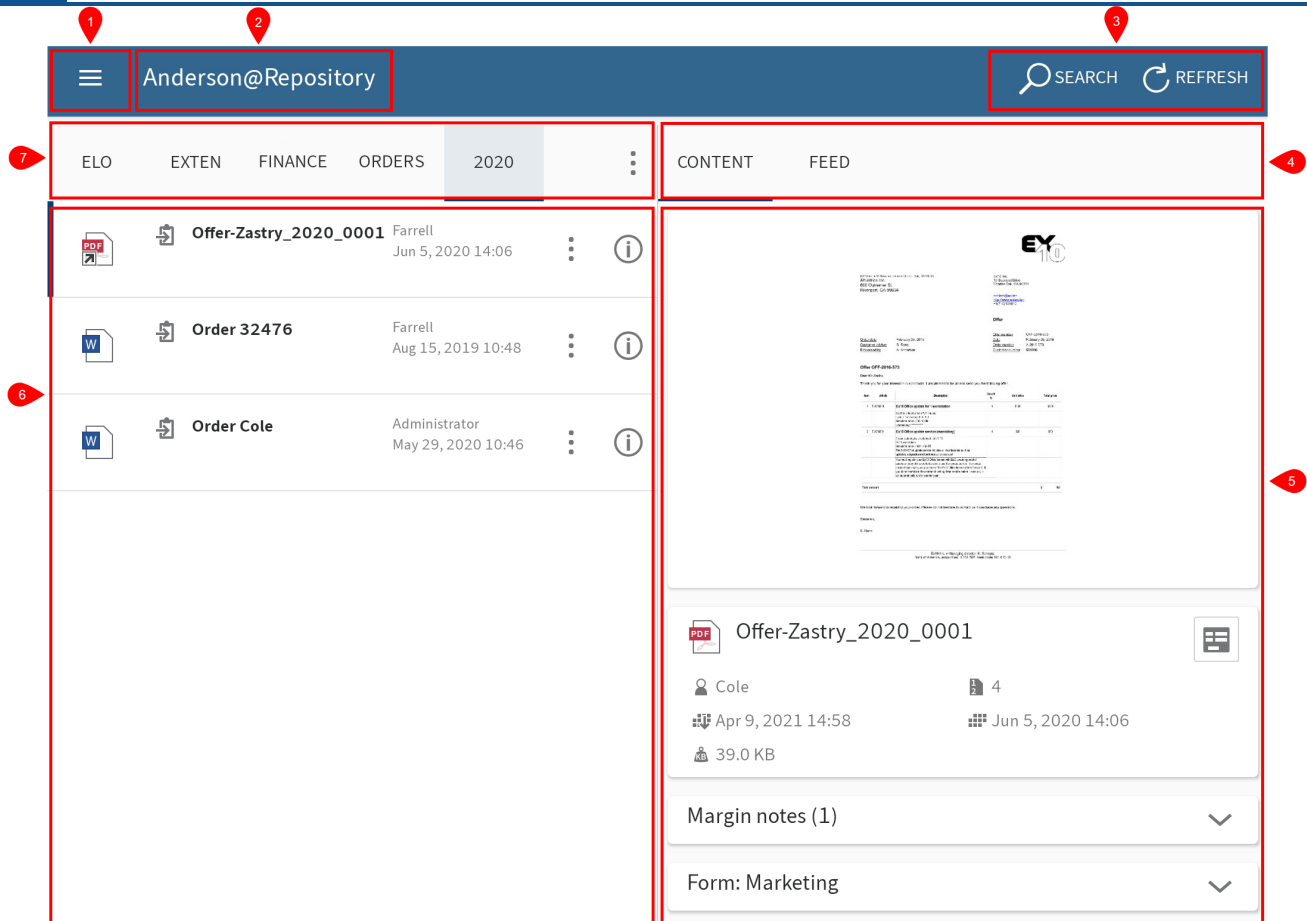
User interface

This documentation describes the user interface in landscape mode on a tablet. It may look different on your device.

The user interface may differ depending on the work area and the function being used.

Layout

The user interface is divided into two main areas: the list view and the viewer pane.



1 Menu (button with three dots): Opens the tile navigation.

2 Menu bar: Depending on the context, it shows the active profile, the selected document, or a search field.

3 Action bar: In this area, you can call various functions.

4 Viewer pane navigation bar: Shows different tabs such as *Content*, *Feed*, or *Search settings* depending on the entry selected and function performed. The current tab is highlighted in blue.

5 Viewer pane: Shows a preview of the selected entry and detailed information.

6 List view: Shows the documents and folders available at the selected level.

7 List view navigation bar: The tabs show the levels of the *Repository* work area. The current level is highlighted in blue.

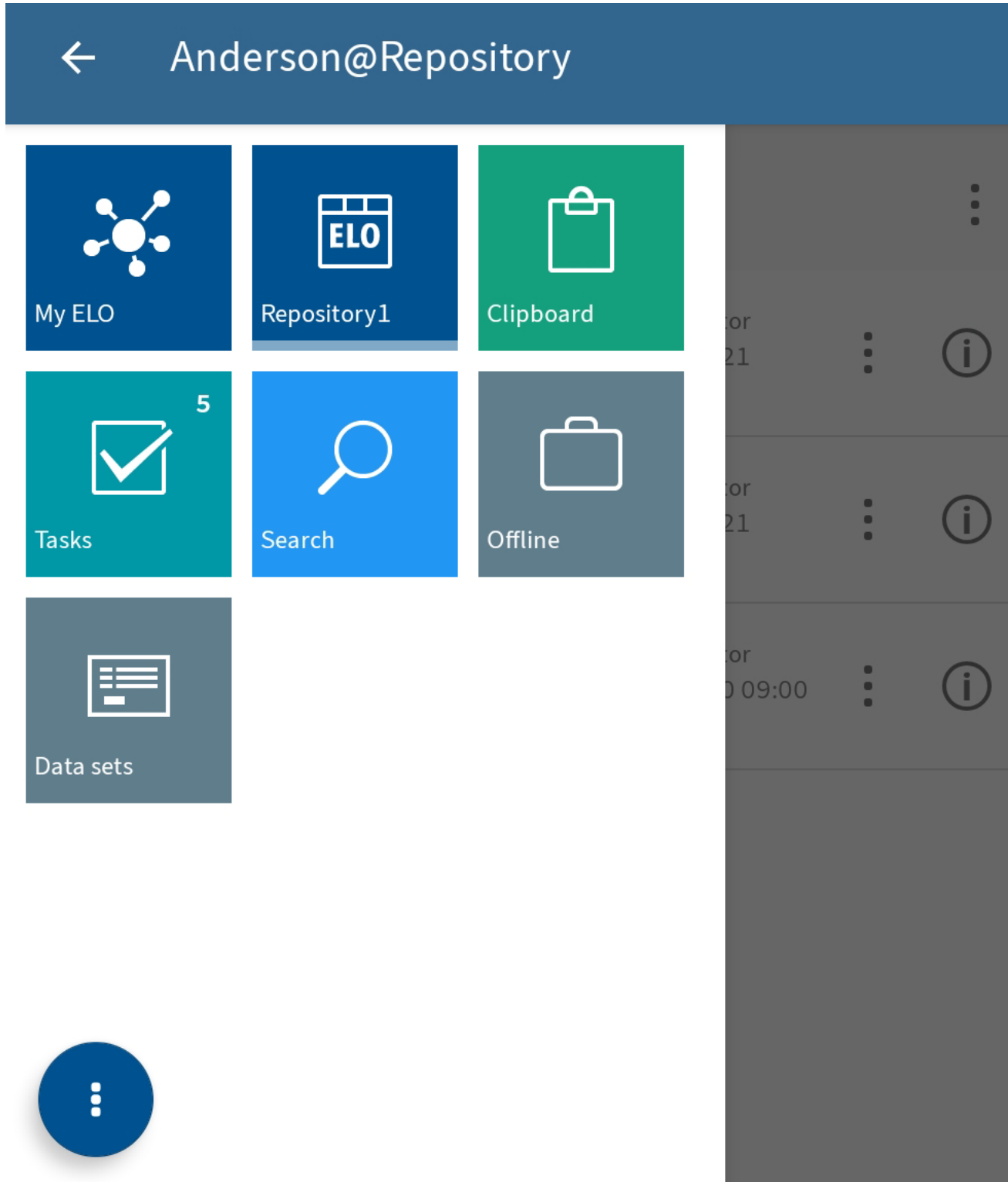
Tile navigation

The ELO app has different work areas. The tile navigation contains an overview of the work areas. From here, you can switch to other work areas and open the *Configuration* dialog box.

Information

Administrators can restrict which work areas users are able to see via the ELO Administration Console.

You can access the tile navigation from the menu (button with three dots) or by swiping your finger from the left towards the right edge of your screen.



The tile navigation contains the following work areas:

- My ELO: Shows news from subscribed feeds as well as information on tasks and workflows.
- Repository: Contains all folders and documents that you can access.
- Clipboard: The *Clipboard* work area is a temporary list of documents and folders.
- Tasks: This work area contains your tasks and workflows.
- Search: Enables you to look for specific entries in ELO.
- Offline: You can download entries to your Offline area to make them available on your device.
- Data sets: Data sets are saved temporarily here. Depending on your settings, they are uploaded to the *Repository* work area as soon as your device is connected to the Internet.








Information

Administrators can add new work areas with embedded web pages to the tile area via *ELOwf > App Manager > Add Client Info*.

Tile navigation context menu

From the tile navigation context menu (button with three dots), you can go straight to the configuration or the ELO in-program help .

← Anderson@Repository

-  My ELO
-  Repository1
-  Clipboard
-  Tasks 5
-  Search
-  Offline
-  Data sets

- Background processes
- Configuration
- About
- Help
- Company Information
- Privacy Policy



- 2020
- 0 14:06
- 19 10:48
- or
20 10:46

The tile navigation context menu contains the following items:

- Background processes: Here, you will find an overview of running background processes. Background processes are started when forms are loaded or data is copied, for example.
- Configuration: In the *Configuration* dialog box, you can adjust the settings for the ELO app.
- About: Here, you will find information about the ELO app, such as the version number.
- Help: Tap the *Help* button to open the ELO in-program help in an external browser.
- Company Information: This button opens the *Company Information*.
- Privacy Policy: You will find the *Privacy Policy* here.

Navigation

When you first start the app, you will be in the *Repository* work area.

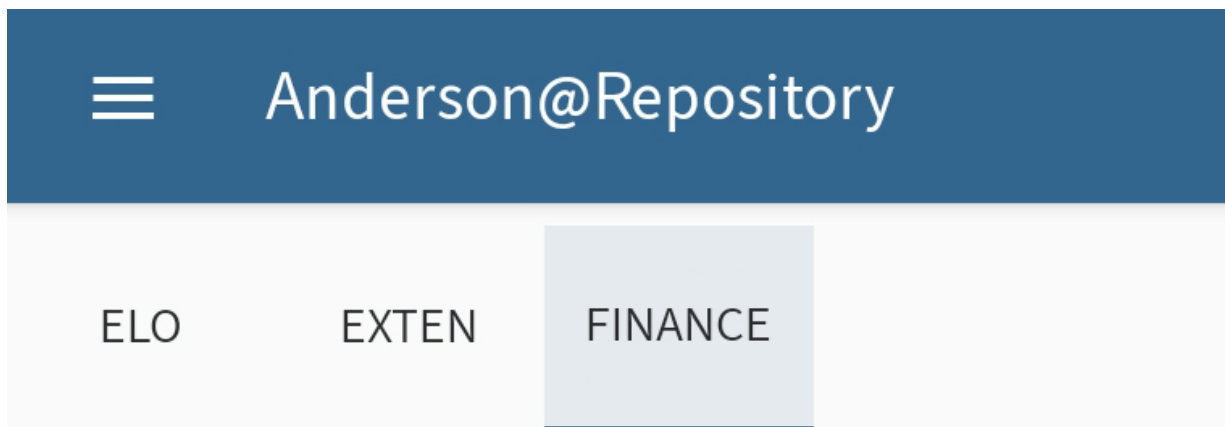
Change folder

Method

1. To switch to another folder, tap the folder you want to open in the list view.

A new tab appears in the list view navigation bar with the folder you opened. The tab of the current folder is marked in blue.

You can now access the entries in this folder.



2. To switch between the folders, tap a tab in the list view navigation bar.

Alternative: Swipe left or right to switch between the folders.

Scroll

If it is not possible to display all entries at once, you can scroll up and down in the list view, viewer pane, menus, and dialog boxes. Swipe up or down on the screen to scroll.

Go to

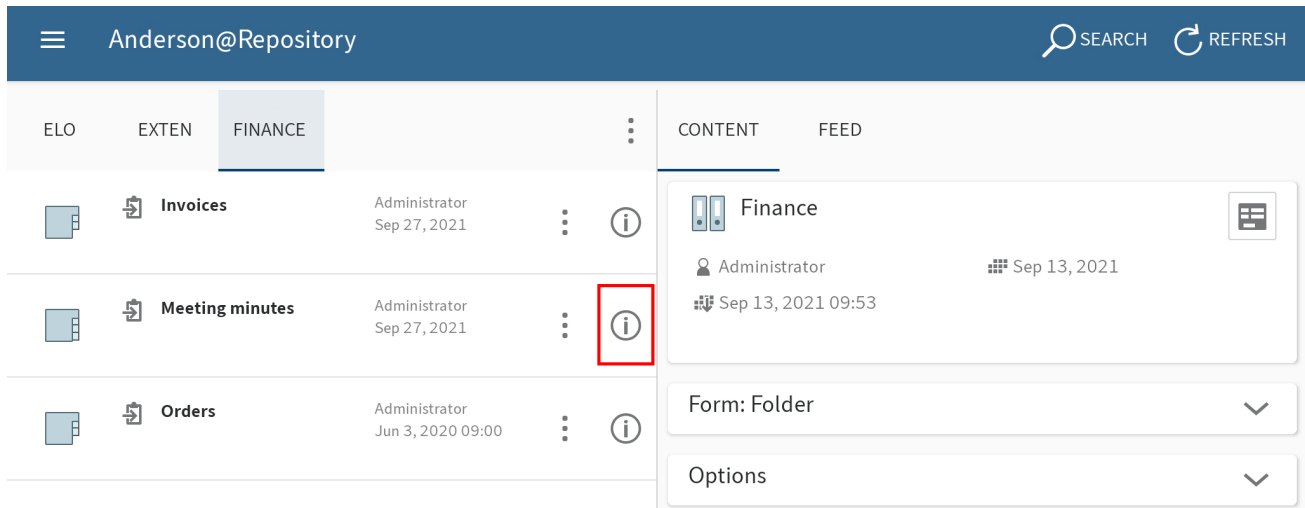
The GO TO function takes you straight to the location of a document or folder in the *Repository* work area.

You will find the *GO TO* button in the context menu for all work areas except for *Data sets*.



Show details

You can display detailed information on folders and documents in the viewer pane.



To view detailed information about folders or documents, tap the information icon next to the entry in the list view.

Alternative: To show the detailed information for documents, tap the entry in the list view.

The detailed information is then displayed in the viewer pane, along with any margin notes and attachments.

Tabs in the viewer pane

Depending on the selected work area, the viewer pane navigation bar will contain different tabs:

- **Content:** In this tab, you will see a preview of PDFs, scans, and image documents. You will also see the metadata for the selected folder or document as well as margin notes and options.
- **Feed:** The feed documents changes made to entries. You can create and comment on posts. You can also open the entry's metadata.
- **Search settings (only in the *Search* work area):** You can customize your search here.
-

Saved values (only in the *Data sets* work area): Shows information on a data set.

Switch between tabs in the viewer pane

You can switch between the different tabs. The current tab is underlined in blue.

Method

Tap the tab you want to open in the viewer pane navigation bar.

Alternative: Swipe left or right to switch between the tabs.

Result

The selected tab is underlined in blue in the navigation bar of the viewer pane.

Show/hide additional detail areas

On some tabs of the viewer pane, the detail areas are hidden for optimized display. Initially, you only see the names of the available detail areas (e. g. *Form* and *Options*). You will recognize detail areas you can hide or show based on the up or down arrow icon. To show or hide details, tap the detail area.

Show e-mails

In the *Message* detail area in the viewer pane, you will see a text preview of filed e-mails.

If an e-mail filed to the repository contains attachments, you will find them in the *Attachments* detail area.

Method

To open an attachment, tap the eye icon to the right of the attachment.

Information

An application for opening the attached files must be installed on your Android device.

Result

The attachment is opened in an external application.

Use the Android *Back* button to return to the ELO app.

Context menu

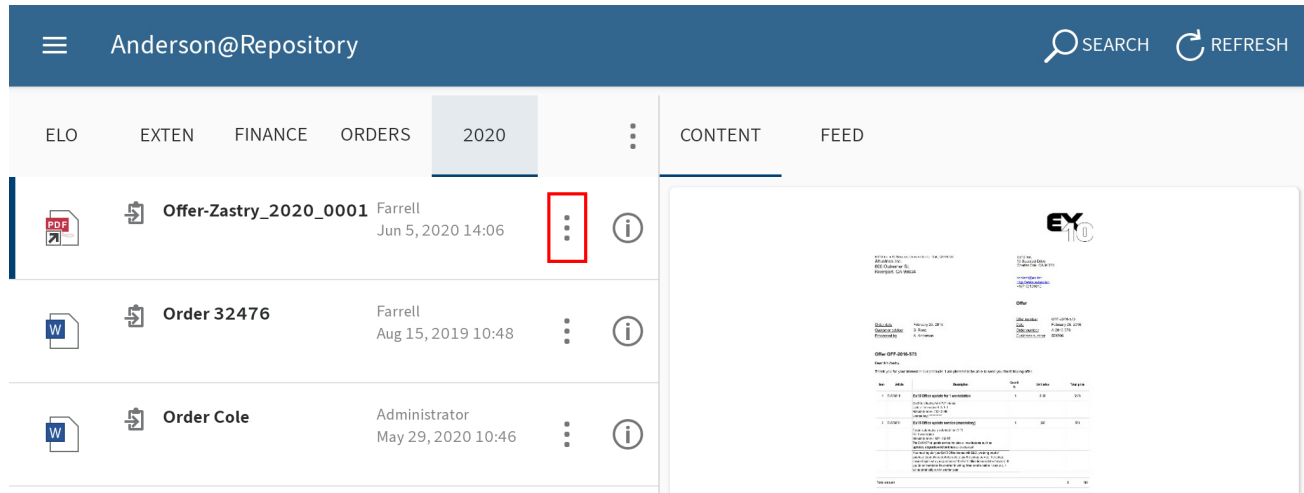
You can call up additional functions for individual documents or folders via the context menu. Various functions are available depending on the type of entry and work area.

Information

Administrators can restrict which functions users are able to see via the ELO Administration Console.

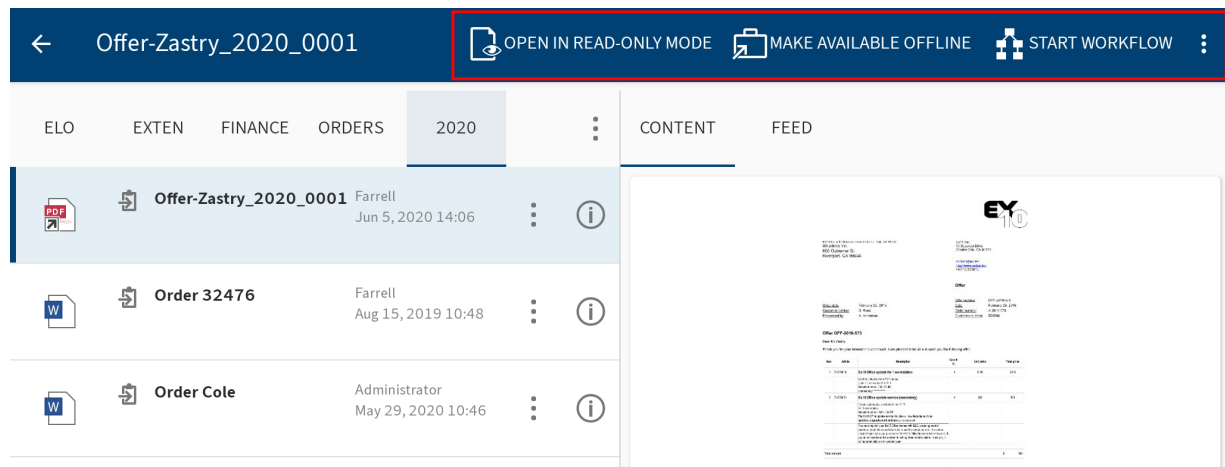
Open context menu

Method



1. Tap the context menu (button with three dots) next to an entry in the list view.

Alternative: Long tap the desired entry and until the context menu appears.



The selected entry is highlighted in blue. The context menu appears in the menu bar.

2. Tap the function you want to use.

Result

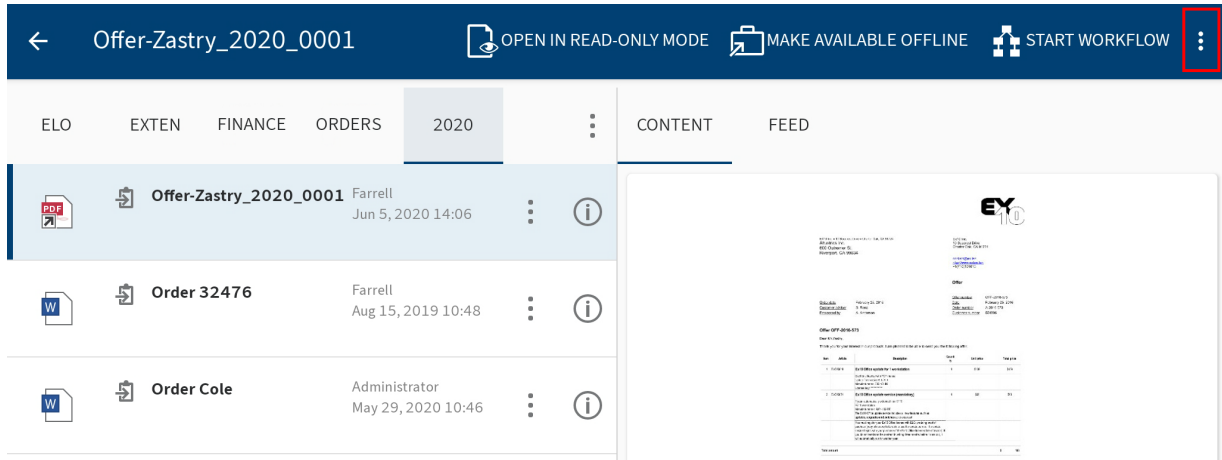
The function is performed.

Call additional functions

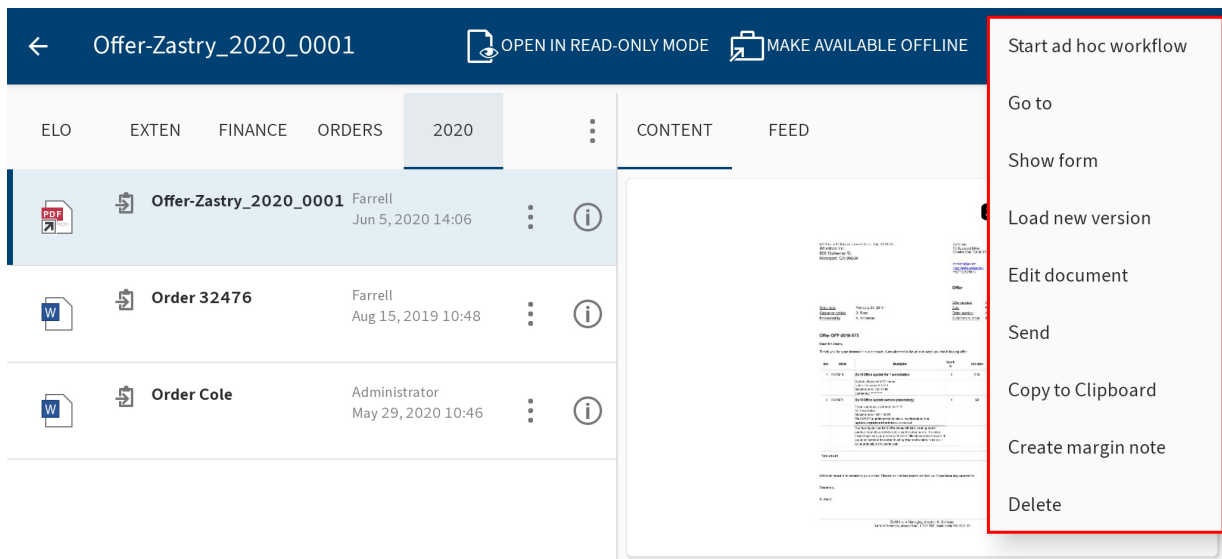
Buttons from the main action bar may be moved to a drop-down menu depending on the width and orientation of the screen used. You can open them from the menu (button with three dots).

Method

1. Open the context menu for an entry (button with three dots).



2. In the context menu, tap the menu (button with three dots).



A drop-down menu appears.

3. Tap the desired function.

Information

Some Android devices have a menu key. In this case, the menu (button with three dots) is not displayed, but replaced by the menu key on your device.

Multiple selection

In the list view, you can select multiple entries at once.

Method

1. Open the context menu for an entry (button with three dots).
2. In the list view, tap the entries you want to select.

Result

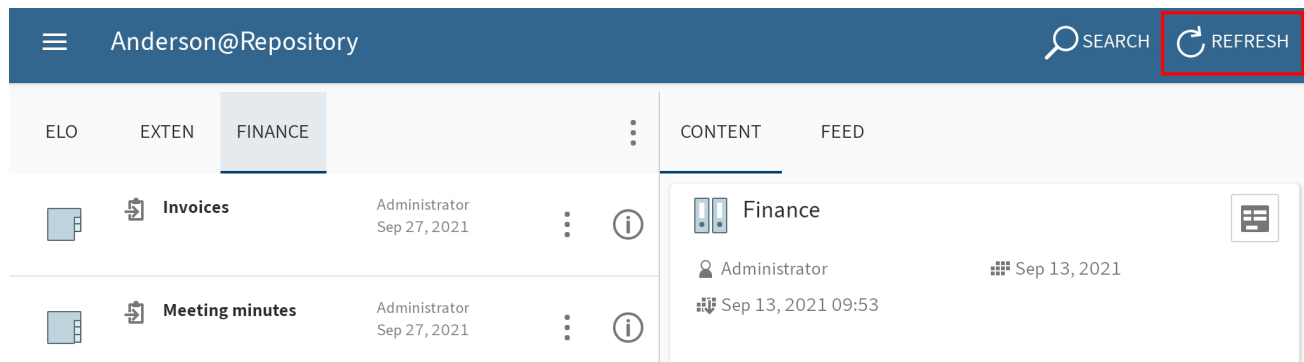
The selected entries are marked in blue.

In the menu bar, you will see how many entries you have selected and what functions are available for selection.

Refresh

Tap the *REFRESH* button to refresh the list view in the selected work area.

You will find the *REFRESH* function in the context menu.



Configuration

In the *Configuration* dialog box, you can change the general settings for all profiles as well as individual settings for each individual profile. You can open the configuration from the context menu for the tile navigation.

← Anderson@Repository

My ELO

Repository1

Clipboard

Tasks

Search

Offline

Data sets

- Background processes
- Configuration**
- About
- Help
- Company Information
- Privacy Policy



2020

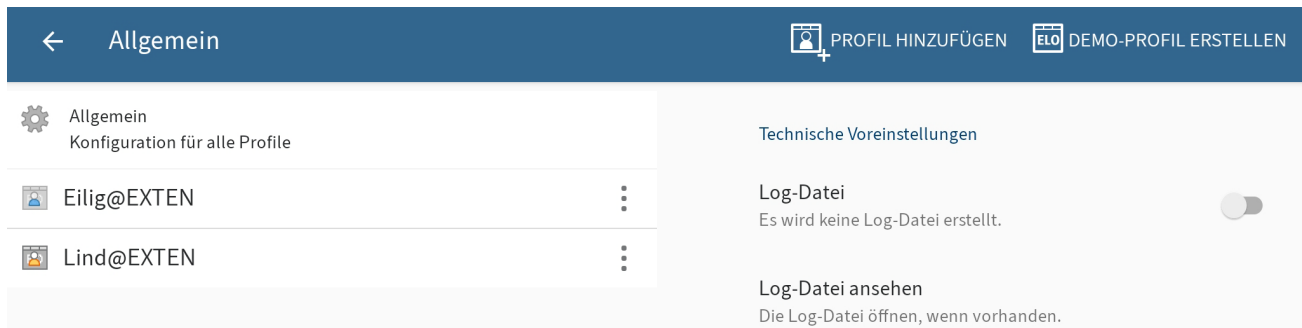
14:06

19 10:48

or
20 10:46

General: Configuration for all profiles

When you open the configuration, you will see the area *General: Configuration for all profiles*. This is where you define settings that apply for all profiles.



You can make the following settings:

- Log file: If this option is enabled, a log file is created on the device's external storage.
- View log file: To open an existing log file, tap *View log file*.
- Notify support: To send an e-mail to ELO support in an external application, tap *Notify support*. If a log file is available, it will be attached.
- Delete log file: Tap *Delete log file* to delete an existing log file.

Individual profile settings

In addition to the general settings, which apply to all profiles, you can also apply settings for an individual profile.

Method

Tap the profile you want to make the settings for.

Result

The submenu for the selected profile appears. The selected profile is highlighted in blue. You can perform the following settings:

Local storage

Use external storage: Choose whether local files should be saved to an external storage medium, such as an SD card, or to the internal storage of the device. Externally saved files are available to other programs and users.

Please note

All local data is deleted when changing the storage location. This includes entries in the *Offline* and *Clipboard* work areas and data sets that have not yet been transferred to the repository.

Storage location for local data: If the *Use external storage* option is enabled, you can select a storage location (e.g. an SD card) for the local data.

Delete local data: Tap *Delete local data* to remove all data stored on the device or the external storage.

Cache

Delete cache directory: Tap *Delete cache directory* to delete all cache files of the active profile.

Network

Automatic data set filing: Decide when data sets are automatically filed to ELO. Tap to open the following options:

- With any connection: The data sets are transferred as long as the device is connected to the Internet.
- Only over Wi-Fi: The data sets are only transferred if a Wi-Fi connection is established.
- No automatic filing: The data sets are not filed automatically.

Metadata

Before you can enter metadata for new folders or documents in the ELO app, your administrator has to create a form and link it to the metadata form.

Information

If a form has not been assigned to the metadata form, the ELO app loads a default form with the fields *Short name*, *Document date*, and *Extra text*. If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

Enter metadata on filing: If you create a new folder or add a file, you can enter metadata for the entries directly. There are different options for entering metadata for new folders and documents. Tap to open the following options:

- Always use the form: If this option is enabled, you will always see a metadata dialog box when filing documents. The form assigned to the metadata form is used to enter the metadata. If a form has not been assigned, the system uses the default form with the *Short text*, *Document date*, and *Extra text* fields.
- Only for metadata forms with form: If this option is enabled, the metadata form will only appear if the selected metadata form is linked to a form. If a form has not been assigned, the new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.
- Do not enter metadata: If this option is enabled, no metadata dialog box opens. The new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.

Enter metadata on serial filing: There are different options for entering metadata when filing multiple documents. Tap to open the following options:

- Always use the form: If this option is enabled, you will always see a metadata dialog box when filing documents. The form assigned to the metadata form is used to enter the metadata. If a form has not been assigned, the system uses the default form with the *Short text*, *Document date*, and *Extra text* fields.
- Only for metadata forms with form: If this option is enabled, the metadata form will only appear if the selected metadata form is linked to a form. If a form has not been assigned, the new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.
- Do not enter metadata: If this option is enabled, no metadata dialog box opens. The new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.

Task settings

Sort order of the tasks lists: Choose how your tasks should be sorted. Tap to open the following options:

- Date/Priority/Name
- Name/Priority/Date
- Priority/Date/Name

Show group tasks: Choose whether group tasks should be displayed.

Show substitution tasks: Choose whether substitution tasks should be displayed.

Show escalations: Choose whether to display escalations for tasks.

Search settings

Specify which fields to include during a search. The following fields are available:

- Short name
- Extra text
- Fields
- Full text

Add profile

To access your company repository, you must connect the ELO app to the repository. You need to set up a profile for this.

Please note

You can only connect a profile to one repository at a time. To access different repositories, you need to create multiple profiles.

The following options are available for setting up a profile:

- If you want to create a profile for yourself, use the [ADD PROFILE](#) function.
- If you want to create a profile for another person as the administrator, use:
 - either an eloprofile file
 - or [Mobile device management](#).

'ADD PROFILE' function

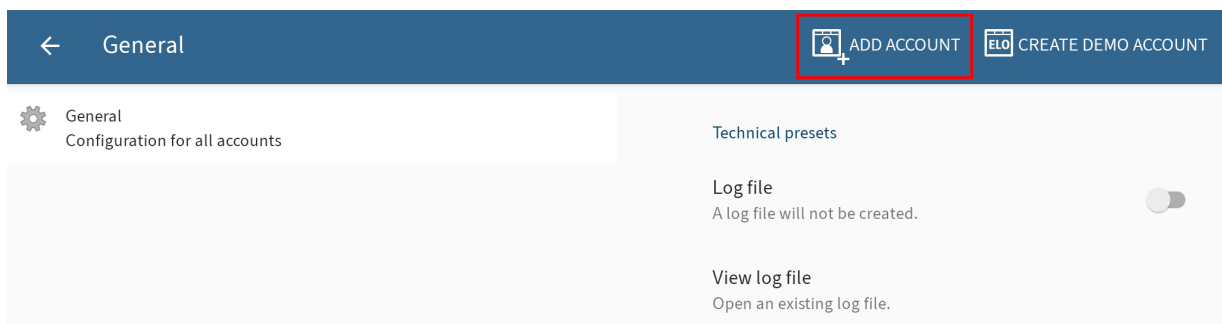
If you want to create a profile for yourself, use the *ADD PROFILE* function.

You can choose between the following options:

- Manual logon
- [Automatic logon with ELOauth](#)

Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap *ADD PROFILE* to create a new profile.

 A screenshot of a mobile application's 'Add profile' dialog box. At the top, there is a dark blue header with a back arrow, the text 'Add profile', and a 'SAVE' button in the top right corner. Below the header, the dialog box is divided into sections. The first section is 'Logon type' with two radio button options: 'Manual logon' (which is selected) and 'Automatic logon with ELOauth'. The second section contains four input fields, each with a label on the left and a text input area on the right: 'Profile name', 'Web Client URL', 'Username', and 'Password'.

The *Add profile* dialog box opens.

3. Select the *Manual logon* option.
4. Enter a name for the repository in the *Profile name* field. You can choose any name you like.
5. Enter the ELO Web Client URL for the repository you want to connect to the *Web Client URL* field. You must use the following pattern:


```
http(s)://<server name>:<port name>/ix-<repository name>/plugin/  
de.elo.ix.plugin.proxy/web
```
6. Enter your ELO user name to the *Username* field.
7. Enter your password to the *Password* field.
8. Tap *SAVE*.

Result

The new profile is now connected to the ELO repository. You can tell that the profile is active by the orange person icon. If you want to use another profile, you have to activate it first.

Alternative

You can also create a profile with an *.eloprofile* file. This file contains the profile data in JSON format:

```
{  
  "name": "<repository name>",  
  "server": "http(s)://<server name>:<port name>/ix-<repository name>/plugin/de.elo.ix.plugin.proxy/web",  
  "user": "<user>",  
  "password": "<user password>"  
}
```

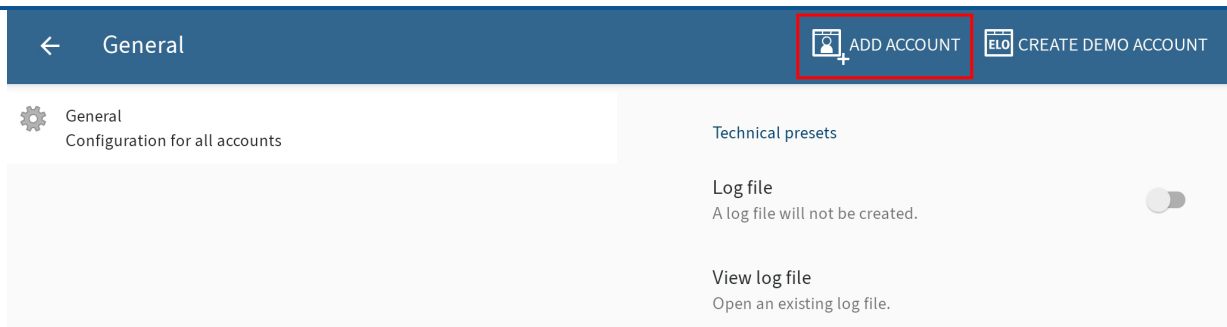
Send the *eloprofile* file to your mobile device, e. g. as an e-mail attachment. Select the ELO app to open the profile file. The profile is created automatically. To use the profile, you have to enable it. You can tell that the profile is active by the orange person icon.

Create a profile with ELOauth

If you want to create an profile for yourself, use the *ADD PROFILE* function.

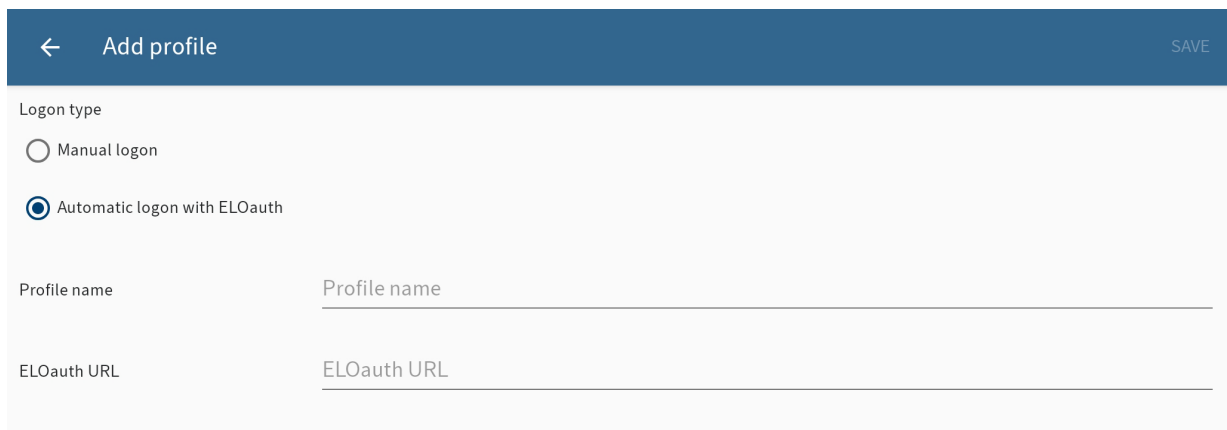
Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap *ADD PROFILE* to create a new profile.



The *Add profile* dialog box opens.

3. Select the *Automatic logon with ELOauth* option.
4. Enter a name for the repository in the *Profile name* field. You can choose any name you like.
5. Enter the full ELOauth URL with `ClientUrl` and `ConfigId`. You must use the following syntax:

```
http(s)://<server name>:<port name>/ix-<repository name>/plugin/
de.elo.ix.plugin.auth/login/?clientUrl=Mobile&configId=<ConfigId>
```

`ConfigId` is the ID of the configuration that should be used. You can read further information about ELOauth in the documentation [ELOauth Plug-in](#).

6. Tap *SAVE*.

Result

The new profile is now connected to the ELO repository. You can tell that the profile is active by the orange person icon. If you want to use another profile, you have to activate it first.

Alternative

You can also create a profile with an `.eloprofile` file. This file contains the profile data in JSON format:

```
{  
  "name": "<Repositoryname>",  
  "eloauth-url": "http(s)://<server name>:<port name>/ix-<repository name>/plugin/de.elo.ix.plugin  
}
```

Send the eloprofile file to your mobile device, e. g. as an e-mail attachment. Select the ELO app to open the profile file. The profile is created automatically. To use the profile, you have to enable it. You can tell that the profile is active by the orange person icon.

Outlook

After creating the profile, a dialog box appears to log on to the app. Tap the button to log on. You will be forwarded to a browser window from which you can log on to ELOauth.

After successfully logging on, the profile appears in the list of profiles in the ELO app. This profile has the user name of the user who is logged on and the profile name that was specified when creating the profile.

If the ELO session has expired, log on again using the button. If you specify that you want to stay logged on, you don't have to enter your data again.

Mobile device management (MDM)

If you want to create a profile for another person as the administrator, you can use a mobile device management system.

To transfer user profiles to a mobile device, information, such as the server URL, has to be entered in the mobile device management system via a JSON editor. The JSON template for entering repository values is loaded right from the app. All you have to do is replace the variables with the relevant data.

Please note

This data is saved on the device unprotected. This means you should not enter any passwords or other sensitive data here.

Taking Microsoft Intune as an example:

Home > Microsoft Intune > Client apps - App configuration policies > ELO 12 Android - Properties >

ELO 12 Android - Properties

Search (Ctrl+/)

Overview

Manage

- Properties
- Assignments

Monitor

- Device install status
- User install status

Name: ELO 12 Android

Description: Enter a description...

Device enrollment type: Managed devices

Platform: Android

Scope (Tags): 0 scope(s) selected

Associated app: ELO 12 for Mobile Devices

Configuration settings: Configured

Permissions: Not configured

Save

OK

Use the JSON editor to configure the disabled configuration keys.

Configuration settings format: Enter JSON data

Download JSON template

```

1 {
2   "kind": "androidenterprise#managedConfiguration",
3   "productId": "com.elo.android.v12",
4   "managedProperty": [
5     {
6       "key": "account_configuration_list",
7       "valueBundleArray": [
8         {
9           "managedProperty": [
10            {
11              "key": "account_name",
12              "valueString": "René"
13            },
14            {
15              "key": "account_server",
16              "valueString": "https://efmd11.elo.com/web-Demo11/"
17            },
18            {
19              "key": "account_user",
20              "valueString": "René"
21            }
22          ]
23        }
24      ]
25    }
26  ]
27 }

```

If the template is not loaded automatically, you can enter it manually in the editor.

Please note

You need the current ELOauth plug-in to use this template.

```

<?xml version="1.0" encoding="utf-8"?>
<restrictions xmlns:android="http://schemas.android.com/apk/res/android">

  <restriction android:key="account_configuration_list" android:title="@string/restriction_acc
    <restriction android:key="account_configuration" android:title="@string/restriction_acc
      <restriction android:key="account_name" android:title="@string/accountdetails_profil
        <restriction android:key="account_server" android:title="@string/accountdetails_serv
          <restriction android:key="account_eloauth_url" android:title="@string/accountdetails
            <restriction android:key="account_user" android:title="@string/accountdetails_userna
              <restriction android:key="account_password" android:title="@string/accountdetails_us
                <restriction android:key="account_delete" android:title="@string/accountdetails_acc
                  <restriction android:key="account_keep_user_password" android:title="@string/accountt
                </restriction>
              </restriction>
            </restriction>
          </restriction>
        </restriction>
      </restriction>
    </restriction>
  </restrictions>

```

Edit profile

If settings on the ELO server or your user data change, you may be required to edit the profile.

Please note

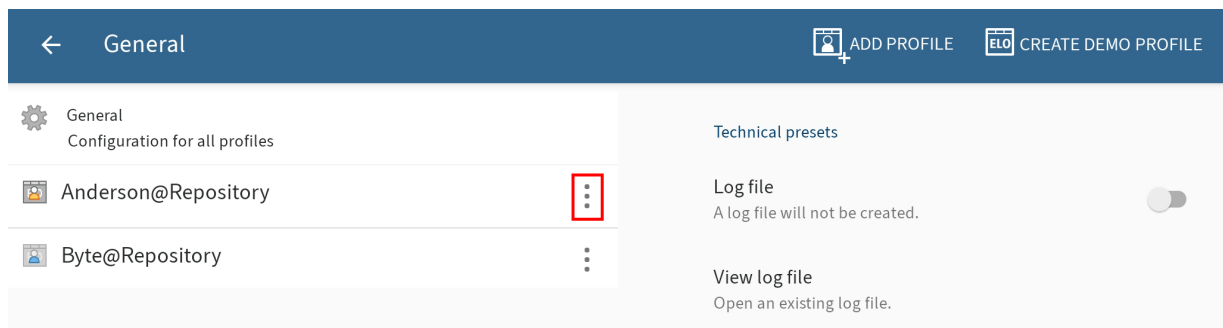
Making changes to a profile deletes all local data on the mobile device. This includes entries in the Offline area, the Clipboard, forms, and form data sets that have not been transferred to the repository.

Information

You cannot change your password in the ELO app. You can change your password in the ELO Java Client or the ELO Web Client.

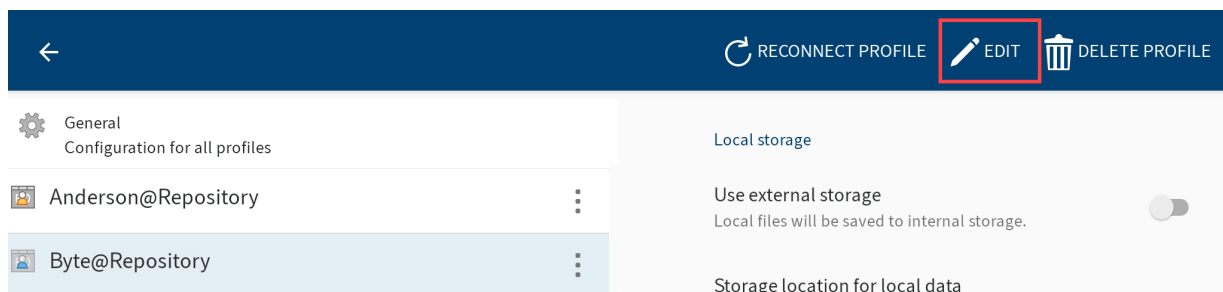
Method

1. Open the configuration via the *Tile navigation > Context menu (button with three dots)*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the profile you want to edit.



The context menu opens.

3. Tap *EDIT* in the context menu.

The *Add profile* dialog box opens. The fields show the data for the selected profile.

4. Make the desired changes.

- 5.

Tap **SAVE**.

Result

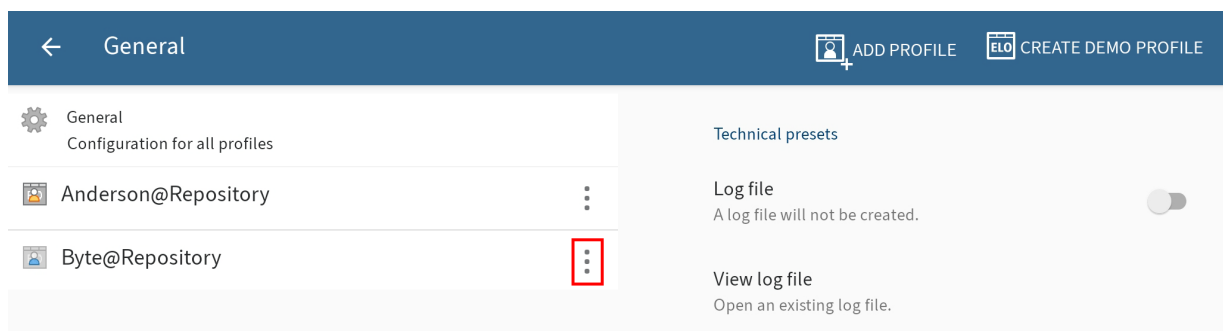
The changes are applied in the ELO app. If the logon information is correct, you can access the repository again.

Change profile

You can create multiple profiles in the ELO app. You can tell that the profile is active by the orange person icon. If you want to use another profile, you have to activate the profile first.

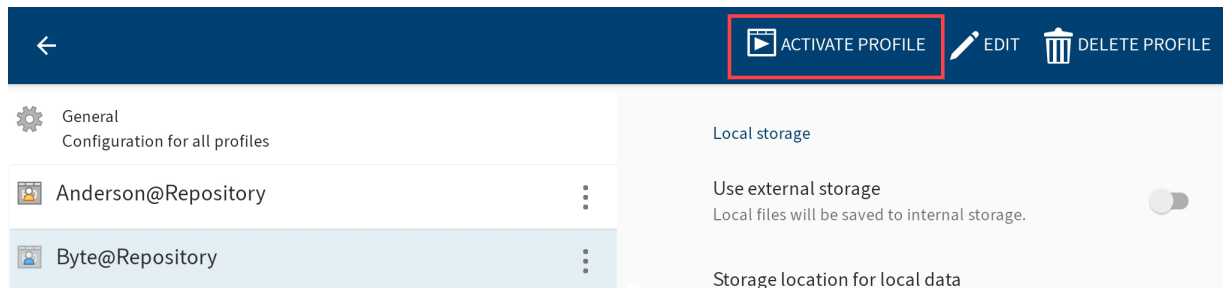
Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the profile you want to activate.



The selected profile is highlighted in blue.

3. Tap **SET PROFILE TO ACTIVE**.



Result

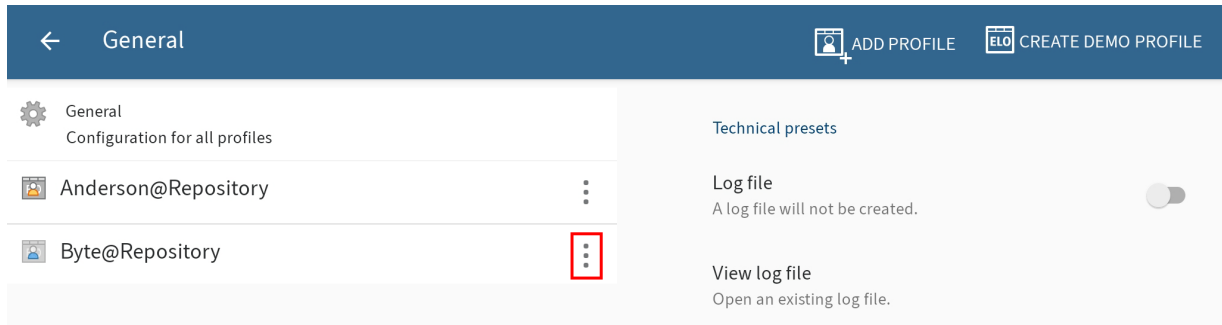
The selected profile is assigned the icon for the active profile (orange person icon). The profile is now active.

Delete profile

You can also delete profiles that you no longer need.

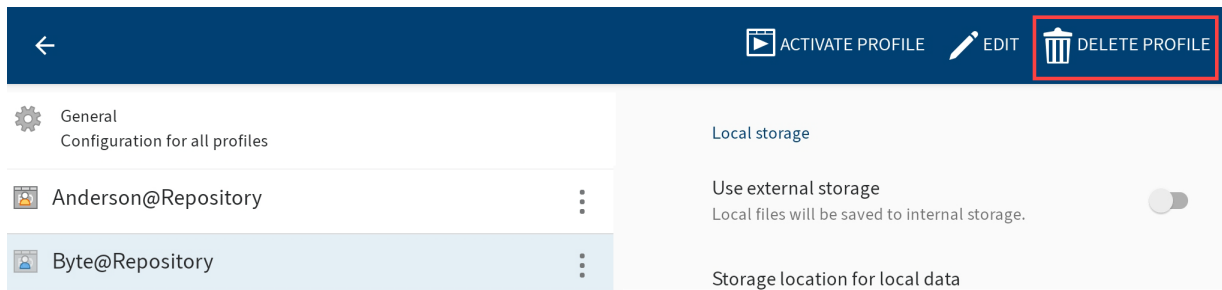
Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the profile you want to delete.



The context menu opens.

3. Tap *DELETE PROFILE* in the context menu.

The *Delete profile* dialog box appears.

4. To delete the profile, tap *YES*.

Result

You have deleted the profile.

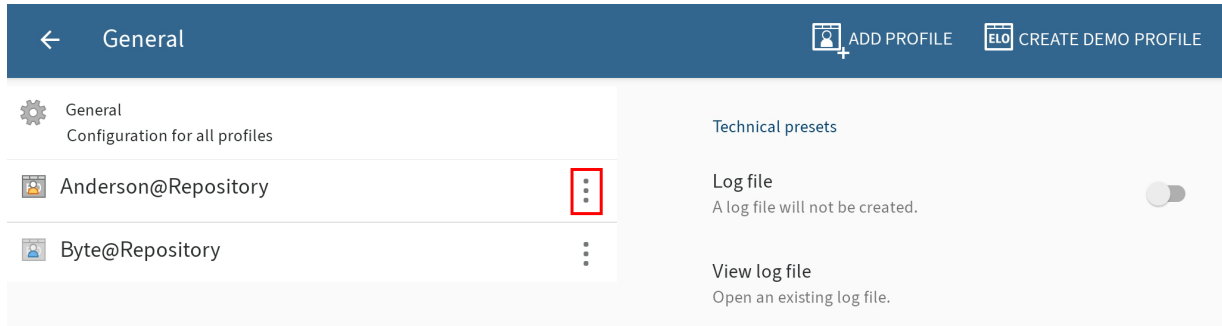
Reconnect profile

To reconnect the active profile to the repository, use the *RECONNECT PROFILE* function. This function establishes a new connection to the repository and reloads all caches and data set forms.

Method

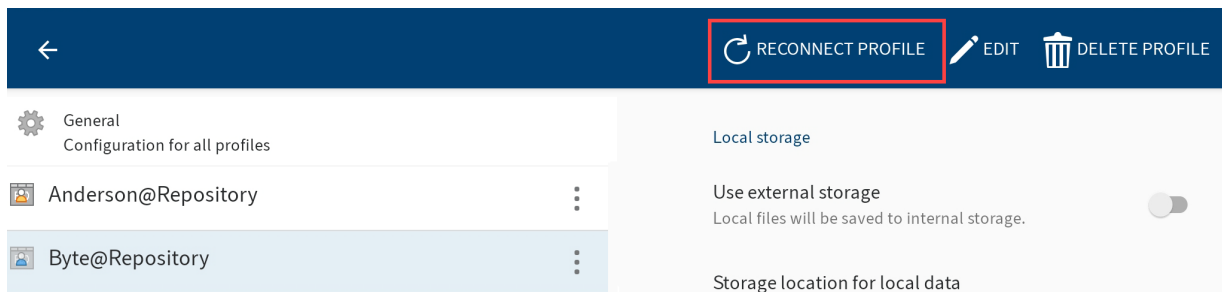
- 1.

Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the profile you want to reconnect.



The context menu opens.

3. Tap *RECONNECT PROFILE* in the context menu.

Result

This reloads the connection.

Basic functions

This chapter explains the basic functions of the ELO app. These include:

- [Create new folder](#)
- [Add file](#)
- [Load new version](#)
- [Open document in read-only mode](#)
- [Edit document](#)
- [Show form](#)
- [Send entry](#)
- [Create margin note](#)
- [Delete entry](#)

For more information on the functions in the [Clipboard](#), [Tasks](#), [Search](#), [Offline](#), [Data sets](#), [Feed](#), and [My ELO](#) areas, refer to the separate chapters.

Create new folder

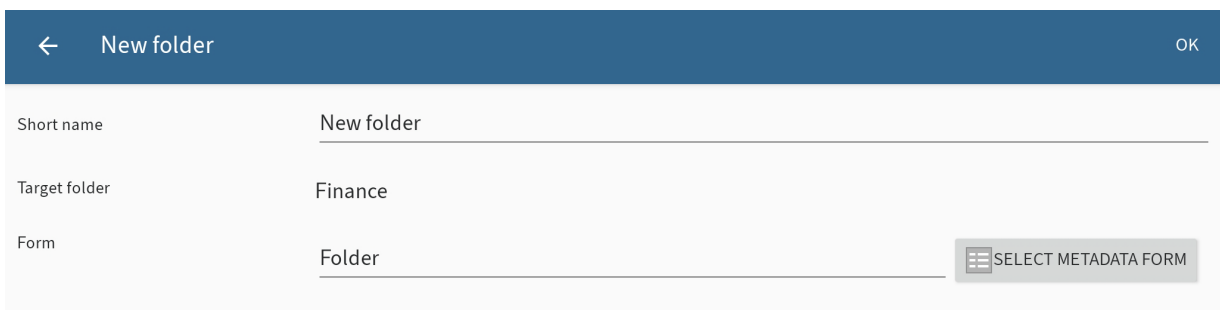
You can create new child folders in existing folders. You always create a folder in the repository that is connected to the active profile.

Information

You can only add new folders in the *Repository* work area.

Method

1. Open the context menu of the folder you want to add a child folder to.
2. In the context menu (button with three dots), tap *New folder*.



Short name	New folder
Target folder	Finance
Form	Folder

SELECT METADATA FORM

The *New folder* dialog box appears.

3. Tap the *Short name* field to enter a name for the new folder.

Optional: The *Folder* metadata form is selected by default. Tap *SELECT METADATA FORM* to change the metadata form.

Information

If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

Information

You cannot create new metadata forms in the ELO app.

4. Tap *OK* to create the new folder.

Result

The *New folder* dialog box closes. You have created a new folder.

Optional: In the configuration, you can specify whether you want a metadata dialog box to appear when filing. You can find more information in the section [Configuration](#).

Add file

You can transfer a file from your device to ELO.

To transfer a file to ELO, you can choose between two options:

- [With the ELO app](#)
- [From an external app](#)

Requirements

You need an external application to add files. The application, such as a file manager or a gallery app, must support file sharing.

Add file with the ELO app**Method**

1. Open the context menu for the folder you want to add a file to.
2. In the context menu (button with three dots), tap *Add file*.

The *Add file* dialog box appears.

3. Tap the document icon at the top right.

The *Select file* dialog box appears.

4. Select one of the following options:

- From file system: Opens the *Select file: Detected file systems* dialog box. Navigate through the folder structure on your device to select a file.
- With another app: Opens an external app you can use to upload files.
- Take a photo: Opens the camera app on your device to take a picture, which can be uploaded.

The short name of the file is displayed in the *Add file* dialog box.

Optional: Tap the *Short name* field to change the short name.

5. Tap *SELECT METADATA FORM* to change the metadata form.

The *Select form* dialog box opens.

Information

If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

6. Tap the desired metadata form in the list.

The metadata form is applied. The *Select metadata form* dialog box closes.

Information

You cannot create new metadata forms in the ELO app.

7. Tap *OK* to transfer the file to ELO.

Result

The *Add file* dialog box closes. This takes you to the filing location of the new file in ELO.

Optional: In the configuration, you can specify whether you want a metadata dialog box to appear when filing. You can find more information in the section [Configuration](#).

Add file with external app

You can also transfer files to ELO from external apps.

Method

1. To transfer a file from an external app to ELO, use the *Share* function in the respective app.



A dialog box for transferring files appears.

2. Select the option *Add file*.

← Add file OK

Short name

Target folder SELECT TARGET FOLDER

DOCX
EX10_2020_Inv
oice.docx

The *Add file* dialog box appears. The file name is entered into the *Short name* field.

Optional: Tap the *Short name* field to change the short name.

- To set the filing location for the file, tap *SELECT TARGET FOLDER*.

The *Select target folder:* dialog box appears.

- Navigate to the folder you want to upload the file to.

The *HISTORY* tab contains the target folders you have previously selected.

- Confirm your selection with *OK*.

Your selection is applied. The *Select target folder:* dialog box closes.

← Add file OK

Short name

Target folder SELECT TARGET FOLDER

Form SELECT METADATA FORM

DOCX
EX10_2020_Inv
oice.docx

- To set a metadata form for the file, tap *SELECT METADATA FORM*.

The *Select form* dialog box opens.

Information

If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

7. Tap the desired metadata form in the list.

The metadata form is applied. The *Select metadata form* dialog box closes.

Information

You cannot create new metadata forms in the ELO app.

8. Tap *OK* to add the file.

Result

The *Add file* dialog box closes. The file has been added. You return to the external application.

Optional: In the configuration, you can specify whether you want a metadata dialog box to appear when filing. You can find more information in the section [Configuration](#).

Load new version

You can load a new version of your documents to document changes to files.

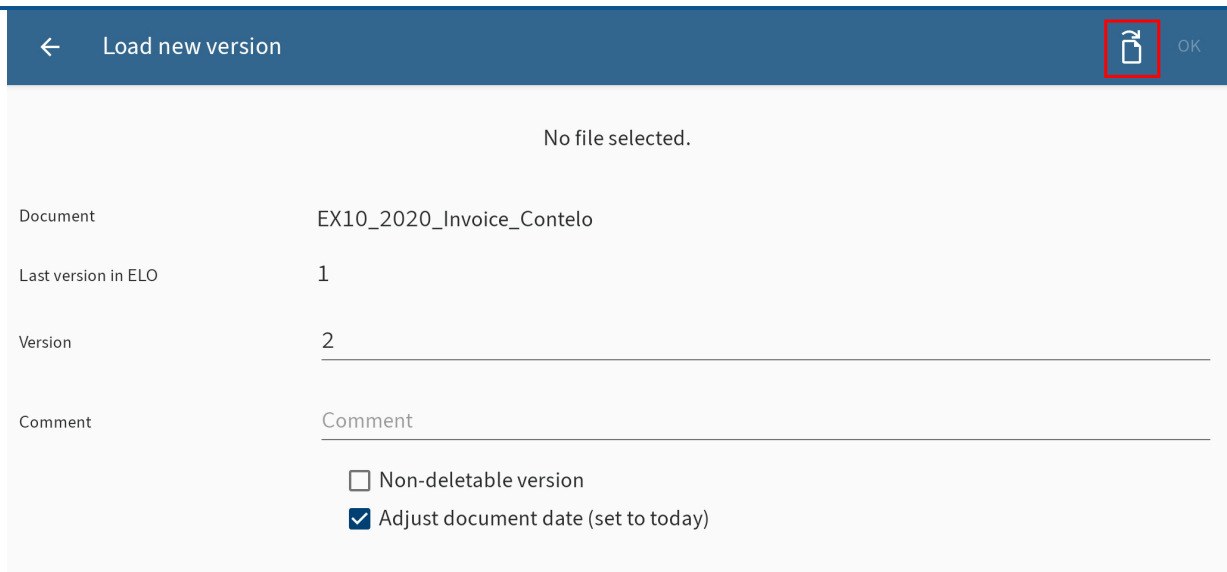
To load a new version, you can choose between two options:


- [With the ELO app](#)
- [With an external app](#)

Load new version with the ELO app

Method

1. Open the context menu for the document you want to load a new version of.
2. In the context menu (button with three dots), tap *Load new version*.



← Load new version  OK

No file selected.

Document EX10_2020_Invoice_Contelo

Last version in ELO 1

Version 2

Comment

Non-deletable version

Adjust document date (set to today)

The *Load new version* dialog box appears.

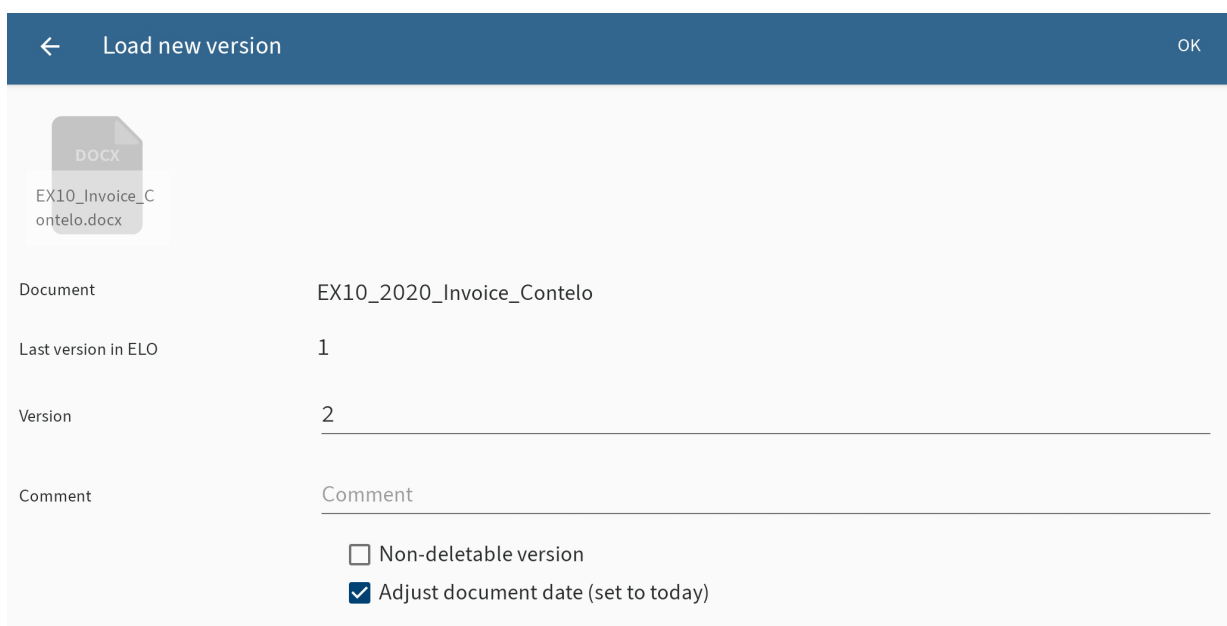
3. Tap the document icon in the top right corner.

The *Select file* dialog box appears.


4. Select one of the following options to load a new version:

- From file system: Opens the *Select file: Detected file systems* dialog box. Navigate through the folder structure on your device to select a file.
- With another app: Opens an external app you can use to upload files.
- Take a photo: Opens the camera app on your device to take a picture, which can be uploaded.

The new file is shown in the *Load new version* dialog box.



← Load new version OK

 EX10_Invoice_Contelo.docx

Document EX10_2020_Invoice_Contelo

Last version in ELO 1

Version 2

Comment

Non-deletable version

Adjust document date (set to today)

5.

You can make the following changes:

- Version: Change the version number in the *Version* field.
- Comment: Enter additional information on the version in the *Comment* field.
- Non-deletable version: Select this option to prevent the version from being deleted from ELO.
- Adjust document date: Enable this option to update the document date.

6. Tap *OK* in the top right corner to load the new version.

Result

You have filed the new version of the document. The *Load new version* dialog box closes.

Load new version with an external app

You can also transfer files to ELO from external apps.

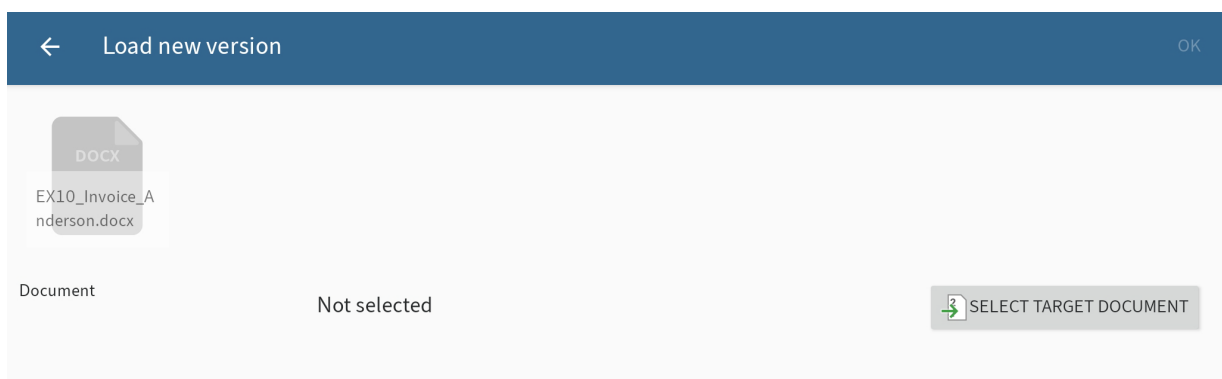
Method

1. To transfer a file from an external app to ELO, use the *Share* function in the respective app.



A dialog box for transferring files appears.

2. Tap the *Load new version* option.



The *Load new version* dialog box appears.

3. To select the document you want to file a new version of in ELO, tap *SELECT TARGET DOCUMENT*.

The *Select document:* dialog box appears.

4. In the folder structure, navigate to the document you want to load a new version of.

The *HISTORY* tab contains the target folders and documents you have previously selected.

5. Confirm your selection with *OK*.

The *Select document:* dialog box closes. The selected file appears in the *Load new version* dialog box.

6. You can make the following changes:

- Version: Change the version number in the *Version* field.
- Comment: Enter additional information on the version in the *Comment* field.
- Non-deletable version: Select this option to prevent the version from being deleted from ELO.
- Adjust document date: Enable this option to update the document date.

7. Tap *OK* in the top right corner to load the new version.

Result

You have filed the new version of the document. The *Load new version* dialog box closes.

Open document in read-only mode

You can open filed documents in read-only mode.

Information

This function is not available in the *Data sets* work area.

Requirements

You must have an external application installed on your device that can open the selected file type.

Method

1. Open the context menu of the document that you want to open in read-only mode.
2. Tap *OPEN IN READ-ONLY MODE* in the context menu.

Result

The document opens in an external application. If multiple suitable applications are installed on your device, a dialog box appears. Select an application.

Use the Android *Back* button to return to the ELO app.

Edit document

With the *Edit document* function, you can make changes to a document using a third-party application (e. g. text processing app).

Information

Not all third-party applications support this function.

Method

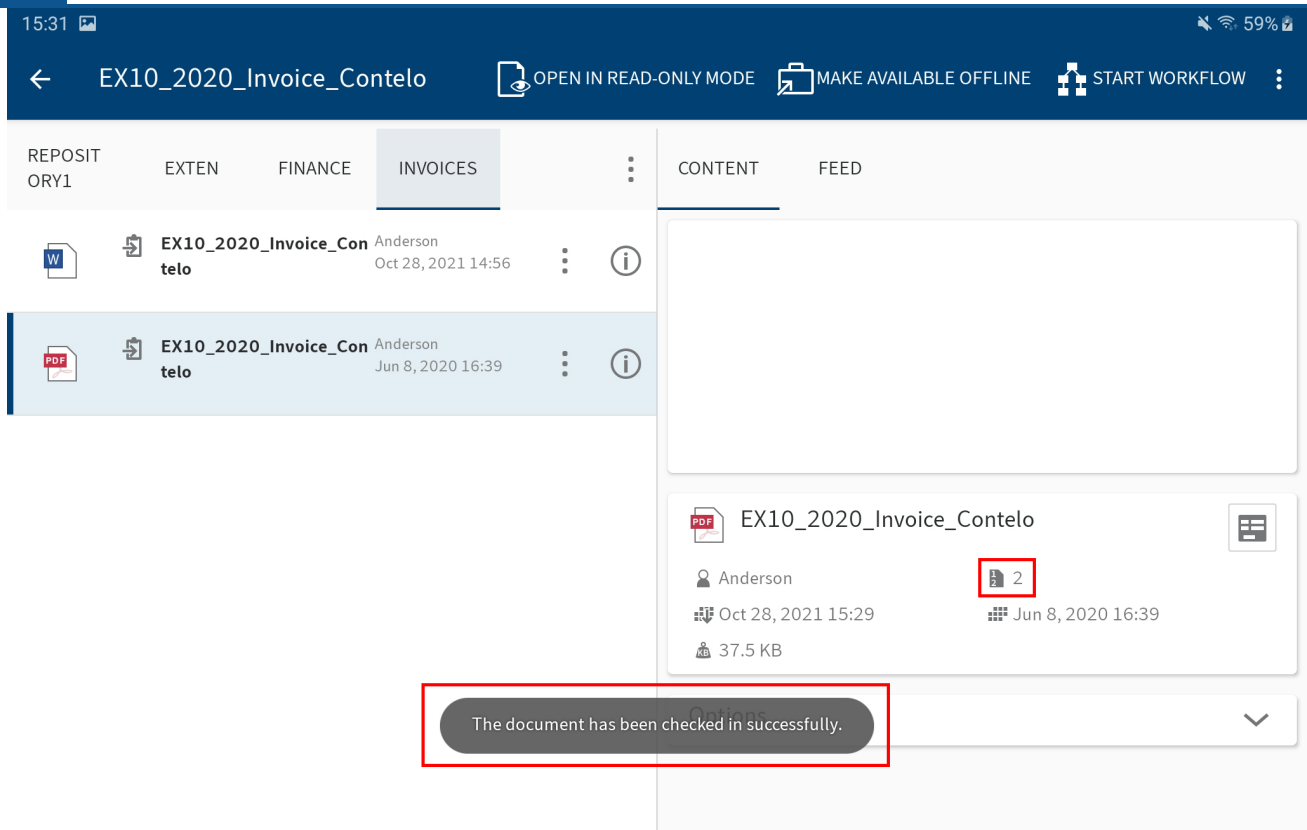
1. Open the context menu of the document that you want to edit.
2. In the context menu (button with three dots), tap *Edit document*.

The document opens in an external app. If several apps are available, choose the app you want to use to edit the document.

Once the document is open in an external app, it is checked out of ELO and locked for other people.

3. Make the desired changes to the document.
4. To finish editing, save your changes in the external app.
5. Close the external app to return to the ELO app.

Result



The document is automatically checked back into ELO once you have saved your changes in the external app and closed it. The document is unlocked for other people. A new version of the document is filed.

Show form

To view or edit the metadata for an entry, use the *Show form* function.

Requirements

Your administrator must have linked a form to the metadata form and defined it as a preview form. For more information, refer to the *ELO Java Client Workflow* manual.

Information

If a preview form has not been assigned to the metadata form, the ELO app loads a default form with the fields *Short name*, *Document date*, and *Extra text*.

Method

1. Select an entry and open the detailed view.

The screenshot shows the ELO mobile app interface. At the top, there is a navigation bar with a back arrow, the title "Offer-Zastry_2020_0001", and three action buttons: "OPEN IN READ-ONLY MODE", "MAKE AVAILABLE OFFLINE", and "START WORKFLOW". Below the navigation bar, there is a tab bar with "REPOSITORY1", "EXTEN", "FINANCE", "ORDERS", "2020", "CONTENT", and "FEED". The "2020" tab is selected. The main content area is divided into two sections. The left section is a list of documents with the following items:

Document Icon	Document Name	Author	Date	More Options	Info
PDF icon	Offer-Zastry_2020_0001	Farrell	Jun 5, 2020 14:06	⋮	i
Word icon	Order 32476	Farrell	Aug 15, 2019 10:48	⋮	i
Word icon	Order Cole	Administrator	May 29, 2020 10:46	⋮	i

The right section shows a preview of the selected document, "Offer-Zastry_2020_0001". The preview displays a document with a header, a table, and a footer. A red box highlights a form icon in the bottom right corner of the preview area.

Below the preview, there is a summary card for the document "Offer-Zastry_2020_0001". It includes the following information:

- Author: Cole
- Number of pages: 4
- Date: Apr 9, 2021 14:58
- Date: Jun 5, 2020 14:06
- Size: 39.0 KB

2. Tap the form icon on the *CONTENT* tab.

Alternative: You can also access the *Show form* function from the context menu (button with three dots).

The screenshot shows the "Show form" dialog box. The dialog has a blue header with a back arrow, the title "Show form", and a refresh icon. The form contains the following fields:

- Short name: Offer-Zastry_2020_0001
- Document date: Jun 5, 2020, 2:06 pm
- Extra text: (Empty text area)

At the bottom of the dialog, there is a section titled "Save without passing forward" with two buttons: "Save" and "Print".

The *Show form* dialog box appears. The dialog box displays the corresponding form.

Optional: Tap the input fields to edit the metadata. To save your changes, tap *Save*.

3. To close the *Show form* dialog box, tap *Back* (arrow icon at top left).

Result

The dialog box closes.

Send entry

You can send entries by e-mail.

Method

1. Open the context menu for the entry you want to send.
2. In the context menu (button with three dots), tap *Send*.

The *Send* dialog box appears.

3. Choose from the following options:

- Send as ELO link: This function enables you to send another user a direct link to an entry in the repository.
- Send document: This function allows you to send a document as an e-mail attachment to someone without access to the repository.

Optional: A dialog box appears if multiple suitable applications are installed on your device. Select an application.

The external application starts.

4. Send the entry as an attachment in the way you normally do in this application.

Result

You have sent an ELO link or a document as an e-mail attachment. The external application closes.

Create margin note

You can place margin notes on a document or folder. You can create three types of margin notes:

- General margin note (yellow): Visible to every user.
- Personal margin note (green): Only visible to the creator of the margin note.
- Permanent margin note (red): This margin note can be viewed by every user and cannot be deleted.

Information

This function is only available in the *Repository* work area.

Method

1. Select an entry and open the context menu.
2. In the context menu (button with three dots), tap *Create margin note*.

The *Create margin note* dialog box appears. *General margin note* is set as the type by default.

Optional: Tap *Personal margin note* or *Permanent margin note* to change the type.

3. Enter your text for the margin note to the *Contents* field.

4. Tap *OK* to save the margin note.

Result

The *Create margin note* dialog box closes. The margin note you created is in the *Margin notes* detail area of the viewer pane.

Optional: To edit or delete a general or personal margin note, tap the pen icon in the *Margin notes* detail area. The *Edit margin notes* dialog box appears. In this dialog box, you can change the contents and type of margin note, or delete the margin note.

Delete entry

You can also delete folders and documents that you no longer need.

Important

The entries are not deleted permanently, just marked as deleted. This mark signals the administrator to remove the documents from ELO permanently.

Method

1. Open the context menu of the entry that you want to delete.
2. In the context menu (button with three dots), tap *Delete*.

The *Delete entry* dialog box appears.

3. Tap *YES* to confirm.

Result

You have deleted the entry.

Clipboard

You can copy frequently used folders and documents to the *Clipboard* work area. This enables you to put together a favorites list for quick access to your most important data. A reference to the selected entry is created on the Clipboard. The filing location in ELO does not change.

Copy to clipboard

You can place frequently used folders and documents on the Clipboard. This enables you to access your entries faster. Use the clipboard icon to do so.

You will find the clipboard icon in front of the short name of the entry in the list view.

The gray clipboard icon means the entry has not been placed on the Clipboard.

Alternative: You can also access the *Copy to Clipboard* function from the context menu (button with three dots).

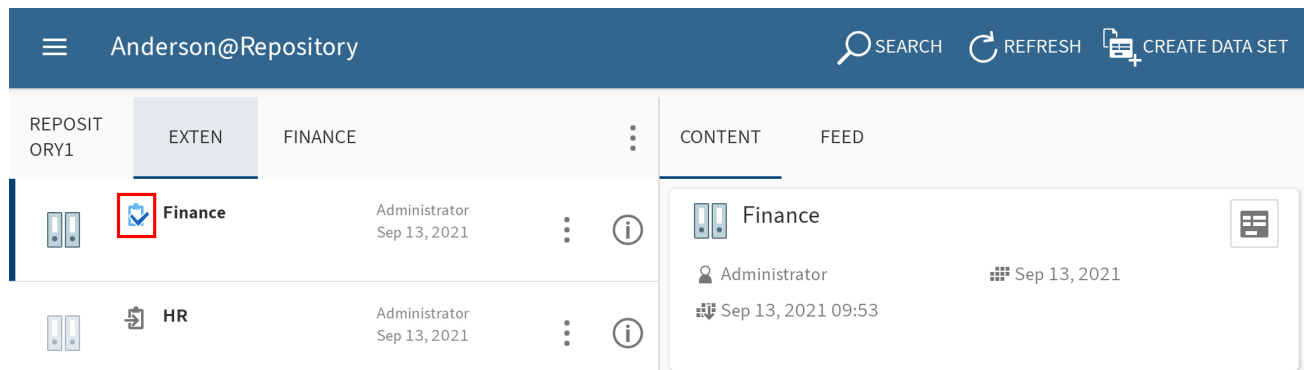
Information

This function is only available in the *Repository* and *Search* work areas.

Method

To copy an entry to the Clipboard, tap the clipboard icon.

Result



The clipboard icon is blue. This means the entry has been placed on the Clipboard.

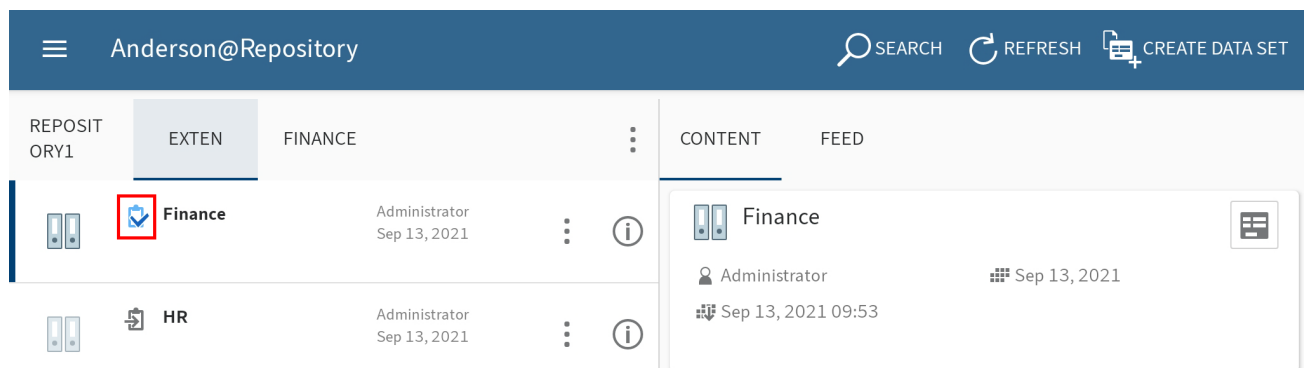
Remove from Clipboard

You can remove entries that you no longer use frequently from the Clipboard.

Please note

If you remove an entry from the Clipboard, this only deletes the reference to the entry from the *Clipboard* work area. The entry remains in the *Repository* work area. To delete an entry from the *Repository* work area, use the *Delete* function.

Use the clipboard icon to remove entries from the Clipboard. You will find the clipboard icon in front of the short name of the entry in the list view.



The blue clipboard icon means the entry has been placed on the Clipboard.

Alternative: You can also access the *Remove from Clipboard* function from the context menu (button with three dots).

Method

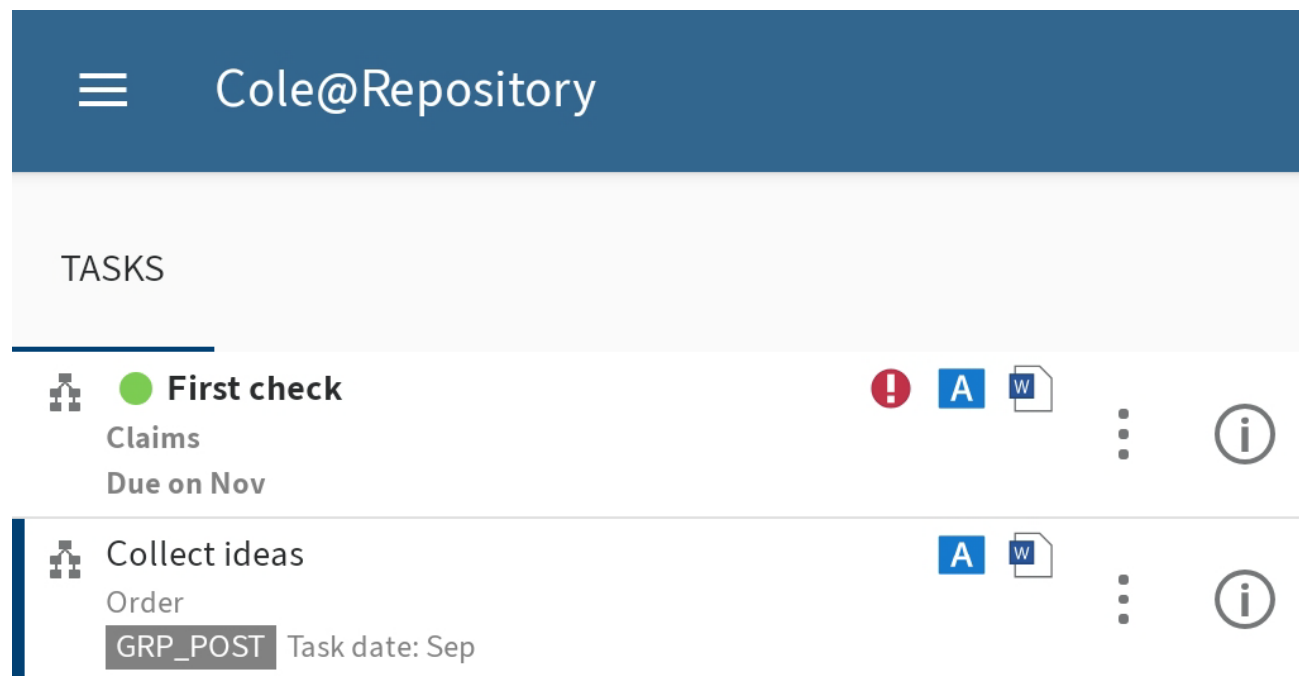
To remove an entry from the Clipboard, tap the blue clipboard icon.

Result

You have removed the entry from the Clipboard. The clipboard icon is gray.

Tasks

The *Tasks* work area contains an overview of your workflows and reminders. This is where you process your tasks.



View

New tasks are shown in a bold font and marked with a green dot. Tasks with passed deadlines are displayed with an exclamation mark.

Configuration

In the *Configuration* dialog box, you can specify which types of tasks to display and which criteria to sort the task list by. You can find more information in the section Configuration.

Start workflow

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

The following options are available for starting workflows:

- *Start ad hoc workflow* function
- *Start workflow* function

Ad hoc workflows are simple, predefined workflows available in ELO. The workflows available to you when you run the *Start workflow* function were defined by your company.

You can learn how to start an ad hoc workflow in the chapter [Start ad hoc workflow](#).

'Start workflow' function

You can start new workflows. Use workflow templates for this.

Information

This function is only available in the *Repository* and *Clipboard* work areas.

Requirements

The workflow templates have already been created in ELO. You cannot create workflows templates in the ELO app.

Method

1. Select the desired entry and open the context menu.
2. Tap *START WORKFLOW* in the context menu.

The *Start workflow* dialog box appears.

3. Tap *SELECT TEMPLATE*.

The *Select template* dialog box appears.

4. Tap the corresponding entry in the list to select a template.

The workflow name is entered to the *Template* and *Workflow name* fields.

Optional: Change the workflow name. Tap the *Workflow name* field and enter a new name.

5. Tap *OK* to start the workflow.

Result

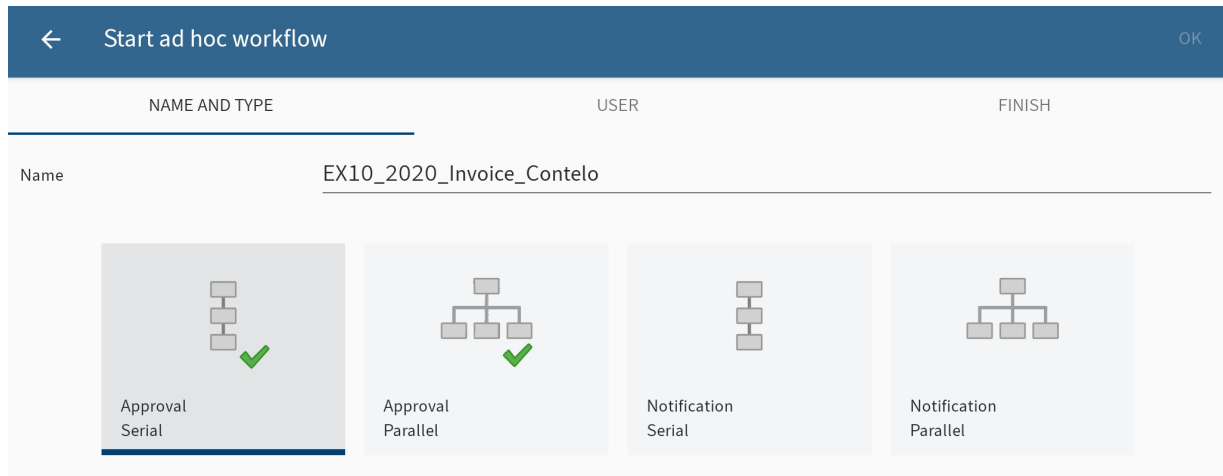
The *Start workflow* dialog box closes. The workflow starts.

Start 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 people.

Method

1. Select the desired entry and open the context menu.
2. In the context menu (button with three dots), tap *Start ad hoc workflow*.



The *Start ad hoc workflow* dialog box opens.

3. In the *Name* field, enter a name for the workflow.
4. Select the type of ad hoc workflow you want to create. You can choose from the following types:
 - Serial approval: The workflow is passed forward sequentially to the participants. The participants must decide whether or not to approve the workflow step. Depending on the result, the corresponding notification is sent to the selected recipient.
 - Parallel approval: The workflow is distributed in parallel. All recipients receive the workflow at the same time. The participants must issue approval individually.
 - Serial notification: The workflow is passed forward sequentially to the individual participants. The participants must confirm receipt of the workflow one after another. As long as the user does not confirm the workflow, the workflow is not passed forward to the next participants.
 - Parallel notification: The workflow will be sent to all participants at once. The participants must confirm receipt of the workflow. Once completed, the corresponding notification is sent to the selected recipient.

1. Switch to the *USER* tab.

2. In the *Job instruction* field, enter the individual job instruction for the user. The user sees the job instruction in the workflow step column of the *Tasks* work area as soon as they have accepted the workflow.

The *For user/group* field is completed with an asterisk symbol by default. This means the job instruction is assigned to all users. To change the job instruction for individual users, tap the pencil icon next to the respective entry.

3. Add the workflow recipients using the *ADD USER* button.

You will see the selected users in the *Recipient list*.

For serial workflows, you can change the order in which the workflows are sent to the users. Tap the user in the list and move them to a new position in the list, keeping your finger pressed down.

4. Change to the *FINISH* tab.

In the Recipient field, you can see which user will be notified when the ad hoc workflow is completed. To change the recipient, tap *SELECT USER*.

Enter a text for the completion message in the *Success message* field.

Enter a text for the cancellation message in the *Cancellation message* field. This only applies to Approval type ad hoc workflows.

In the *End script* field, you can select a script that is executed after the ad hoc workflow is completed.

Requirement: Your administrator has provided an end script. You will find more information in the [ELO Java Client Workflow](#) documentation.

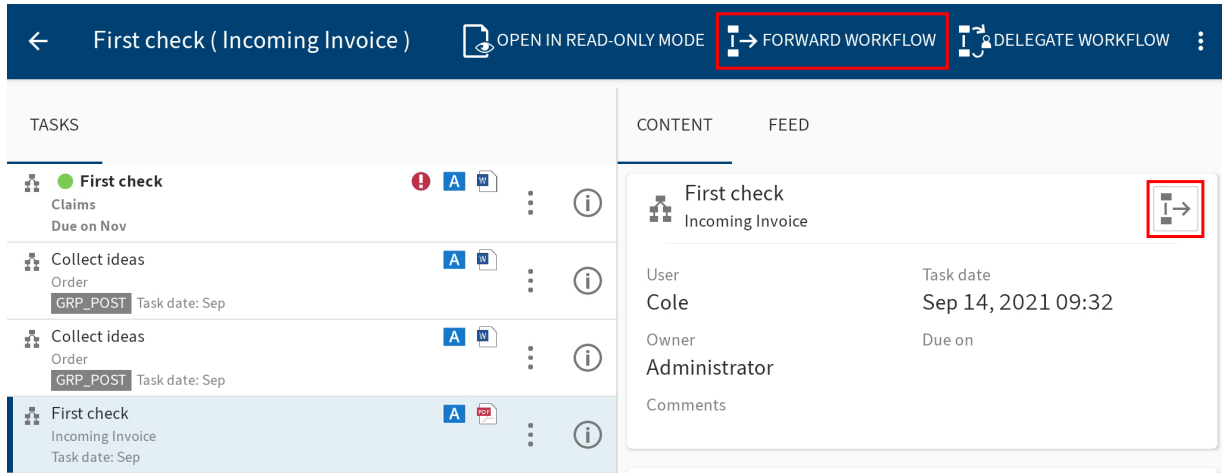
5. Tap *OK* to start the ad hoc workflow.

Forward workflow

To transfer a workflow to the next user, select the *Forward workflow* function.

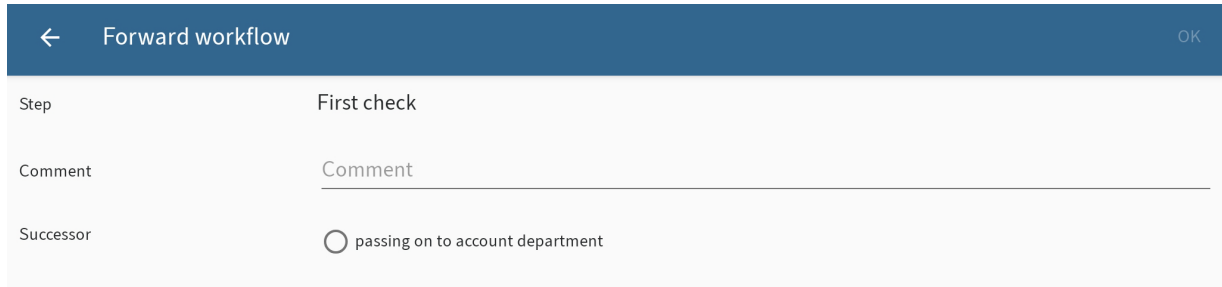
Method

1. In the *Tasks* work area, select the workflow you want to forward and open the context menu.



2. In the context menu (button with three dots), tap *Forward workflow*.

Alternative: In the viewer pane, tap *Forward workflow* to the right of the short name.



The *Forward workflow* dialog box appears.

3. Tap the user that you want to forward the workflow to.

The successor is highlighted.

Optional: Tap the *Comment* input field to add a note to the workflow.

4. Tap *OK*.

Result

You have forwarded the workflow to the selected user. The *Forward workflow* dialog box closes.

Delegate workflow

To assign a workflow to another person, use the *Delegate workflow* function.

Method

1. Select the desired entry in the *Tasks* work area and open the context menu.
2. Tap *Delegate workflow* in the context menu.

The *Delegate workflow* dialog box appears.

3. Tap *SELECT USER*.

The *Select user or group* dialog box appears.

4. Tap an entry in the list to select a recipient.

You can make the following changes:

- **Notify after processing:** This option is enabled by default. This means that you get the workflow back after it has been processed to check its status. Tap to uncheck the box if you do not want to be notified.
- **Information:** To add a note to the workflow, tap the input field.

1. Tap *OK*.

Result

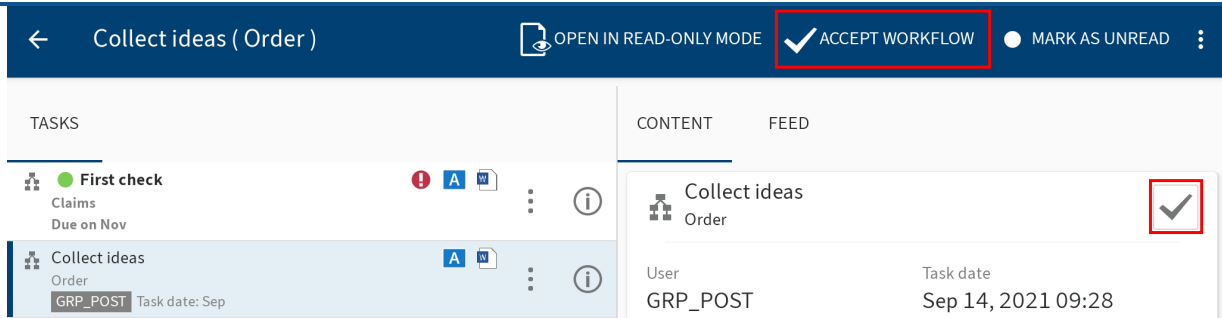
You have delegated the workflow to the selected recipient. The *Delegate workflow* dialog box closes.

Accept workflow

Workflows sent to a group appear in the *Tasks* work area of all group members. To process this type of workflow, use the *Accept workflow* function. Now, only you can process the workflow, and the other group members no longer see the workflow in their tasks. This prevents multiple people from being able to process the same workflow at the same time.

Method

1. In the *Tasks* work area, select the workflow and open the context menu.



2. In the context menu (button with three dots), tap *Accept workflow*.

Alternative: In the viewer pane, tap *Accept workflow* to the right of the short name.

Result

The workflow is assigned to you. Other members of the group do not have access to it.

Edit workflow form

You can fill out workflow forms, save the data entered to them, and forward them.

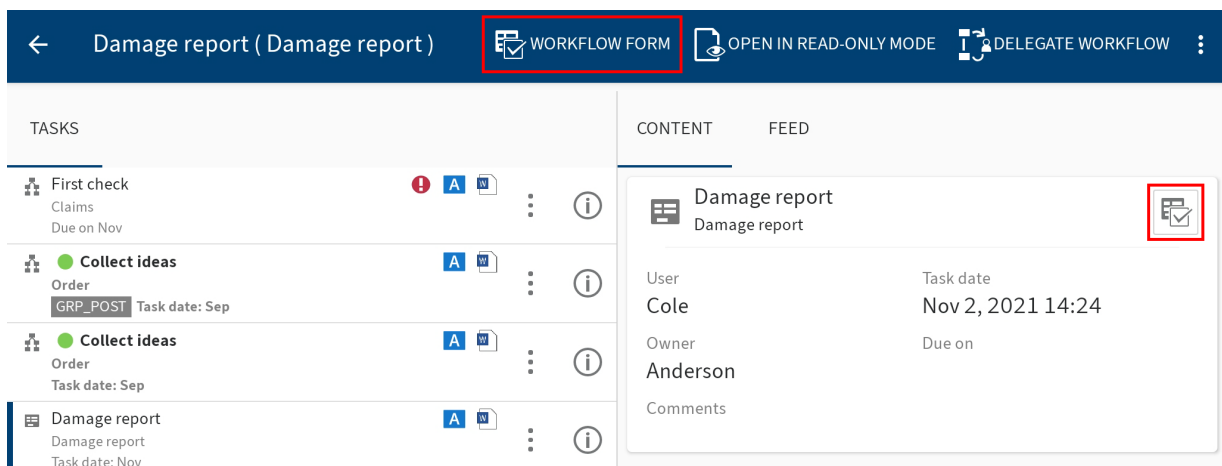
If a workflow is based on a form, the *Workflow form* button is shown both in the viewer pane and the context menu of the respective workflow.

Requirements

The workflow forms must have been created in a desktop version of ELO. You cannot create workflow forms in the ELO app.

Method

1. In the *Tasks* work area, select the workflow and open the context menu.



2. Tap the *Workflow form* button to open the form.

Alternative: Tap the *Workflow form* button in the viewer pane of the selected workflow.

Workflow form

Damage report

Customer data

Insurance number Damage number

Insured person

Last name First name

Street Nr.

Zip code City

Damage

Fire Hail Landslide Flood Other

Date of the accident

Next processing step

node 3

Save without passing forward

Save Print

The *Workflow form* dialog box appears. The form is displayed.

3. Complete the form. You can edit different fields depending on the form.

Optional: Tap *Save* to save your entries. Tap *Print* to print the form.

1. Depending on the workflow structure, forms are usually forwarded to the next user/node after being processed. To forward a workflow form, tap the corresponding button under *Next processing step*.

Result

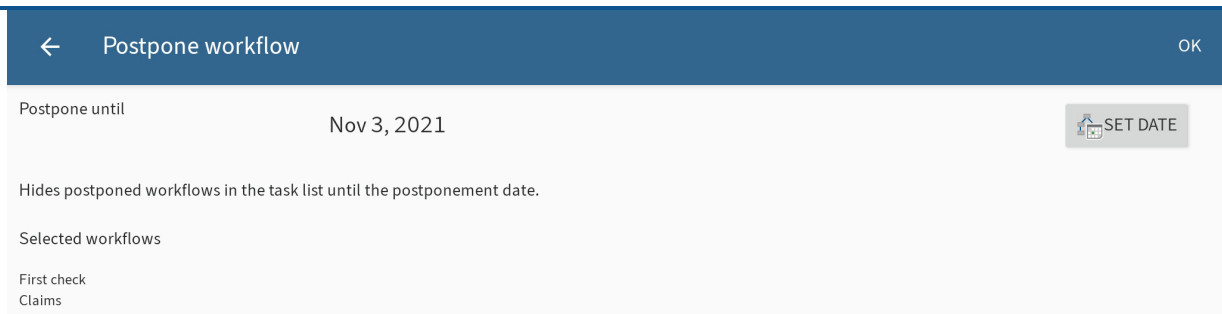
The form is forwarded to the next user of the workflow with the information you entered. The *Workflow form* dialog box closes.

Postpone workflow

Use the *Postpone workflow* function to suspend processing of a workflow. You can specify a date until which a workflow will be hidden in the *Tasks* work area. Once the date has been reached, the workflow appears in the list again.

Method

1. Select the desired entry in the *Tasks* work area and open the context menu.
2. In the context menu (button with three dots), tap *Postpone workflow*.



The *Postpone workflow* dialog box appears.

3. To specify how long you want to postpone the workflow for, tap *SET DATE*.
4. Select a date in the calendar.
5. Tap *OK*.

Result

You have postponed the workflow. The workflow is hidden from your task list until the selected date.

Delete workflow

You can delete workflows that you no longer need.

Method

1. Select the desired entry in the *Tasks* work area and open the context menu.
2. In the context menu (button with three dots), tap *Delete*.

The *Delete workflow permanently* dialog box opens.

3. Tap *YES* to confirm.

Result

You have deleted the workflow. The *Delete workflow permanently* dialog box closes.

Search

You can use the *Search* function on the menu bar to search ELO. The search results are displayed in the *Search* work area. From here, you can start a new search, create search favorites, and edit previous searches.

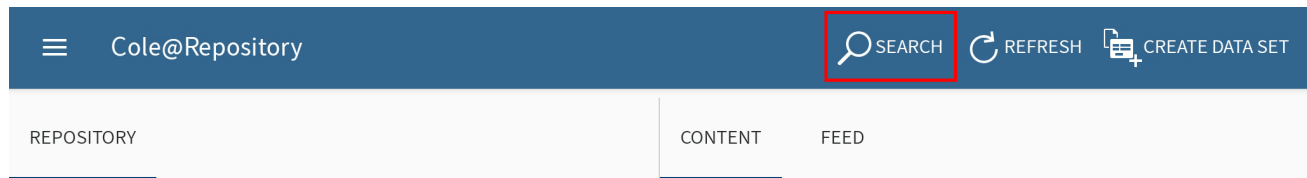
In the *Configuration* dialog box, you can specify which fields to include during the search. You can find more information in the section Configuration.

Start new search

You can start a search in any work area using the SEARCH button on the action bar. Tap the *SEARCH* button on the action bar.

Alternative: You can tap the magnifying glass icon in the *Search work* area to start a new search.

Method



1. Tap *SEARCH* on the action bar.

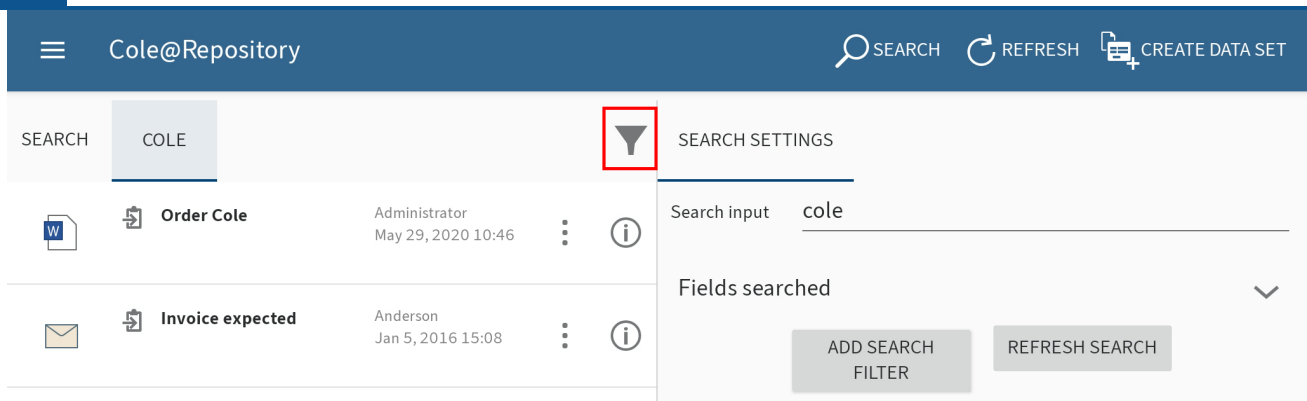
A search field and a list of search suggestions open on the menu bar. The on-screen keyboard opens.

2. Enter a search term.
3. Tap a suggestion from the list.

Alternative: Tap the *Enter* button on the on-screen keyboard to look for a specific character or a character string.

Result

The search starts. You are directed to the results list in the *Search* work area.



Optional: To change your search settings and add search filters, tap the filter icon to the top right of the results list. You can find more information in the section [Edit search and add filters](#).

Edit search and add filters

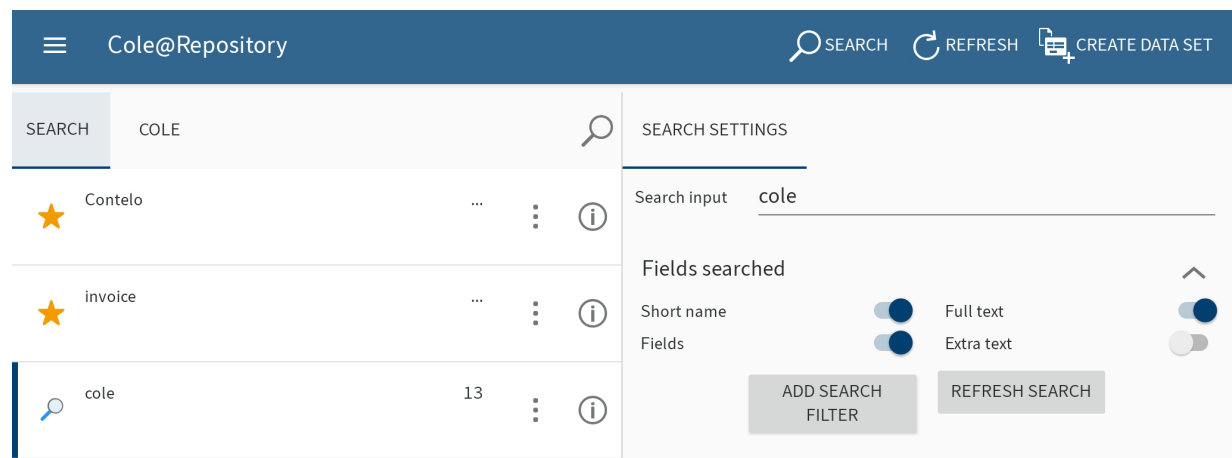
You can edit a search that you have already used by changing the search term and adding or deleting filters.

Method

1. To change the settings for a search you have already performed, tap the info icon next to the corresponding search in the list view of the *Search* work area.

Alternative: In the list view, tap the corresponding search to open the results list.

The search settings appear in the viewer pane.



2. You can make the following settings:

- Search input: To change the search term, tap the input field.
- Fields searched: Select which fields to include in the search. You can choose the fields *Short name*, *Full text*, *Fields*, and *Extra text*.

At least one field has to be selected.

Information

The *REFRESH SEARCH* button is active once you have made a change. Tap the button to start the search again.

Add search filter

- To apply search filters, tap *ADD SEARCH FILTER*.

The *Select filter* dialog box appears. You can select the following filters:

- **Date:** Only entries with the selected document date are shown.
- **Form:** Only entries filed with the selected form are shown.
- **Entry type:** Only the selected entry type is shown.
- **Filed by:** Only entries filed by the selected user are shown.
- **Editor:** Only entries for which the selected user is entered as the editor are shown.
- **Filing date:** Only entries filed on the selected date are shown.

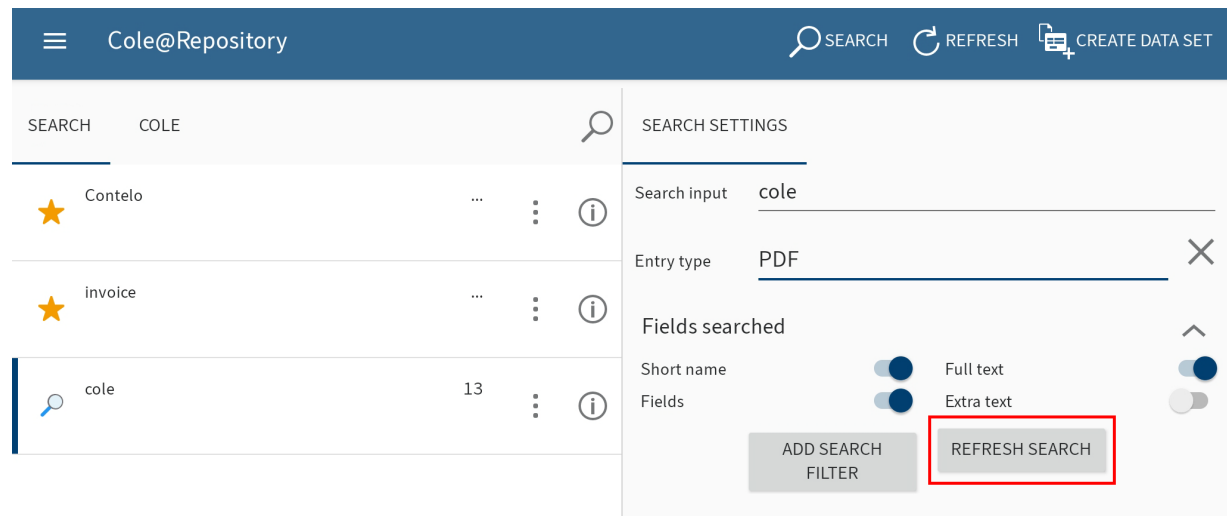
- In the *Select filter* dialog box, tap the desired filter.

The filter appears in the viewer pane with an input field. By default, the input field contains a placeholder symbol.

- Tap the input field and delete the placeholder symbol.

A drop-down menu appears.

- In the drop-down menu, tap the desired filter setting.



The selection appears in the filter input field.

Information

To remove a filter, tap the X icon next to the filter.

-

To start the search with the new settings, tap *REFRESH SEARCH*.

Result

The search is refreshed. The list of results appears.

Create favorite

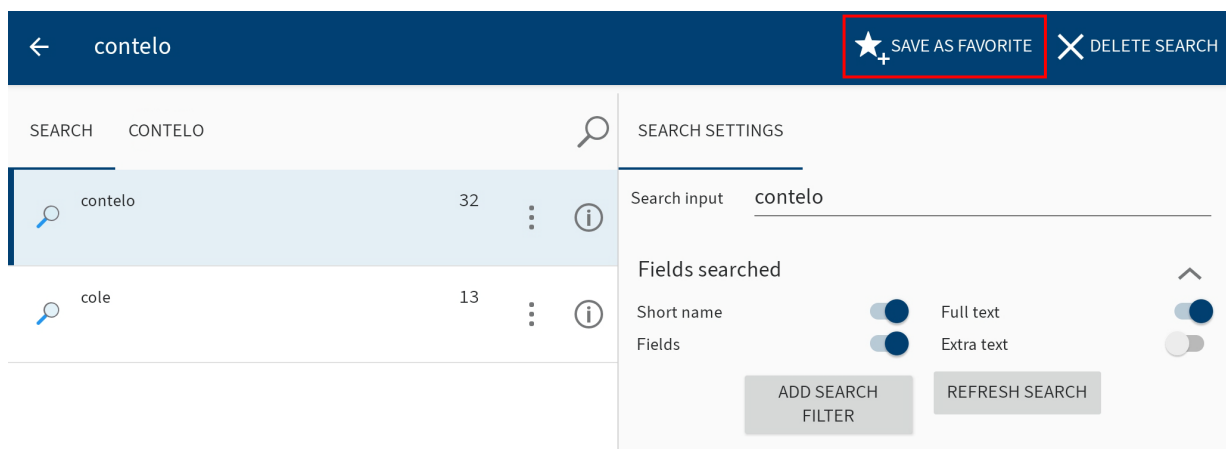
All searches are saved in the *Search* work area. These are deleted when you close the ELO app. To save a search permanently, you need to save it as a favorite. Favorites are not deleted when you close the app.

Information

Search favorites that you create in the ELO app are also available in other clients. However, search favorites created in other clients are not available in the ELO app.

Method

1. Open the context menu of the respective search.



2. In the context menu, tap *SAVE AS FAVORITE*.

The *Enter a name for the search favorite* dialog box appears.

3. Name the search favorite.
4. Tap *OK* to confirm.

Result

The favorite is now saved to the *Search* work area. The star icon represents favorites.

Optional: To delete a favorite, use the *DELETE FAVORITE* function in the context menu.

Offline

You can file folders and documents you would like to access even without an Internet connection in the *Offline* work area. The entries are filed as a copy to the internal or external storage of your device. The filing location in ELO does not change.

In the *Configuration* dialog box, you can specify whether to store entries from the *Offline* work area to the internal storage of your device or to an external storage medium such as an SD card.

Make entries available offline

You can transfer any document or folder from the *Repository* work area to the *Offline* work area access to your data even without an Internet connection. The documents and folders are filed as a copy to the internal storage of your device or to an external storage device (such as an SD card).

Information

Other applications also have access to entries filed offline.

Please note

Depending on the size of the entry you are transferring, large data volumes may need to be processed. We only recommend transferring large data volumes to the *Offline* work area when your device is connected to the Internet and a power source. Please make sure that you have sufficient storage space.

Information

Margin notes are not stored offline for technical reasons.

Method

1. Select the desired entry and open the context menu.
2. Tap *MAKE AVAILABLE OFFLINE* in the context menu.

This starts a background process that makes the selected entry available offline. This may take several minutes depending on the data volume.

Result

Once the background process is complete, you will find the entry in the *Offline* work area. You can now access the entry without an Internet connection.

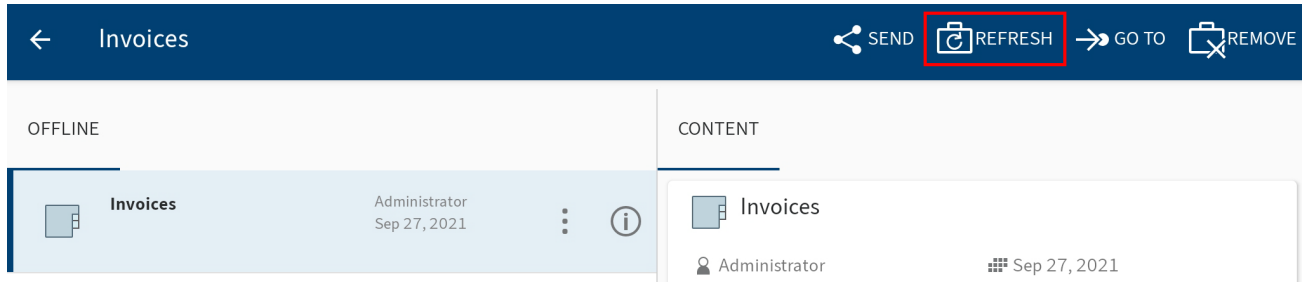
Information

Tap *Background processes* in the tile navigation context menu to see the status of the background process. The *Active processes* area appears.

Refresh entry in the Offline area

In the *Offline* work area, you see the status of the entries the last time they were synchronized. Changes to the original entries are not automatically transferred to the *Offline* work area. To ensure that your offline entries are up to date, you need to refresh the entries.

Method



To refresh the data of an entry, tap *REFRESH* in the entry's context menu.

Result

A background process starts. The data of the selected entry is compared with the data on the server and refreshed.

Remove entries from the Offline area

If you want to delete offline entries from your device, you need to remove them from the *Offline* work area.

Information

Entries filed to the *Offline* work area are deleted from your device/external storage medium. The original entries remain in ELO.

Method

1. Select the desired entry and open the context menu.
2. Tap *REMOVE* in the context menu.
The *Remove* dialog box appears.
3. Tap *YES* to confirm.

Result

The selected entry is removed in a background process.

Information

Tap *Background processes* in the tile navigation context menu to see the status of the background process. The *Active processes* area appears.

Data sets

Data sets enable you to enter data in a form and save it to ELO. You can also save data in forms without an Internet connection. You can transfer the data sets as soon as your device is connected to ELO.

Settings for transferring data sets

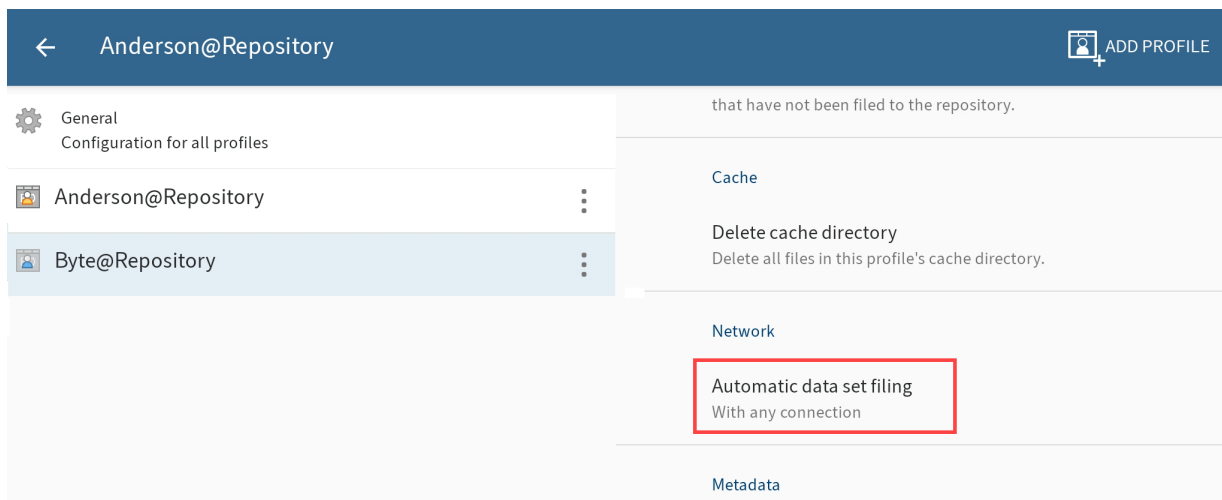
In the *Configuration* dialog box, you can decide when to automatically file data sets to ELO.

Method

1. Open the configuration via the *Tile navigation > Context menu*.

The *Configuration* dialog box opens.

2. Tap the profile you want to make the settings for.



The configuration options for the selected profile appear. The selected profile is highlighted in blue.

3. In the *Network* area, tap *Automatic data set filing*.

The *Automatic data set filing* dialog box opens. Specify when data sets are automatically filed to ELO. You have the following options:

- With any connection: The data sets are transferred as long as the device is connected to the Internet.
- Only over Wi-Fi: The data sets are only transferred if a Wi-Fi connection is established.
- No automatic filing: The data sets are not filed automatically.

4. Tap the desired settings.

Result

The *Automatic data set filing* dialog box closes. Your changes have been applied.

Requirements

To work with data sets, you need a metadata form with the corresponding settings and a specific form.

Metadata form

When submitting data with the ELO app, all data is saved to a metadata form. Create a separate metadata form for each form you want to enter data with. To do so, use the [ELO Administration Console](#).

The layout of the metadata form depends on the data you want to submit. Use the metadata form to define:

- The fields for submitting data
- The filing path for the data sets (filing definition) you created
- Whether you can add one or multiple files to the data set (form type)

Fields

Add a field and the associated group for each data field that you want to include in the form. These fields are linked to the form. The user enters data to the fields via the form in the app.

Filing definition

Create a filing definition so that the data sets can be uploaded to ELO. The data sets cannot be filed to the repository without a filing definition.

Form type

The form type specifies whether the data set is created as a document or as a folder. You can select the following settings:

Usage > Folders: If this option is enabled, data sets are created as folders. You can attach multiple files to a data set. However, you do not have to attach a file. Attachments are filed with the *Basic entry* metadata form.

Usage > Documents: If this option is enabled, data sets are created as documents. You must attach a file. You cannot attach more than one file.

If both options are selected, the conditions for the *Usage - Documents* option will apply.

Form

You need a specific form to create a data set. You create this form using the ELO form designer in the ELO Administration Console or in the ELO Java Client.

Information

For detailed information on *forms*, refer to the [ELO Java Client Workflow](#) manual.

Please note

Data set forms are intended for offline use. This means you cannot use functions that require a connection to the ELO Indexserver, such as ELOas rules or dynamic keyword lists.

Please note

A data set form must be created as a separate template. Data set forms must not be divided into tab groups.

A data set form must meet the following criteria:

Form name: The name of the form must follow this pattern: `offline_<NAME>`. Replace `<NAME>` as required.

Template: The form requires a template. The name of the template must follow this pattern: `main_<NAME>`. Replace `<NAME>` as required.

The names of the form and the template do not need to match.

Connecting metadata forms

You need to link the template to a suitable metadata form (see above).

Method

1. Open the template in the ELO form designer.

The screenshot shows the 'Global form settings' dialog box. The 'Metadata form' dropdown menu is highlighted with a red box and shows '126: Damage report' selected. Other settings include 'Template name' (main_damagereport), 'Languages', 'Translation variable (prefix)', and checkboxes for 'Limited variable access' and 'Realign columns'.

2. Open the *Metadata form* drop-down menu under *Global form settings*.
3. Select the metadata form you require.

Information

If the metadata form does not show up in the list, it is possible that the *ELOWf* module did not transfer the data to the client. Restart the module and the client. Afterwards, click *Refresh* in the form designer.

1. Tap *Apply* to apply your changes.

Alternative: The changes are also applied when you save the template.

Result

The name and the ID of the selected metadata form are grayed out in the *Metadata form* field.

Linking fields

To ensure that the data is applied to the metadata of the data set, you need to link each field form to a metadata field.

Link to a field as follows:

1. Open the template in the ELO form designer.
2. Click the line of the form that you want to link to a field.

Properties of the selected cell

Field type	Text
Variable name	IX_GRP_CITY
Keyword list	
URL	
Display	
Tooltip	
Validation	
Validation message	
Formula	
Keyboard shortcut	<input type="checkbox"/>
Character count	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Read-only
Form columns	<input type="checkbox"/>

3. Open the *Variable name* drop-down menu under *Properties of the selected cell*.
4. Select a field.

The name of the variable that establishes the connection to the field is located in the *Variable name* field.

5. Save the form once you have created and connected all form fields.

Result

You can now use the form to create data sets.

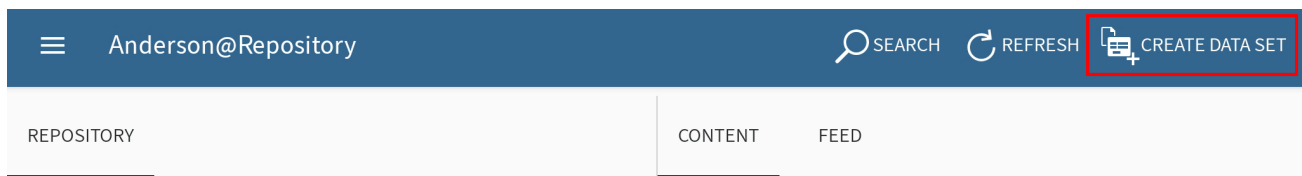
Create data set

To submit data to a form and add files, use the *CREATE DATA SET* function.

Requirements

You must have created a data set form in the ELO Java Client or the ELO Administration Console. Forms are automatically uploaded to and updated on your mobile device. Every three days, the system checks whether new forms exist or whether changes have been made to existing forms. If you reconnect or change your user account, forms are automatically downloaded and updated.

Method



1. Tap *CREATE DATA SET* on the action bar.

The *Select form* dialog box appears.

2. Tap the form that you want to fill out.

 A screenshot of the 'Edit' dialog box for a 'Damage report' form. The dialog has a dark blue header with a back arrow, the title 'Edit', and 'SAVE' and 'FINISH' buttons. Below the header is a light gray bar with two tabs: 'FORM' (selected) and 'FILES'. The main content area is titled 'Damage report' and contains a form with the following fields:

- Customer data** (header)
- Insurance number (text input)
- Damage number (text input)
- Insured person (text input)
- Last name (text input)
- First name (text input)
- Street (text input)
- Nr. (text input)
- Zip code (text input)
- City (text input with a search icon)
- Damage** (header)
- Radio buttons for: Fire, Hail, Landslide, Flood, Other
- Date of the accident (date picker)

The *Edit* dialog box appears along with the selected form.

In this dialog box, you fill out the form, add files, save the data, and finalize the data set.

Fill out form

3. Tap the fields to fill out the form. The type of entry you need to make depends on the field type.

Add file

The number of files you can or need to add to a data set depends on the metadata form. Create the metadata form in the ELO Administration Console.

You can select the following metadata form options in the ELO Administration Console:

- Usage > Folders: If this option is enabled, data sets are created as folders. You can attach multiple files to a data set. However, you do not have to attach a file. Attachments are filed with the *Basic entry* metadata form.
- Usage > Documents: If this option is enabled, data sets are created as documents. You must attach a file. You cannot attach more than one file.

If both options are selected, the conditions for the *Usage > Documents* option will apply.

The screenshot shows the 'Edit' screen for a 'Damage report' form. The top bar is dark blue with a back arrow, 'Edit', and a document icon (highlighted with a red box) next to 'SAVE' and 'FINISH' buttons. Below the bar, the screen is divided into 'FORM' and 'FILES' sections. The 'FORM' section is titled 'Damage report' and contains several input fields and checkboxes. The 'FILES' section is currently empty.

FORM		FILES
Damage report		
Customer data		
Insurance number	<input type="text"/>	Damage number <input type="text"/>
Insured person	<input type="text"/>	
Last name	<input type="text"/>	First name <input type="text"/>
Street	<input type="text"/>	Nr. <input type="text"/>
Zip code	<input type="text"/>	City <input type="text"/>
Damage		
<input type="checkbox"/> Fire <input type="checkbox"/> Hail <input type="checkbox"/> Landslide <input type="checkbox"/> Flood <input type="checkbox"/> Other		
Date of the accident	<input type="text"/>	<input type="text"/>

4. To add a file, tap the document icon on the action bar.

The *Select file* dialog box appears.

5. Select one of the following options to add a file:

- From file system: Opens the *Select file: Detected file systems* dialog box. Navigate through the folder structure on your device to select a file.
- With another app: Opens an external app you can use to upload files.
- Take a photo: Opens the camera app on your device to take a picture, which can be added to the data set.

- 6.

Select a file.

The new file is displayed in the *Edit* dialog box on the *FILES* tab.

Remove added file

Optional: If the data set form was linked to a folder form, you can remove any attached files. Long tap the file you want to remove until the context menu opens. Tap the X icon in the context menu. The file is removed.

Change added file

Optional: If the data set form was linked to a document form, you cannot remove attached files. These data sets always require a file attachment. You can select another file to replace an existing attachment. Long tap the file you want to change until the context menu opens. Tap the document icon in the context menu and select a new file.

Save

Optional: If you have not finished completing a data set or do not want to upload it to the *Repository* work area yet, you can save it. Tap *SAVE*. The data set is saved in the *Data sets* work area. The data set has the status *Incomplete* and is not yet loaded to the *Repository* work area.

Information

Once you have completed a data set for transfer to the *Repository* work area, you can no longer edit it.

Finish

7. To complete a data set for transfer to the *Repository* work area, tap *FINISH*.

Result

Depending on the setting, the data set is automatically transferred to the *Repository* work area or stored in the *Data sets* work area with the status *Ready for transfer*.

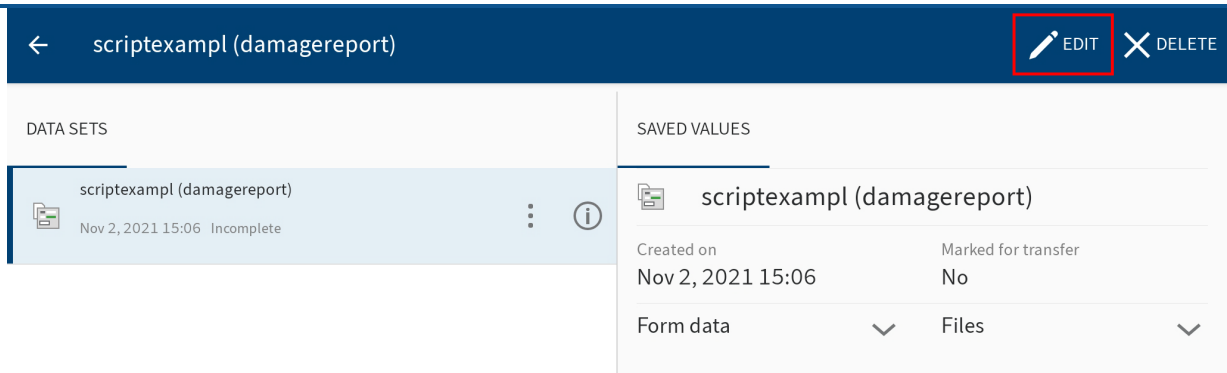
You can find more information in the sections [Automatically transfer data set](#) and [Manually transfer data set](#).

Edit data set

You can edit data sets that you have saved but not yet completed.

Method

1. Open the context menu for the data set.



2. Tap *EDIT* in the context menu.

The *Edit* dialog box appears.

3. Make the desired changes.

4. Tap *SAVE* to save the data set or *FINISH* to load the data set to the *Repository* work area.

Result

You have edited the data set.

Automatically transfer data set

You need to complete a data set before you can transfer it to the *Repository* work area. If your device is not connected to the Internet, the data set is saved in the *Data sets* work area. Completed data sets are loaded to the *Repository* work area as soon as your device is connected to the Internet.

Information

Once you have completed a data set for transfer to the *Repository* work area, you can no longer edit it.

Requirements

In the *Configuration* dialog box, the *Automatic data set filing with any connection* or *Automatic data set filing only over Wi-Fi* option must be enabled. You can find more information in the section [Settings for transferring data sets](#).

Method

← Edit SAVE FINISH

FORM FILES

Damage report

Customer data

Insurance number Damage number

Insured person

Last name First name

Street Nr.

Zip code City

Damage

Fire Hail Landslide Flood Other

Date of the accident

To complete a data set for transfer to the *Repository* work area, tap *FINISH* in the *Edit* dialog box.

Result

The *Edit* dialog box closes.

If your device is connected to the Internet, the data set is transferred to the *Repository* work area immediately. If your device is not connected to the Internet, the data set is saved in the *Data sets* work area. There, it is assigned the status *Ready for transfer*.

Anderson@Repository

SEARCH REFRESH CREATE DATA SET

DATA SETS

scriptexampl (damagereport)
Nov 2, 2021 15:21 **Ready for transfer**

SAVED VALUES

scriptexampl (damagereport)

Created on Nov 2, 2021 15:21 Marked for transfer Yes

Form data Files

Completed data sets are transferred to the *Repository* work area as soon as your device is connected to the Internet. The filing process generally starts automatically.

Once a data set is transferred to the *Repository* work area, it no longer appears in the *Data sets* work area. The data set can now be found at the specified location in the *Repository* work area. In the *Form* detail area in the viewer pane, you will see all information saved on the data set.

Anderson@Repository

SEARCH REFRESH CREATE DATA SET

DOCUMENTS 2020 INVOICES DAMAGE REPORT CONTENT FEED

Damage report (Jul 4, 2018 13:14:57) Administrator Jul 4, 2018 13:15

Damage report (Jul 4, 2018 13:43:49) Administrator Jul 4, 2018 13:46

offline_scriptexamples(main_damagereport) (1... Cole Oct 18, 2018 11:16

Scan_20200513840284 Administrator May 12, 2020 20:26

Damage report (Jul 4, 2018 13:14:57)

Administrator 1
Apr 9, 2021 14:52 Jul 4, 2018 13:15
11.1 KB

Form: Damage report

Insurance number 76983	Damage number 00012
LastName	FirstName
Insured person	Street
StreetNo	ZIPCode
City	Damage
Date of accident 20180702	

Options

Manually transfer data set

If automatic transfer of data sets is not enabled, you can manually start a transfer to the *Repository* work area. You need to complete a data set before you can transfer it to the *Repository* work area. The data set is saved in the *Data sets* work area.

Information

Once you have completed a data set for transfer to the *Repository* work area, you can no longer edit it.

Requirements

Your device must be connected to the Internet.

Method

← Edit SAVE FINISH

FORM FILES

Damage report

Customer data

Insurance number 275938 Damage number 0014573

Insured person Santini

Last name First name

Street Nr.

Zip code City

Damage

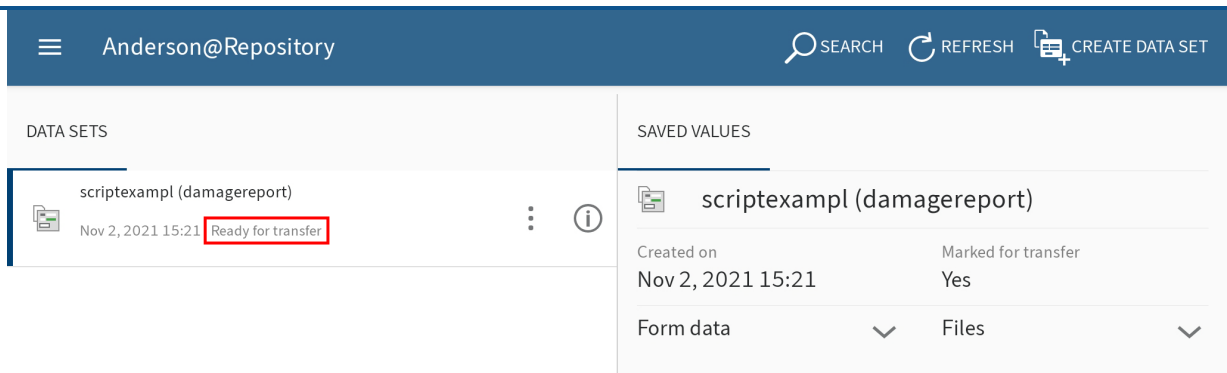
Fire Hail Landslide Flood Other

Date of the accident 11/2/2021

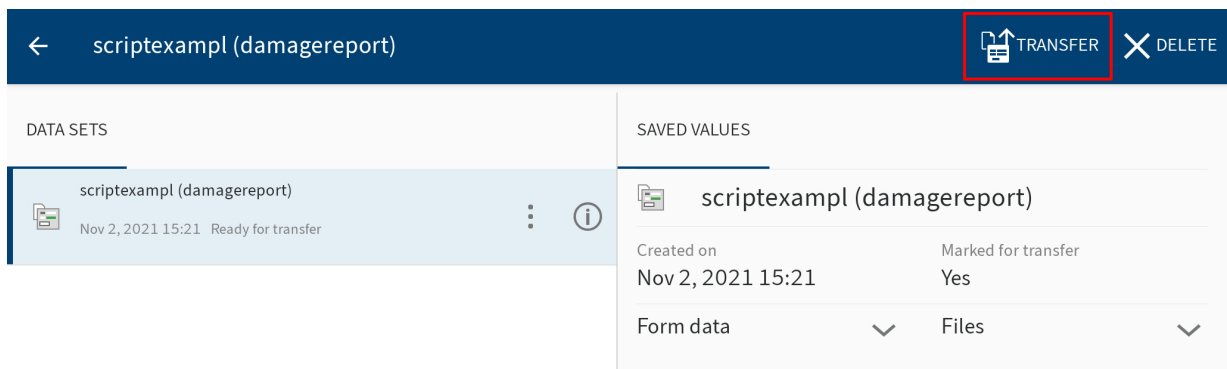
1. To complete a data set for transfer to the *Repository* work area, tap *FINISH* in the *Edit* dialog box.

The *Edit* dialog box closes.

The data set is saved in the *Data sets* work area. There, it is assigned the status *Ready for transfer*.



2. Open the context menu for the data set.



3. Tap *TRANSFER* in the context menu.

Result

The data set is loaded to the *Repository* work area.

Once a data set is transferred to the *Repository* work area, it no longer appears in the *Data sets* work area. The data set can now be found at the specified location in the *Repository* work area. In the *Form* detail area in the viewer pane, you will see all information saved on the data set.

Anderson@Repository

SEARCH REFRESH CREATE DATA SET

DOCUMENTS 2020 INVOICES DAMAGE REPORT CONTENT FEED

DOCUMENTS 2020	INVOICES	DAMAGE REPORT	CONTENT	FEED
Damage report (Jul 4, 2018 13:14:57) Administrator Jul 4, 2018 13:15			Damage report (Jul 4, 2018 13:14:57)	
Damage report (Jul 4, 2018 13:43:49) Administrator Jul 4, 2018 13:46			Administrator 1 Apr 9, 2021 14:52 Jul 4, 2018 13:15 11.1 KB	
offline_scriptexamples(main_damagereport) (1... Cole Oct 18, 2018 11:16			Form: Damage report	
Scan_20200513840284 Administrator May 12, 2020 20:26			Insurance number 76983 Damage number 00012 LastName FirstName Insured person Street StreetNo ZIPCode City Damage Date of accident 20180702	
			Options	

Delete data set

You can delete data sets that you do not want to transfer to the *Repository* work area.

Method

1. Open the context menu for the data set.

← scriptexampl (damagereport) TRANSFER DELETE

DATA SETS	SAVED VALUES
scriptexampl (damagereport) Nov 2, 2021 15:21 Ready for transfer	scriptexampl (damagereport) Created on Nov 2, 2021 15:21 Marked for transfer Yes Form data Files

2. Tap *DELETE* in the context menu.

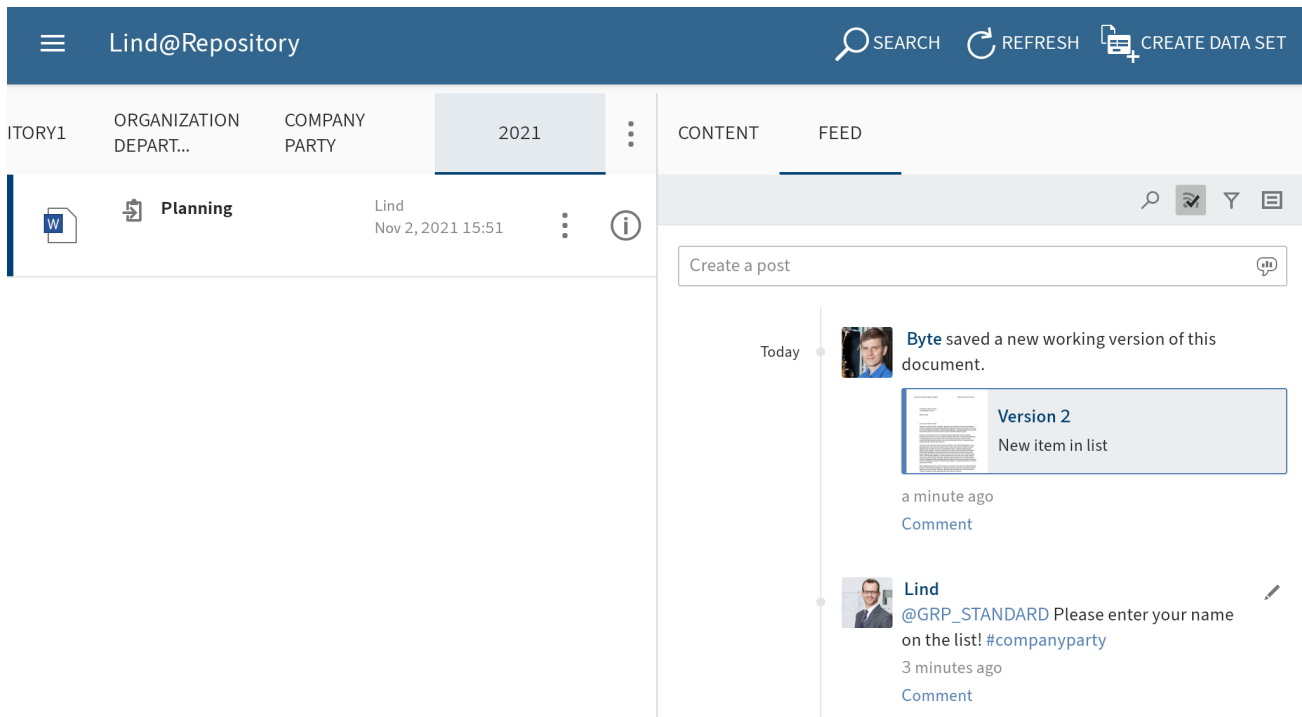
Result

You have deleted the data set.

Feed

ELO offers several functions that support collaboration within your company. The ELO feed is a chat-based tool that provides a great way to exchange information on an entry.

Posts related to an entry are shown on the *FEED* tab. In the feed, you can comment on posts, mention colleagues, link posts, and categorize topics using hashtags.



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

The following message types are shown in the feed:

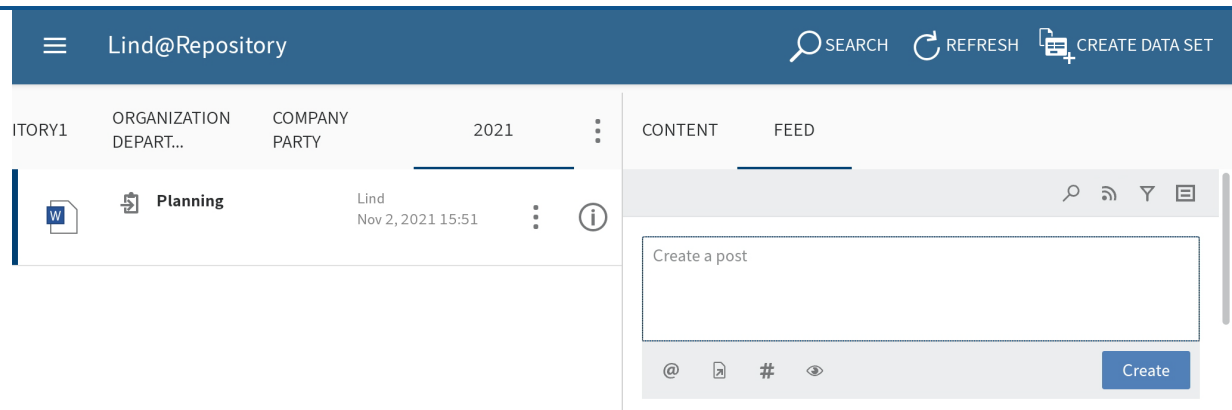
- Posts
- Comments
- Events (e .g. when a new version of a document is filed or changes are made to the working version)

Create post

To exchange information on an entry, you can create a feed post.

Method

1. Tap the *Create a post* input field on the *FEED* tab.



The input field opens. The on-screen keyboard appears.

2. Enter your text.

Tap the icons below the input field to add to your post. You have the following options:

- **Mention:** Use the @ icon to address your feed post directly to another person or group. The people mentioned can see the feed post in their *My ELO* work area.
- **Reference:** Use the document icon with an arrow to link your feed post with an entry in ELO. Tapping the reference automatically takes the person to the filing location of the linked entry.
- **Hashtag:** Tap the # symbol to add hashtags to a post. You can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.
- **Visibility:** Use the eye icon to restrict who can read your post. You can apply this restriction for future feed posts. Tap the *Remember selected visibility* radio button. Your visibility settings will be set as the default for new feed posts.

3. To upload your post, tap the *Create* button.

Result

Your post appears in the feed.

Edit post

You can change your own posts later on.

Method

The screenshot shows the ELO mobile app interface. At the top, there is a navigation bar with a menu icon, the user name 'Lind@Repository', and buttons for 'SEARCH', 'REFRESH', and 'CREATE DATA SET'. Below the navigation bar, there is a header section with 'ITORY1', 'ORGANIZATION DEPART...', 'COMPANY PARTY', and '2021'. The main content area is divided into two sections: 'CONTENT' and 'FEED'. The 'CONTENT' section shows a document titled 'Planning' with a 'W' icon, shared by 'Lind' on 'Nov 2, 2021 15:51'. The 'FEED' section shows a 'Create a post' input field and a list of posts. The first post is from 'Byte' and says 'Byte saved a new working version of this document.' Below it is a card for 'Version 2' with the text 'New item in list'. The second post is from 'Lind' and says '@GRP_STANDARD Please enter your name on the list! #companyparty'. A red box highlights the edit icon (pencil) next to the comment.

1. Tap *Edit* (pencil icon).
Editing mode is enabled.
2. Make the desired changes.
3. To save your changes, tap *Save*.

Result

Your changes are applied.

Comment on post

You can enter a comment on any post.

Information

The visibility settings of the post you are commenting on apply. You cannot change the visibility settings of a comment.

Method

1. Tap *Comment* below the post.
The input field opens. The on-screen keyboard appears.
2. Enter a comment.
Tap the icons below the input field to add to your comment. You have the following options:

Mention: Use the @ icon to address your feed post directly to another person or group. The people mentioned can see the feed post in their *My ELO* work area.

- Reference: Use the document icon with an arrow to link your feed post with an entry in ELO. Tapping the reference automatically takes the person to the filing location of the linked entry.
- Hashtag: Tap the # symbol to add hashtags to a post. You can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.

3. Tap *Create* to post your comment.

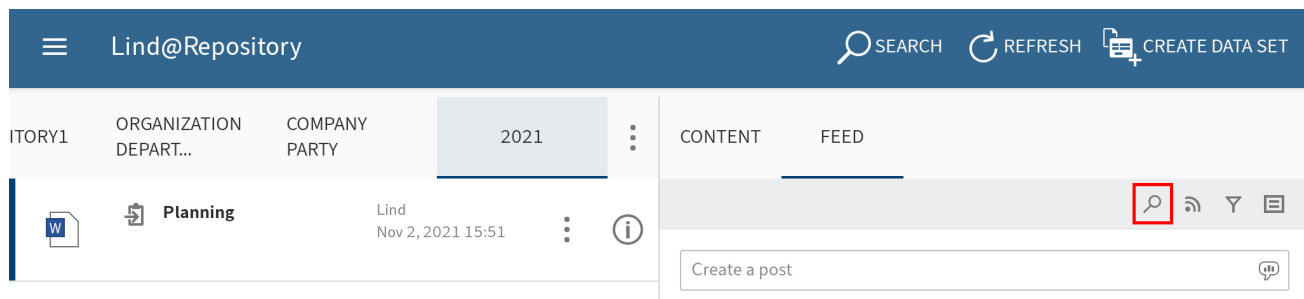
Result

Your comment shows up in the feed under the corresponding post.

Search feed

Tap the *Search feed* button (magnifying glass icon) to search within the selected feed. When the search is completed, you will only see posts containing the search term in the feed.

Method



1. Tap the magnifying glass icon.
The search input field opens.
2. Enter the search term to the input field.
3. Tap the magnifying glass icon to start the search.

Result

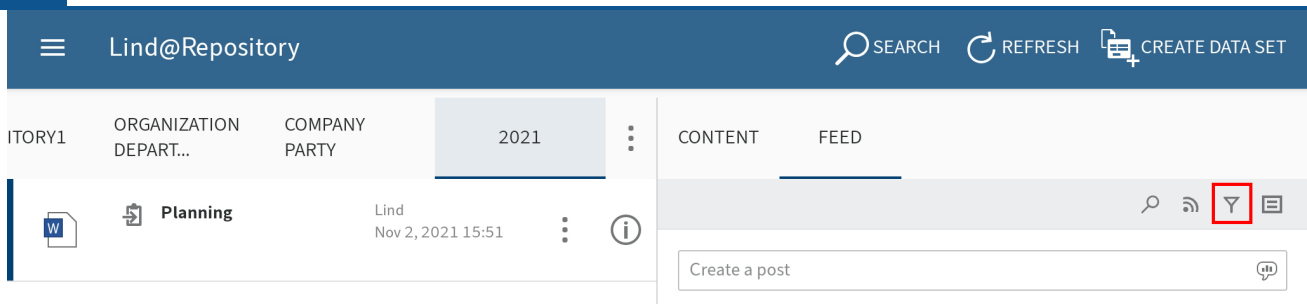
When the search is completed, you will only see posts containing the search term in the feed. The matches are highlighted in yellow.

Optional: To return to the normal feed after a search, tap the X icon in the search field.

Add filter

You can search the feed for specific terms as well as filter it by specific criteria.

Method



1. Tap the filter icon.

The filters appear below the input field.

You can select the following filters:

- Post author: Only posts created by the selected person are shown.
- Post type: Only posts of the selected type are shown.
- Hashtag: Only posts containing the selected hashtag are shown.
- Additional filters: Depending on the settings, additional filters are available, e. g. filter by posts you are mentioned in.

Information

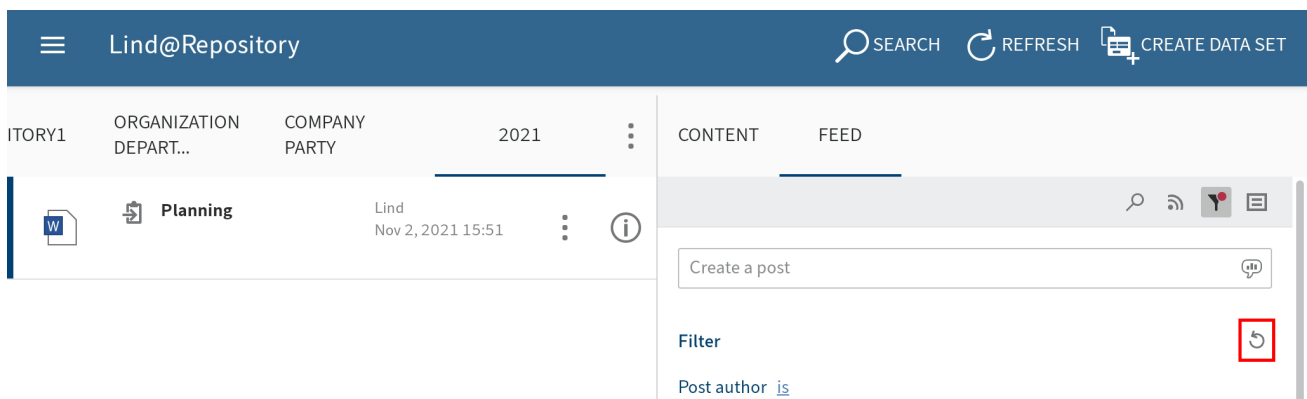
In the default settings, all filters are applied in *is* mode. You can also set the filters to *is not* mode. To change this mode, tap *is/is not* next to the filter category.

2. Tap the filter you want to apply. You can select multiple filters.

Result

The selected filter is highlighted and marked with a check mark. The result of the applied filter appears in the feed.

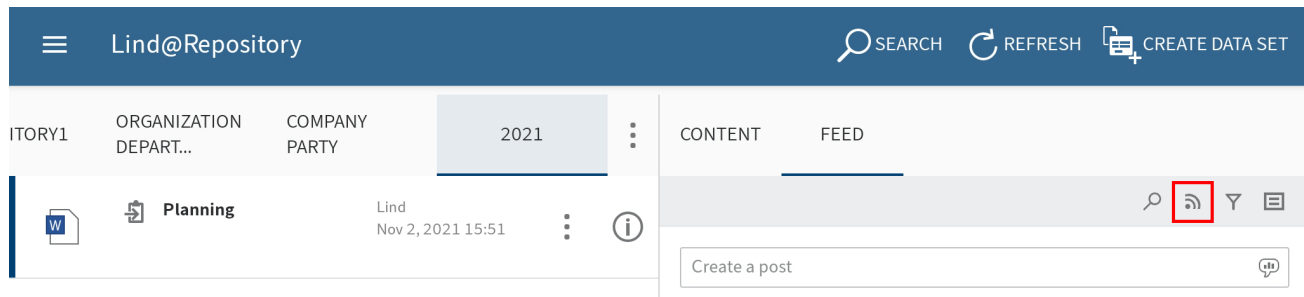
Optional: To clear all filters, tap *Reset filters* (arrow icon).



Subscribe to feed

To be notified of any updates in a feed, you can subscribe to the feed.

Method



To subscribe to a feed, tap the *Subscribe* button in the feed.

Result

You have subscribed to the feed. The *Subscribe* button is marked with a check.

All subscribed feeds are listed in the *My ELO* work area. Once a new post is added to a subscribed feed, you see the new post in your *My ELO* work area.

Information

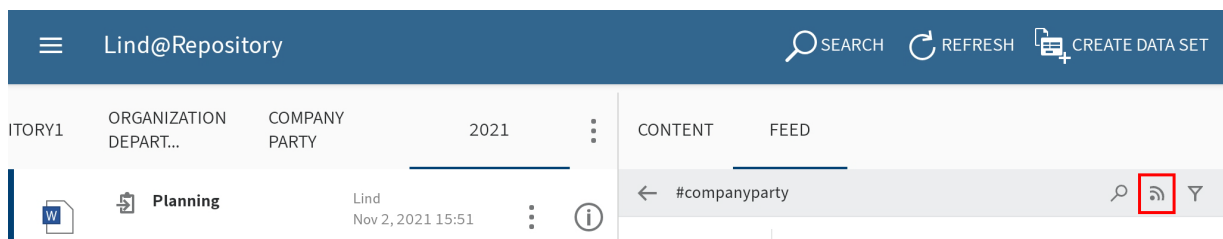
You can automatically subscribe to feeds. This applies to specific events that are triggered by you. You can enable the automatic feed subscription options in *My ELO > Settings > My ELO settings*.

Subscribe to a hashtag

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

Method

1. To subscribe to a hashtag, tap it in a post.



You will see an overview of posts with this hashtag.

2. Tap *Subscribe* (antenna icon) in the upper bar.

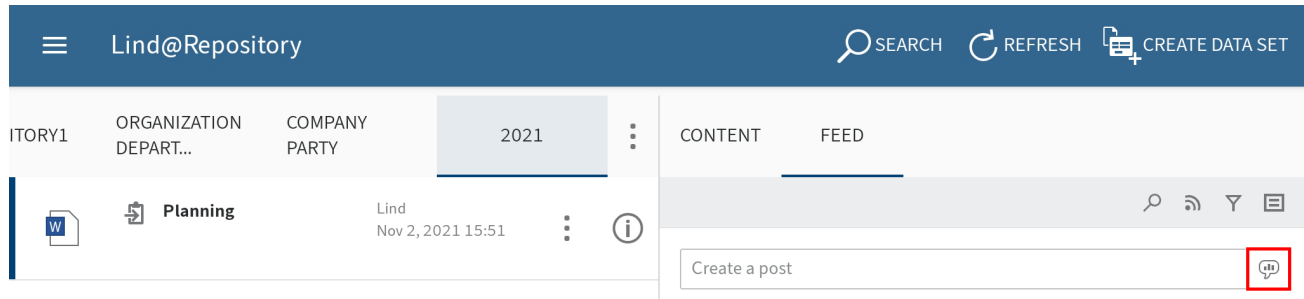
Result

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

Create a poll

You can create polls on the *Feed* tab.

Method



1. Tap the *Create poll* button.

The *Create poll* area opens.

2. Create the poll. You have the following options:

- Ask a question: Enter a question to the input field.
- Add answer option: Enter answer options to the input fields. Insert a new input field with the *Add new answer* button. Tap the X icon to delete an answer option.
- Poll duration: You can select how long you want the poll to remain open in the drop-down menu.
- Additional options: This is where you specify whether participants can select more than one answer, see the names in the result, and add their own answers.

Tap the icons below the input field to add to your poll. You have the following options:

- Mention: Use the @ icon to address your poll directly to another person or group. The people mentioned can see the poll in their *My ELO* work area.
- Reference: Use the document icon with an arrow to link your poll to an entry in ELO. Tapping the reference automatically takes the person to the filing location of the linked entry.
- Hashtag: Tap the # symbol to add hashtags to your poll. You can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.
- Visibility: Use the eye icon to restrict who can read your poll. You can apply this restriction for future polls. Tap the *Remember selected visibility* radio button. Your visibility settings will be set as the default for new polls.

1. Tap *Create* to start the poll.

Result

The poll shows up in the feed.

Information

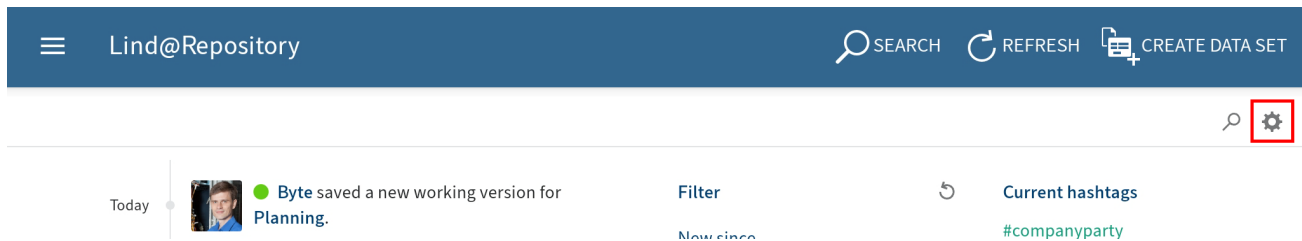
Once a user has taken a poll, it can no longer be modified.

My ELO

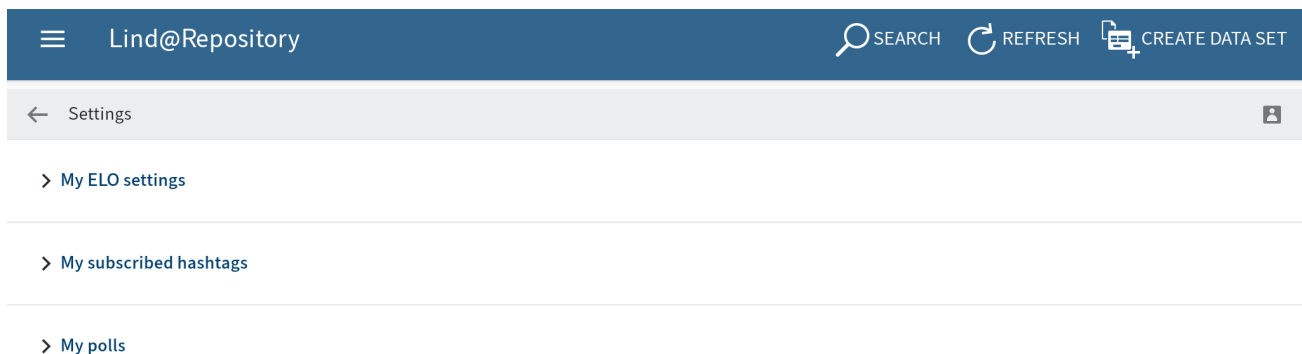
Feed posts for different entries are listed in the *My ELO* work area. For example, you will see posts from subscribed feeds or posts you were mentioned in. You will also find an overview of your workflows and current hashtags in *My ELO*.

Settings

In the *Settings* area, you can configure the *My ELO* work area. You will also find an overview of hashtags you have subscribed to and polls you have started.



Tap the *Settings* button (gearwheel icon) in *My ELO* to open the *Settings* area.



In the *Settings* area, you have the following options:

My ELO settings

Automatically subscribe to the feed: Specify when you want to automatically subscribe to a feed.

Number of seconds to display the "Undo" button: If you delete a feed post from *My ELO*, the *Undo* button appears. This button enables you to undo the delete action. You specify how many seconds the *Undo* button will be displayed for after removing a post.

Remove all posts from My ELO: If you no longer want to see feed posts in *My ELO*, you can hide them. The *Remove all posts from My ELO* button hides all feed posts in your *My ELO* work area. Posts you have marked as important are not removed.

Information

The *Remove all posts from My ELO* function only hides posts in your *My ELO* work area. The post is not deleted. It stays in the feed for the corresponding entry.

My subscribed hashtags

Search for hashtag: You can search for hashtags in ELO. Enter the hashtag you are looking for to the input field or select a hashtag from the drop-down menu. Tap a hashtag to view an overview of feed posts with the selected hashtag.

Subscribed hashtags: Here is a list of all the hashtags you have subscribed to. Tap a hashtag to view an overview of feed posts with the subscribed hashtag. Tap the antenna icon with the check mark to delete the subscription.

My polls

Here is a list of polls you have started. Tap a poll in the list to go to the poll.

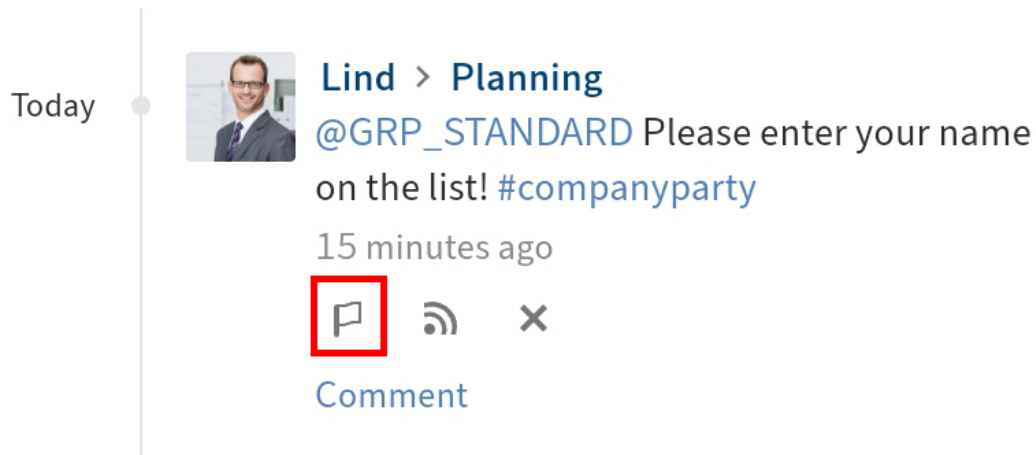
Feed

In the *My ELO* feed, you will find an overview of all feed posts relevant to you. You will see posts from subscribed feeds and posts you were mentioned in. Posts older than one month do not show up. New feed posts are denoted with a green dot.

The screenshot shows the ELO mobile app interface. At the top, there is a navigation bar with the user name 'Lind@Repository' and icons for search, refresh, and 'CREATE DATA SET'. Below the navigation bar, there is a search icon and a gear icon. The main content area is divided into a feed and a filter sidebar. The feed shows two posts: one from 'Byte' about a new working version for 'Planning' (9 minutes ago) and one from 'Lind' about entering a name on a list (11 minutes ago). A red box highlights the first post. The filter sidebar on the right includes sections for 'Filter', 'Current hashtags', 'Escalated workflow', 'Claims', and 'My recently started workflows'. The 'Filter' section has options for 'New since' (Today, Yesterday, One week, One month), 'Form' (Basic entry), 'Post author' (Byte, Lind), 'Post type' (User post, Working version changed), and 'Hashtag' (#companyparty). The 'Current hashtags' section shows '#companyparty'. The 'Escalated workflow' section shows '1 Escalated workflow'. The 'Claims' section shows 'First check, Lind'. The 'My recently started workflows' section shows 'Incoming Invoice under 5000€, Cole'.

Mark post as important

Posts older than one month are removed from the *My ELO* work area. To show posts in *My ELO* permanently, you can mark them as important.



To show a post permanently in *My ELO* tap the *Mark as important* button.

You can recognize posts that are marked as important by the red flag icon. The post remains in the *My ELO* area even if it is more than a month old.

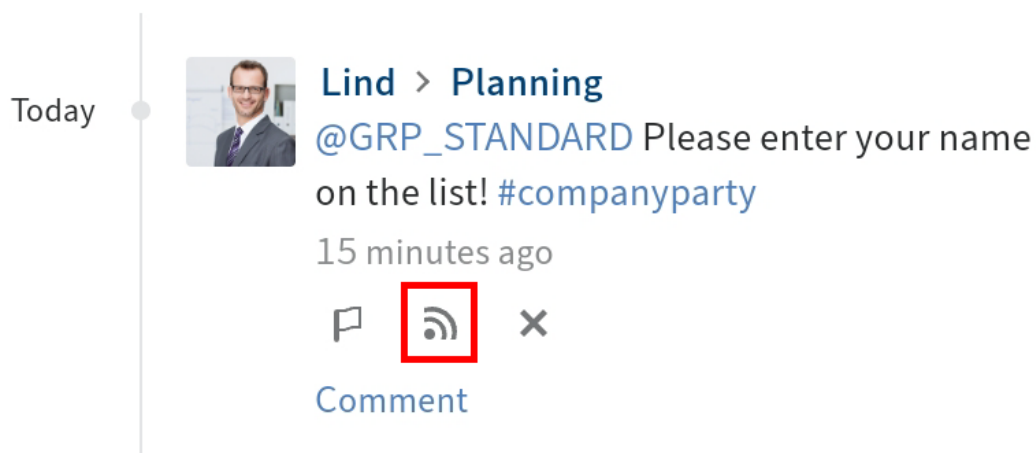
Remove marker

To delete the marker, tap the red flag icon. As soon as the post is more than a month old, it will no longer be displayed in the *My ELO* work area.

Subscribe to feed

In the *My ELO* work area, posts from feeds you are not subscribed to, but were mentioned in, are also shown. You can subscribe to these feeds in *My ELO*.

Method



Tap the *Subscribe* button.

Result

You have subscribed to the feed. The check mark indicates this.

All subscribed feeds are listed in the *My ELO* work area. Once a new post is added to a subscribed feed, you see the new post in your *My ELO* work area.

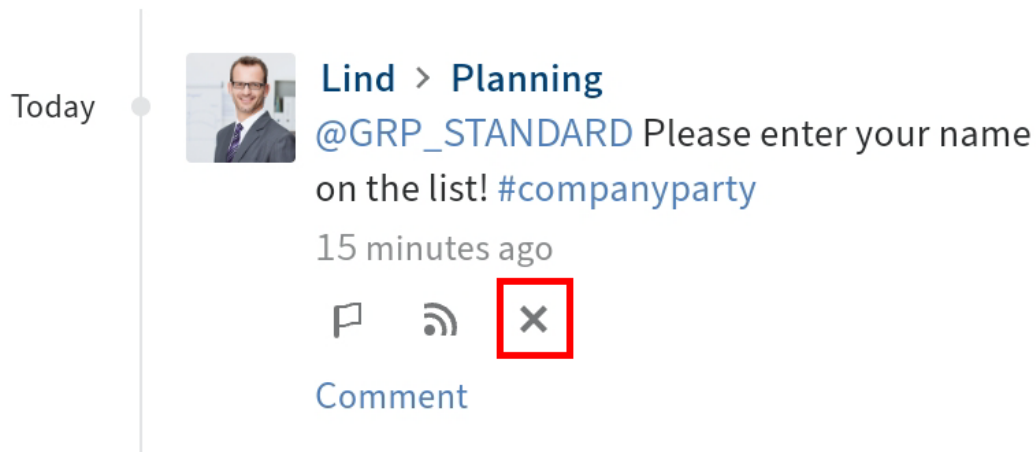
Hide post

If you no longer want to see a post, you can hide it in the *My ELO* work area.

Information

The *Remove all posts from My ELO* function only hides posts in your *My ELO* work area. The post is not deleted. It stays in the feed for the corresponding entry.

Method



Tap the *Remove from My ELO* button (x icon) to hide a post in your *My ELO* work area.

Result

This post will be removed from My ELO.

Undo

The post is removed from *My ELO*. To show the post again, tap *Undo*.

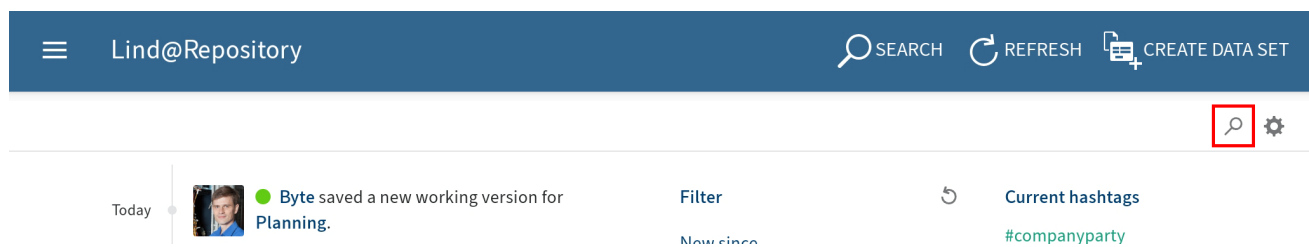
Information

The *Undo* function is only displayed for 5 seconds by default. You can change the length of time it is displayed in *Settings > My ELO settings*.

Search feed

Tap the *Search feed* button (magnifying glass icon) to search within the displayed feed. When the search is completed, you will only see posts containing the search term in the feed.

Method



1. Tap the magnifying glass icon.

The search input field opens.

2. Enter the search term to the input field.

3. Tap the magnifying glass icon to start the search.

Result

When the search is completed, you will only see posts containing the search term in the feed. The matches are highlighted in yellow.

Optional: To return to the normal feed after a search, tap the X icon in the search field.

Filters

You can search the feed for specific terms as well as filter it by specific criteria.



Today

Byte saved a new working version for **Planning**.

New item in list

9 minutes ago

[Comment](#)

Lind > **Planning**

@GRP_STANDARD Please enter your name on the list! #companyparty

11 minutes ago

[Comment](#)

Filter

New since

Today

Yesterday

One week

One month

Form [is](#)

Basic entry 2

Post author [is](#)

Byte 1

Lind 1

Post type [is](#)

User post 1

Working version changed 1

Hashtag [is](#)

#companyparty 1

Current hashtags

#companyparty

1 Escalated workflow

Claims

First check, Lind

My recently started workflows

Incoming Invoice under 5000€, Cole

You can select the following filters:

- **New since:** Filter the feed by the date the post was created. You can choose between: *Today*, *Yesterday*, *One week*, and *One month*.
- **Form:** Filter the feed by the metadata form of the entry.
- **Post author:** Filter the feed by the people who created posts.
- **Post type:** Filter the feed by the type of post. There are two post types: Automatically created posts (e.g. *Document version created*) and posts created by people (*User posts*).
- **Hashtag:** Filter the feed by hashtags.
- **Additional filters:** Filter the feed by posts directly related to you, such as posts you were mentioned in.

Information

In the default settings, all filters are applied in *is* mode. You can also set the filters to *is not* mode. To change this mode, tap *is/is not* next to the filter category.

Apply filters

Method

To apply a filter, tap the filter in the list. You can select multiple filters in all areas except *New since*.

Result

The selected filter is highlighted and marked with a dot or check mark. You will now only see the filtered posts.




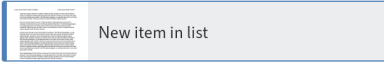
Optional: To clear all filters, tap *Reset filters* (arrow icon).

Hashtags






Today


 **Byte** saved a new working version for **Planning**.

 New item in list




9 minutes ago

[Comment](#)

 **Lind** > **Planning**
@GRP_STANDARD Please enter your name on the list! #companyparty

11 minutes ago

[Comment](#)

Filter

New since

- Today
- Yesterday
- One week
- One month

Form [is](#)

- Basic entry 2

Post author [is](#)

- Byte 1
- Lind 1

Post type [is](#)

- User post 1
- Working version changed 1

Hashtag [is](#)

- #companyparty 1

Current hashtags

#companyparty

1 Escalated workflow

Claims

First check, Lind

My recently started workflows

2 Incoming Invoice
under 5000€, Cole

You will find an overview of hashtags currently in use in your company repository in *My ELO*.

Tap a hashtag to view an overview of feed posts with the selected hashtag.

Workflows

The screenshot shows the ELO mobile app interface. At the top, there is a navigation bar with a menu icon, the user name "Lind@Repository", and icons for SEARCH, REFRESH, and CREATE DATA SET. Below the navigation bar, there is a search and settings icon.

The main content area displays a feed of posts. The first post is from "Byte" and says "Byte saved a new working version for Planning." It includes a preview of a document titled "New item in list" and was posted 9 minutes ago. The second post is from "Lind" and says "Lind > Planning @GRP_STANDARD Please enter your name on the list! #companyparty" and was posted 11 minutes ago.

On the right side, there is a "Filter" section with the following options:

- New since:
 - Today
 - Yesterday
 - One week
 - One month
- Form [is](#):
 - Basic entry 2
- Post author [is](#):
 - Byte 1
 - Lind 1
- Post type [is](#):
 - User post 1
 - Working version changed 1
- Hashtag [is](#):
 - #companyparty 1

On the far right, there is a "Current hashtags" section showing "#companyparty". Below this, there is a red-bordered box containing the following information:

- 1** Escalated workflow
- Claims
- First check, Lind
- My recently started workflows**
- Incoming Invoice under 5000€, Cole

In the *My ELO* work area, you will see which workflows you recently started and who is currently processing the task. You will also find an overview of escalated workflows you are involved in.

Tap a workflow to go to the selected workflow in the *Tasks* work area.

Edit user profile

Feed posts are marked with the name and profile picture of the author. You can edit your profile.

Method

The screenshot shows the ELO mobile app settings screen. At the top, there is a navigation bar with a menu icon, the user name "Lind@Repository", and icons for SEARCH, REFRESH, and CREATE DATA SET. Below the navigation bar, there is a back arrow and the text "Settings".

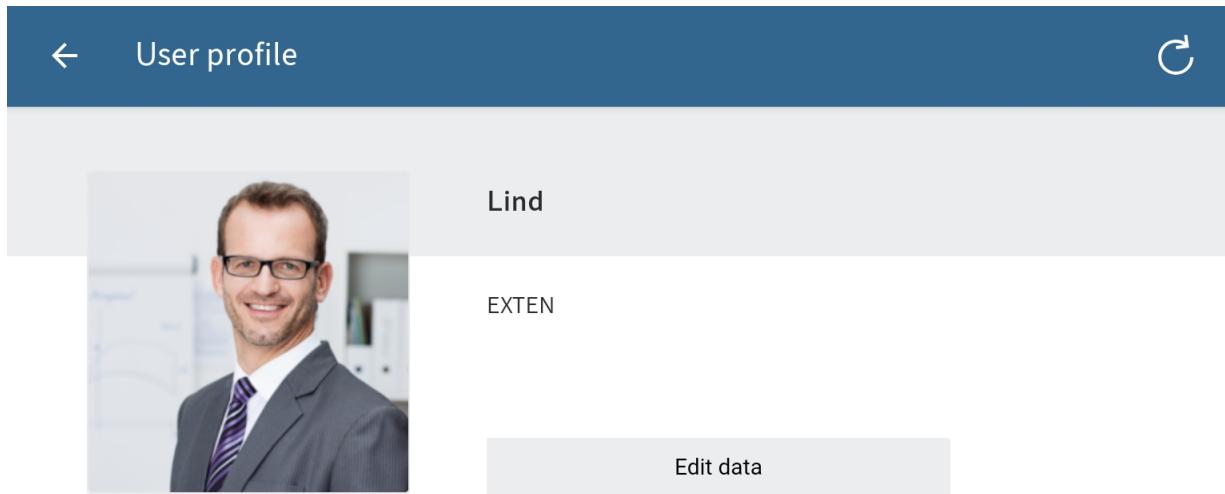
The settings menu includes the following options:

- > My ELO settings
- > My subscribed hashtags
- > My polls

A red-bordered box highlights the user profile icon in the top right corner of the settings screen.

To open your profile, in *My ELO*, tap *Settings* (gear icon) > *My profile* (gray person icon at the top right).

Alternative: In the feed, tap your profile picture or user name to open your user profile.



The *User profile* dialog box opens.

2. Tap *Edit data* to edit your profile.

Editing mode is enabled.

3. Make the desired changes.
4. Tap *Save* to apply your changes.

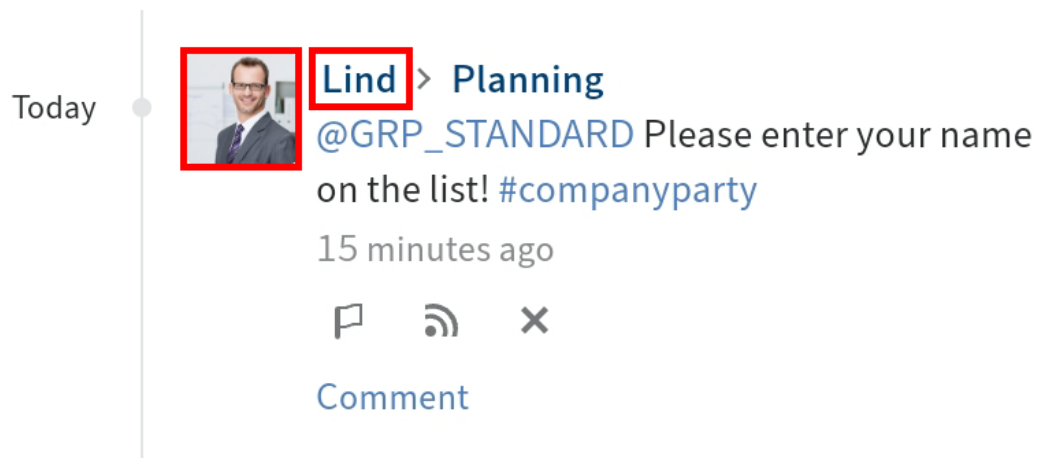
Result

Your changes are applied. You are now back in the profile overview.

View user profile

For more information on a person, you can view their profile.

Method



In the feed, tap the image or the person's name to see their profile.

Result

The user profile opens.

Optional: To close the user profile, tap *Back* (arrow icon) on the menu bar.