ELO mobile apps

ELO app (iOS)

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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 your ELO repository.

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 an iPad in landscape mode. This documentation explains how to use the app with an iPad. 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:

- iOS 14 or higher installed on the mobile device
- ELO Web Client 20.10 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 unlimited functionality

> **Please note**
>
> HTTPS is essential for secure communication because 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 *App Store*.

Method

1. Tap *LOAD*.

   The installation dialog box opens.

2. 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 opens.

Demo repository

When you start the app for the first time, it opens to a demo repository, which will help you to familiarize yourself with the app. The demo profile has restricted functions without write rights.

Add profile

To access your company repository, you need to set up a profile. You can find more information in the section Add and activate profile.

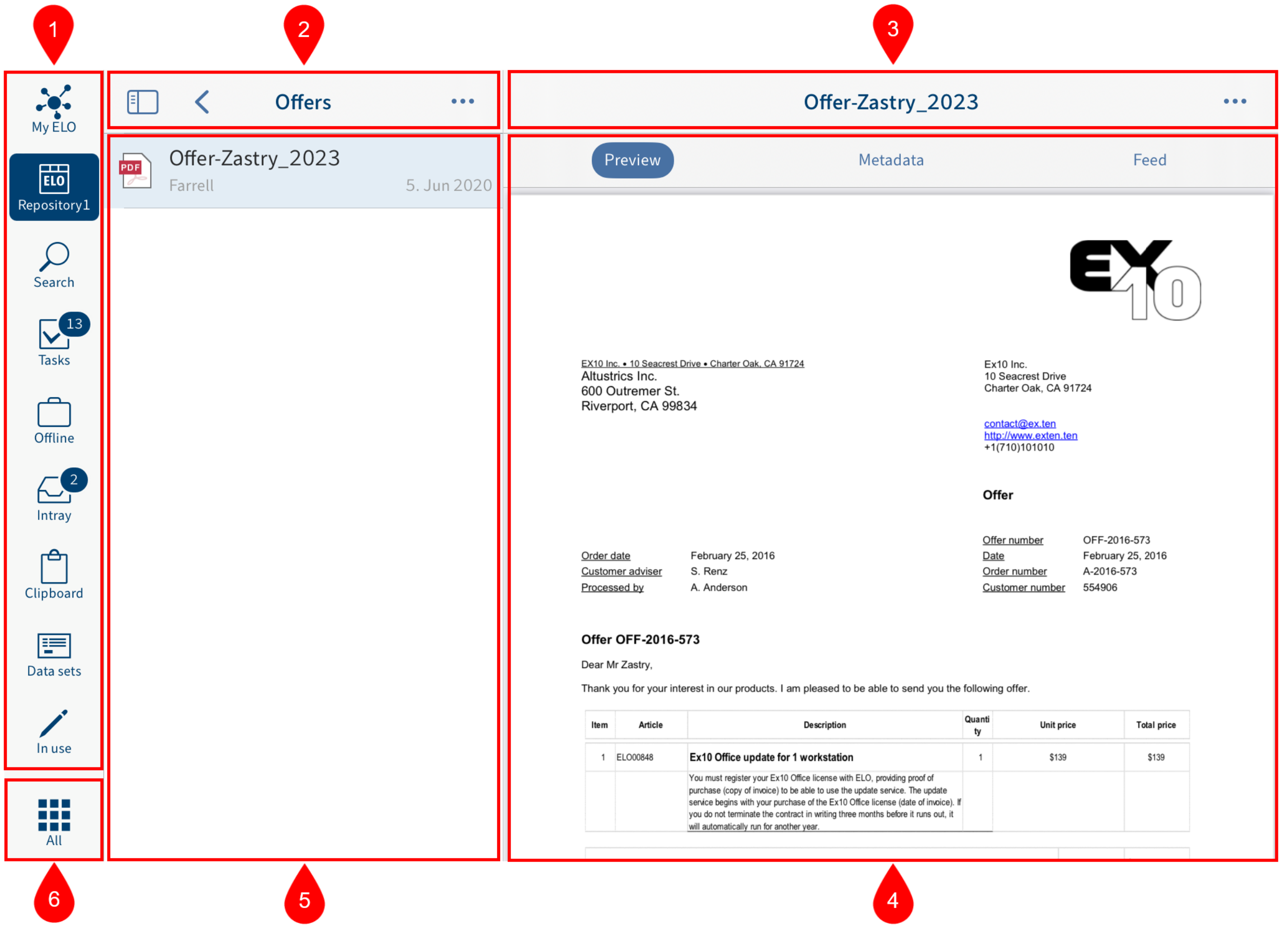
Language

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 an iPad. It may look different on your device.

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



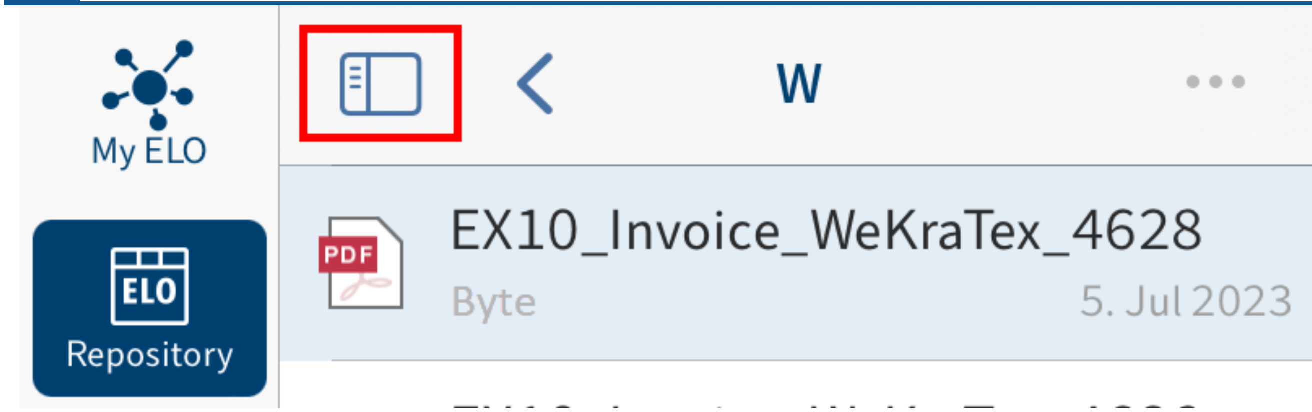
1 Work area toolbar: The work area toolbar gives you access to the most important work areas. You can also open the tile navigation with the *Tile navigation* button.

2 List view navigation bar: Shows the current work area or level.

3 Navigation bar: Shows different tabs such as *Preview*, *Metadata*, or *Feed* depending on the selected entry and current function. The currently active tab is highlighted in blue.

4 Viewer pane: Shows a preview of the selected entry or detailed information.

If you are using the app on an iPad, you can change the size of the viewer pane. To increase or decrease the size of the viewer pane, tap the *Increase/decrease size of viewer pane* icon.



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

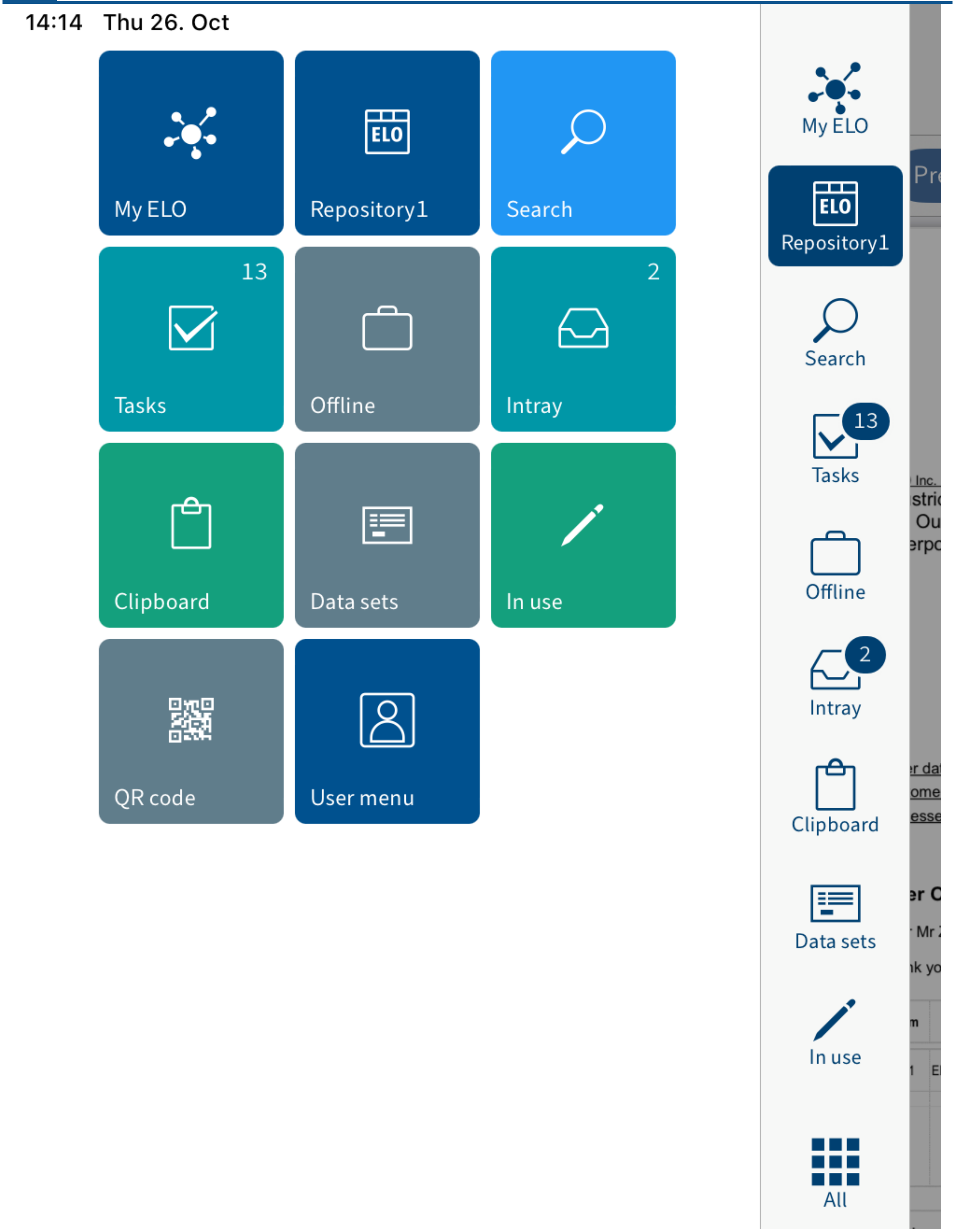
6 Tile navigation: Opens the tile navigation.

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 open the tile navigation with the *Tile navigation* button on the work area toolbar.



The tile navigation contains the following work areas and functions:

-

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.
- Search: Enables you to look for specific entries in ELO.
- Tasks: This work area contains your tasks and workflows.
- Offline: You can download entries to your Offline area to make them available on your device.
- Intray: This is where you manage files that you want to file to the *Repository* work area.
- Clipboard: The *Clipboard* work area is where you can temporarily store documents and folders.
- Data sets: Data sets are saved temporarily here. You can transfer data sets to the *Repository* work area as soon as your device is connected to the Internet.
- QR code: Use the *QR code* tile to start a QR code scan with your device's camera.
- Configuration: In the *Configuration* dialog box, you can configure the settings as well as create and edit profiles.

Information

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

Navigation

When you start the ELO app, the app opens to the *Repository* work area.

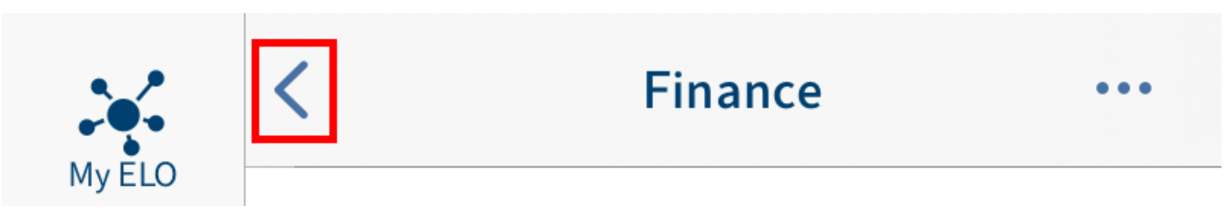
Change folder

Method

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

   The level opens in the list view. In the navigation bar, you see the current level.

   You can now access the entries at this level.

2. To return to the previous level, tap the *Back* button in the navigation bar.

   Alternative: Tap and keep your finger on the navigation bar. This will open your navigation path. Tap an entry to go to that level.

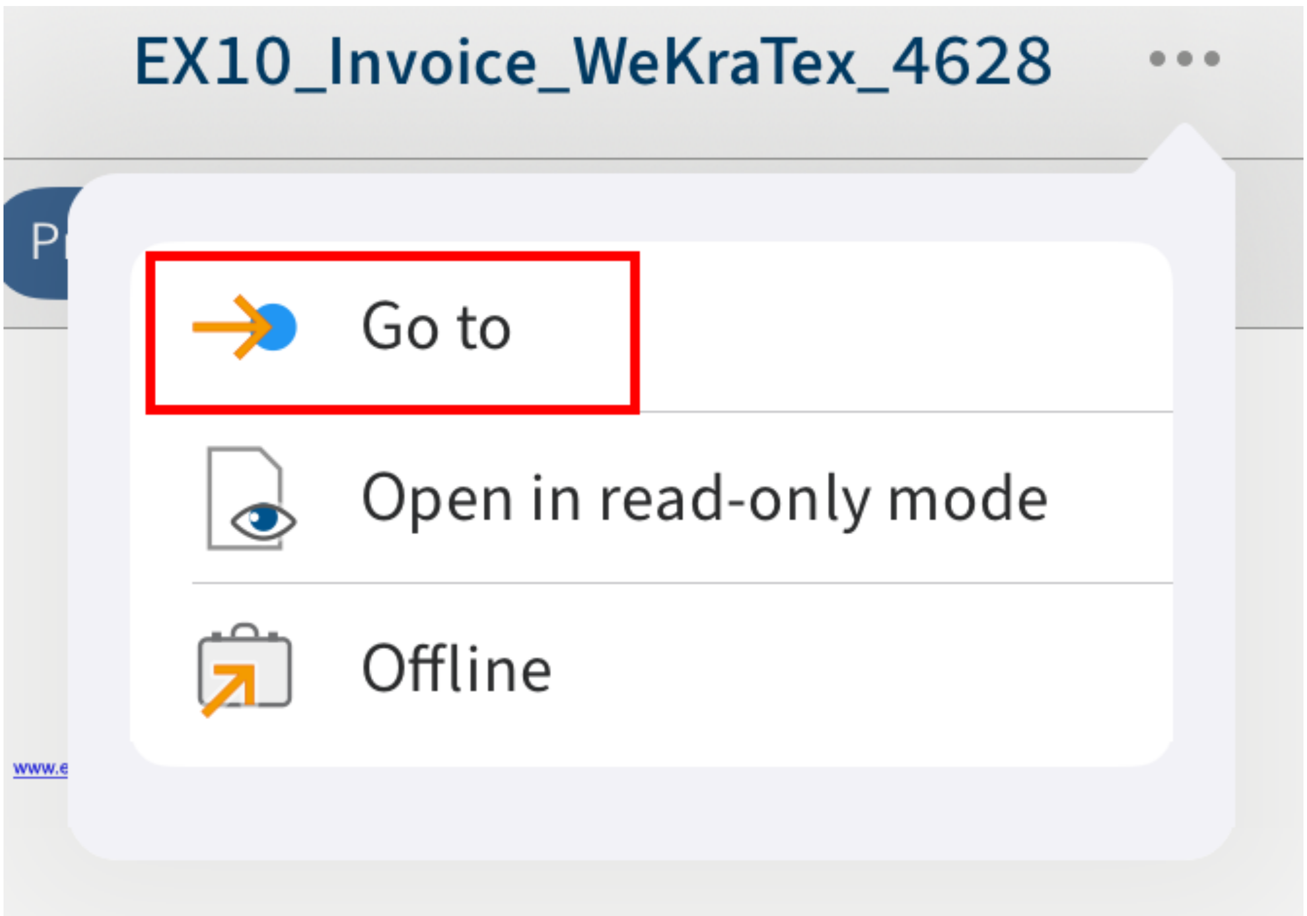
Scroll

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' function

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* function in the menu (button with three dots) of the *Search*, *Tasks*, *Offline*, and *Clipboard* work areas.

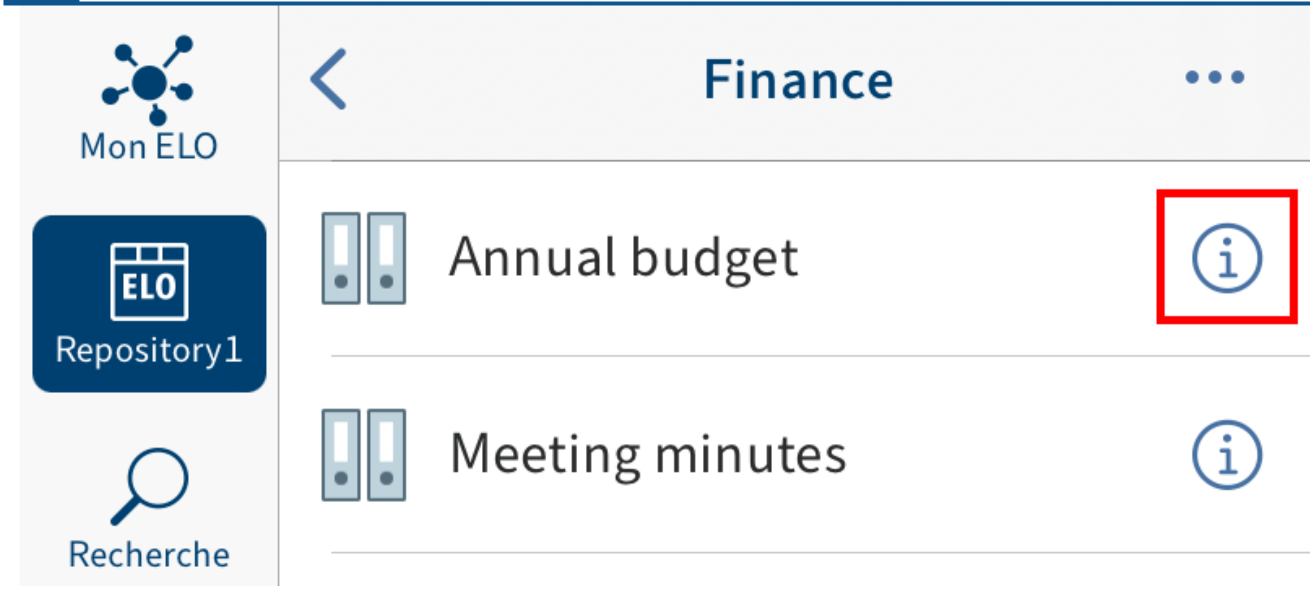


Show details

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

Show folder details

Method



To view detailed information about a folder, tap the info icon next to the entry in the list view.

Result

The information about the selected folder appears in the viewer pane.

Show document details

Method

To view detailed information about a document, tap the info icon next to the entry in the list view.

Result

If available, the preview of the document is displayed in the viewer pane.

Tabs in the viewer pane

Depending on the selected work area and entry, the viewer pane navigation bar will contains different tabs:

- Preview: This tab contains the preview of the document, provided that one exists.
- Metadata: You will see the metadata for the document here.
- Feed: The feed documents changes to entries. You can create and comment on posts.
- Margin note: Contains any existing margin notes.
- Form: If applicable, you will see the form for an entry.

Switch between tabs in the viewer pane

You can switch between the different tabs. The currently active tab is highlighted in blue.

Method

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

Result

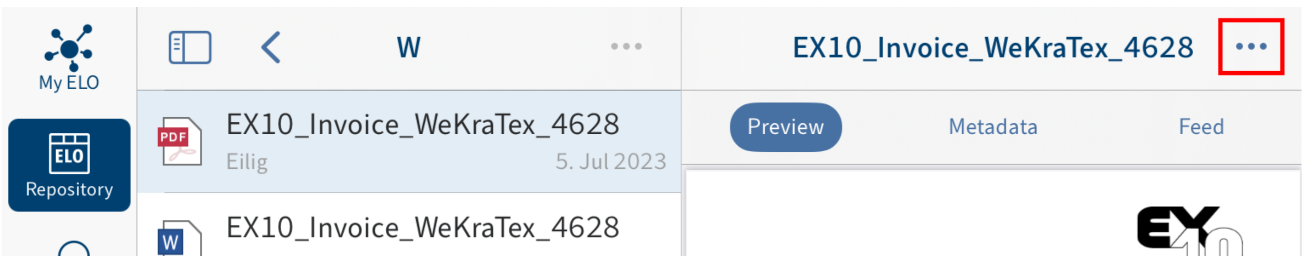
The selected tab is highlighted in blue in the navigation bar of the viewer pane.

Menu (button with three dots)

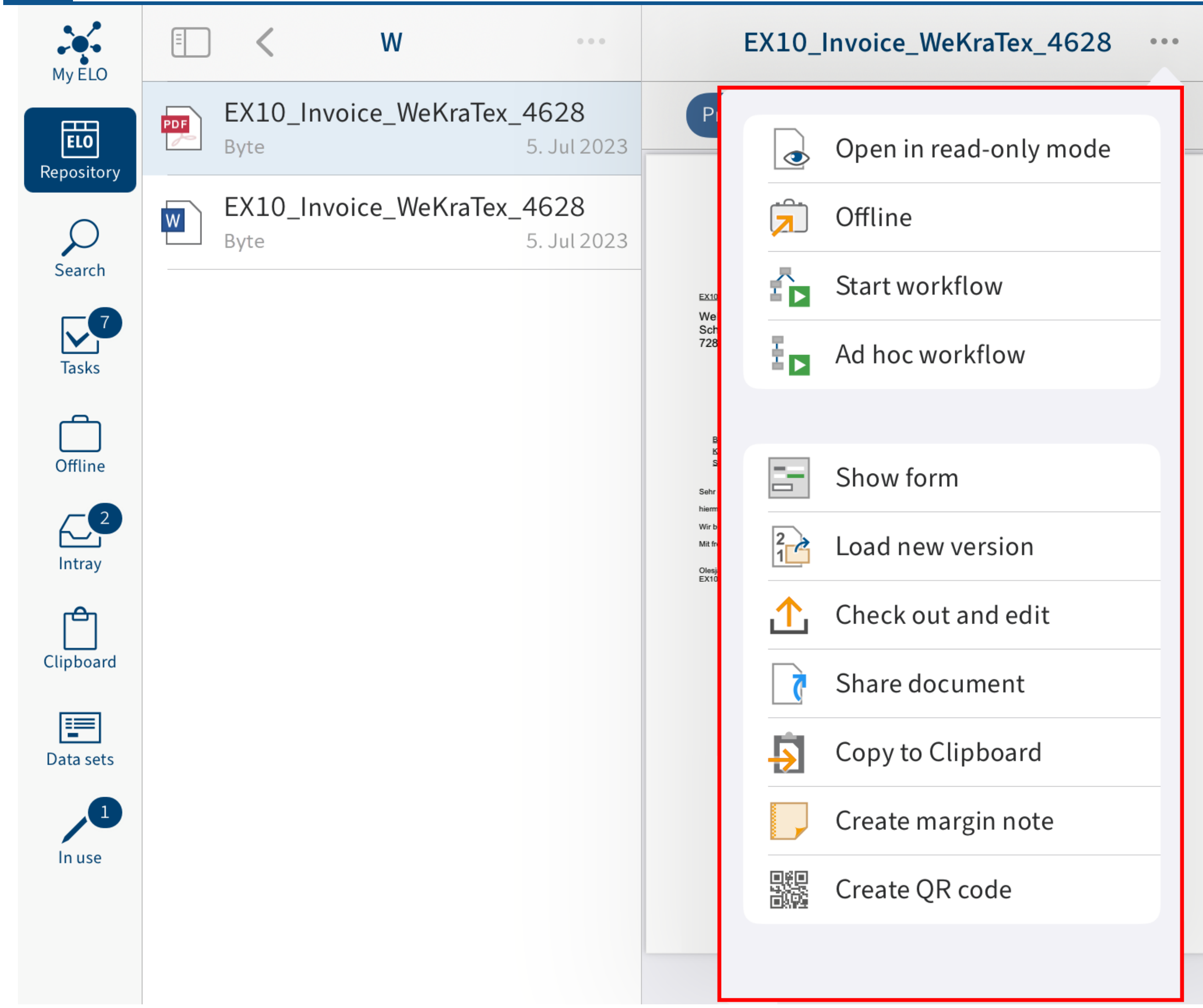
You can call functions for individual documents or folders from the menu (button with three dots). Various functions are available depending on the type of entry and work area.

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

You get to the menu using the button with three dots in the navigation bar.



Different functions are available depending on the selected entry.

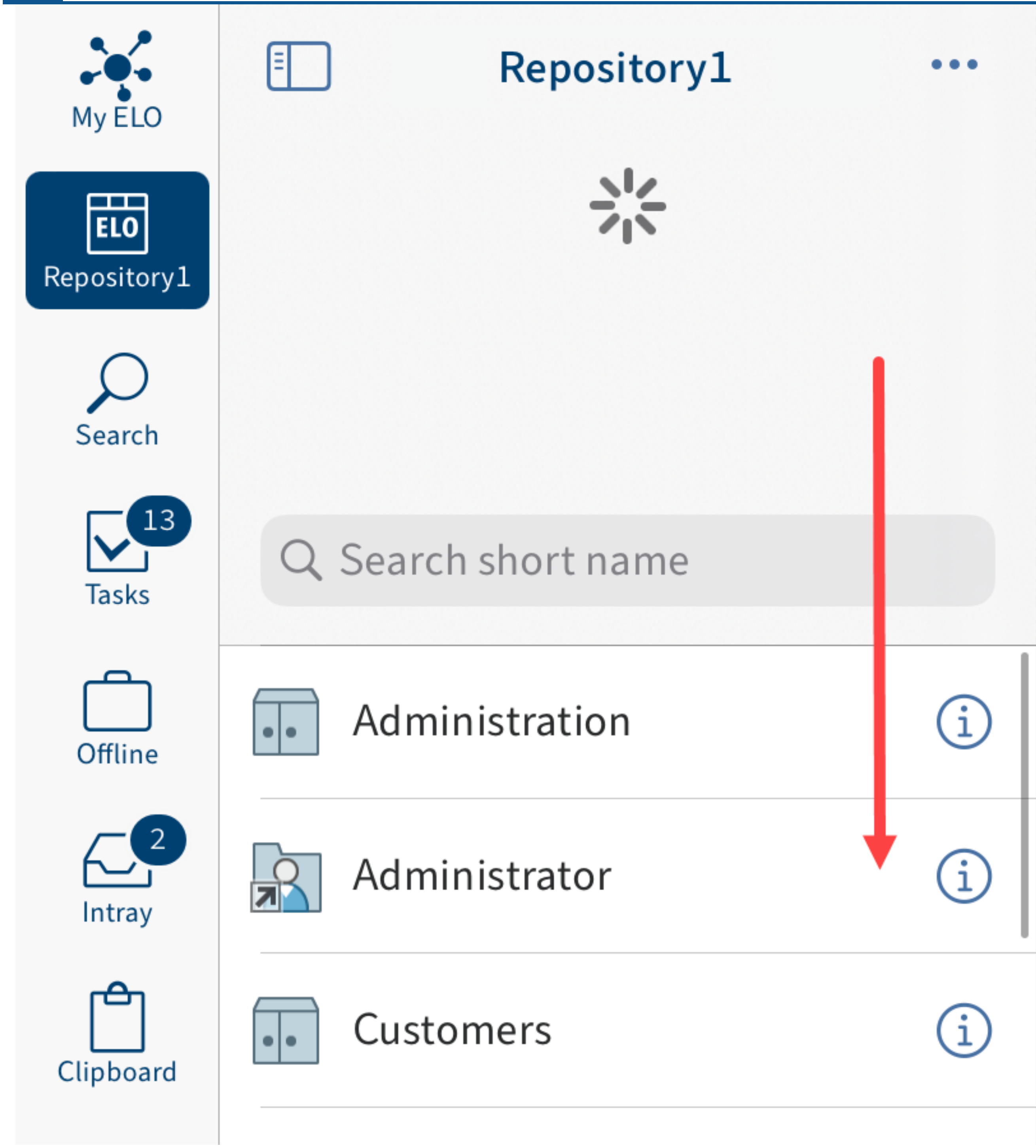


Information

You can also access the *New folder* and *Insert file* functions by tapping the menu (button with three dots) in the list view navigation bar.

Refresh

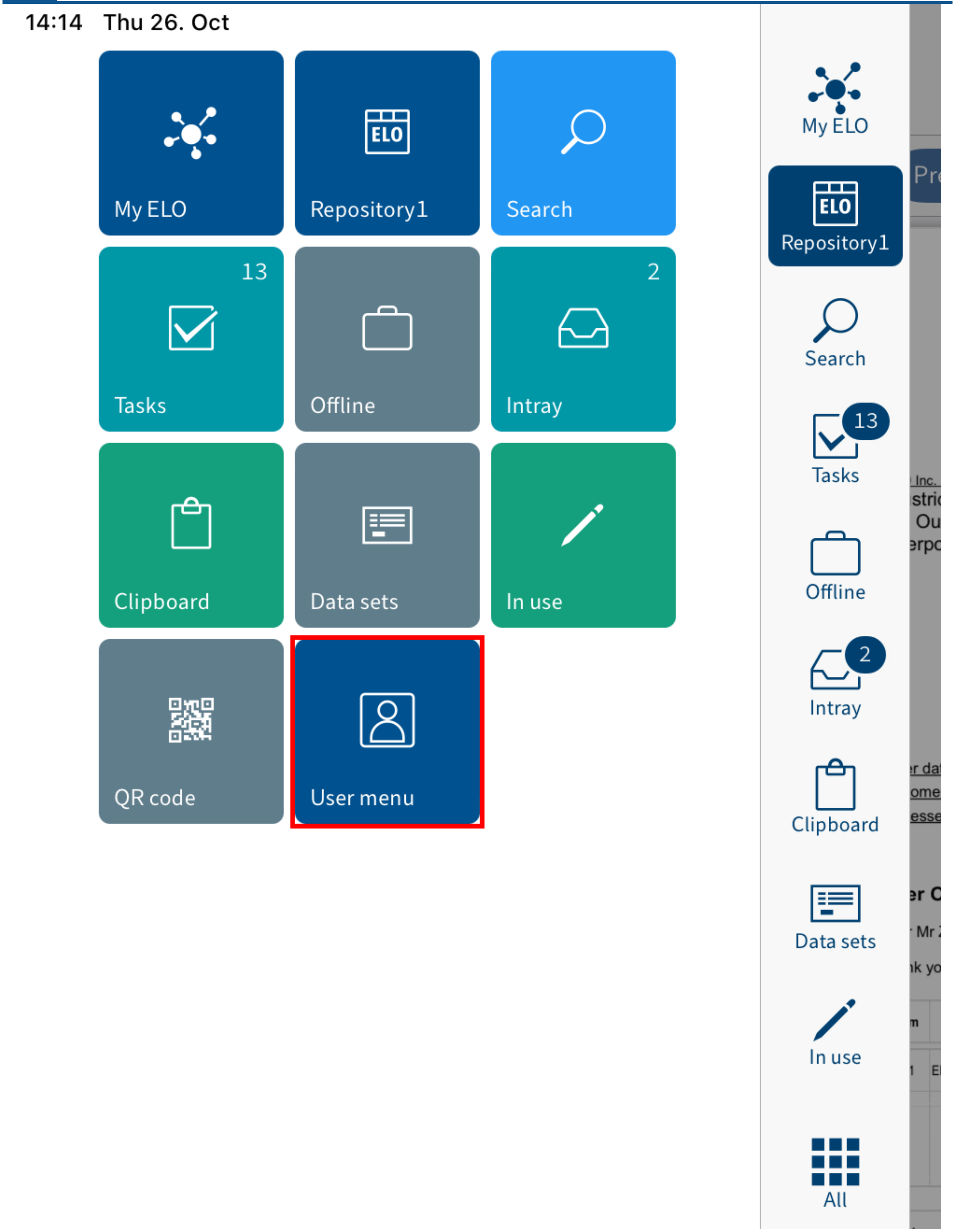
Tap the *Refresh* button to refresh the list view in the selected work area.



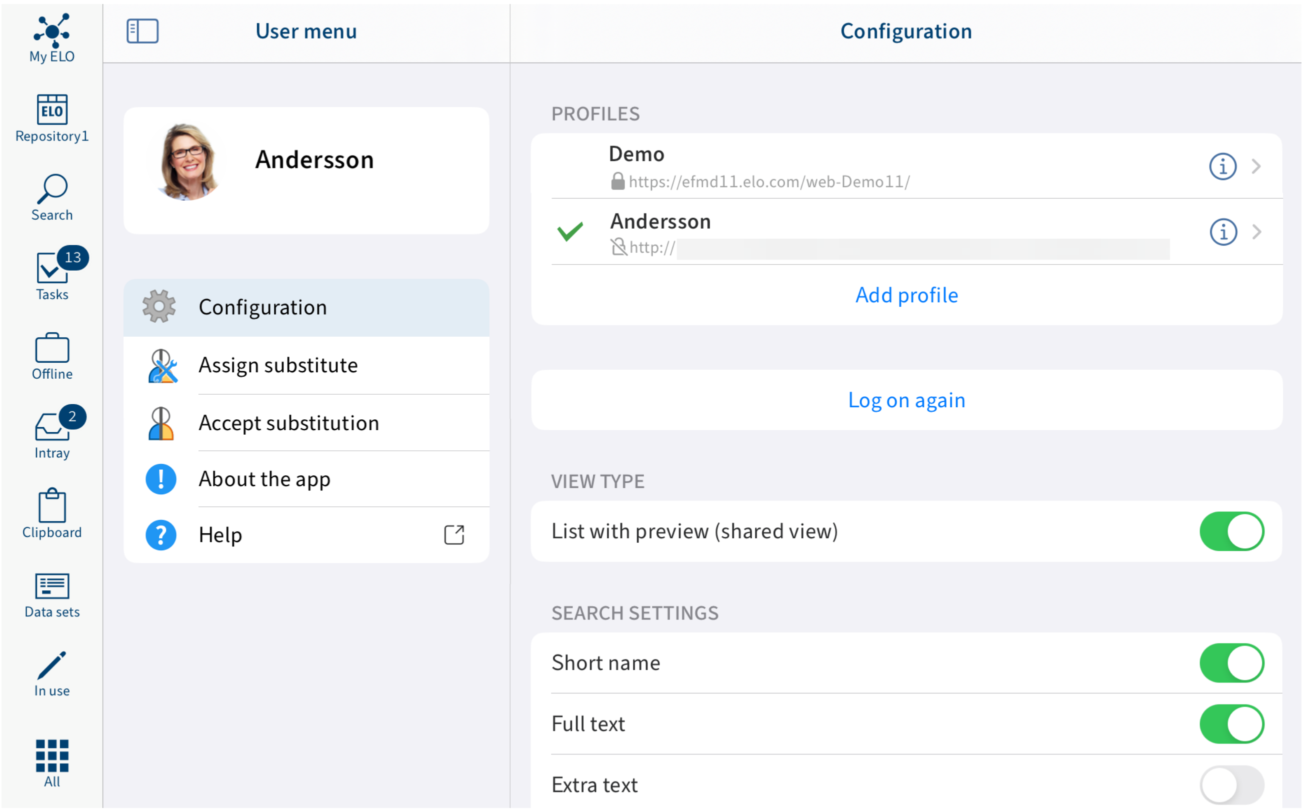
Swipe down in the list view to refresh the list in the current work area.

User menu

In the *User menu* dialog box, you can modify the settings for the profiles and their substitutions. Open the configuration via the *Tile navigation > User menu*.


14:14 Thu 26. Oct
My ELO
Repository1
Search
13
Tasks
Offline
2
Intray
Clipboard
Data sets
In use
QR code
User menu
My ELO
Repository1
Search
13
Tasks
Offline
2
Intray
Clipboard
Data sets
In use
All

Configuration



In the Configuration dialog box, you have the following options:

Notify support

Tap the *About* button to get information about the ELO app, such as the version number.

Tap the letter icon to send an e-mail to ELO support in an external application.

Profiles

The *PROFILES* area lists the available profiles. A check mark indicates that the profile is active.

More information is available in the previous sections Add and activate a profile, Edit profile, and Delete profile.

Log on again: Use the *Log on again* function to reload the connection to ELO. The cache is automatically deleted, e.g. the icons loaded from the server.

Security

> **Information**
>
> The ELO app supports Touch ID and Face ID authentication.

Display mode

List with preview (split view): If this option is enabled, you will see the list view (folders and documents in the repository) and the viewer pane (preview of the selected entry or detailed information), as described in User interface. When this option is disabled, you will either see the list view or the viewer pane depending on your position in the repository.

Search settings

In the *SEARCH SETTINGS* area, you specify which fields you want to include during a search. The following fields are available:

- Short name
- Full text
- Fields
- Extra text
- Version comments

Task settings

In the *TASK SETTINGS* area, select which types of task you want to be displayed in the *Tasks* work area. The following types of task are available:

- Escalations
- Substitution tasks
- Group tasks
- Reminders

Offline

Download via cellular network: If this option is enabled, the ELO app connects to the Internet via a cellular network when there is no Wi-Fi connection available.

Other

Show delete: If the *Show delete* option is enabled, the *Delete* function shows up in the menu (button with three dots).

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*.

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.

Advanced

Enable logging: Specify whether you want to create a log file.

Send log file: With this function, you can send the log file by e-mail, for example.

About

Company Information: This menu item contains information about the company.

Privacy Policy: You will find the Privacy Policy here.

Open source licenses: You will find the open source licenses used in the app here.

Add and activate profile

To access your company repository, you must connect the ELO app to the repository. First, you need to set up and activate a profile.

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

'Add profile' function

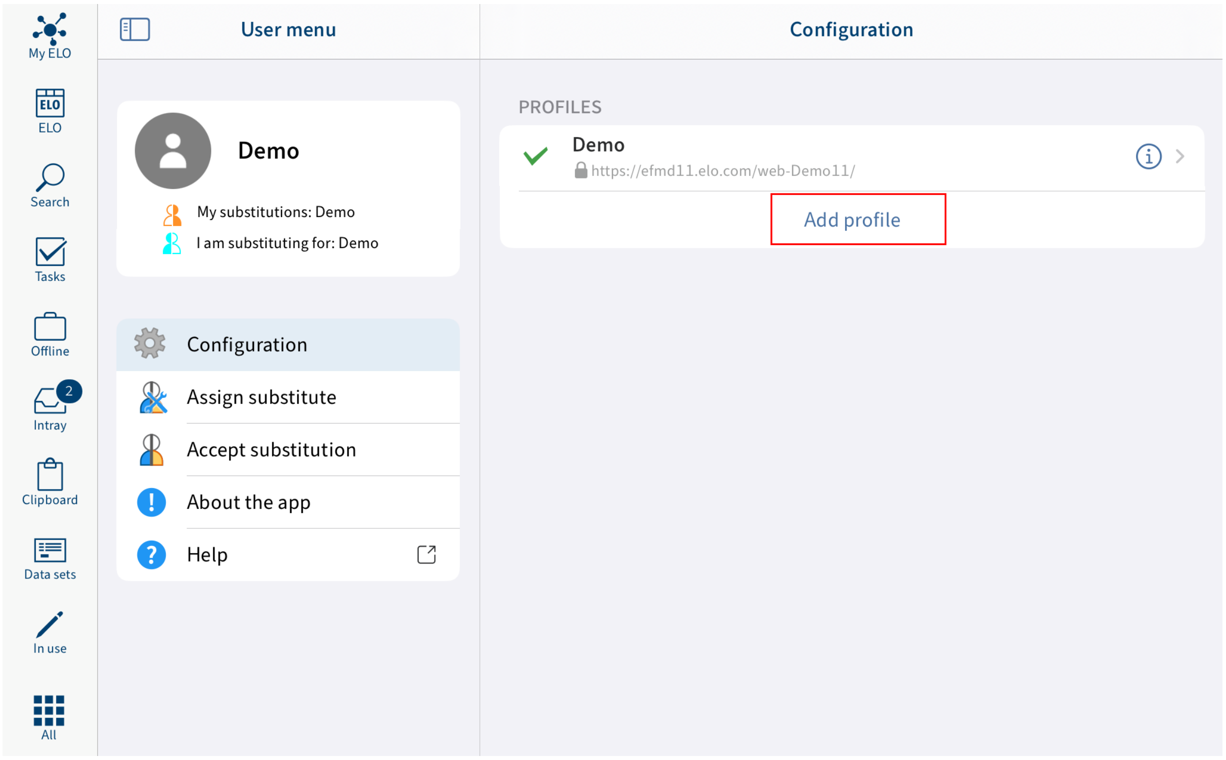
You can choose between the following options:

- Manual logon
- Automatic logon with ELOauth

Method

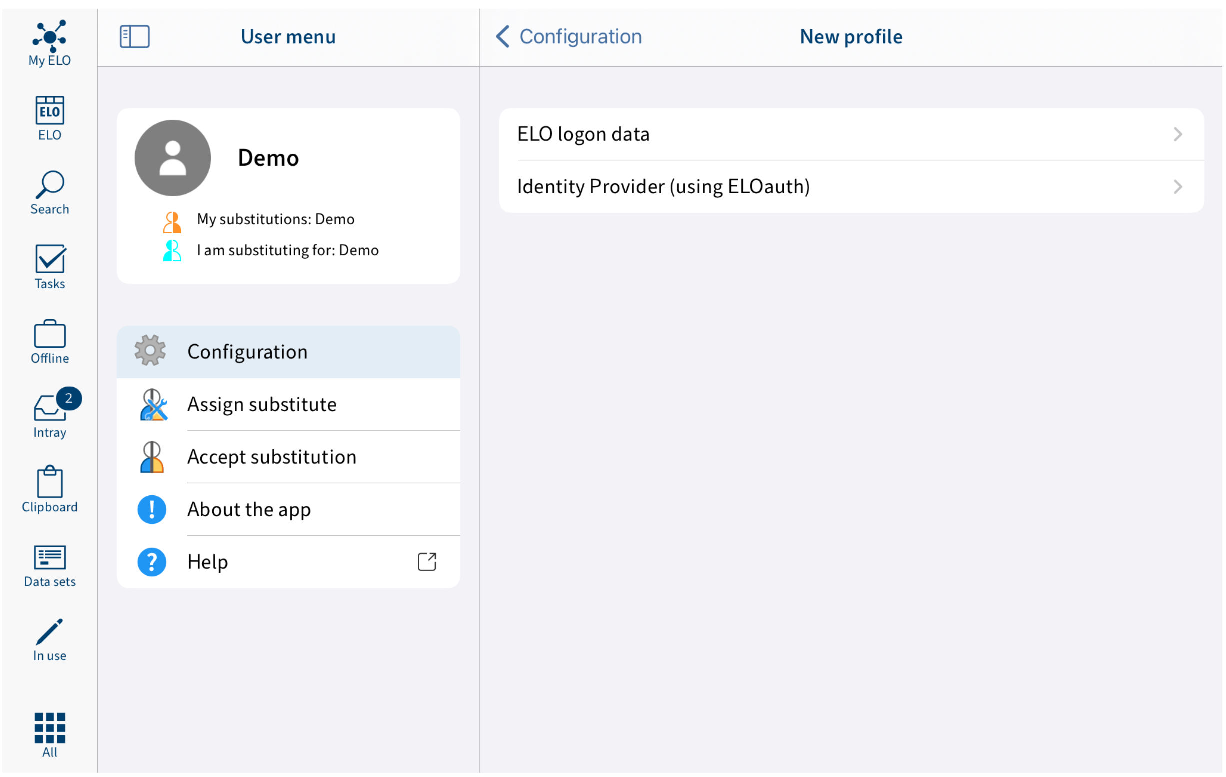
1.

Open the configuration via the *Tile navigation > Configuration*.



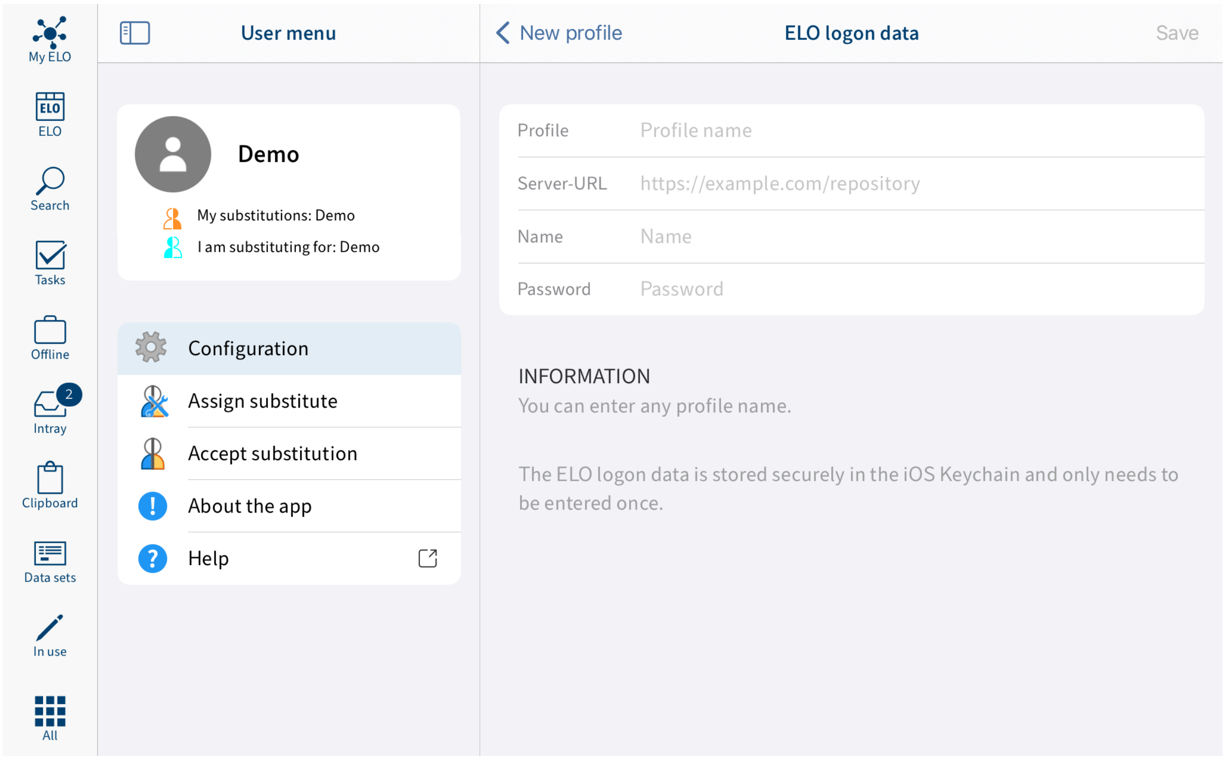
The *Configuration* dialog box opens.

2. Tap *Add profile*.



The *New profile* dialog box opens.

3. Select the *ELO logon data* option.



The *ELO logon data* dialog box opens.

4. Enter a name for the repository in the *Name* field.

5. In the *Server URL* field, enter the server URL as shown in the example: `https://example.com/repository/`.

   You can also enter the ELO Web Client URL for the repository you want to connect to. You must use the following format:

```
http(s)://<server name>:<port name>/ix-<repository name>/plugin/
de.elo.ix.plugin.proxy/web/
```

> **Please note**
>
> If you are accessing the repository via VPN, the server name must not end in `.local`. In this case, replace the server name with the server IP address.

6. Enter your ELO user name in the *Name* field.

7. Enter your password in the *Password* field.

8. Tap *Save*.

   You have now added the profile. To use the profile, you have to enable it.

9.

Tap the profile you want to enable.

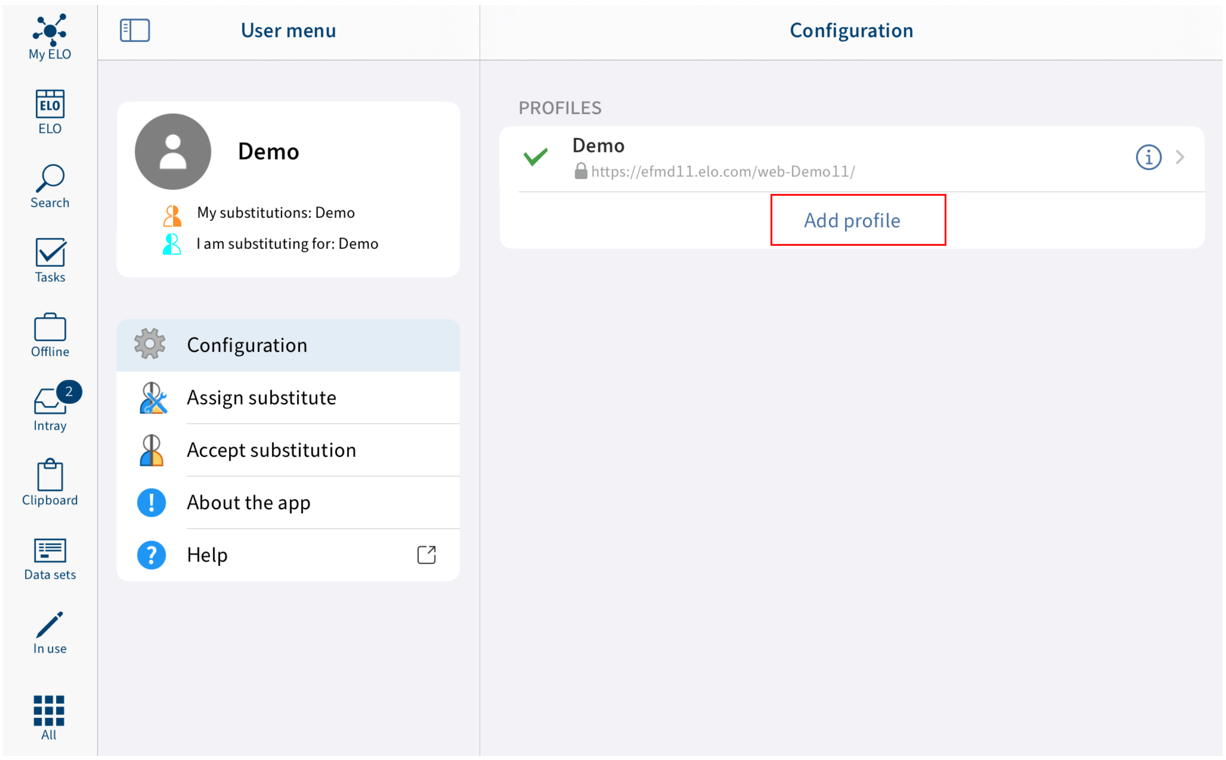
Result

A check mark indicates that the profile is active. You are now connected to ELO.

Create profile with ELOauth

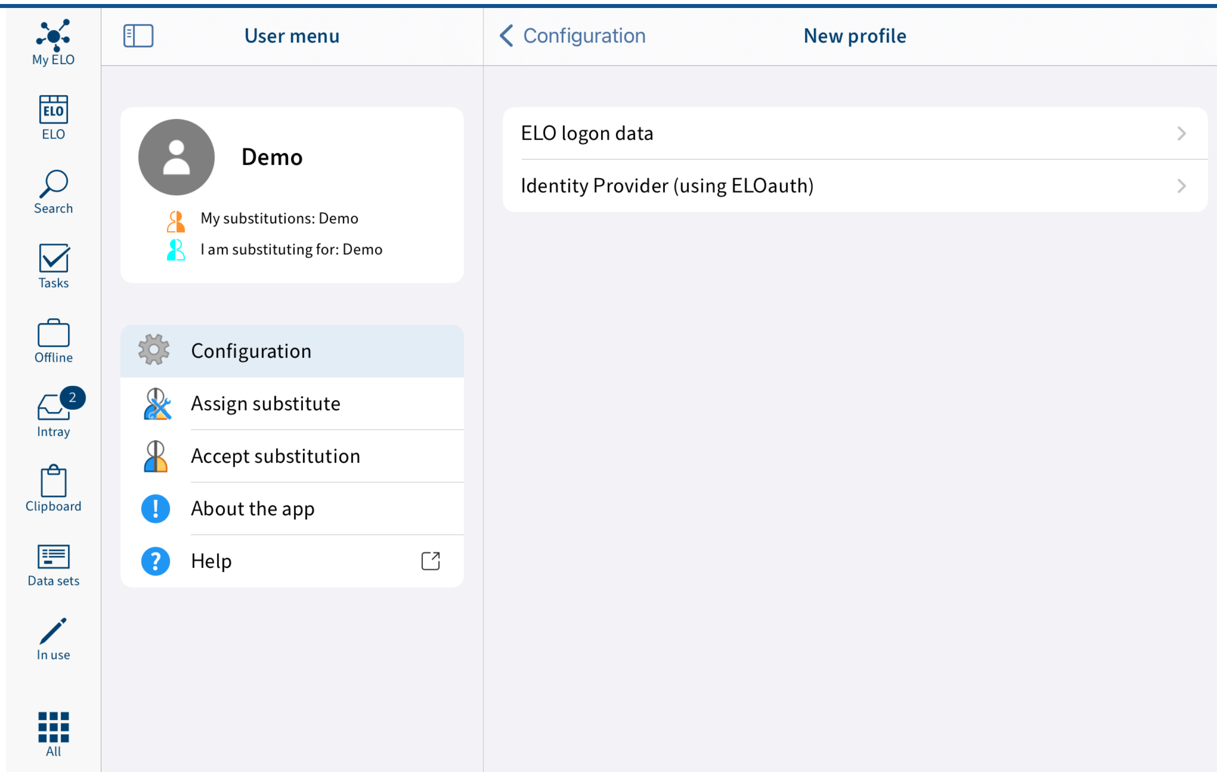
Method

1. Open the configuration via the *Tile navigation > Configuration*.



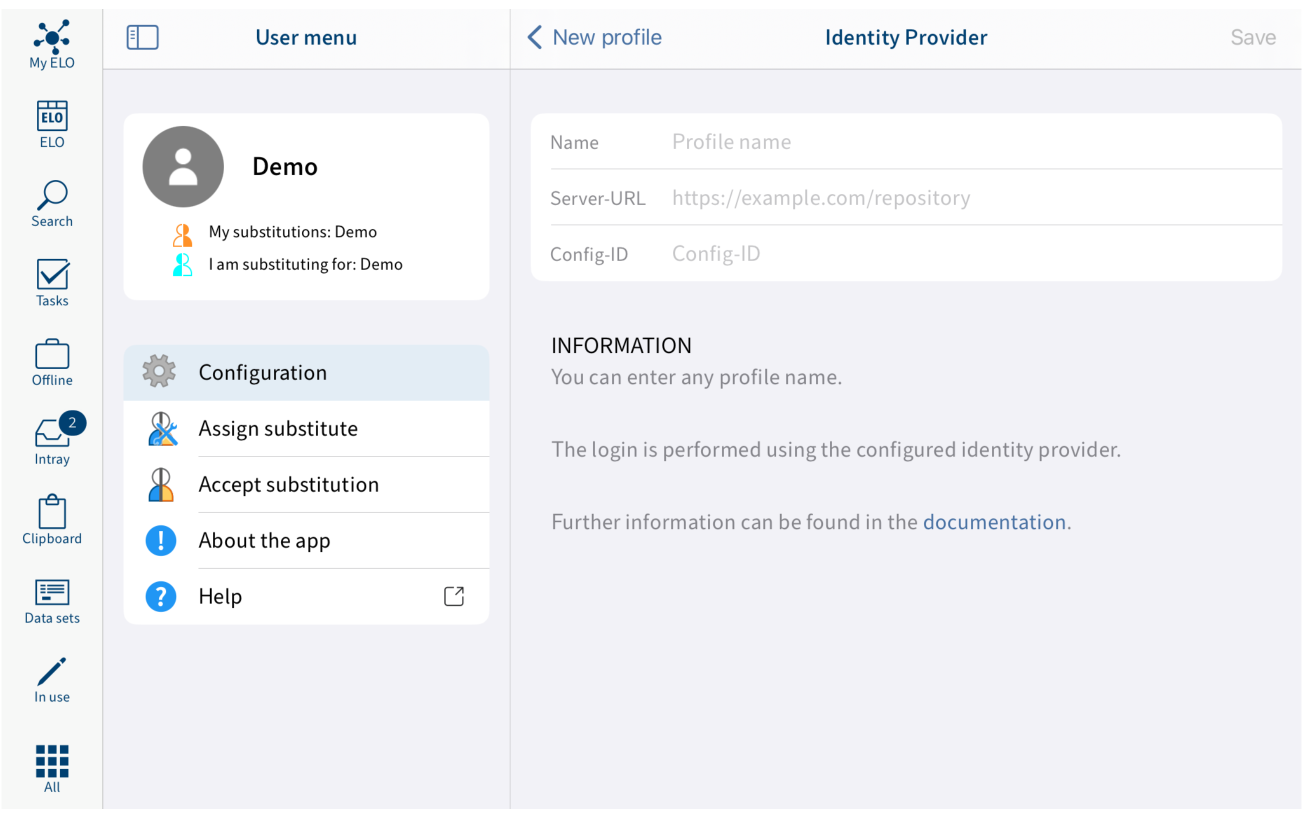
The *Configuration* dialog box opens.

2. Tap *Add profile*.



The *New profile* dialog box opens.

3. Select the *Identity provider (via ELOauth)* option.



1. Enter a name for the repository in the *Name* field.

2.

In the *URL* field, enter the server URL as shown in the example: `https://example.com/repository/`.

You can also enter the ELO Web Client URL for the repository you want to connect to. You must use the following format:

```
http(s)://<server name>:<port name>/ix-<repository name>/plugin/de.elo.ix.plugin.proxy/web/
```

> **Please note**
>
> If you are accessing the repository via VPN, the server name must not end in `.local`. In this case, replace the server name with the server IP address.

3. Enter the config ID. You configure the config ID in the JSON file in ELOauth under `"azureadproxy"`.

   For more information on the *config ID*, refer to the *Manual configuration* chapter of the ELOauth plug-in documentation.

4. Tap *Save*.

   You have now added the profile. To use the profile, you have to enable it.

5. Tap the profile you want to enable.

Result

A check mark indicates that the profile is active. You are now connected to ELO.

Alternative: You can also add a profile by entering the profile data to 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.
    "user": "<user>",
    "password": "<user password>"
}
```

Create the profile file in JSON format and save the file with the extension ".eloprofile". Send the .eloprofile file to your mobile device, e.g. as an e-mail attachment. To open the file, select the ELO app on your mobile device. The *New profile* dialog box opens. The fields automatically contain the data from the .eloprofile file. Tap *Save* to add the profile.

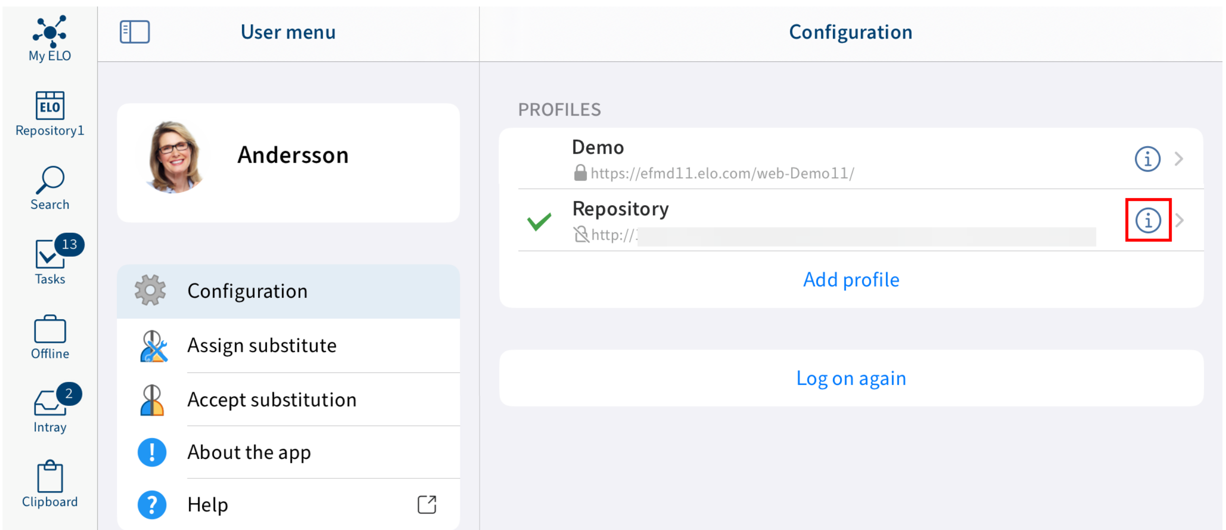
Edit profile

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

> **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 > Configuration*.



The *Configuration* dialog box opens.

2. In the *PROFILES* area, tap the info icon next to the profile you want to edit.

   The *Edit* dialog box appears.

3. Make the desired changes.

4. Tap *Save*.

Result

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

Delete profile

You can also delete profiles that you no longer need.

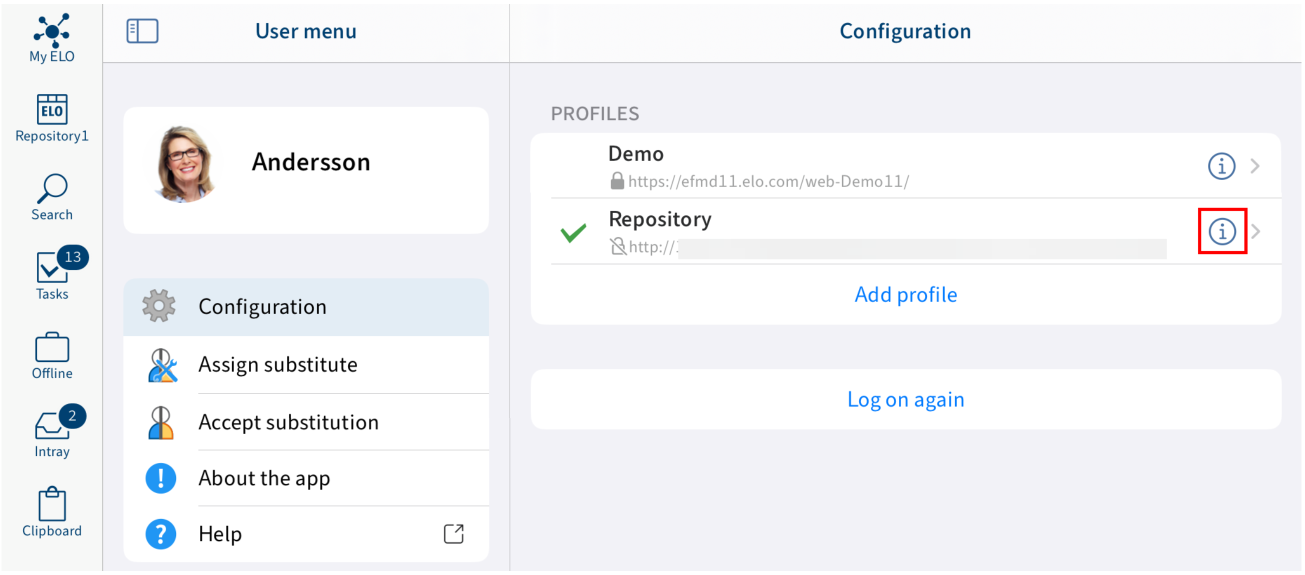
> **Please note**

If you delete your profile, you remove all the data, for example, all the documents that you have filed in the *Offline* and *Data sets* work areas.

Deleting the app removes all the data. Only the entries in the keychain are retained.

Method

1. Open the configuration via the *Tile navigation* > *Configuration*.



The *Configuration* dialog box opens.

1. In the *PROFILES* area, tap the info icon next to the profile you want to delete.

   The *Edit* dialog box appears.

2. Tap *Delete*.

   The *Delete profile?* dialog box appears.

3. Tap *Delete* to delete the profile.

Result

You have deleted the profile.

Basic functions

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

- Create new folder
- Insert file
- Load new version
- Edit document
- Show form
- Share document
- Create margin note
- Delete entry
- Create QR code
- Scan QR code
- Assign substitute
- Accept substitution

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.

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

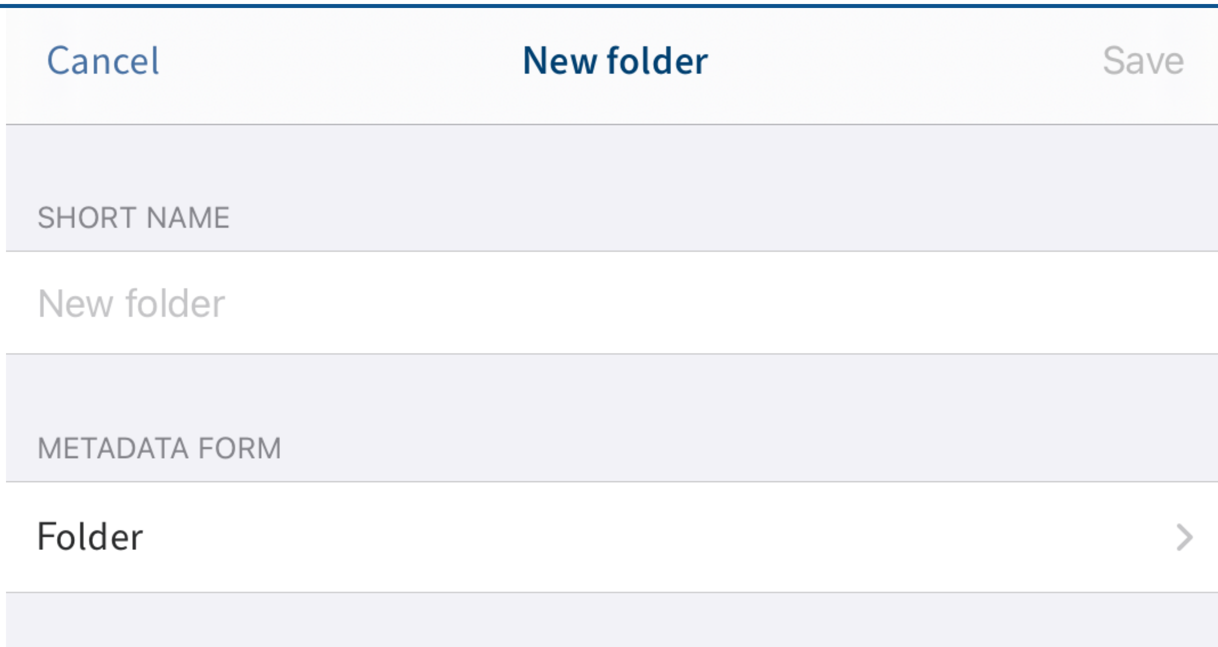
Method

1. Tap the info icon next to a folder in the list view.

   The information about the selected folder appears in the viewer pane.

2. In the navigation bar, tap *Menu (button with three dots) > New folder*.

   Alternative: Tap *Menu (button with three dots) > New folder* in the list view navigation bar.



The *New folder* dialog box appears.

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

   Optional: Tap *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 *Save* 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. To enter metadata retroactively, use the Show form function.

Insert file

You can transfer a file from your device to ELO. There are two ways to insert a file:

- From the menu
-

From the Intray

Requirements

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

Insert file from the menu

To insert a file from the menu (button with three dots), proceed as follows:

Method

1. Tap the info icon next to the folder in the list view that you want to insert a file into.

   The information about the selected folder appears in the viewer pane.

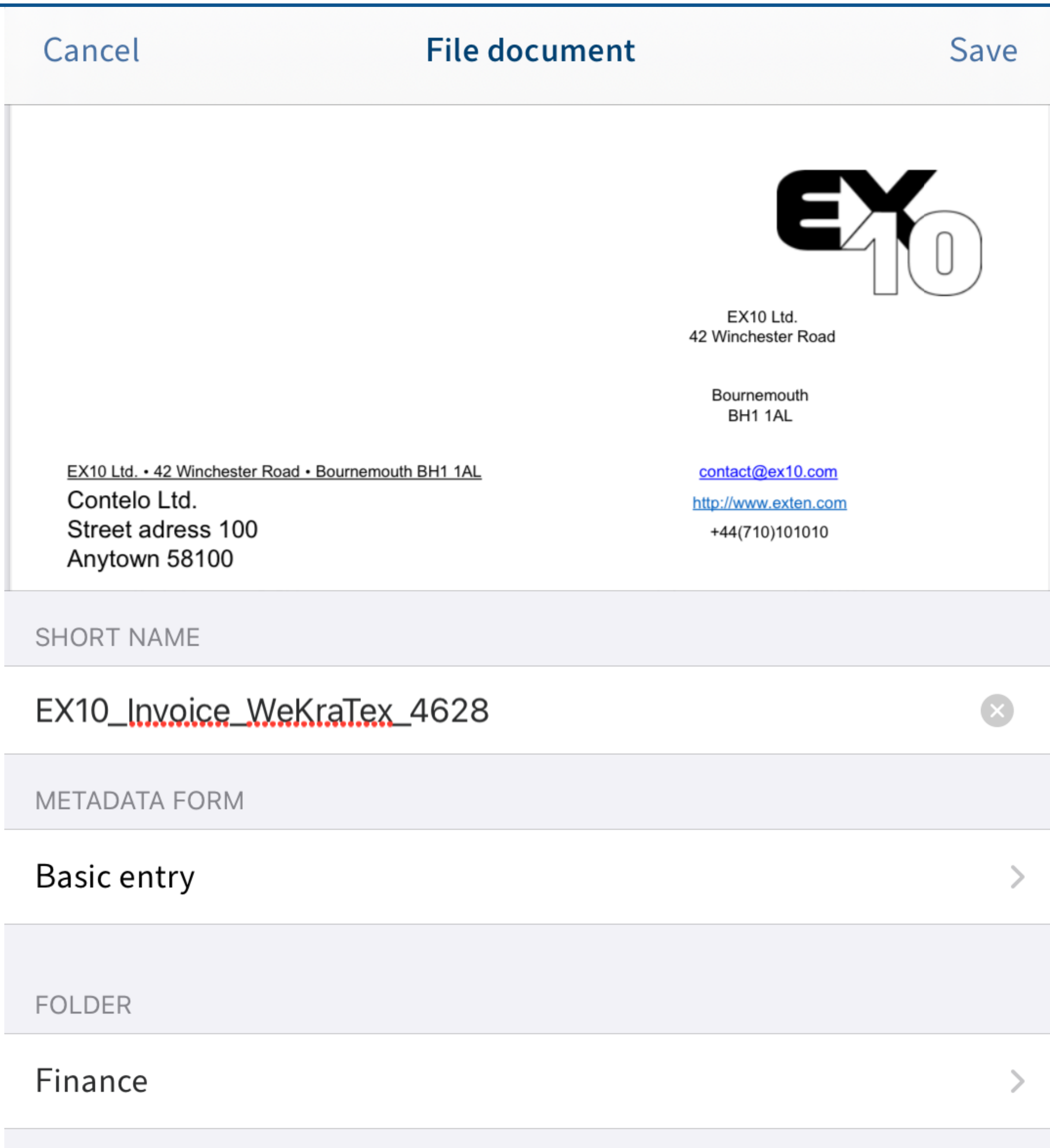
2. In the navigation bar, tap *Menu (button with three dots) > Insert file*.

   Alternative: Tap *Menu (button with three dots) > Insert file* in the list view navigation bar.

   The *Insert file* dialog box opens.

3. Select one of the following options:

   - New photo: Opens the camera app on your device to take a photo. Take a photo.
   - Photo from album: Opens the image gallery on your device. Select an image from your album.
   - Intray: Shows an overview of documents in the *Intray* work area. Select a document.
   - QuickScan: Opens the integrated ELO QuickScan app. Scan a document. You can find more information about this in the *ELO QuickScan (iOS)* manual.
   - Browse: Opens locations on your device or cloud storage. Select a document.



The *File document* dialog box opens.

4. Tap the *Short name* field to enter a name for the document.

5. The *Basic entry* metadata form is selected by default. Tap *Metadata form* to change the metadata form.

   The *Metadata form* dialog box opens. The list contains all available metadata forms that have already been created in ELO.

> **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.

6. Tap the metadata form you want to use. A check mark indicates that the metadata form is selected.
7. Tap *File document* to confirm your selection.

   The *Form* dialog box closes. The name of the new metadata form appears in the *Metadata form* field.

   Optional: To change the target folder of the new document, tap the *Folder* input field.
8. To insert the document, tap *Save*.

Result

The *File document* dialog box closes. You have filed the new document to the target 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. To enter metadata retroactively, use the Show form function.

Insert file from the Intray

To insert a file via the *Intray* work area, proceed as follows:

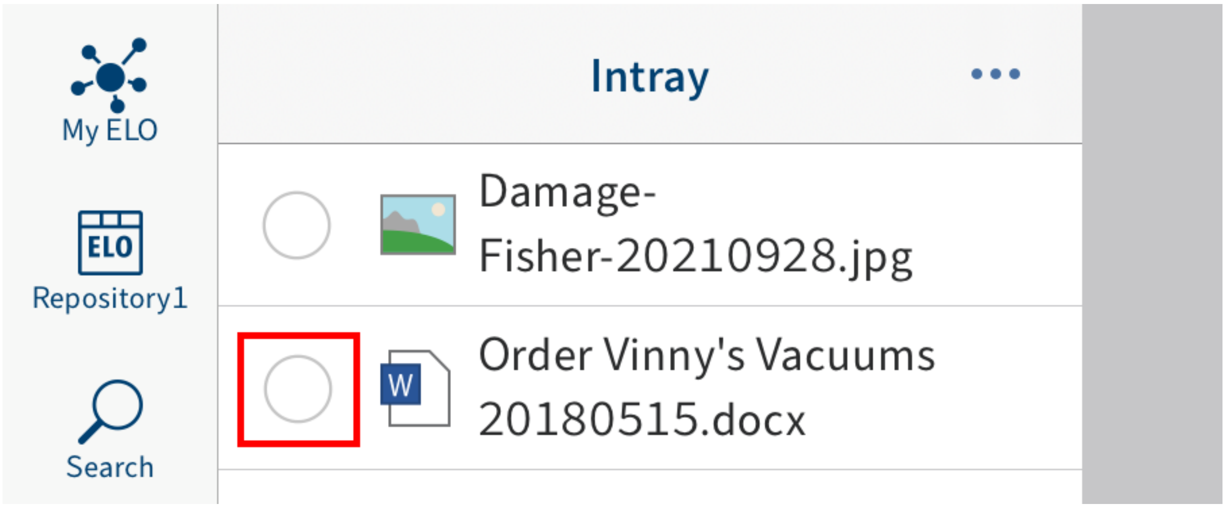
Method

1. Open the *Intray* work area.
2. In the navigation bar, tap *Menu (button with three dots) > Add file*.

   The *Add file* dialog box appears.
3. Select one of the following options:
   - New photo: Opens the camera app on your device to take a photo. Take a photo.
   - Photo from album: Opens the image gallery on your device. Select an image from your album.
   - QuickScan: Opens the integrated ELO QuickScan app. Scan a document. You can find more information about this in the *ELO QuickScan (iOS)* manual.
   - Browse: Opens locations on your device or cloud storage. Select a document.

   The selected document or photo is added to the Intray. It will appear in the list view in the Intray.

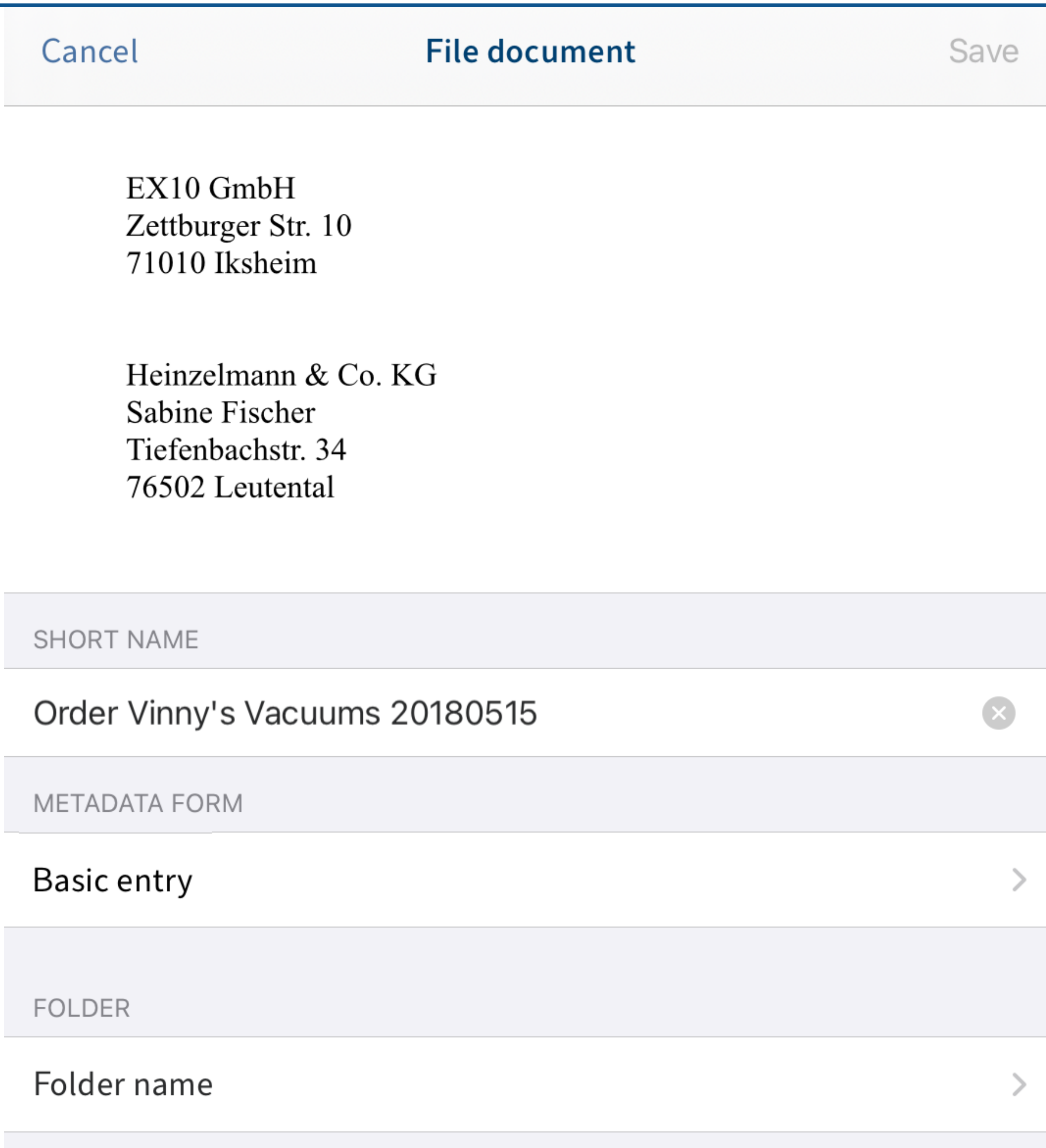
Alternative: You can also upload files to the Intray from external apps. To do so, use the *Share* function in the respective app.



4. Tap the radio button to the left of the document to select it.

   A check mark indicates that the document is selected.

5. In the navigation bar, tap *Menu (button with three dots) > File document*.



The *File document* dialog box opens. The file name is entered to the *Short name* field.

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

6. The *Basic entry* metadata form is selected by default. Tap *Metadata form* to change the metadata form.

   The *Metadata form* dialog box opens. The list contains all available metadata forms that have already been created in ELO.

> **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.

7. Tap the metadata form you want to use. A check mark indicates that the metadata form is selected.
8. Tap *File document* to confirm your selection.

   The *Form* dialog box closes. The name of the new metadata form appears in the *Metadata form* field.
9. To specify the filing location, tap the *Folder* input field.

   The *Select target folder* dialog box appears.
10. Navigate to the folder you want to file the document to.

    The *History* tab contains the target folders you have previously selected.
11. Confirm with *Select*.

    Your selection is applied. The *Select target folder* dialog box closes.
12. To insert the document, tap *Save*.

Result

The *File document* dialog box closes. You have filed the new document to the target 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. To enter metadata retroactively, use the Show form function.

Load new version

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

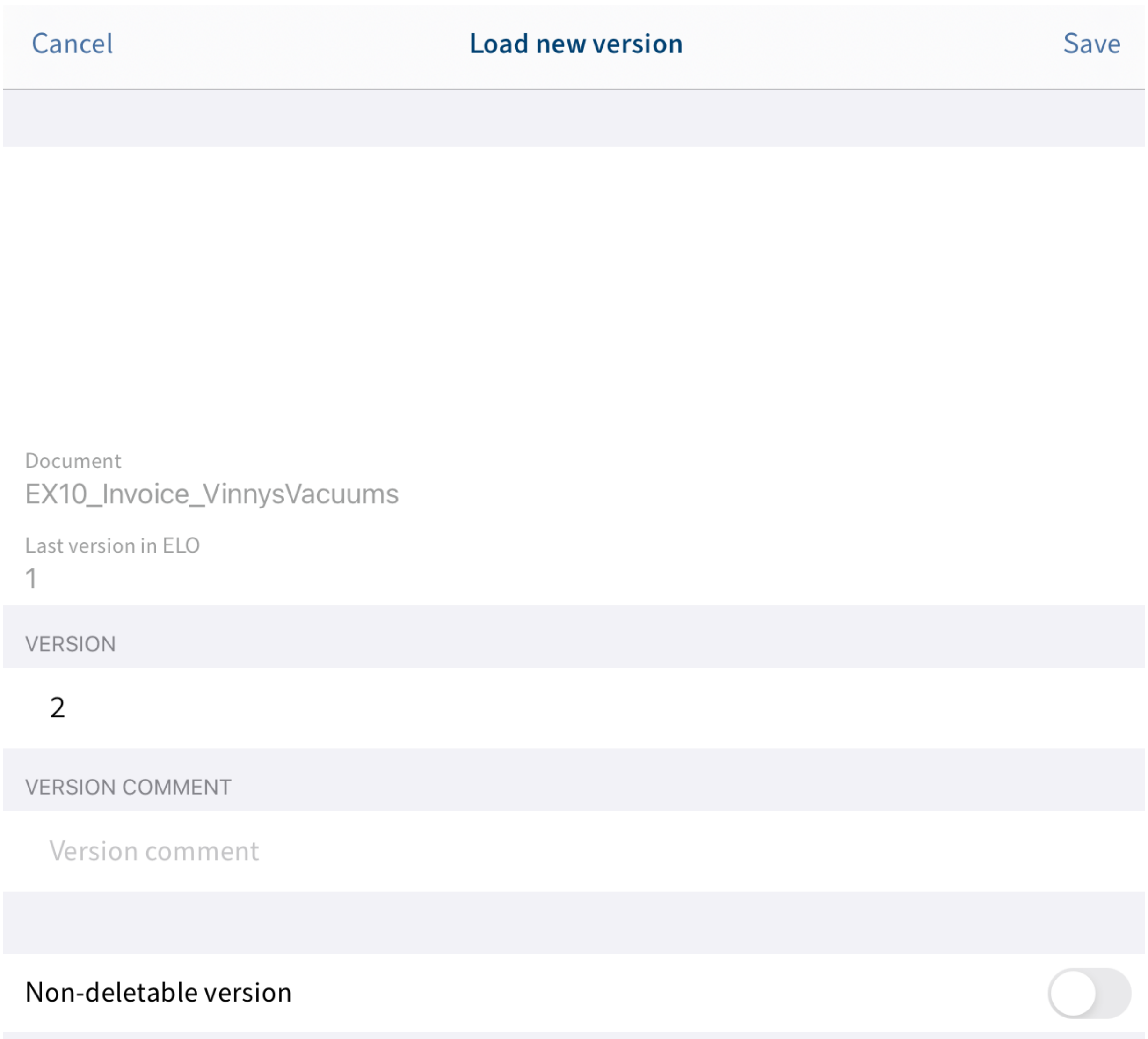
Method

1. Select the document you want to upload a new version of.
2. In the navigation bar, tap *Menu (button with three dots) > Load new version*.

   The *Insert file* dialog box opens.
3. Select one of the following options:

   -

New photo: Opens the camera app on your device to take a photo. Take a photo.
- Photo from album: Opens the image gallery on your device. Select an image from your album.
- Intray: Shows an overview of documents in the *Intray* work area. Select a document.
- QuickScan: Opens the integrated ELO QuickScan app. Scan a document. You can find more information about this in the *ELO QuickScan (iOS)* manual.
- Browse: Opens locations on your device or cloud storage. Select a document.



The *Load new version* dialog box appears.

4. You can make the following changes:
   - Version: Change the version number in the *VERSION* field.
   - Version comment: Enter additional information in the *VERSION COMMENT* field.
   - Non-deletable version: Select this option to prevent the version from being deleted from ELO.
5. Tap *Save* to load the new version.

Result

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

Edit document

With the *Check out and edit* function, you can make changes to a document using a third-party application (e.g. text editor app).

> **Information**
>
> Not all third-party applications support this function.

Method

1. Select the document you want to edit.
2. In the navigation bar, tap *Menu (button with three dots) > Check out and edit*.

   A selection dialog box opens.
3. Select the external application you want to edit the document with.

   The document opens in an external app.

   Once the document is open in an external app, it is checked out of ELO and locked for other people.
4. Make the desired changes to the document.
5. To finish editing, save your changes in the external app.
6. Close the external app to return to the ELO app.
7. In the menu (button with three dots), tap *Check in*.

Result

The document is checked back into ELO. 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 the entry that you want to show the form for.
2. In the navigation bar, tap *Menu (button with three dots) > Show form*.

   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*. The *Print* function is not available in the ELO app.
3. To close the *Show form* dialog box, tap *Close*.

Result

The dialog box closes. Your changes are applied.

Share document

To send a document from an external application (e.g. by e-mail), use the *Share document* function.

Method

1. Select the document that you want to send.
2. In the navigation bar, tap *Menu (button with three dots) > Share document*.

   The *Share document as* dialog box opens.
3. Choose from the following options:
   - Copy: This function allows you to send a document as a copy to persons without access to the repository.
   -

ELO ECD link: This function enables you to send another user a direct link to an entry in the repository.
  - ELO URL link: Some external applications do not support the ELO ECD link format. This function enables you to send another user a URL link to a document in the repository.

A selection dialog box opens.

4. Select the external application that you want to send the document with.

5. Send the document in the way you normally do in this application.

Result

You have sent the document. The external application closes.

Create margin note

If you want to add comments to a document or folder, you can use margin notes. 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. Tap the entry that you want to add a margin note to.

2. In the navigation bar, tap *Menu (button with three dots) > Create margin note*.

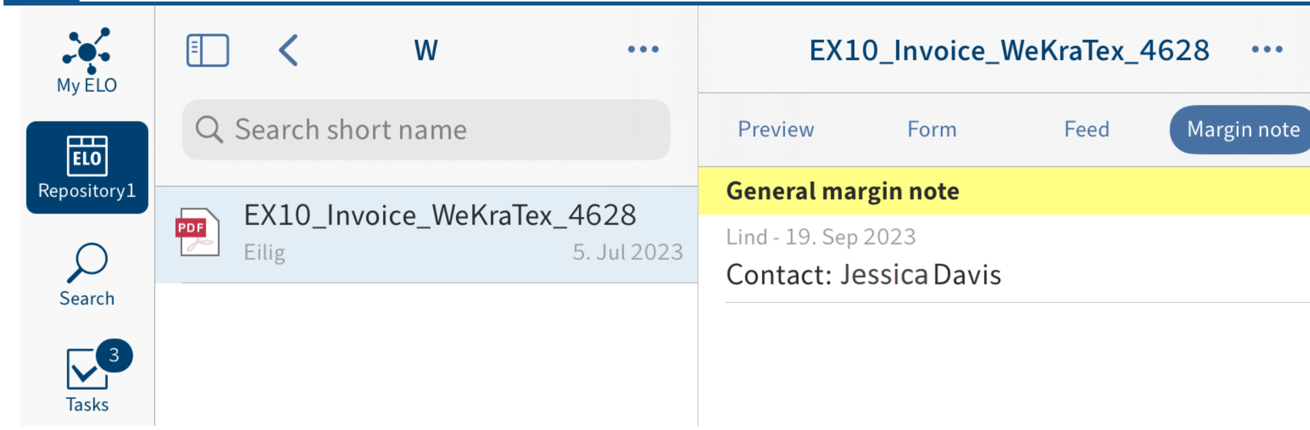
   The *Margin note* dialog box appears. *General margin note* is set as the default type.

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

3. Enter your text for the margin note to the colored input field.

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

Result



The *Margin note* dialog box closes. The new margin note is located on the *Margin note* tab in the viewer pane.

Optional: To edit or delete a general or personal margin note, tap the margin note in the viewer pane. The *Margin note* dialog box appears. In this dialog box, you can change the contents of the margin note, or delete the margin note.

Delete entry

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

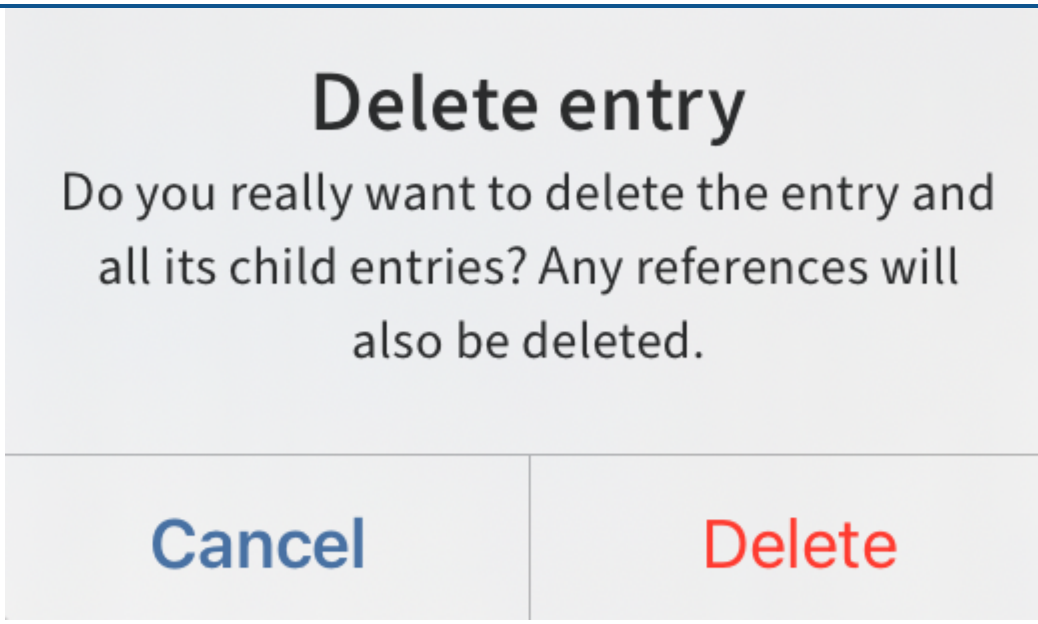
> **Important**
>
> The entries are not deleted permanently, just marked as deleted. This mark signals the administrator to remove the documents from ELO permanently.

Requirements

The *Show delete* option is enabled. You will find this option in the *Configuration* dialog box under *OTHER*.

Method

1. Select the entry that you want to delete.
2. In the navigation bar, tap *Menu (button with three dots) > Delete*.



The *Delete entry* dialog box appears.

3. Confirm with *Delete*.

Result

You have deleted the entry.

Create QR code

To access entries in ELO quickly and easily, you can generate and print QR codes. When you scan a QR code, you go straight to the entry in ELO.

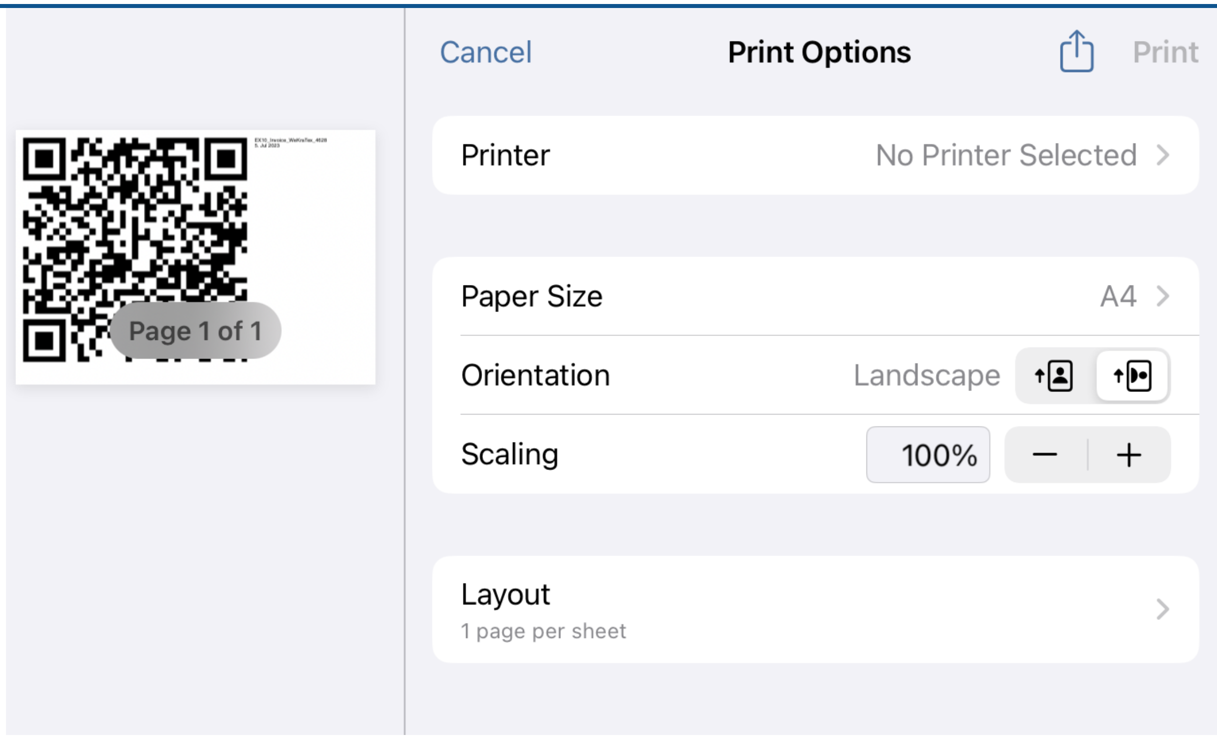
Requirements

Your printer must support Apple AirPrint.

Method

1. Select the entry that you want to create a QR code for.

2. In the navigation bar, tap *Menu (button with three dots) > Create QR code*.



The QR code is created. The *Options* dialog box appears.

3. Select a printer.

4. Tap *Print*.

Result

The QR code is printed.

Scan QR code

There are two ways to access an entry in ELO using a QR code:

- Scan QR code with the ELO app
- Scan QR code with your device's camera app

Requirements

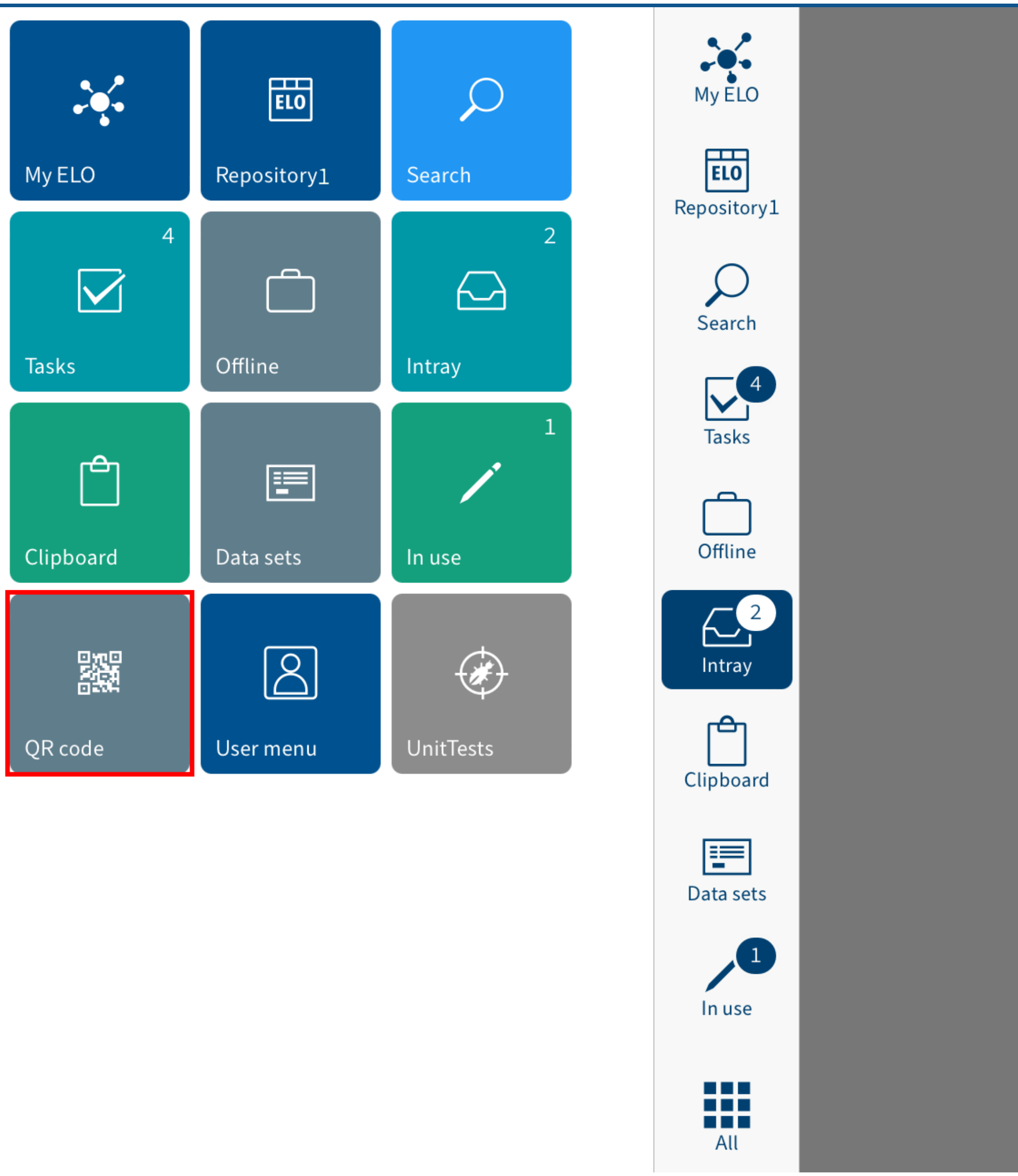
The entry linked to the QR code must be in the repository that your profile in the ELO app is connected to.

Scan QR code with the ELO app

To scan a QR code with the ELO app, proceed as follows:

Method

1. Tap the *Tile navigation* button.



The tile navigation opens.

2. Tap the *QR code* tile.

   The QR code scanner in the ELO app opens. You will see a green search field in the middle of the screen.

3. Bring the QR code into focus.

Result

The QR code is read, taking you straight to the entry in ELO.

Scan QR code with the camera app

To scan a QR code with your device's camera app, proceed as follows:

Method

1. Open the camera app.

2. Bring the QR code into focus.

The pop-up window *ELO QR-CODE* appears at the top of the screen.

3. Tap the pop-up window.

Result

The ELO app opens and goes straight to the entry.

Assign substitute

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

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

Please note

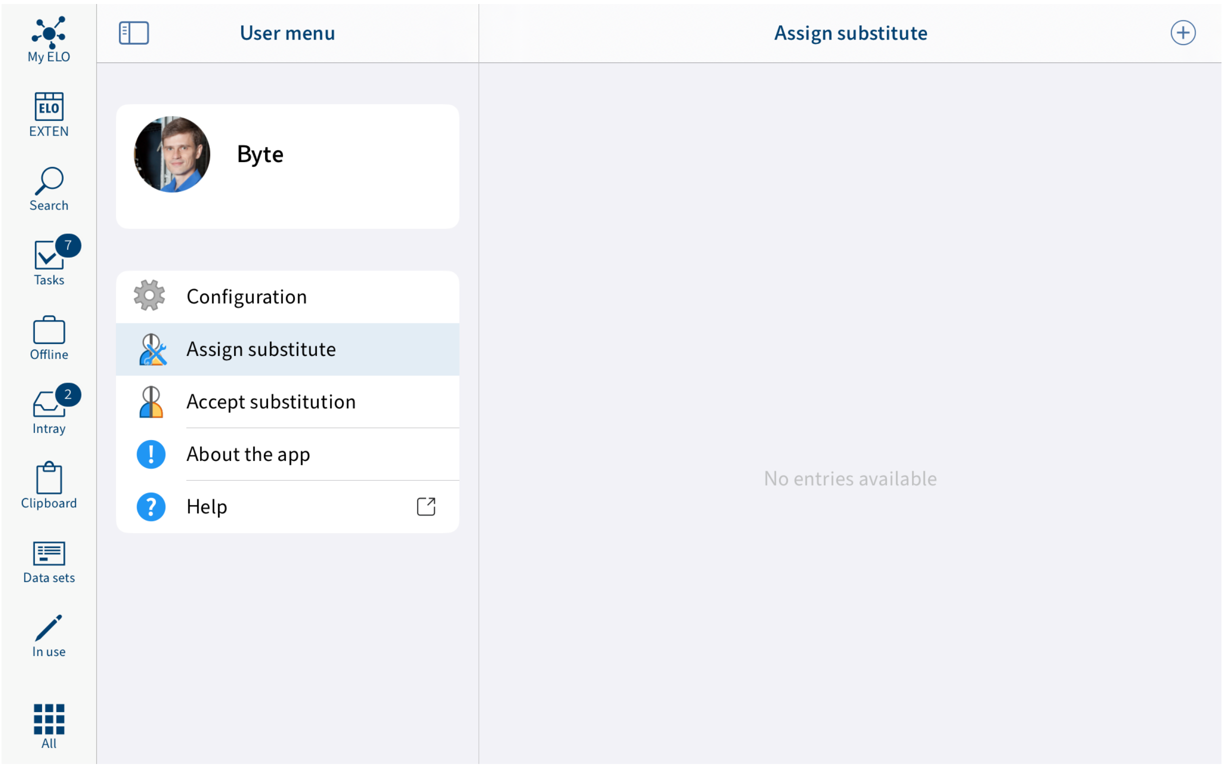
A substitution rule can only be changed or deleted by the

- creator,
- main administrator,
- subadministrator, and
- the supervisor of the user

being substituted.

Method

1. Open the area *Assign substitute* in the user menu.



2. Tap the plus icon to select your substitute (user/group).

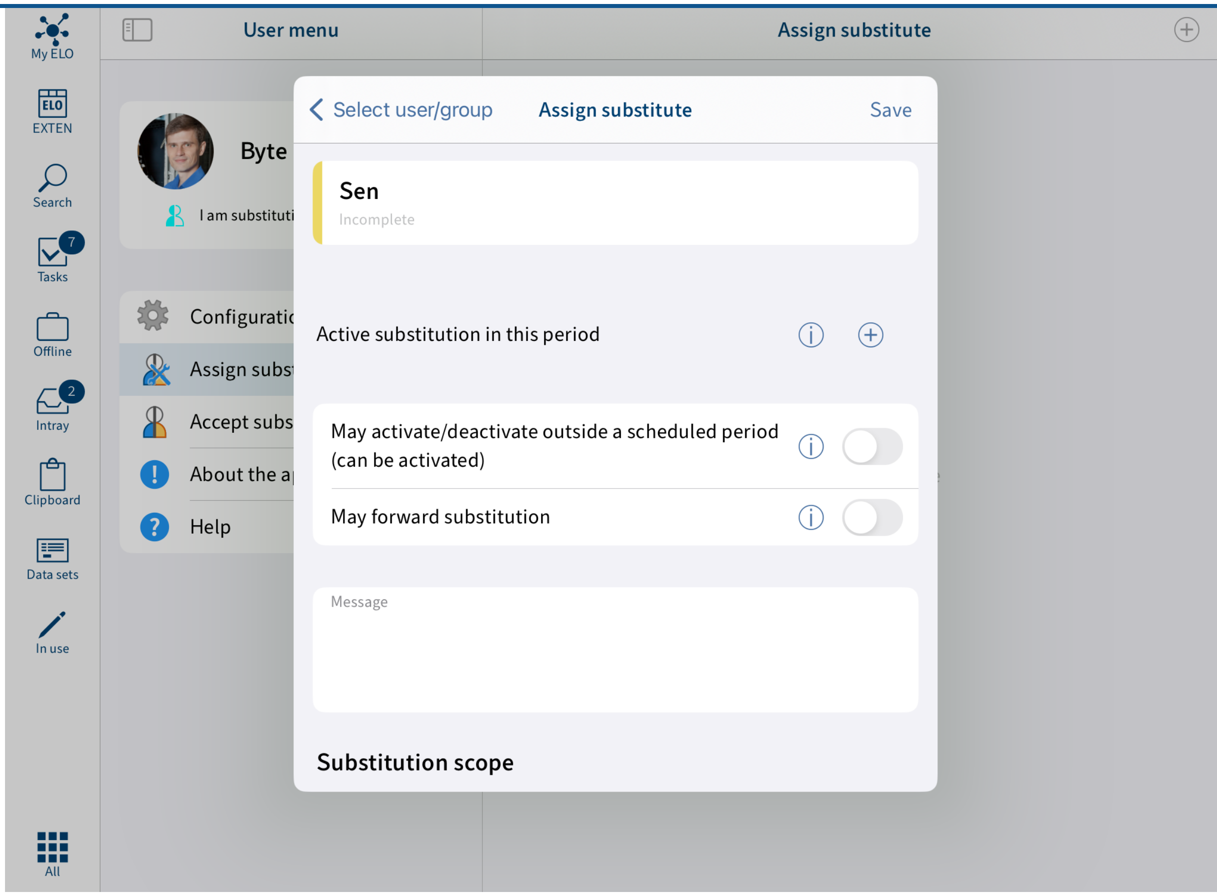
3. Select your substitute using the input field or the list.

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

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

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

4. To configure more exact settings for your substitute, tap the respective substitute.



You have the following options for assigning a substitute:

- Period: You can set a period during which another user automatically acts as your substitute.
- Substitution rights: This gives another user the right to substitute for you. In this case, they have to activate and deactivate substitution themselves.

Active substitution in this period: Use the plus icon to select a period for the substitution. You can add multiple periods. The substitution will be activated automatically on the start date specified.

You can define the following periods:

- a definite period with a start and end
- an unlimited period with a start
- multiple definite and/or unlimited periods

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

Information

Periods are not deleted automatically; you have to delete them by clicking the *Delete* button.

May activate/deactivate outside a scheduled period (can be activated): If you enable this option, the substitute is allowed to activate or deactivate the substitution themselves. This gives them permission to substitute for you in general without you defining a substitution period.

May forward substitution: Substitutions are not forwarded automatically.

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

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

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

Please note

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

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

- Substitute inherits everything: Your substitute can see everything that you see.
- Restrict substitution: You decide what your substitute is allowed to see.

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

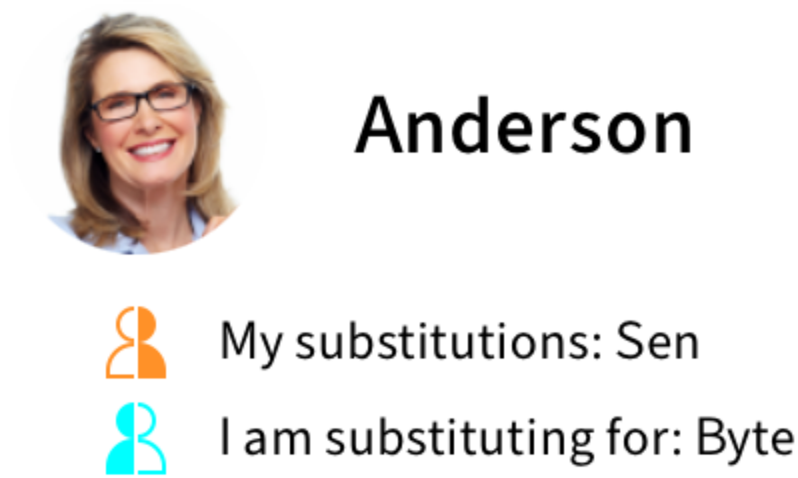
  - Personal tasks and workflows: Your substitute can access tasks and workflows that you have been assigned personally, not those given to you as a member of a group.
  - Intray access: Your substitute has access to your Intray. This option is only available in the ELO Java Client.
  - Inherit group membership: Use the plus icon to select which of your groups the substitution applies to. The substitute is assigned the user rights, permissions to entries, annotations, feed entries, and group tasks associated with the group. This allows you to create multiple substitutes for the same period and allocate permissions for different groups. Only the groups that allow substitution are available for selection.

5.

Tap *Save*.

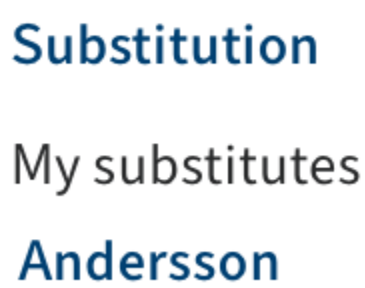
Result

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



You can tell who you are substituting or who is substituting for you from the person icon.

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



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

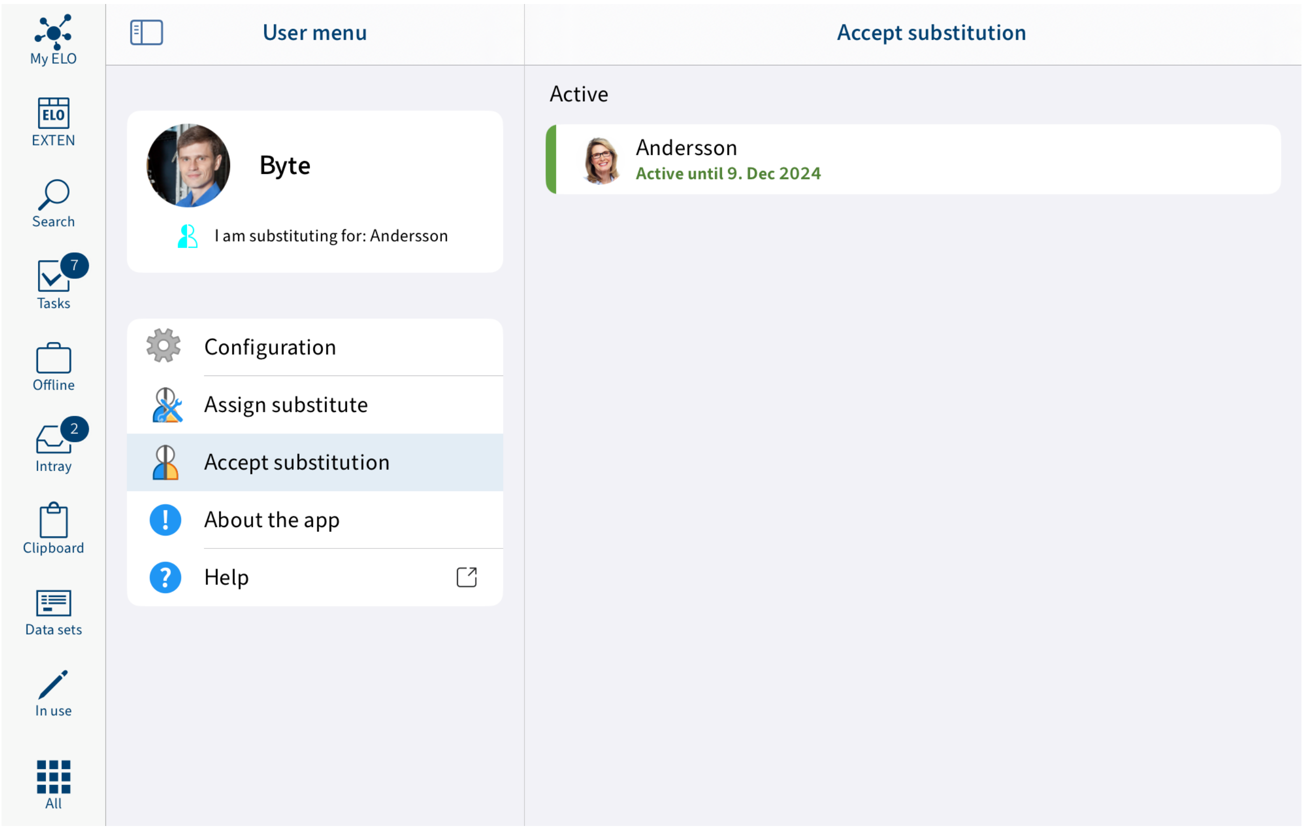
Outlook

A substitution ends

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

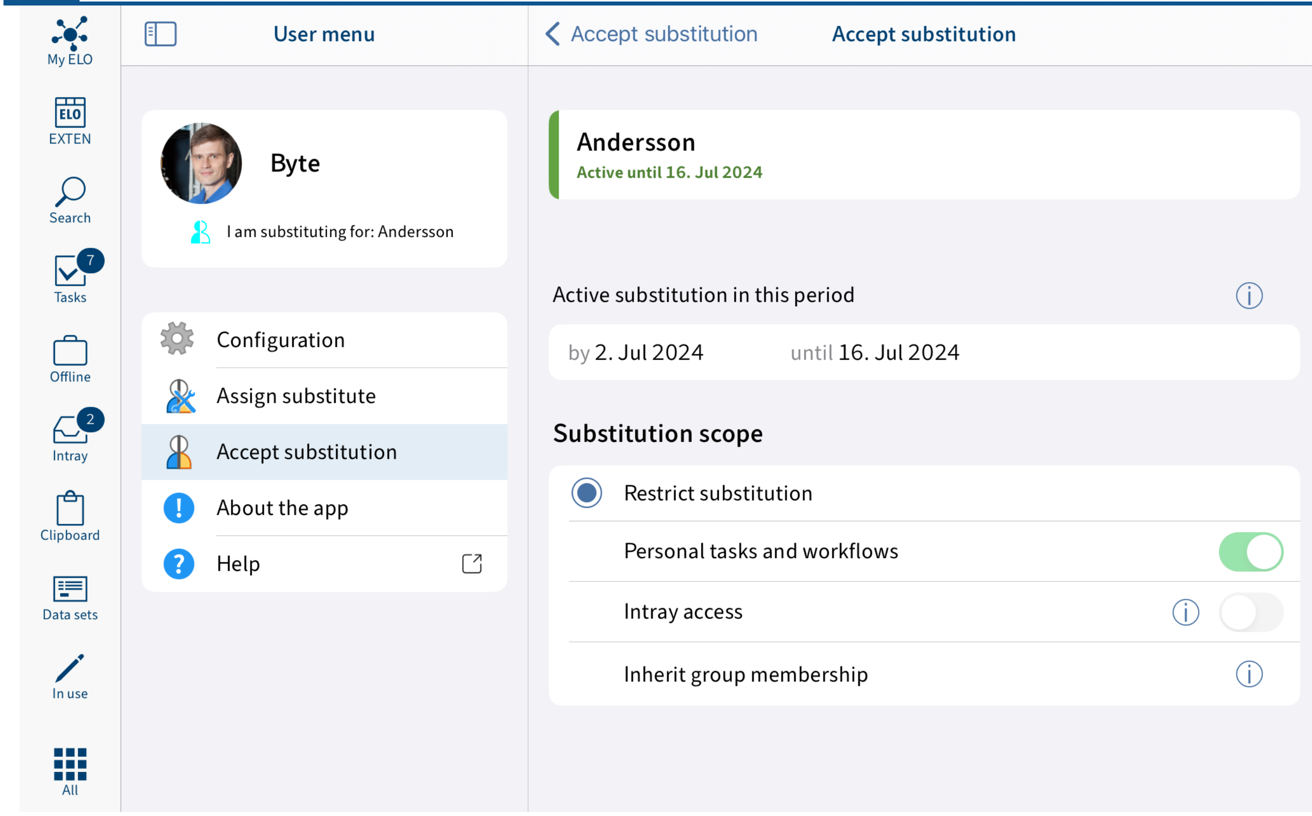
You can learn how to accept a substitution in the section Accept substitution.

Accept substitution



In the user menu, tap *Accept substitution*. In the dialog box, you can see who you are currently substituting for or may substitute for. The following options are available for accepting substitution:

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



Active

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

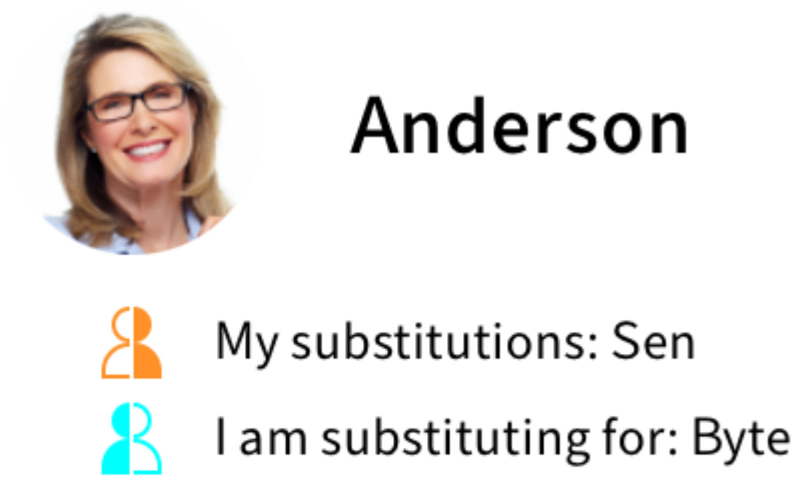
You will recognize active substitutions by a green bar to the left of the profile picture.

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

Edit substitutions

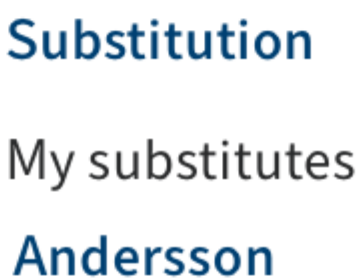
You have the following options:

- Activate/deactivate: These buttons allow you to activate substitutions that are currently inactive or deactivate active substitutions you want to end. These buttons are only available if the user you want to substitute for has given you the right to activate and deactivate the substitution yourself.
- Forward: With this button, you can forward a substitution if the user you are substituting for has given you the corresponding right. You can either hand off the substitution entirely or appoint an additional substitute.



You can tell who you are substituting or who is substituting for you from the person icon.

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



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

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.

> **Information**
>
> The Clipboards are synchronized between the clients. You have the same Clipboard entries in all the ELO clients you are using.
>
> This function is not currently available in the ELO app (iOS).

Copy to Clipboard

To access frequently used folders and documents more quickly, place entries in the *Clipboard* work area. A reference to the selected entry is created on the Clipboard. The filing location in ELO does not change.

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

Method

1. Select the entry that you want to place on the Clipboard.
2. In the navigation bar, tap *Menu (button with three dots) > Copy to Clipboard*.

Result

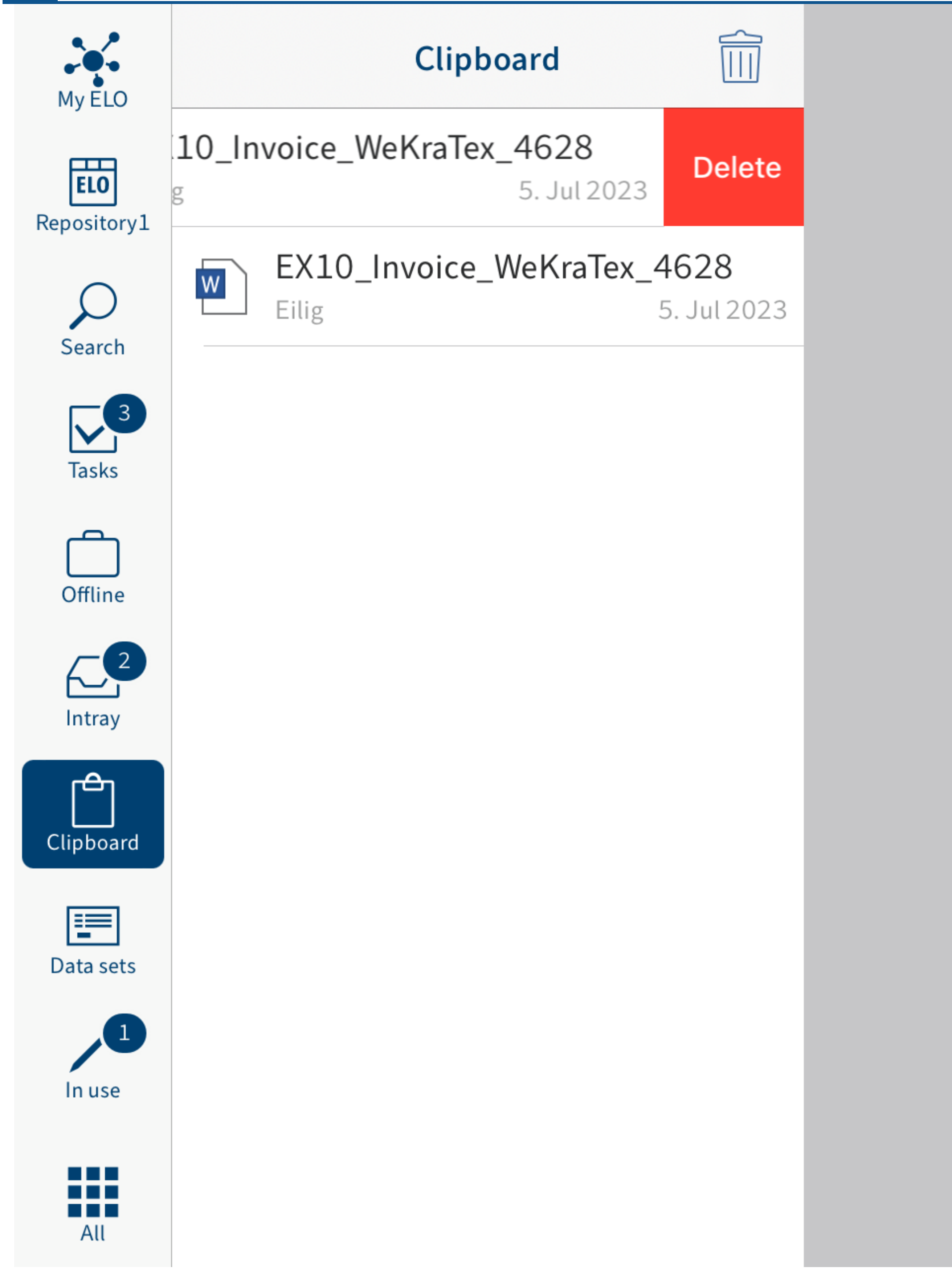
You have copied the entry to the Clipboard.

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.

Method


My ELO
Repository1
Search
3
Tasks
Offline
2
Intray
Clipboard
Data sets
1
In use
All
Clipboard
10_Invoice_WeKraTex_4628
g
5. Jul 2023
Delete
EX10_Invoice_WeKraTex_4628
Eilig
5. Jul 2023

Swipe left on the entry to delete it.

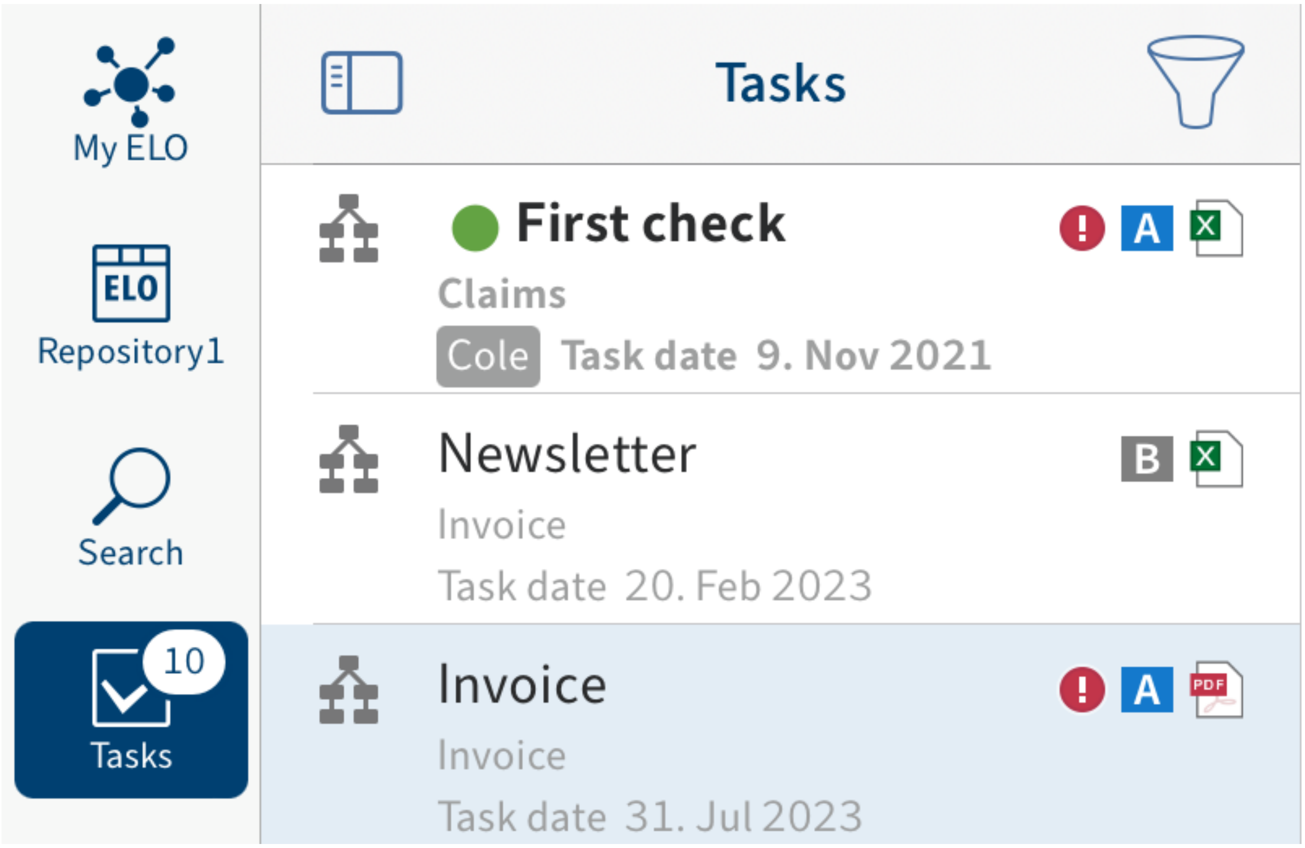
Alternative: Tap the recycle bin icon to remove an entry from the Clipboard.

Result

You have removed the entry from the *Clipboard* work area.

Tasks

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



The tasks are sorted according to their priority: A (high), B (medium), and C (low).

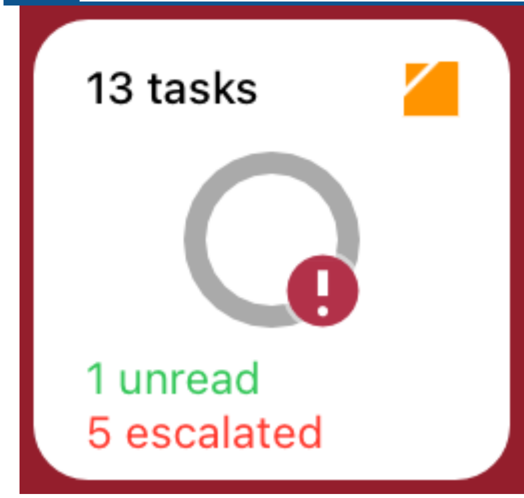
New tasks are shown in a bold font and marked with a green dot. If you want to mark a task as unread to highlight it with a green dot in the task list again, use the *Mark as unread* function in the menu (button with three dots).

Tasks with passed deadlines are displayed with an exclamation mark.

You can define which types of tasks are shown via the filter icon.

Create widget

You can create an iOS widget for your task list. You can then place this widget on your home screen, for example, to quickly see whether you have received a new task.



The widget indicates how many tasks you have in total, how many are unread, and how many are escalated. The widget changes depending on its size. Tap the widget to open the task list in the app.

Refer to the Apple documentation to learn how to add a widget.

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.

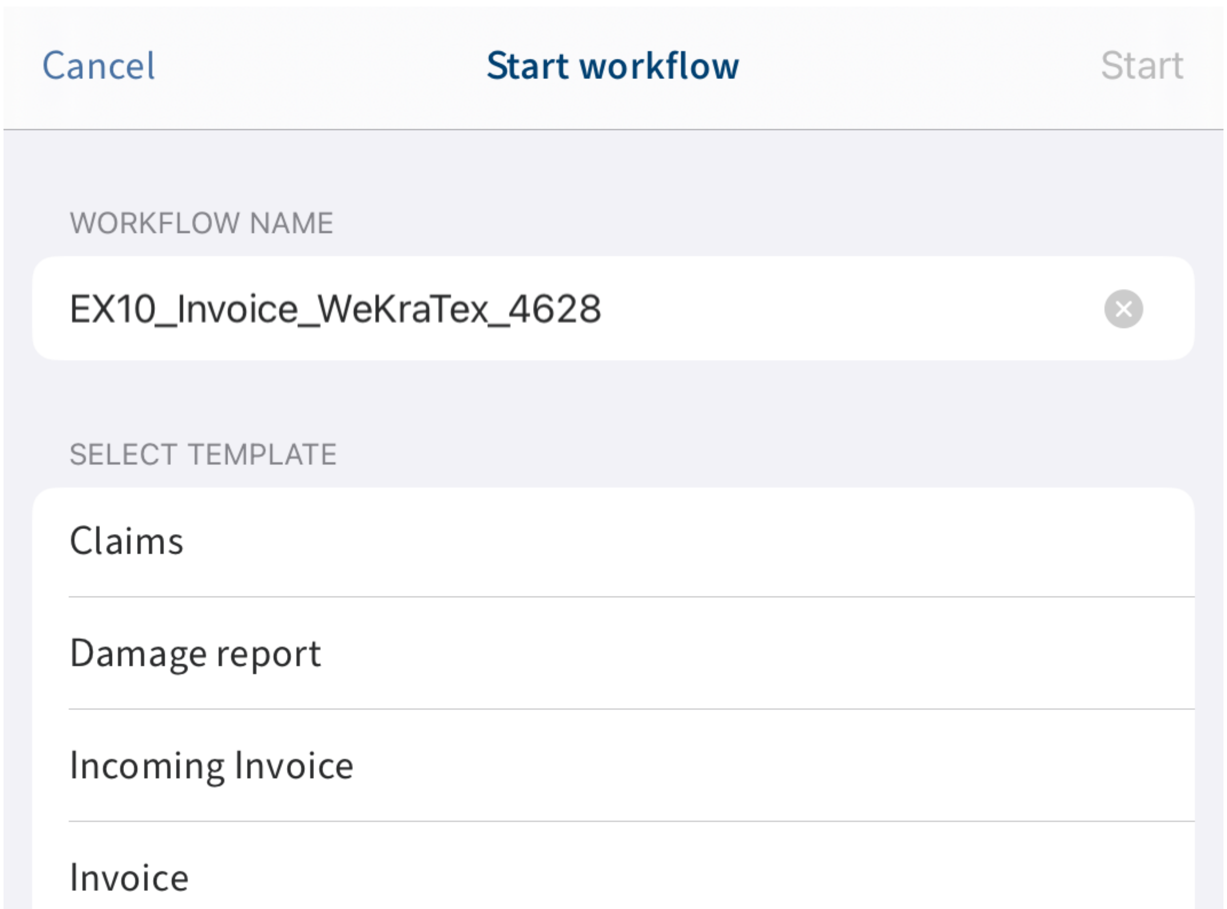
> **Information**
>
> This function is only available in the *Repository* and *Clipboard* work areas.

Requirements

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

Method

1. Select the entry that you want to start a workflow on.
2. In the navigation bar, tap *Menu (button with three dots) > Start workflow*.



The *Start workflow* dialog box appears.

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

3. Tap the corresponding entry in the list to select a workflow template.

A check mark indicates that the template is selected.

4. Tap *Start*.

Result

The *Start workflow* dialog box closes. The workflow starts. The workflow is displayed in the *Tasks* work area of the user responsible.

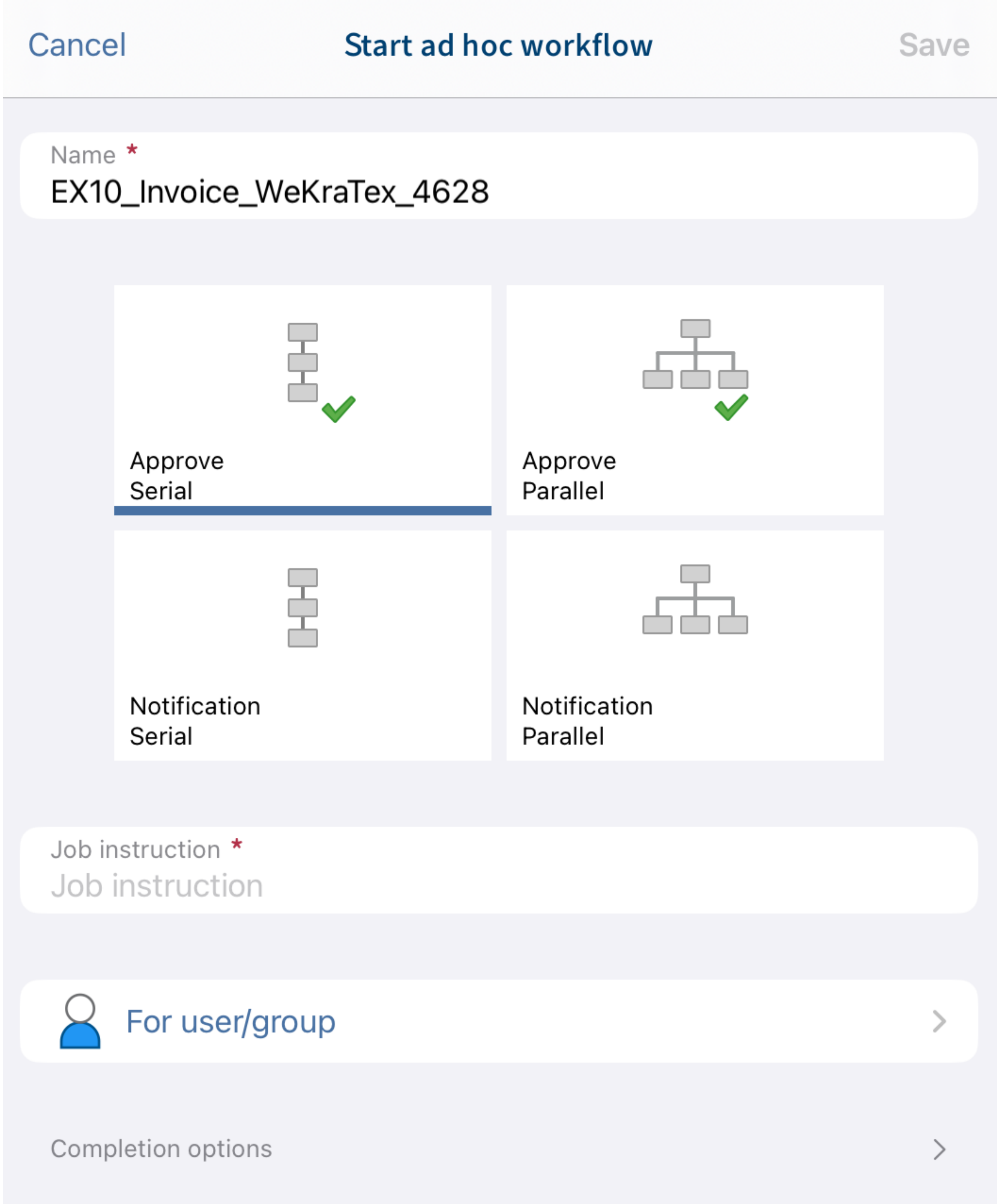
Start ad hoc workflow

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 users.

Method

1. Select the desired entry and open the context menu.

2. In the navigation bar, tap *Menu (button with three dots) > 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.

5. In the *Job instruction* field, enter the 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.

6. Add the workflow recipients using the *For user/group* 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.

7. Tap *Completion options*.

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

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

   Enter a text for this 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.

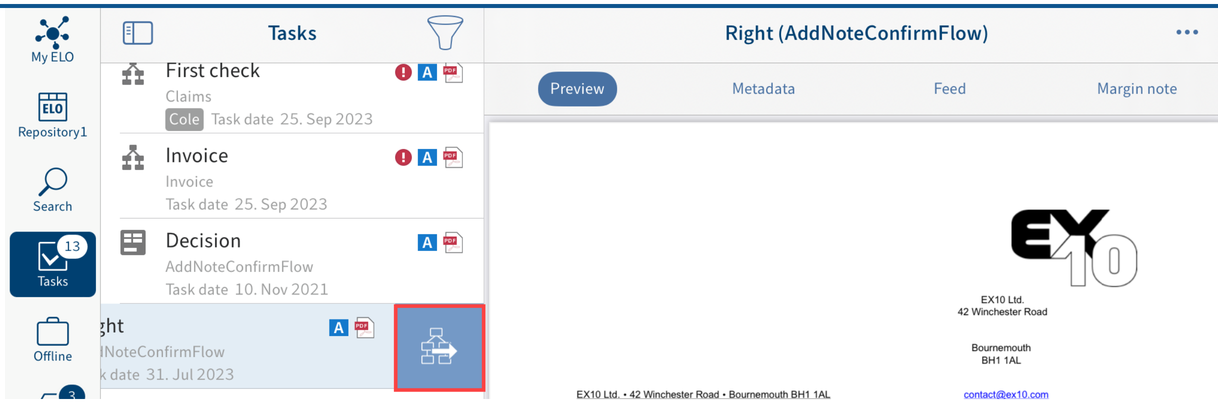
8. Tap *Save* to start the ad hoc workflow.

Forward workflow

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

Method

1. Swipe left on the workflow you want to forward.



2. Tap the *Forward workflow* button.

   Alternative: You can also access the *Forward workflow* function from the menu (button with three dots).

The *Forward workflow* dialog box appears.

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

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

   A check mark indicates that the user is selected.

4. Tap *Forward*.

Result

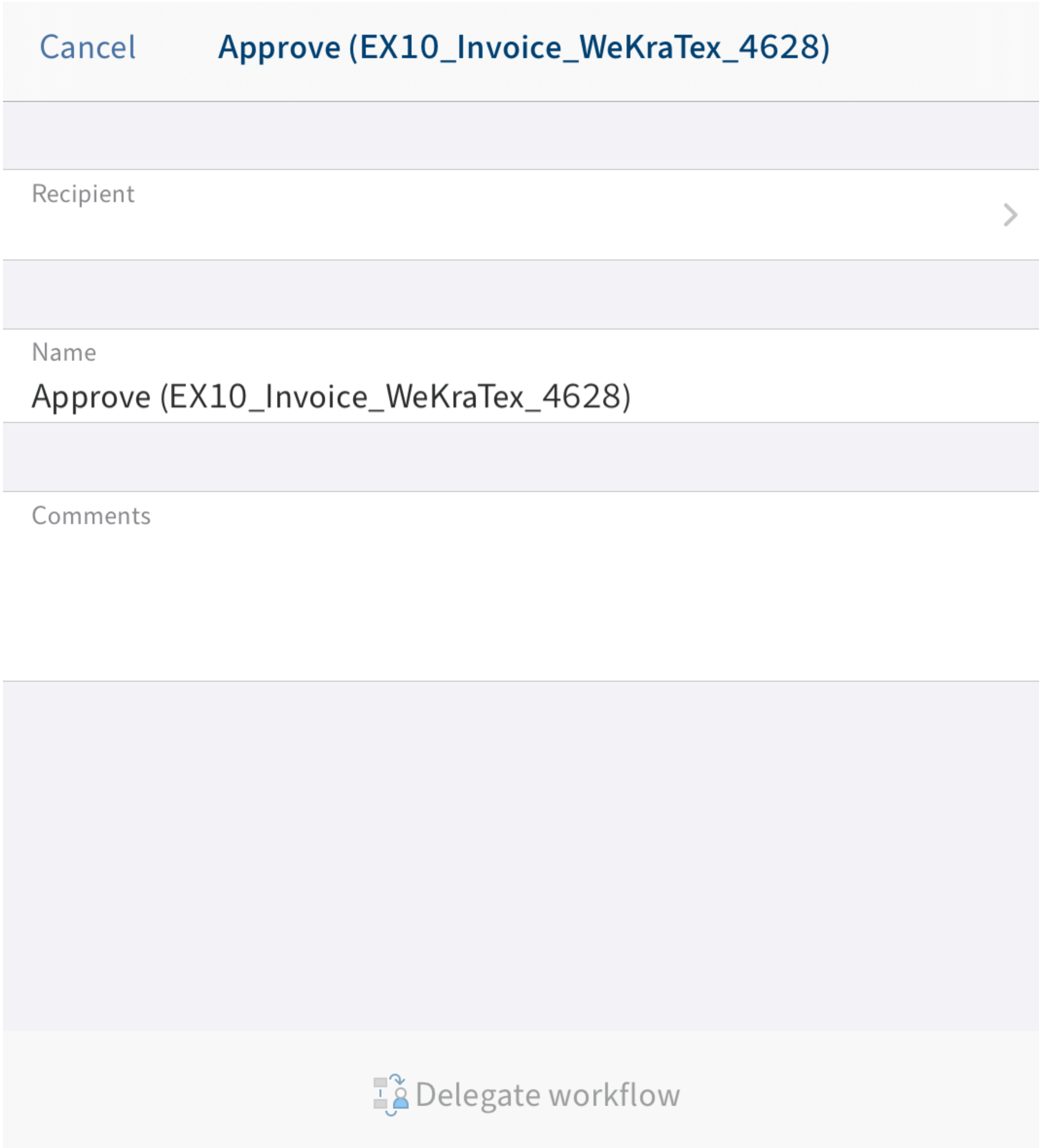
The *Forward workflow* dialog box closes. You have forwarded the workflow to the selected user.

Delegate workflow

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

Method

1. In the *Tasks* work area, select the workflow you want to delegate.
2. In the navigation bar, tap *Menu (button with three dots) > Delegate workflow*.



The *Delegate workflow* dialog box appears.

3.

Tap the *Recipient* field.

The *Recipient* dialog box opens.

4. Select the user that you want to delegate the workflow to. Scroll down to see the full list of users.

   Alternative: Tap the *Groups* tab to select a group.

   A check mark indicates that the recipient is selected.

5. Tap *Back* to apply your selection.

   The selected user appears in the *Recipient* field.

   You can make the following changes:

   - Name: To rename the workflow, enter a new name in the input field.
   - Comment: To add a note to the workflow, tap the input field.

6. Tap *Delegate workflow*.

Result

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

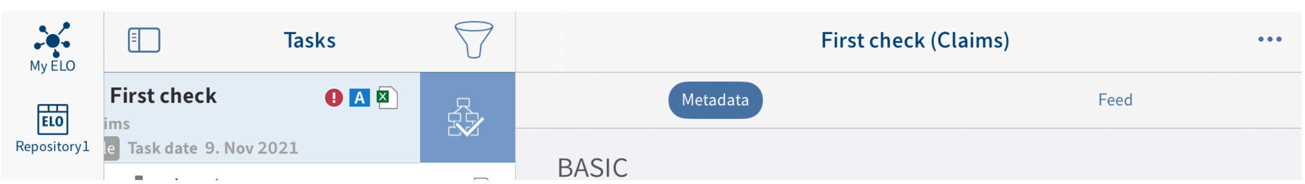
Accept workflow

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

Swipe left on the workflow you want to accept.

Alternative: You can also access the *Accept workflow* function from the menu (button with three dots).



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.

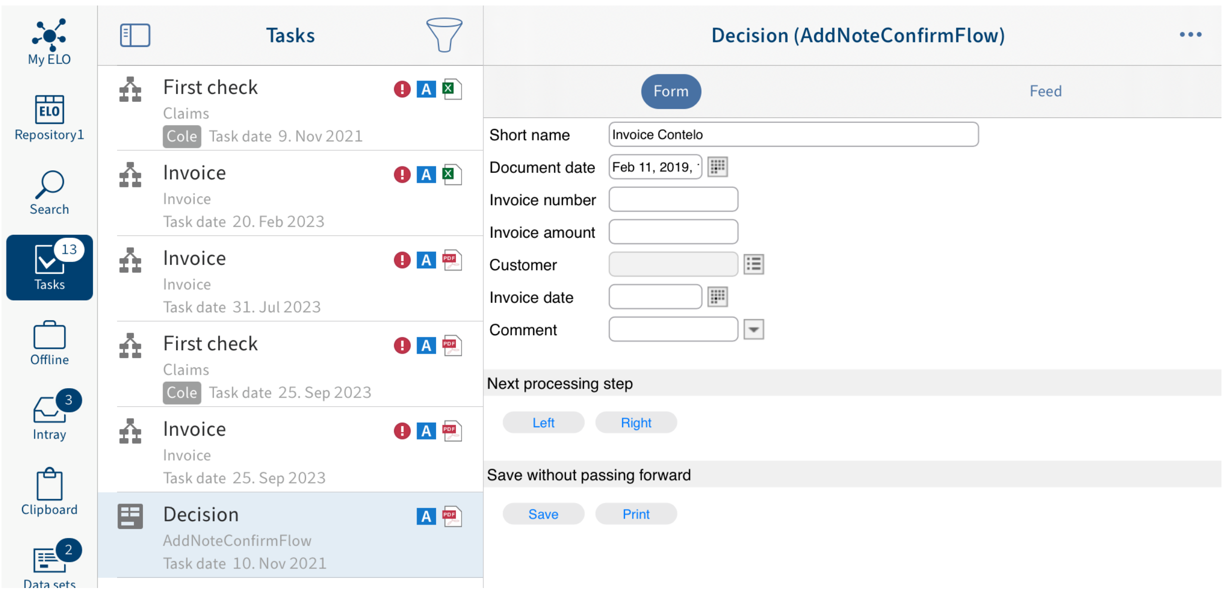
If a workflow is based on a form, the *Form* tab appears in the navigation bar of the viewer pane.

Requirements

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

Method

1. In the *Tasks* work area, select the workflow you want to edit.



The workflow form is displayed in the *Form* tab.

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

   Optional: Tap *Save* to save your entries.

   Information

   The *Print* function is not available in the ELO app.

3. Depending on the workflow structure, forms are usually passed forward 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 passed forward to the next user of the workflow with the information you entered.

Delete reminder

If you have created a reminder for an entry, this entry appears in the *Tasks* work area on the selected date. If you no longer need a reminder, you can remove it from the *Tasks* work area. The entry remains in the *Repository* work area.

Method

1. In the *Tasks* work area, select the reminder you want to delete.
2. In the navigation bar, tap *Menu (button with three dots) > Delete*.

Result

You have deleted the reminder.

Search

In the *Search* work area, you can start a new search, create search favorites, and edit previous searches.

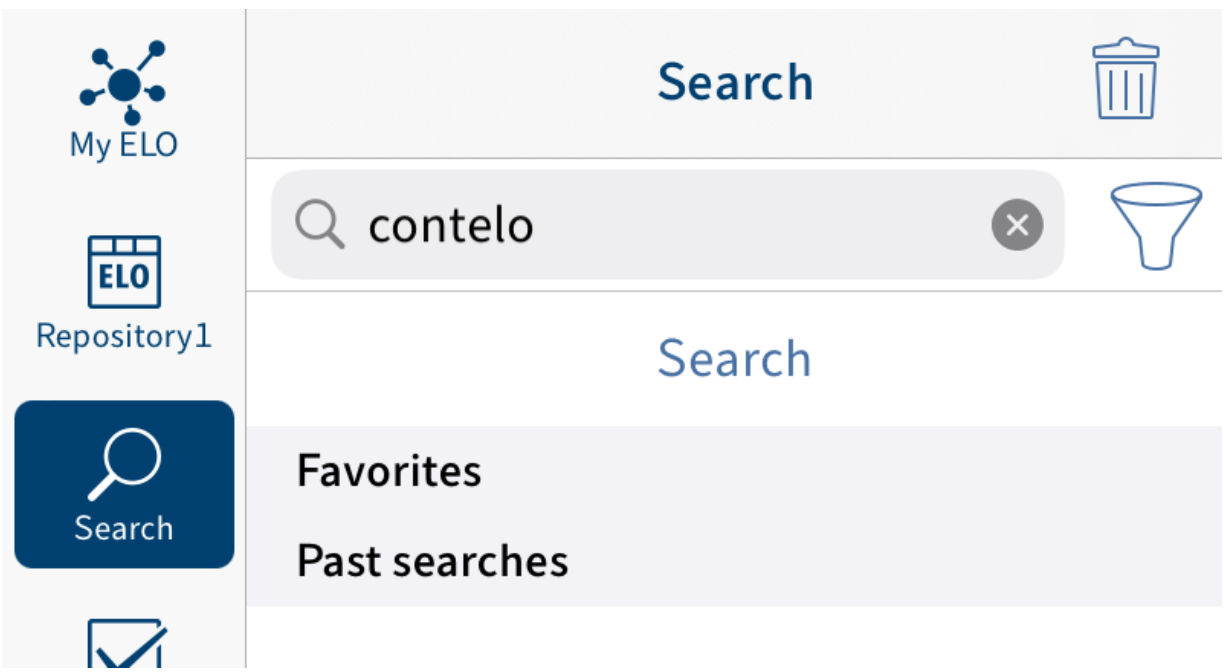
In the *Configuration* dialog box, you can specify which fields to include during the search. You can find more information in the section Configuration.

Start new search

To perform a search in ELO, start a new search in the *Search* work area.

Method

1. Open the *Search* work area.
2. Enter a search term into the search field.



3. Tap the filter icon to the right of the search field to add a filter.

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

   - Filed by: Only entries filed by the selected user are shown.
   - Filing date: Only entries filed on the selected date are shown.
   - User: Only entries for which the selected user is entered as the editor are shown.
   - Date: Only entries with the selected document date are shown.
   - Entry type: Only the selected entry is shown.
   - Form: Only entries filed with the selected form are shown.
4. Select a filter and confirm with *Save*.

The filter is applied and appears below the search field.

Optional: Tap the filter to delete it.

5. Tap *Search* to start the search.

Result

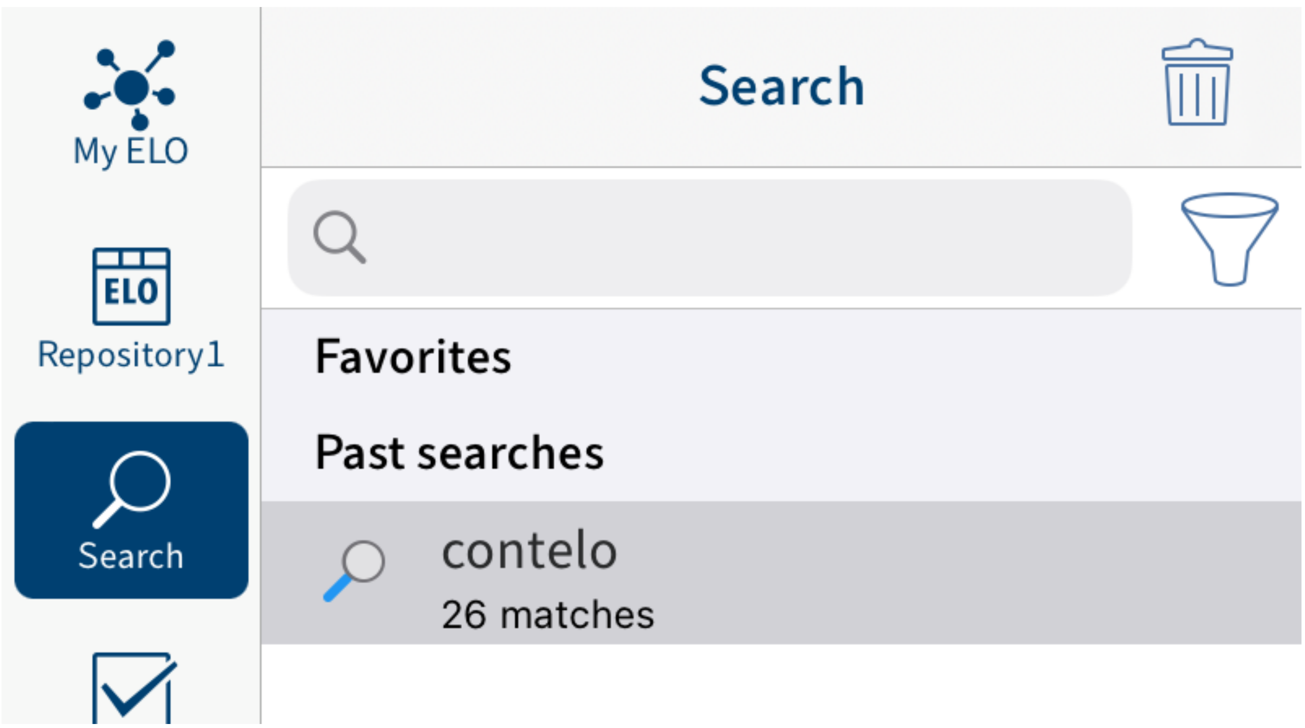
The list of search results appears.

The search is saved in the *Previous searches* area until you close the app.

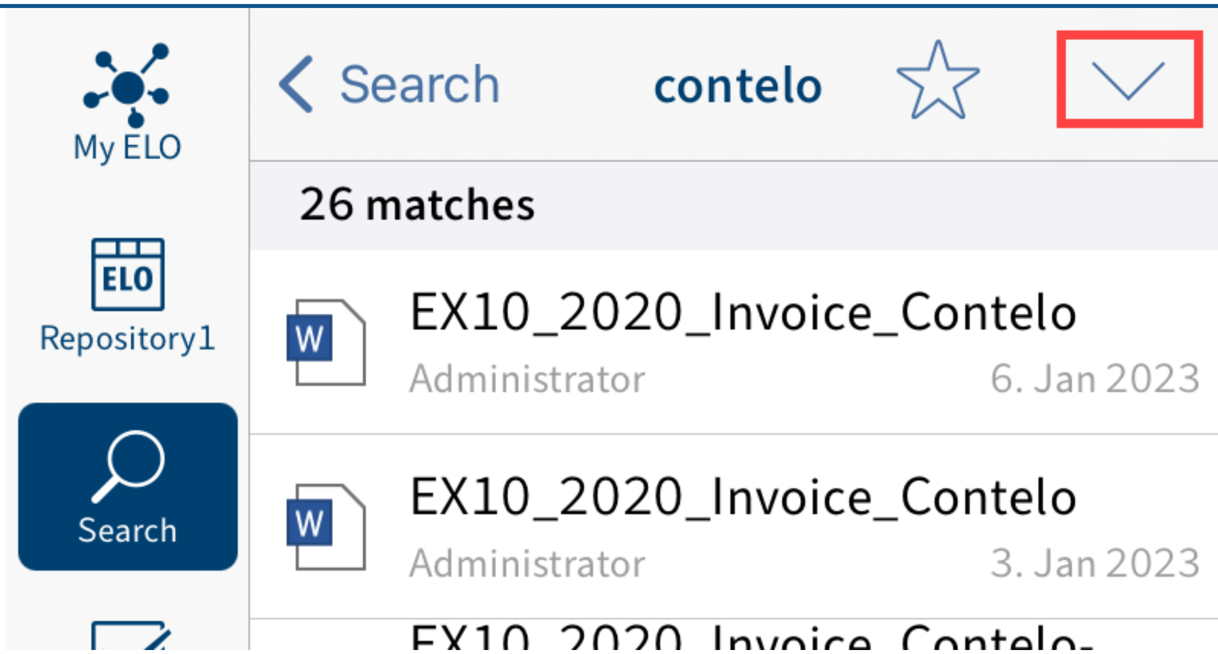
Edit search

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

Method

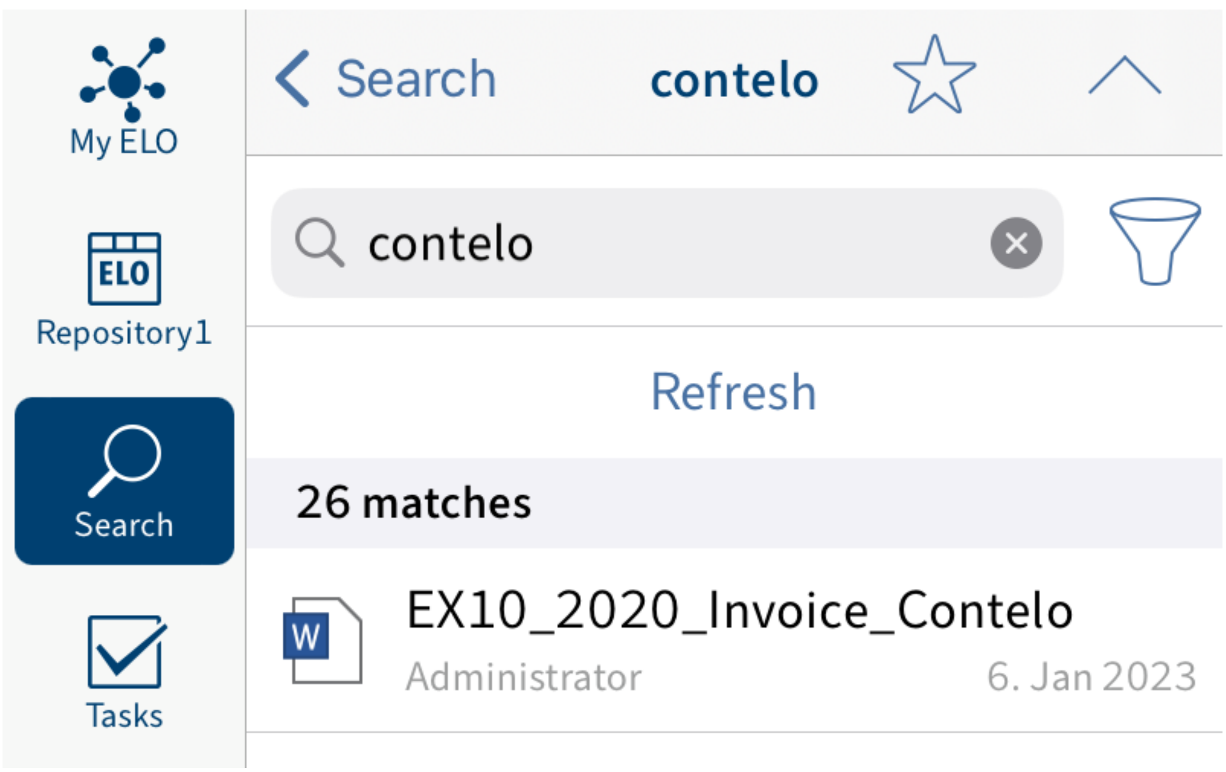


1. In the *Previous searches* area, tap the search that you want to edit.



The list of search results appears.

2. Tap the arrow icon in the navigation bar.



The search bar appears.

3. Tap the search field to enter a search term.
4. Tap the filter icon to the right of the search field to add a filter.

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

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

5. Select a filter and confirm with *Save*.

   The filter is applied and appears below the search field.

   Optional: Tap the filter to delete it.

6. Tap *Refresh*.

Result

The search is refreshed. The new list of search results appears.

Create favorite

All searches are saved in the *Previous searches* area. These are deleted when you close the ELO app. If you want to permanently save a search with all settings and filters in the *Search* work area, save it as a favorite. Favorites are not deleted when you close the app.

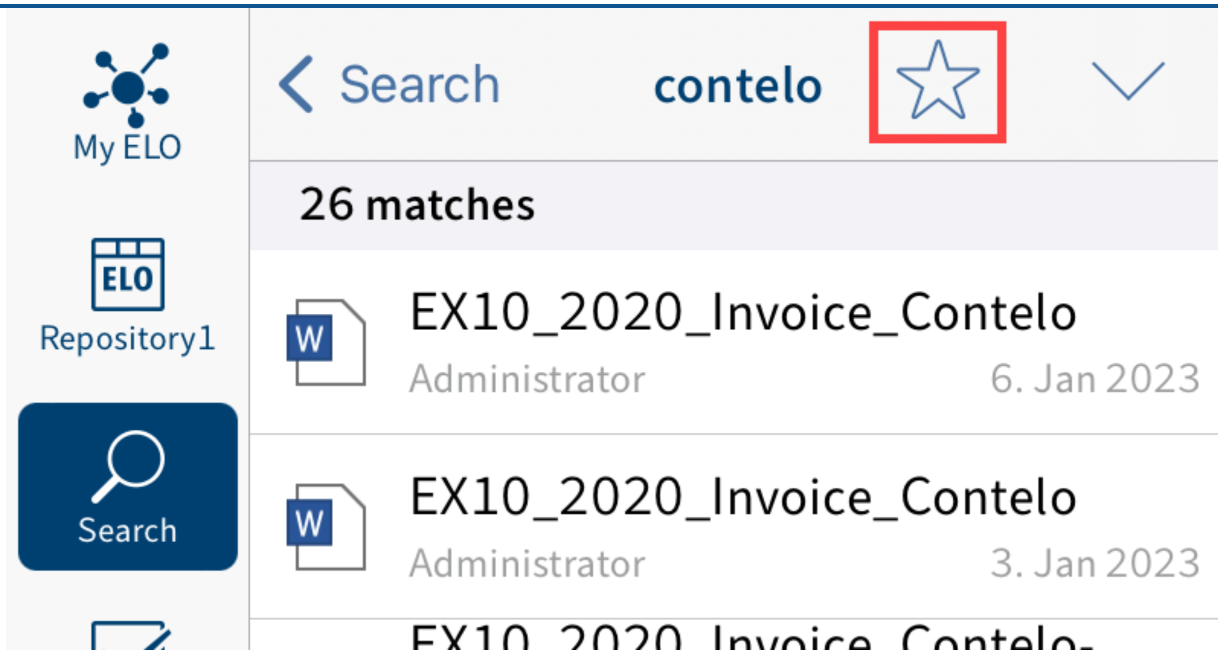
Information

Search favorites that you create in the ELO app are also available in other clients, such as the ELO Java Client or the ELO app (Android). However, search favorites created in other clients are not available in the ELO app.

Method

1. Start a new search or tap a previous search.

   The list of search results appears.



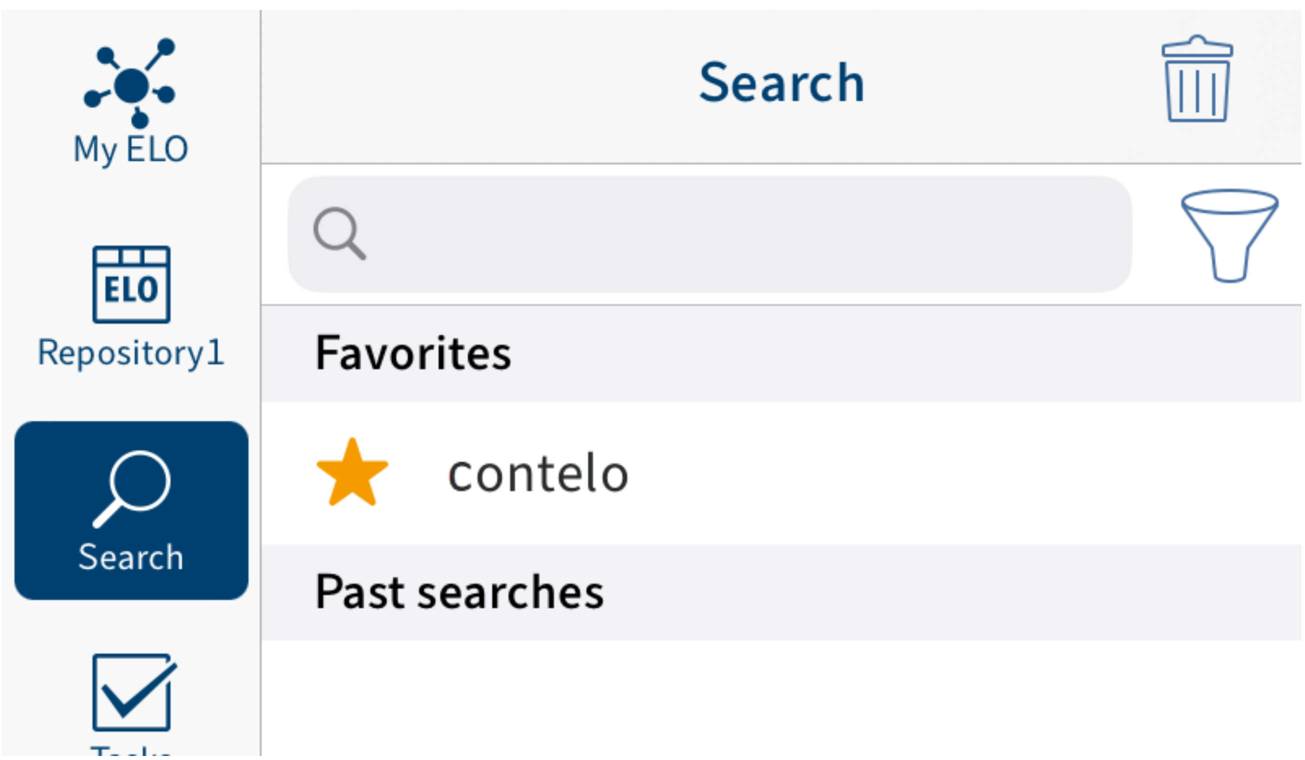
2. Tap the star icon.

   The *Add favorite* dialog box appears.

3. Enter a name for the search favorite.

4. Tap *OK* to confirm.

Result



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

Optional: To delete a favorite, swipe your finger on the favorite from right to left or tap the recycle bin icon.

Offline

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

Make entries available offline

You can transfer entries from the *Repository* work area to the *Offline* work area, enabling you to access your data even without an Internet connection. The documents and folders are filed as copies to the internal storage of your device.

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 entry that you want to make available offline.
2. In the navigation bar, tap *Menu (button with three dots) > Offline*.

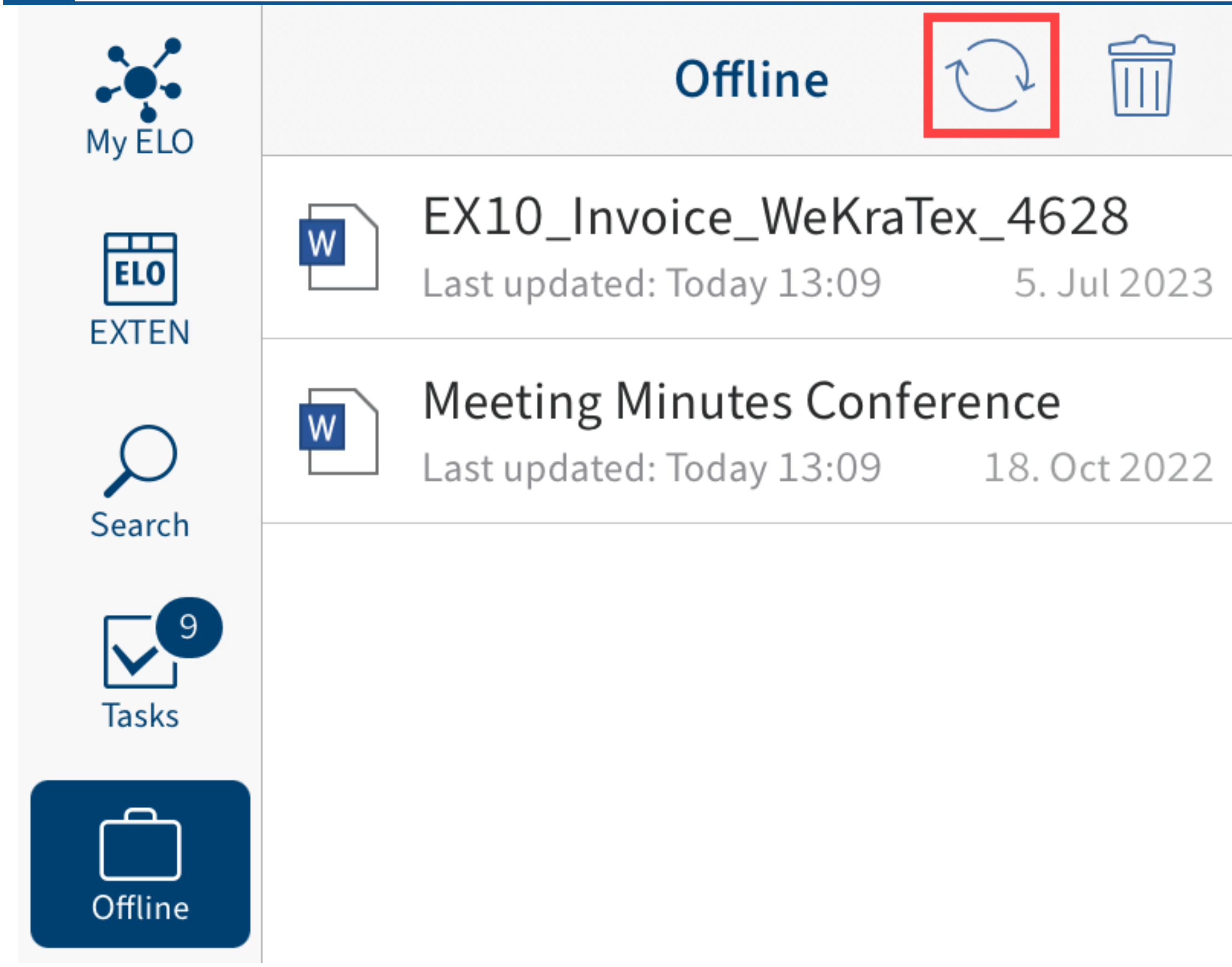
Result

You have filed the entry to the *Offline* work area.

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



Tap the refresh icon in the *Offline* work area.

Result

This updates the entries with the latest contents from the server.

Alternative: To update individual entries, use the *Refresh* function in the menu (button with three dots).

Remove entries from the Offline area

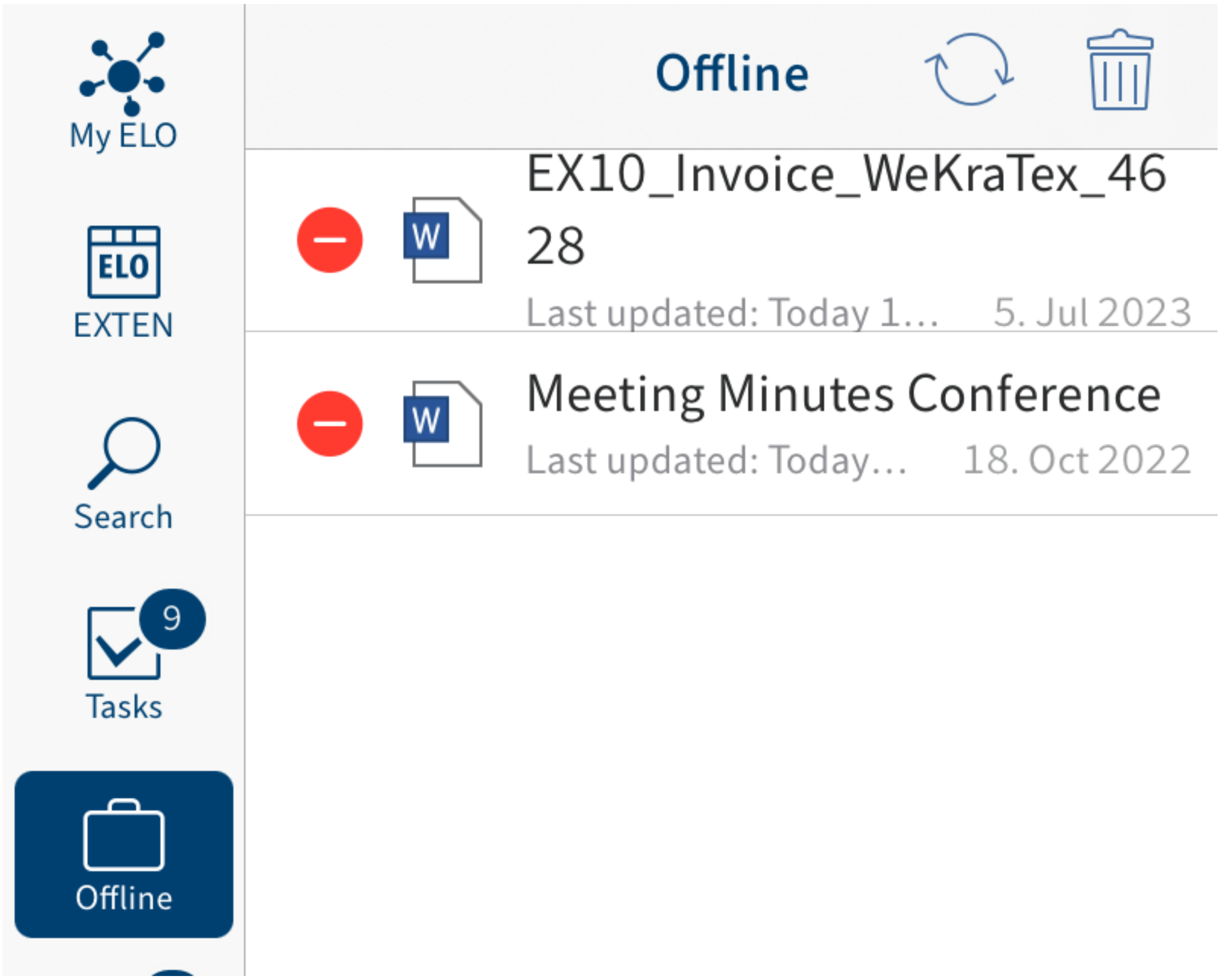
If you want to delete offline entries from your device, you need to remove them from the *Offline* work area.

> **Information**
>
> Entries filed to the *Offline* work area are deleted from your device. The original entries remain in ELO.

Method

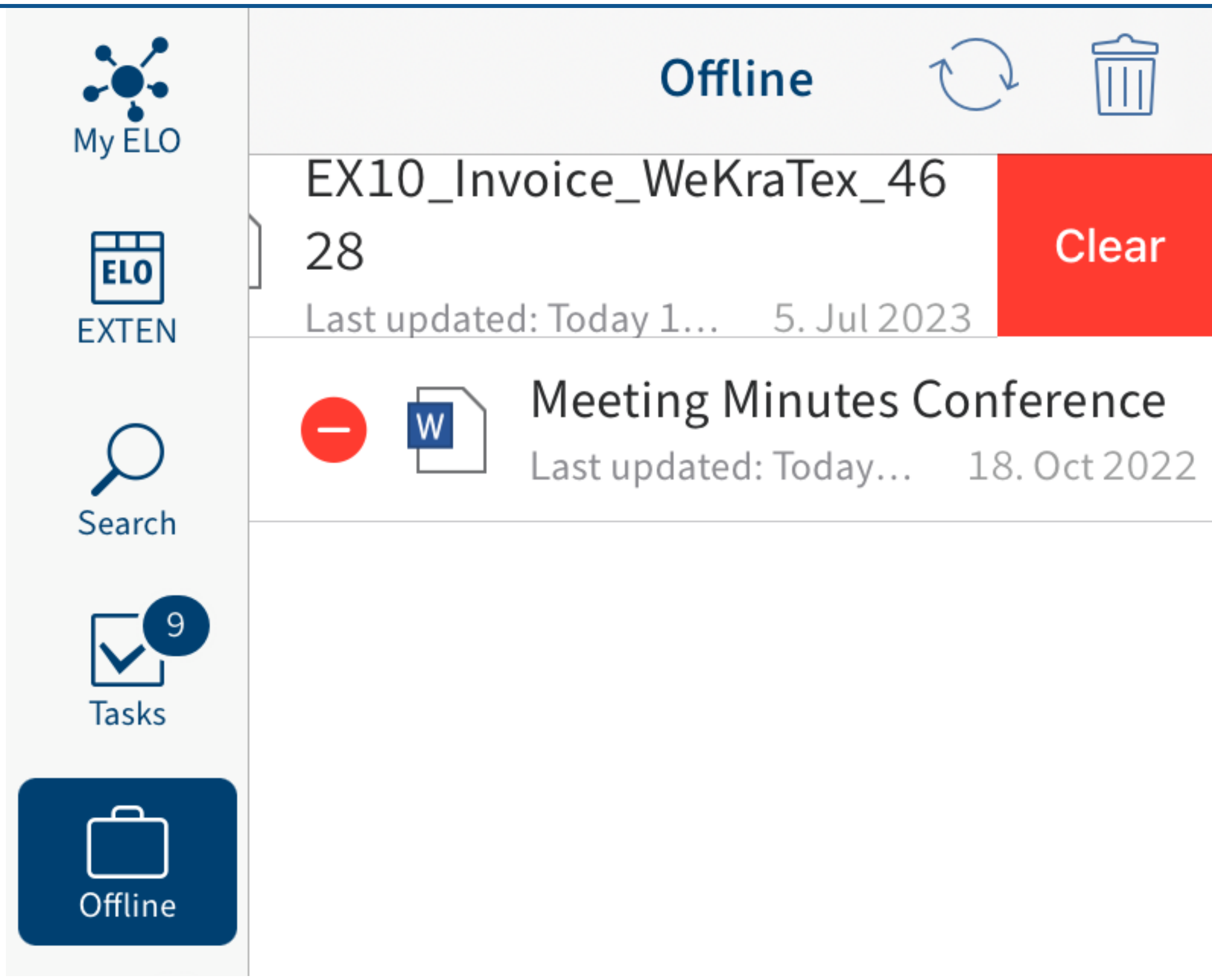
1.

Tap the recycle bin icon in the navigation bar.



A red delete icon appears to the left of the entries.

2. Tap the delete icon to the left of the entry that you want to remove from the *Offline* work area.



The *Remove* button appears.

3. Tap *Remove*.

Result

You have removed the entry from the *Offline* work area.

To return to the normal list view, tap the recycle bin icon again.

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.

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 ELO for Mobile Devices, 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 be composed according to the following outline: `main_<NAME>`. Replace *<NAME>* as required.

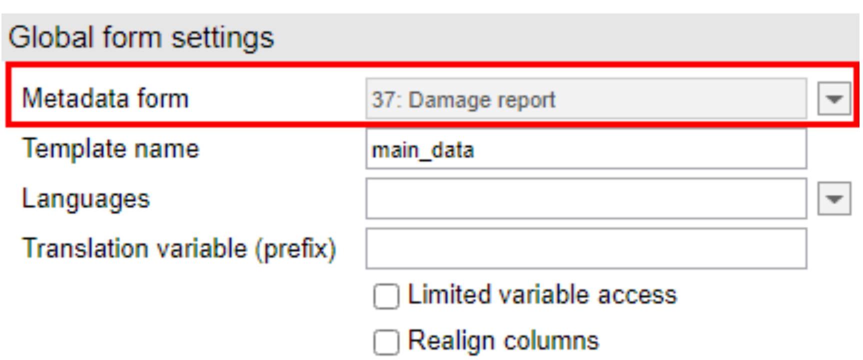
The names of the form and the template do not need to match.

Link to metadata form

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

Method

1. Open the template in the ELO form designer.



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.

4. 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.

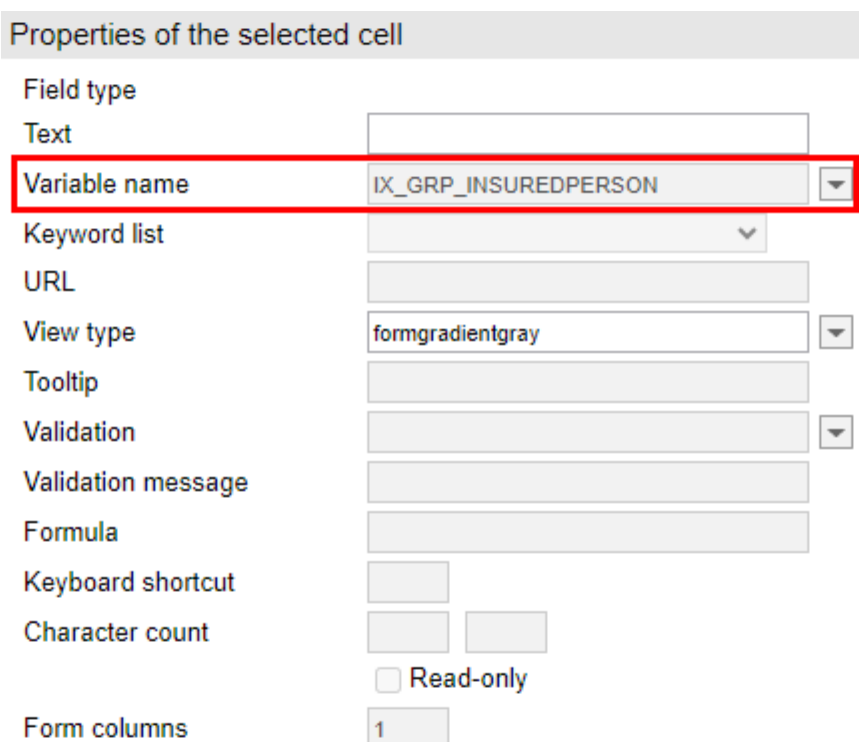
Link to fields

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



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 grayed out 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.

Download forms

You need to download forms manually. The forms are saved on your device. You can then access the forms without an Internet connection.

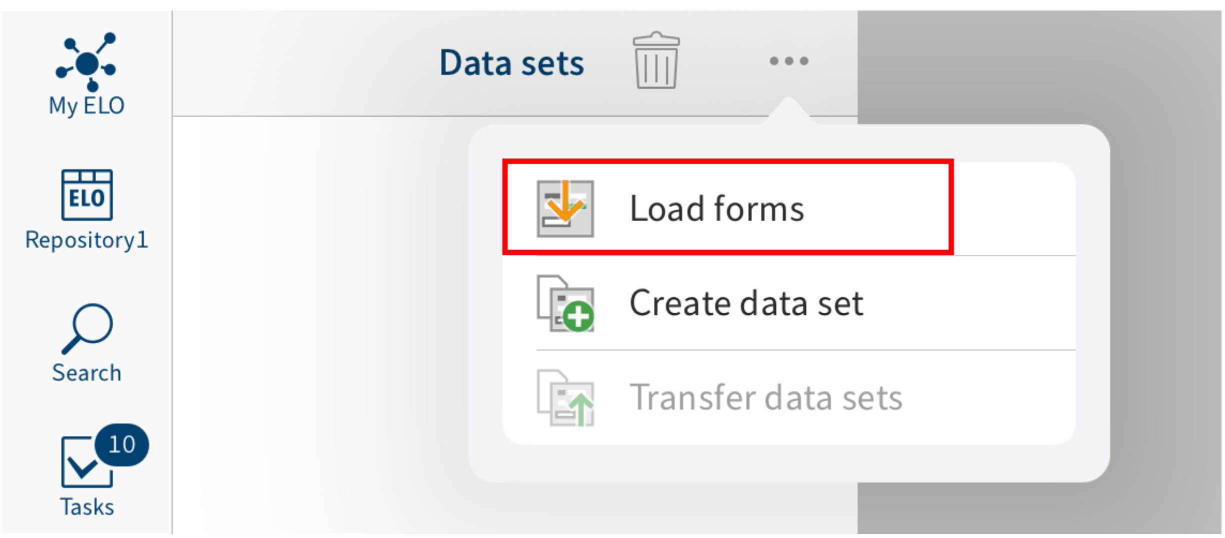
Requirements

Your administrator must have created at least one form and linked it to a metadata form. You can find more information about this in the Requirements section of the *Data sets* chapter.

Method

1. Open the *Data sets* work area.

2. Tap the menu (button with three dots) in the list view navigation bar.



   A drop-down menu appears.

3. Tap *Load forms*.

Result

The forms are loaded. Once the download is complete, you can use the forms.

Create data set

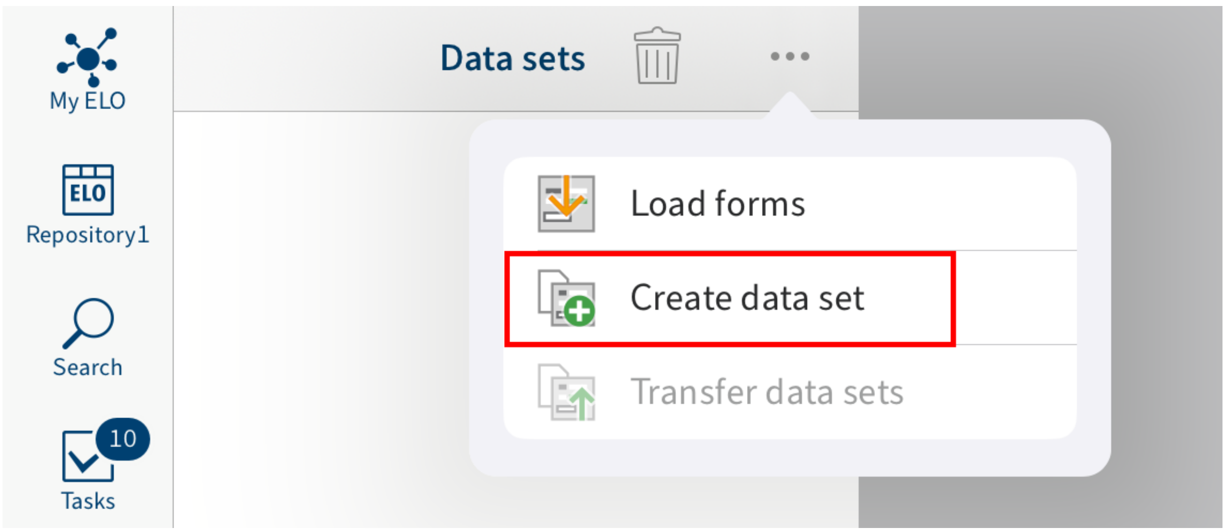
To submit data to a form and add files, use the *Create data set* function.

Requirements

You must have uploaded a data set form to your device. Refer to the Download forms section for more information.

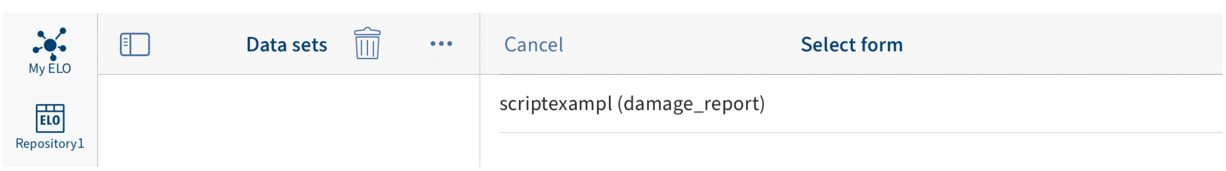
Method

1. Open the *Data sets* work area.
2. Tap the menu (button with three dots) in the list view navigation bar.



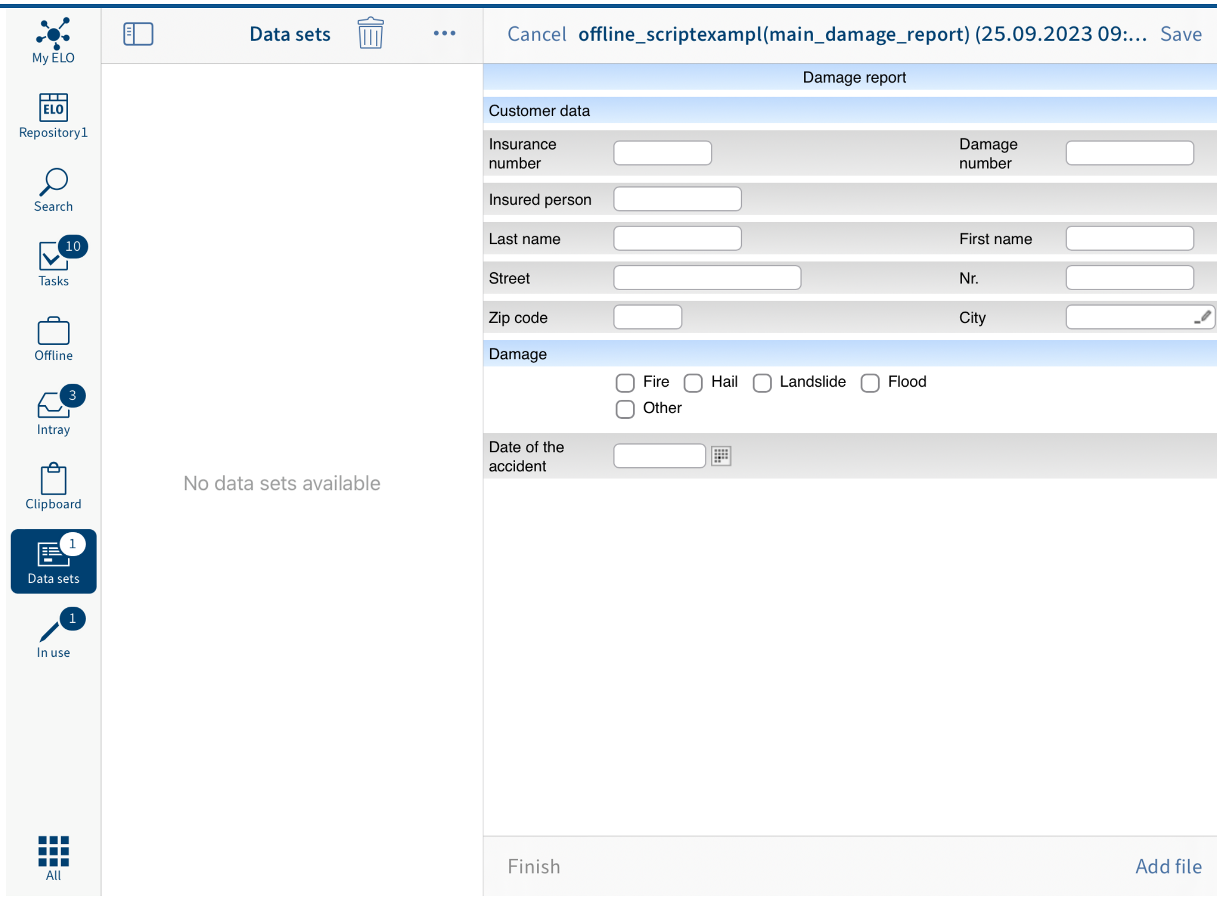
A drop-down menu appears.

3. Tap *Create data set*.



The *Select form* dialog box opens in the viewer pane.

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



The form opens in the viewer pane. This is where you complete the form, add files, save the data, and finalize the data set.

Fill out form

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

Add file

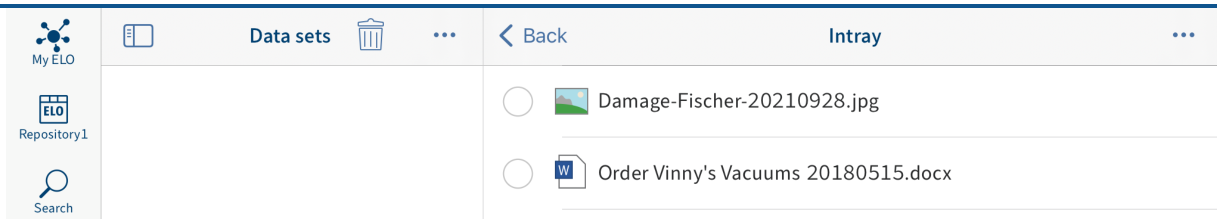
The number of files you can or need to add to a data set depends on the metadata form. Create the metadata form in the ELO Administration Console.

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.

6. To add a file, tap *Add file* at the bottom right.



The *Intray* opens in the viewer pane.

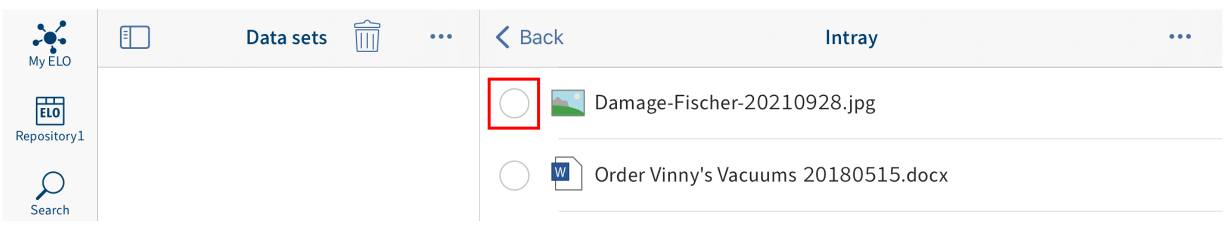
Optional: To upload a new document to the *Intray*, in the viewer pane, tap *Menu (button with three dots) > Add file*.

The *Add file* dialog box appears.

Select one of the following options:

- New photo: Opens the camera app on your device to take a photo. Take a photo.
- Photo from album: Opens the image gallery on your device. Select an image from your album.
- QuickScan: Opens the integrated ELO QuickScan app. Scan a document. You can find more information about this in the *ELO QuickScan (iOS)* manual.
- Browse: Opens locations on your device or cloud storage. Select a document.

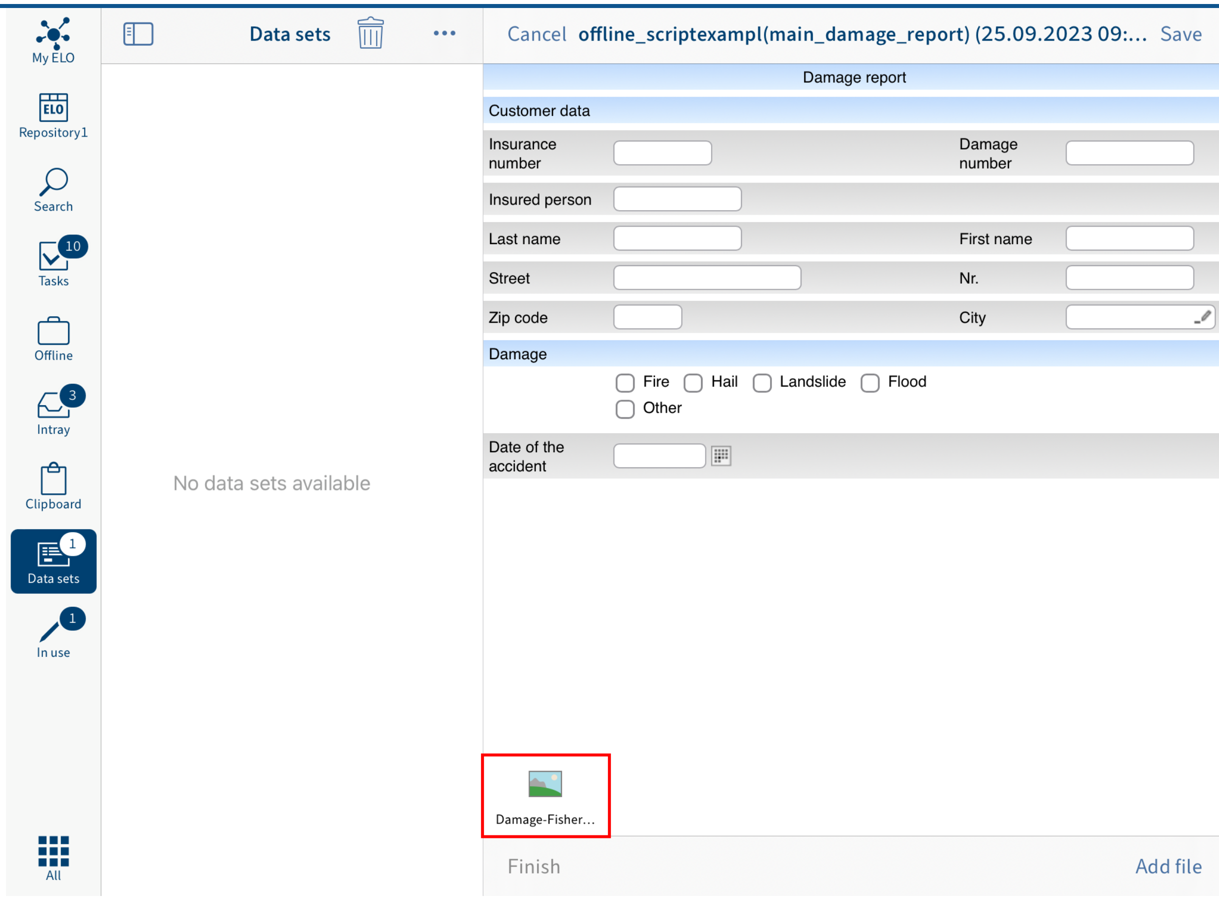
The selected document or photo is added to the Intray. It will appear in the list view in the Intray.



7. Tap the radio button to the left of the document that you want to add.

   A check mark indicates that the document is selected.

8. In the viewer pane, tap *Menu (button with three dots) > Transfer document*.



The document is added to the data set.

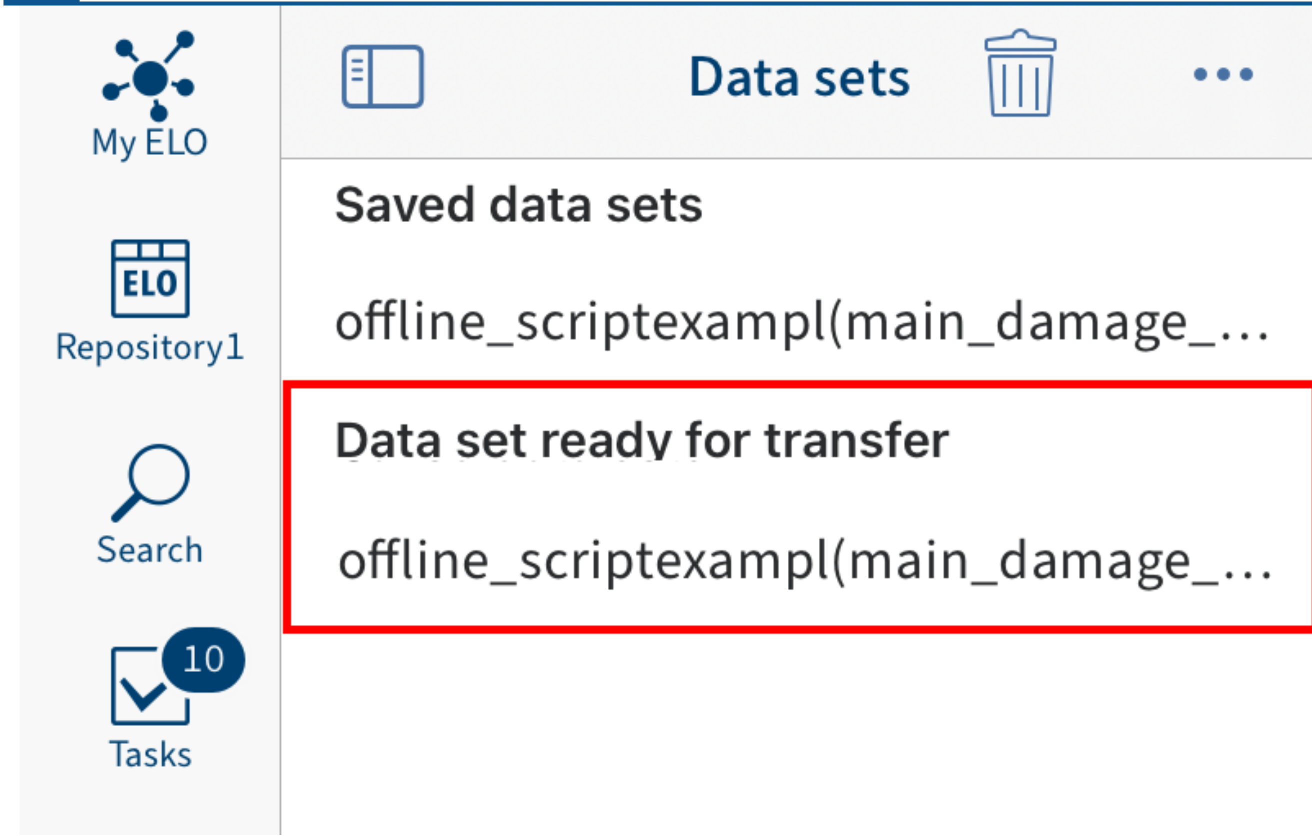
Save data set

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. To do so, tap *Save*. The data set is saved to the *Saved data sets* in the *Data sets* work area. To continue editing, tap the data set in the *Saved data sets* area.

Complete data set

9. To complete a data set so that you can transfer it to the *Repository* work area, tap *Finish*.

Result



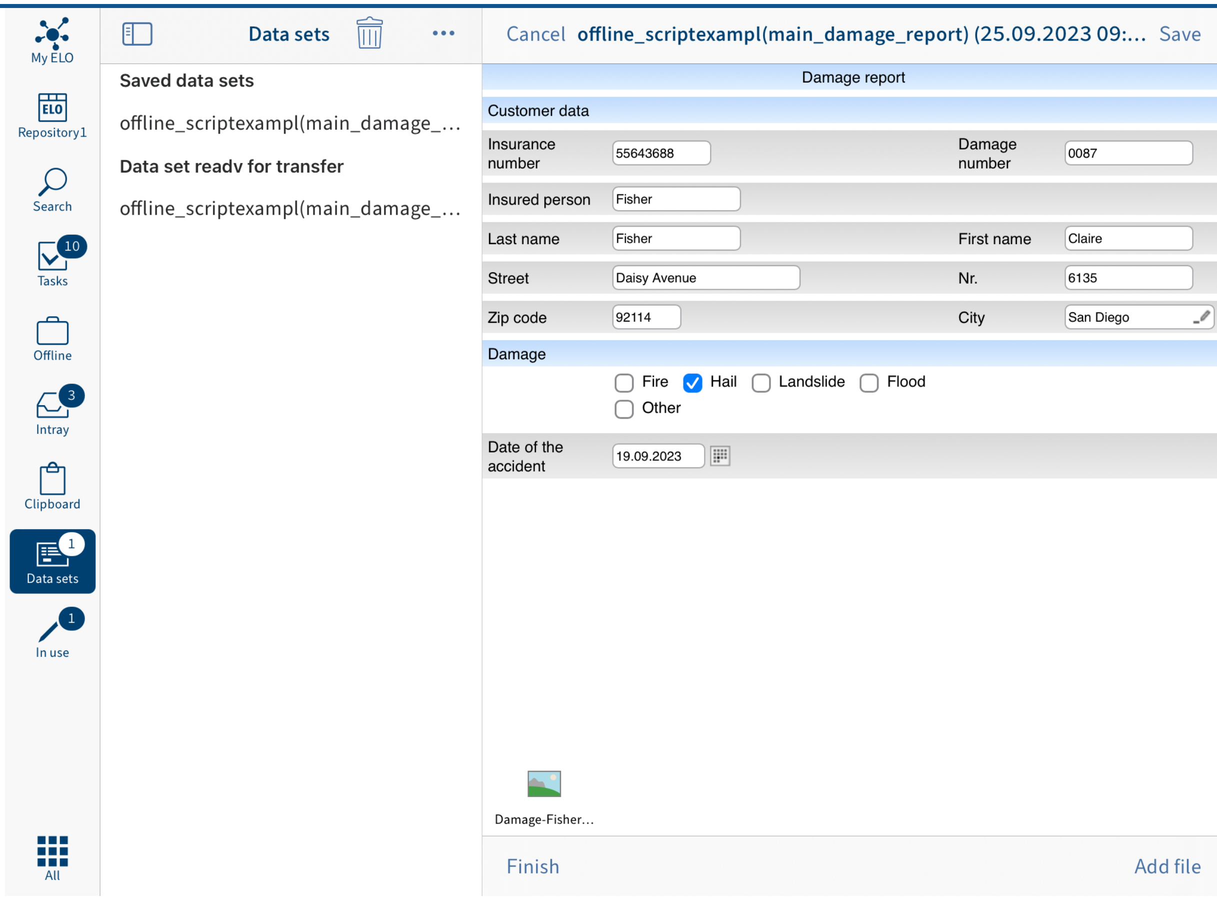
The data set is saved to the *Data set ready for transfer* area in the *Data sets* work area. You can transfer the data set to the *Repository* work area as soon as your device is connected to the Internet. You can find more information about this in the Transfer data set to the Repository work area section.

Edit data set

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

Method

1. Tap the data set in the *Saved data sets* area.



The form opens in the viewer pane.

2. Make the desired changes.

3. Tap *Save* to cache the form data or *Finish* to complete editing.

Result

You have edited the data set.

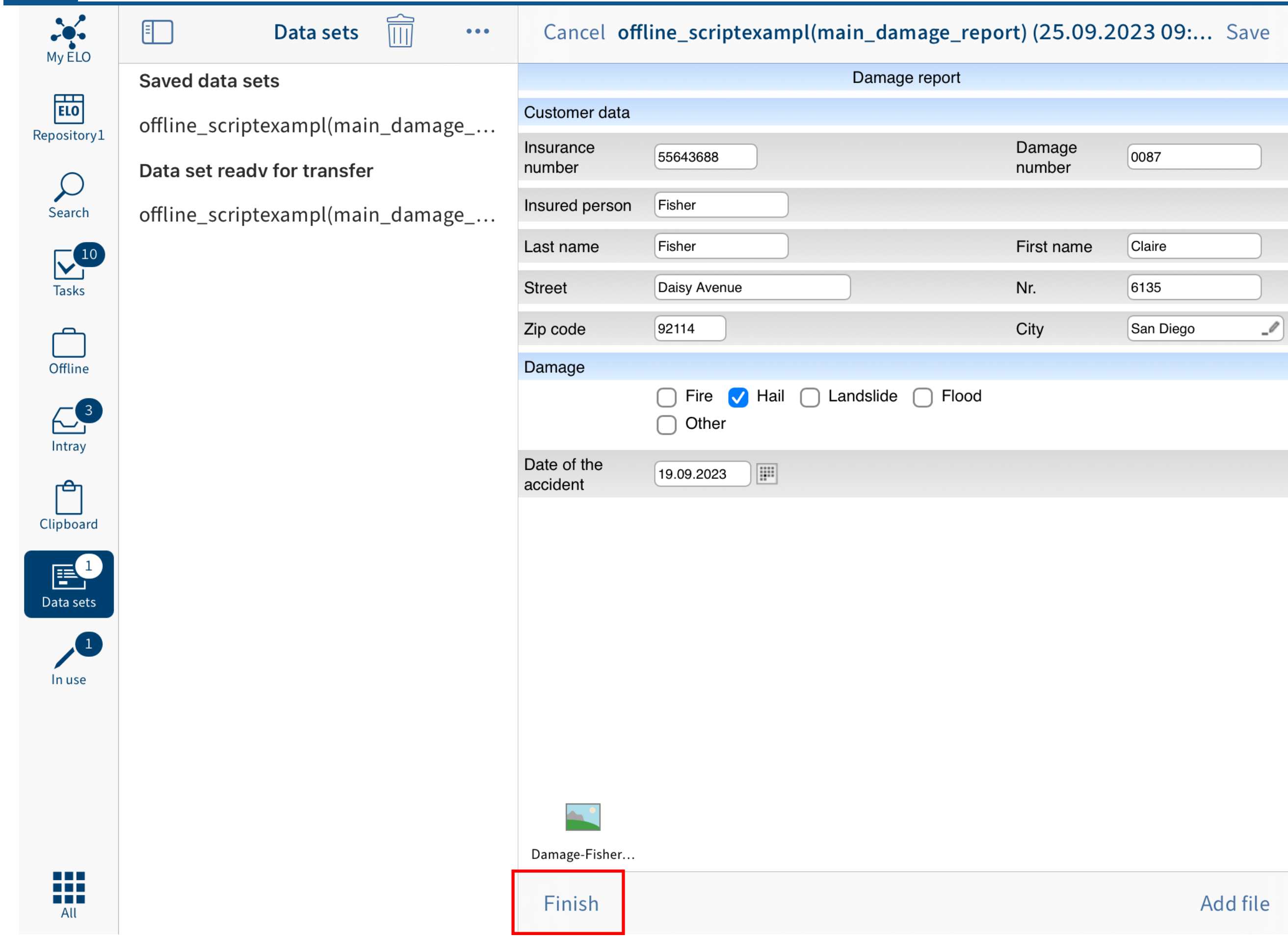
Transfer data set to the 'Repository' work area

You need to complete a data set before you can transfer it to the *Repository* work area. The data set is saved to the *Data set ready for transfer* area in the *Data sets* work area. You can transfer the data set to the *Repository* work area as soon as your device is connected to the Internet.

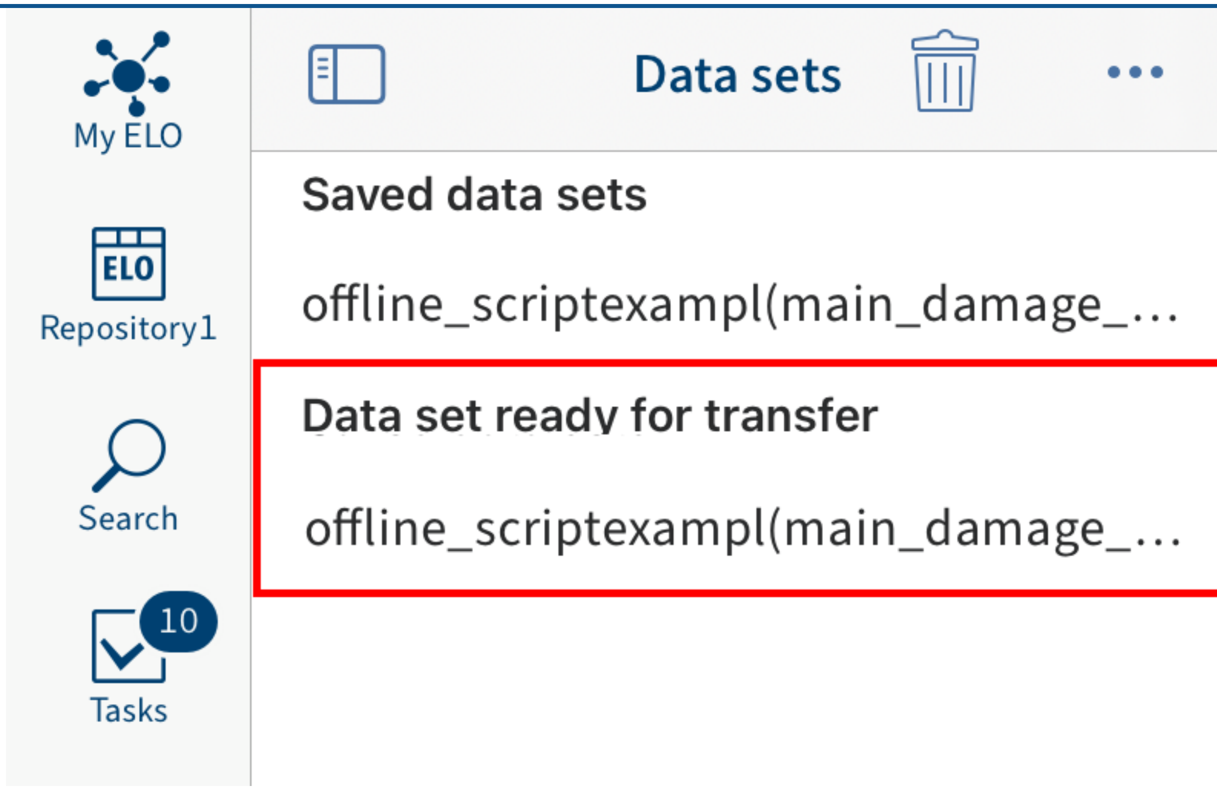
Requirements

Your device must be connected to the Internet.

Method



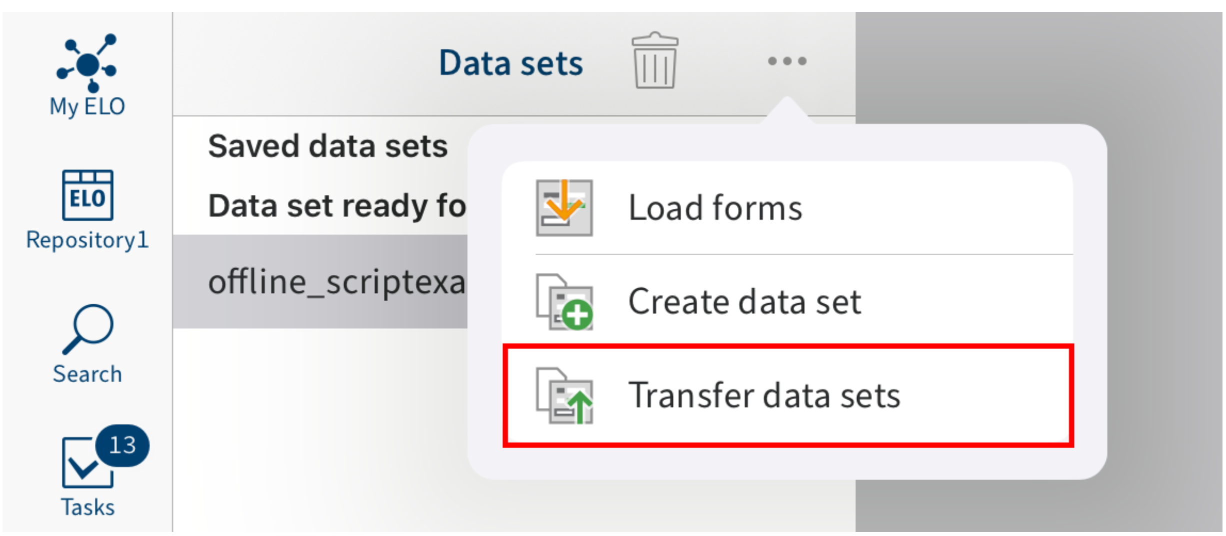
1. To complete a data set so that you can transfer it to the *Repository* work area, tap *Finish* in edit mode of the form.



The data set is moved to the *Data set ready for transfer* area.

You can transfer data sets to the *Repository* work area as soon as your device is connected to the Internet.

2. In the *Data sets* work area, tap the menu (button with three dots).



A drop-down menu appears.

3. Tap *Transfer data sets*.

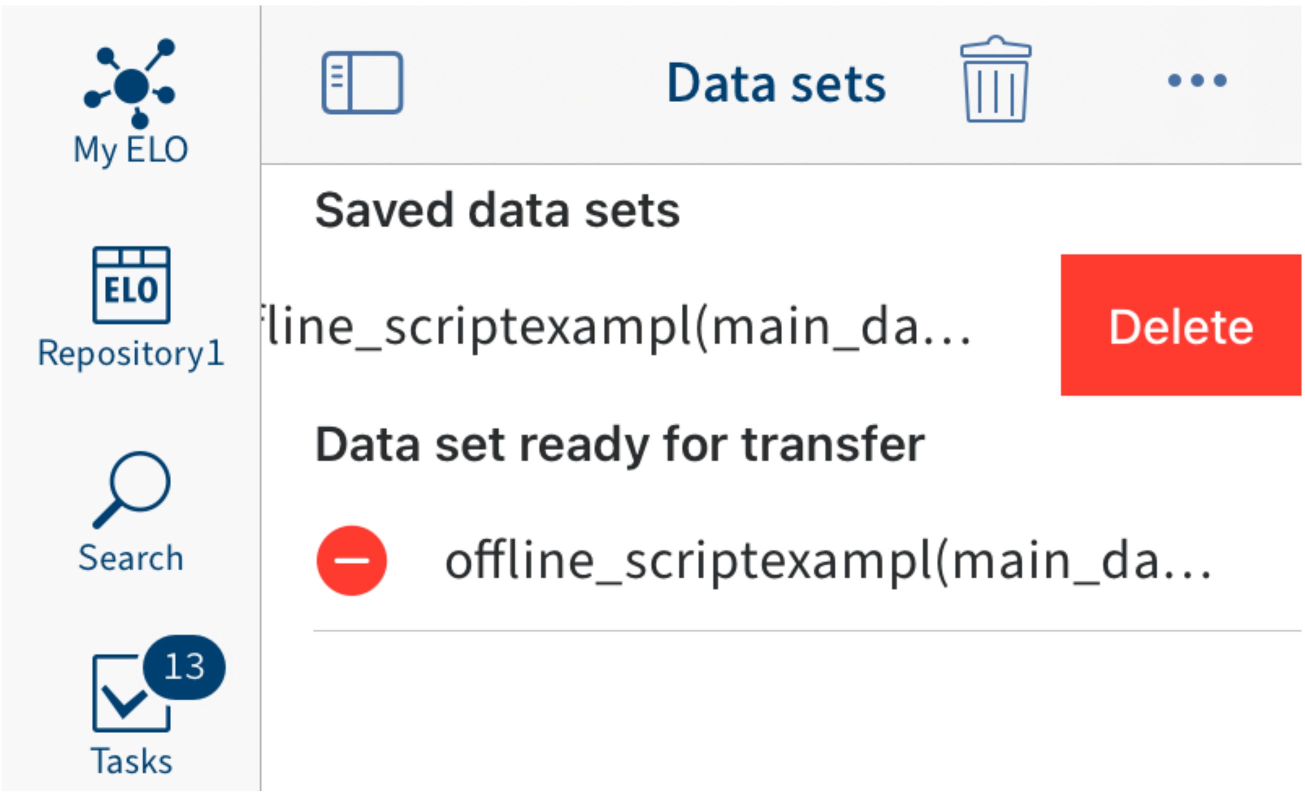
Result

All data sets in the *Data set ready for transfer* area are uploaded to the *Repository* work area. Once a data set is transferred to the repository, 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. You can see the saved data on the *Form* tab.

Delete data set

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

Method



Swipe left on the data set to delete it.

Alternative: Tap the recycle bin icon to delete a data set.

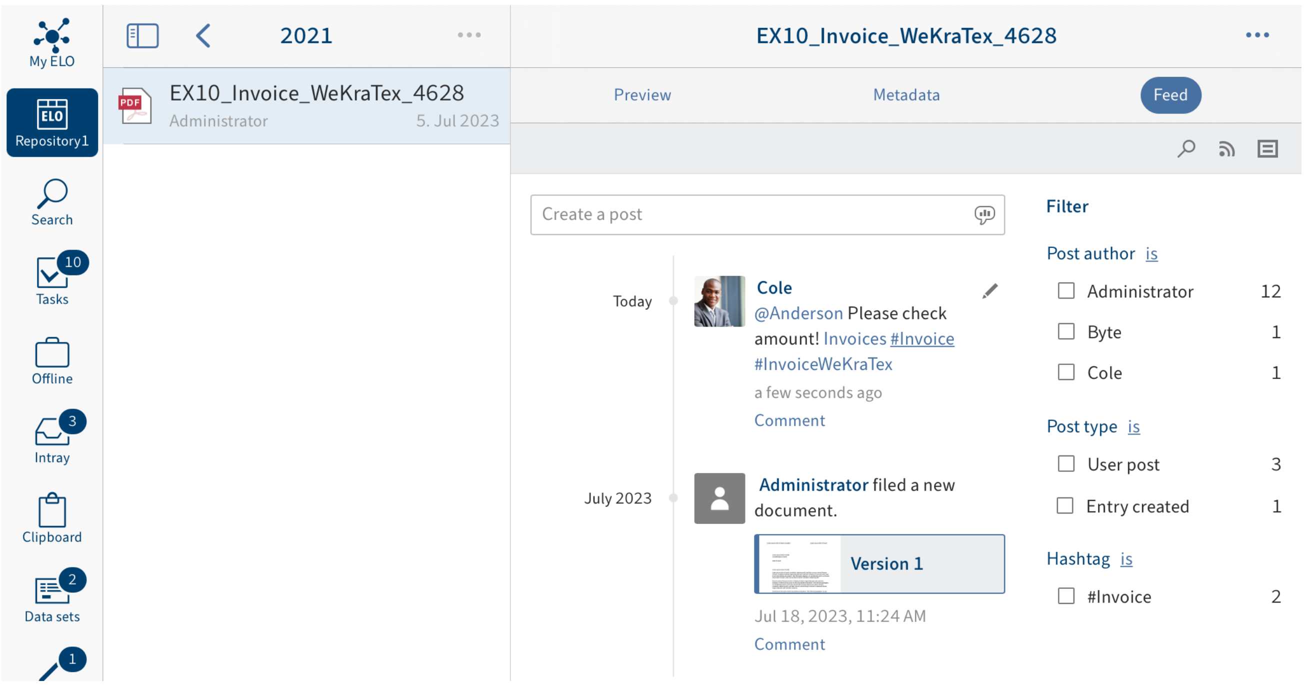
Result

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 and record changes to the entry.

The following message types are shown in the feed:

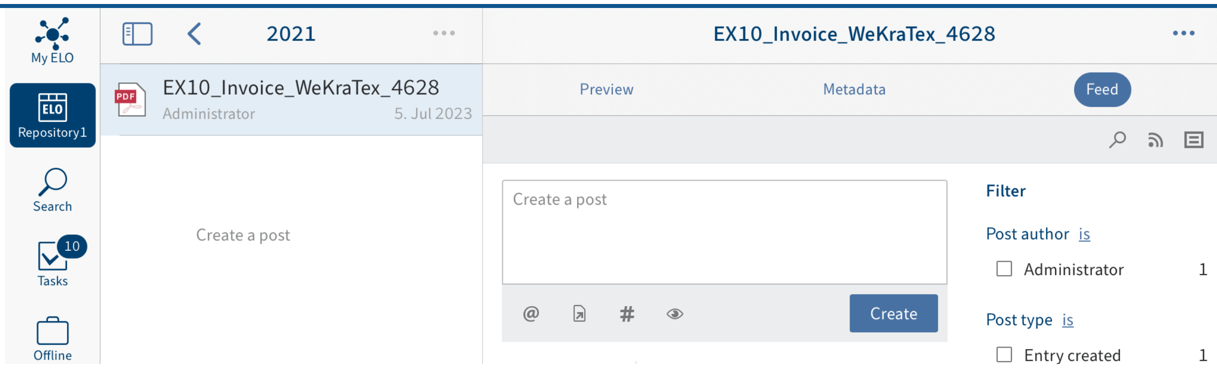
- Posts
- Comments
- Events (e.g. when a new version of a document is filed or changes are made to the working version)

Create post

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

Method

1. Tap the *Create a post* input field.



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 user 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 user 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.

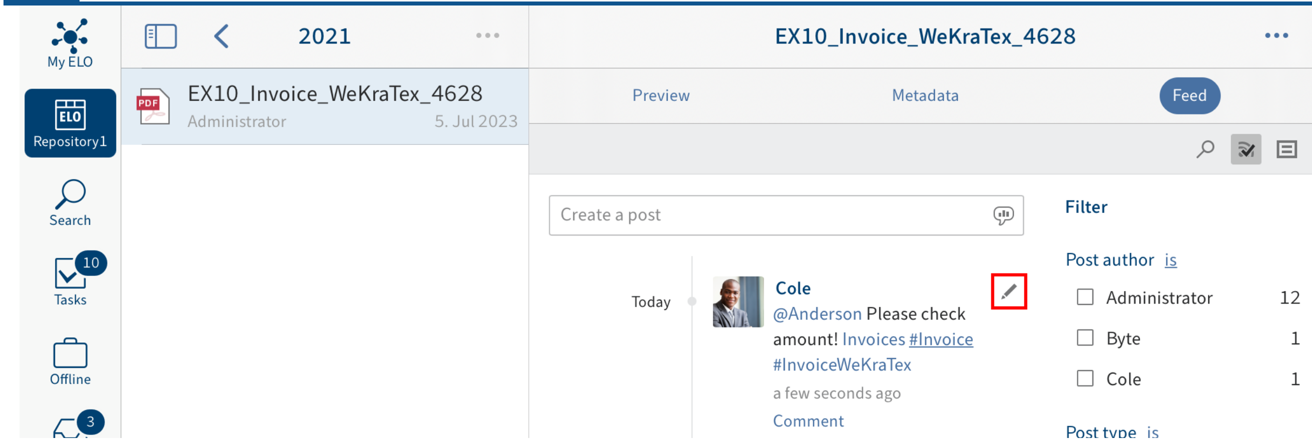
Result

Your post appears in the feed.

Edit post

You can change your own posts later on.

Method



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 user 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 user 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.

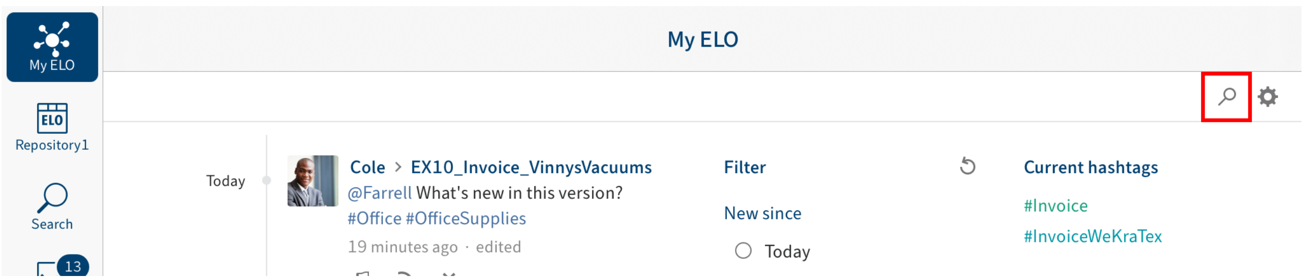
Result

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.

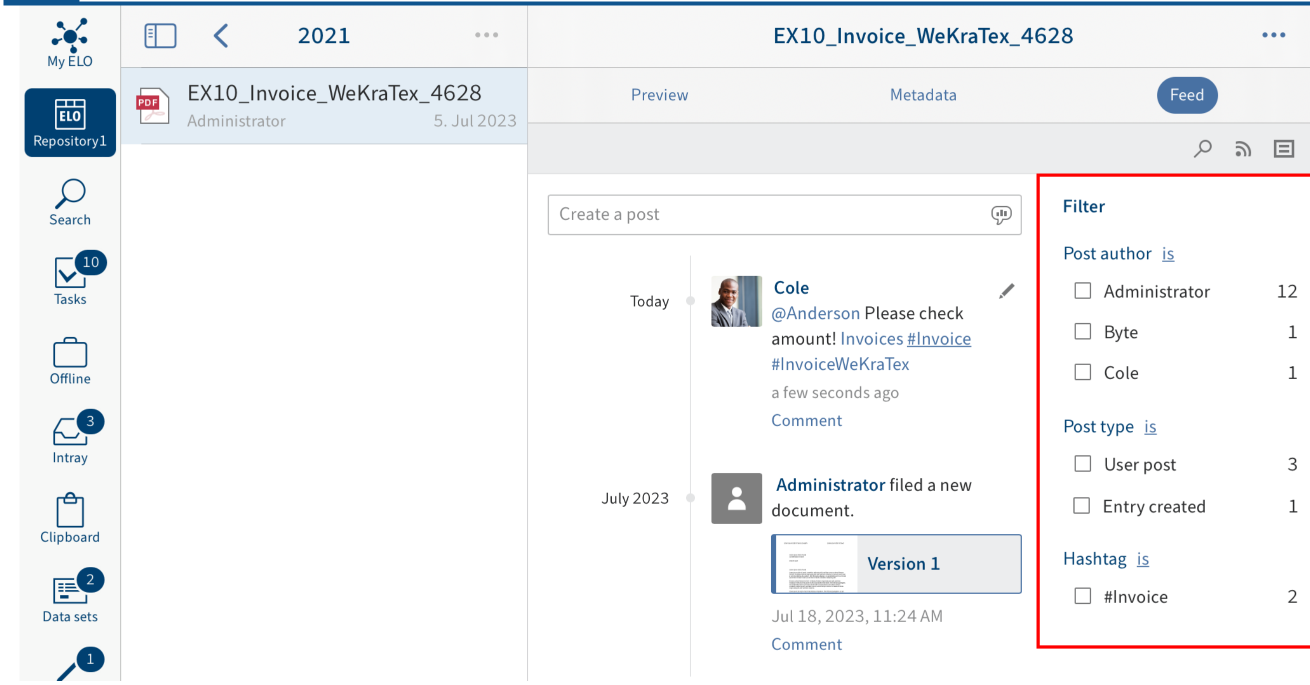
Result

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.



Information

If the filters are not shown, tap the filter icon in the gray bar.

You can select the following filters:

- Post author: Only posts created by the selected user 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, such as filtering by posts you are mentioned in.

Information

With 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.

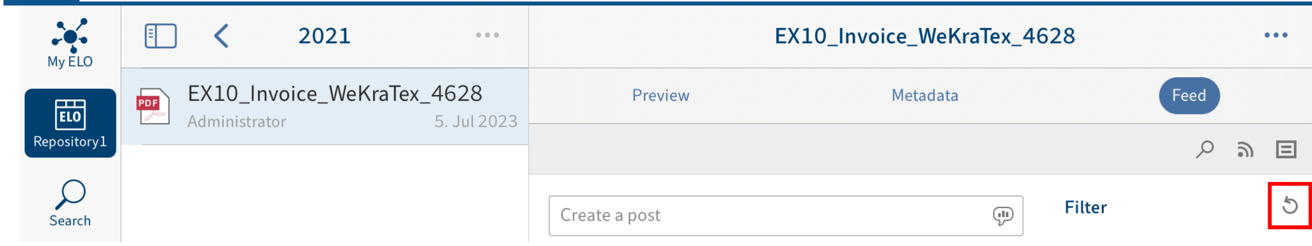
Method

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.

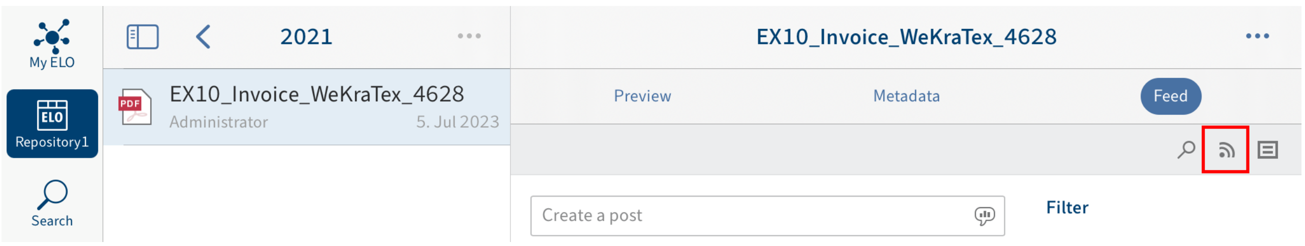
Optional: To clear all filters, tap *Reset filters* (arrow icon).



Subscribe to feed

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

Method



Tap the *Subscribe* button in the open feed.

Result

You have subscribed to the feed. The *Subscribe* button is marked with a check. Once a new post is added to a subscribed feed, you see the new post in your *My ELO* work area.

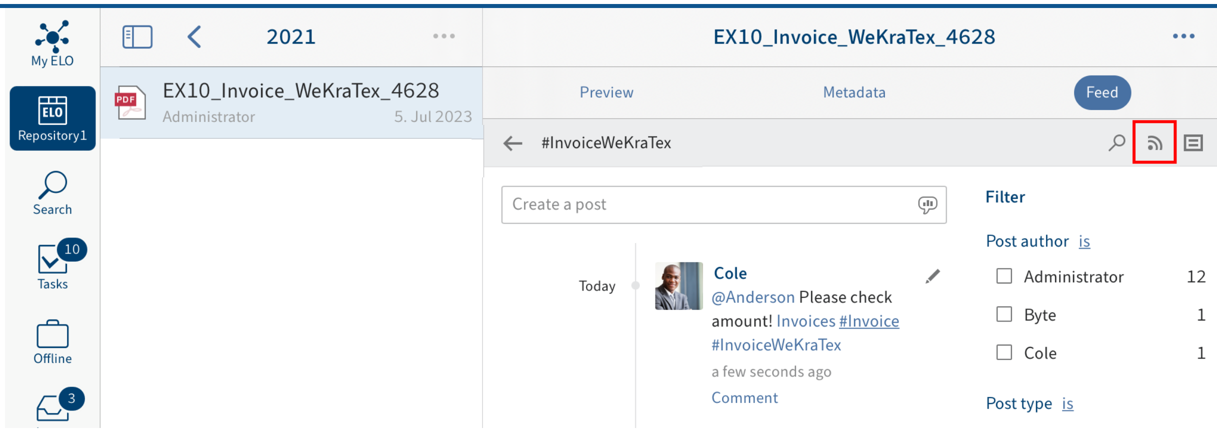
> **Information**
>
> You can automatically subscribe to feeds. This applies to specific events that are triggered by you. You can enable the automatic feed subscription options in *My ELO* > *Settings* > *My ELO settings*.

Subscribe to 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.

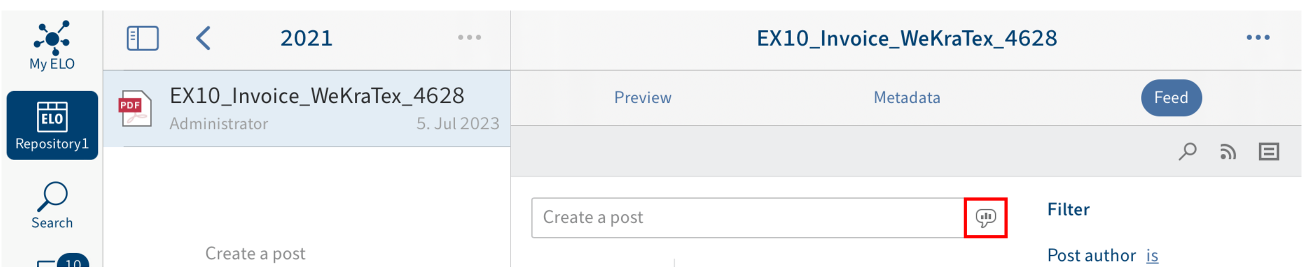
Result

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

Create 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 user 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 user 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 user 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.

3. Tap *Create* to start the poll.

Result

The poll shows up in the feed.

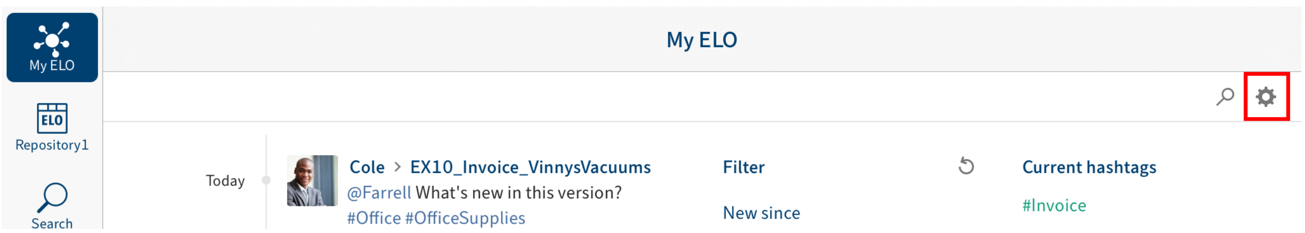
> **Information**
>
> Once a user has taken a poll, it can no longer be modified.

My ELO

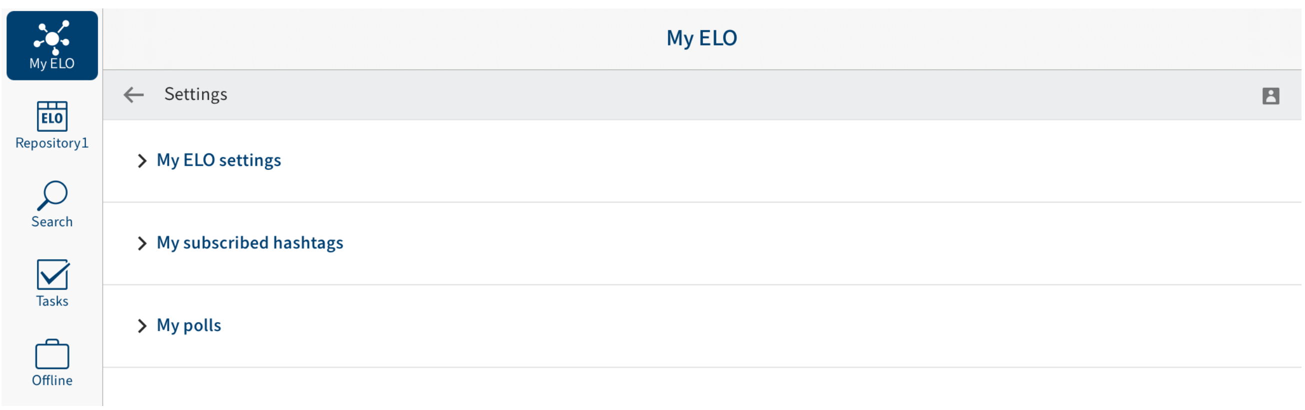
Feed posts for different entries are listed in the *My ELO* work area. For example, you will see posts from subscribed feeds or posts you were mentioned in. You will also find an overview of your workflows as well as current hashtags in *My ELO*.

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.

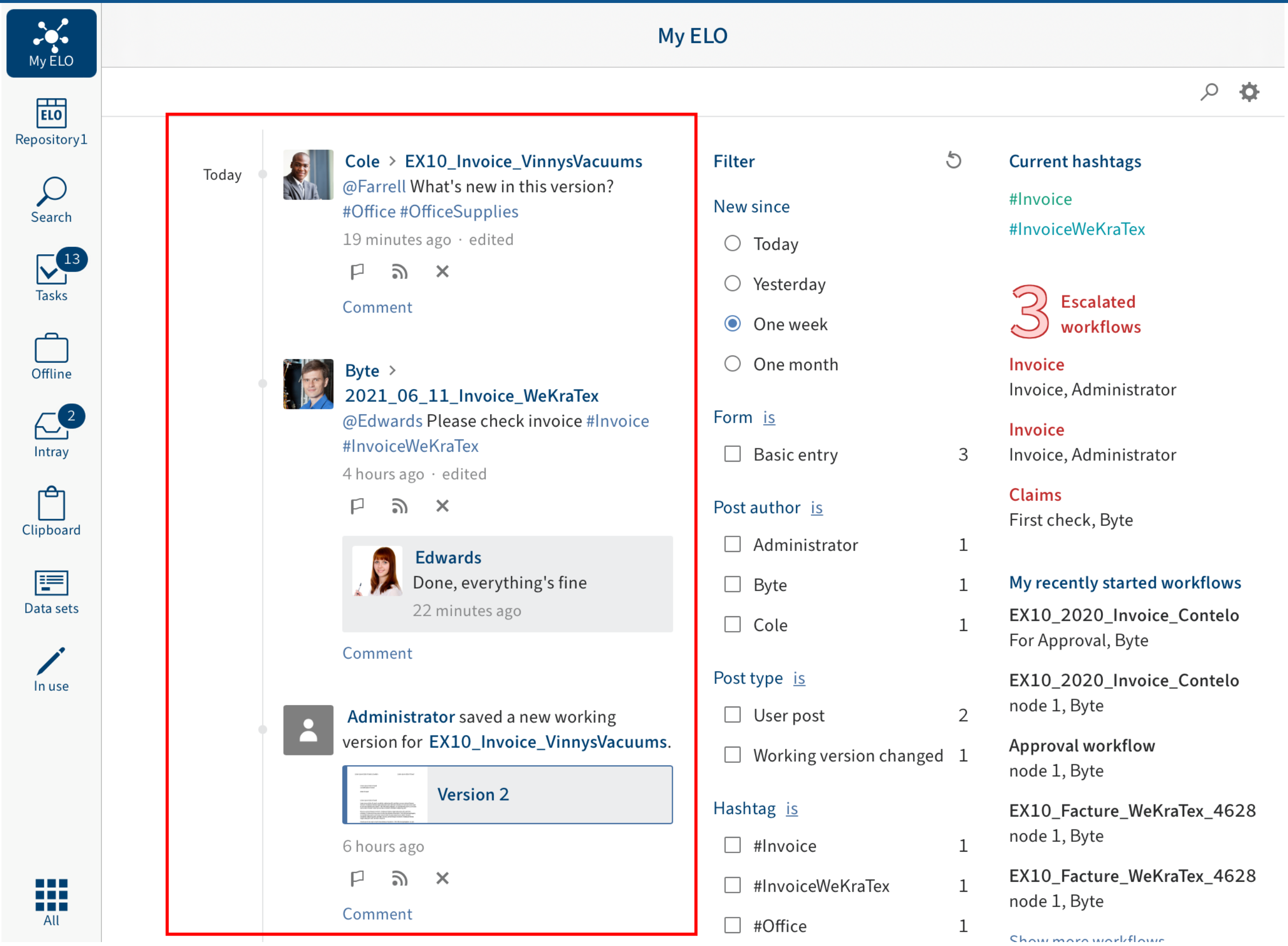
Subscribed hashtags: Here is a list of all the hashtags you have subscribed to. Tap a hashtag to view an overview of feed posts with the subscribed hashtag. Tap the antenna icon with the check mark to delete the subscription.

My polls

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

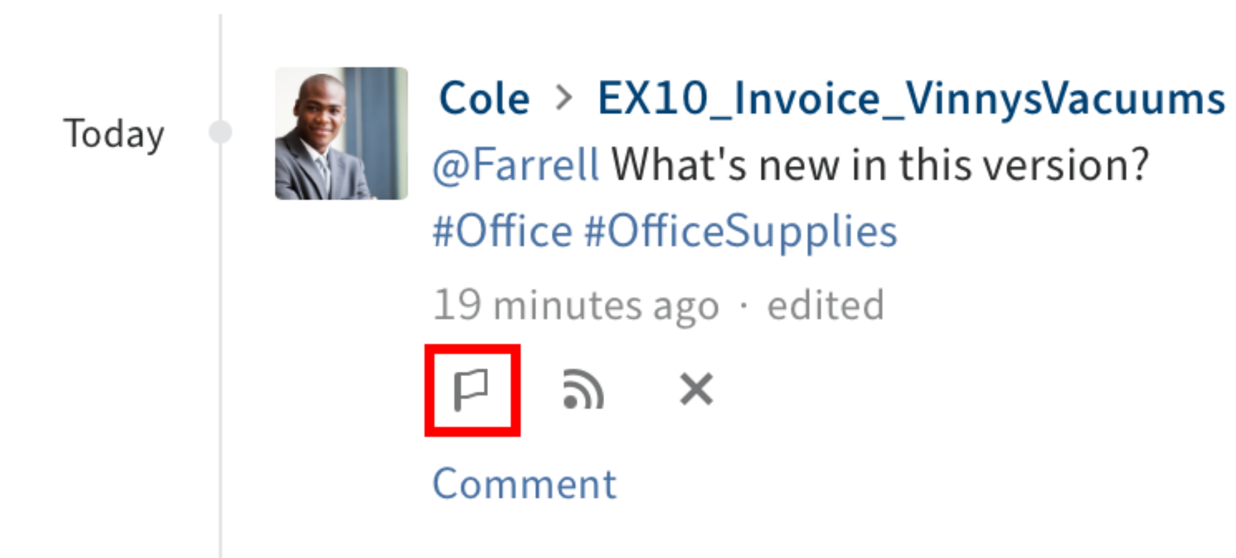
Feed

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.



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.

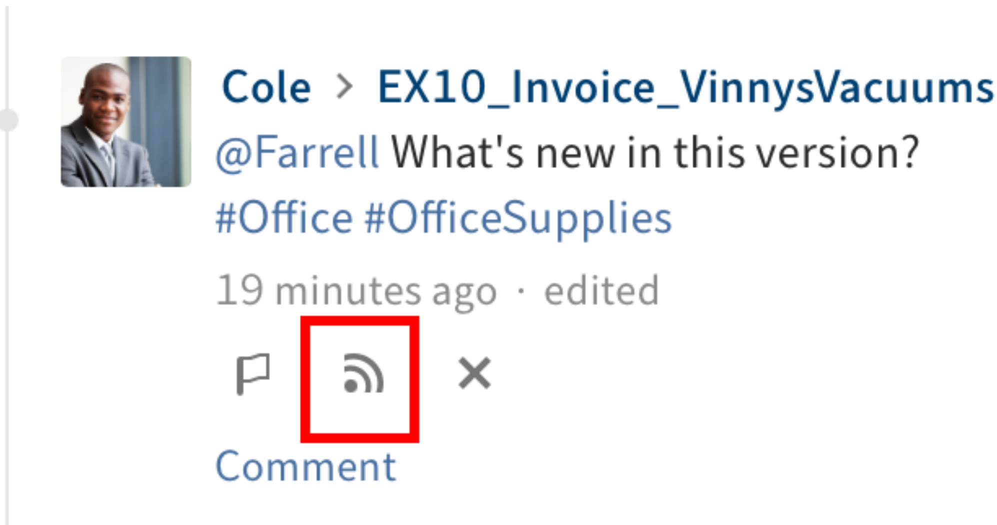
Remove marker

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.

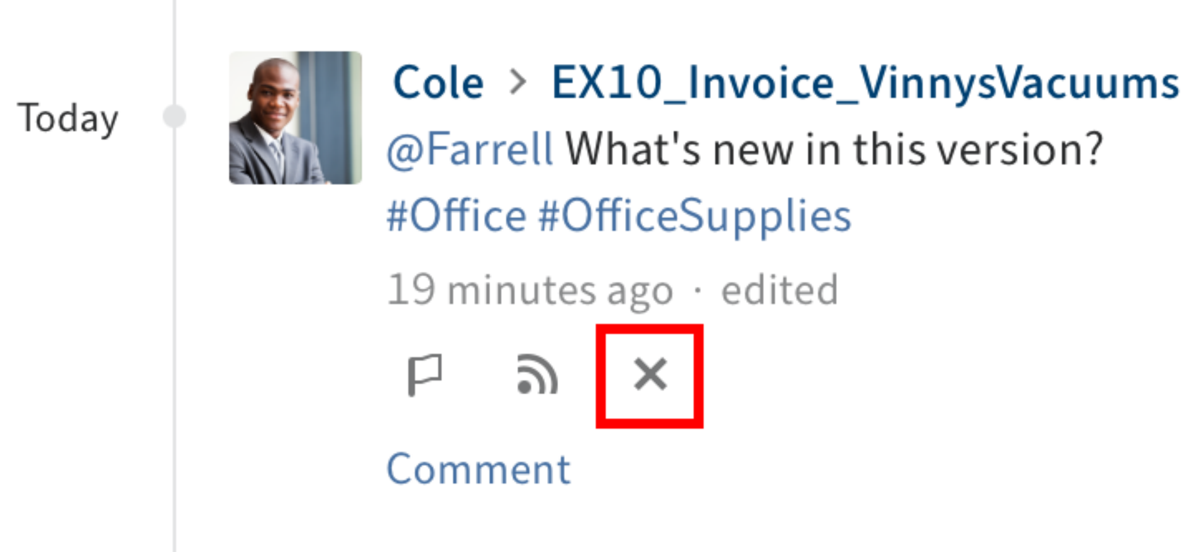
All subscribed feeds are listed in the *My ELO* work area. Once a new post is added to a subscribed feed, you see the new post in your *My ELO* work area.

Hide post

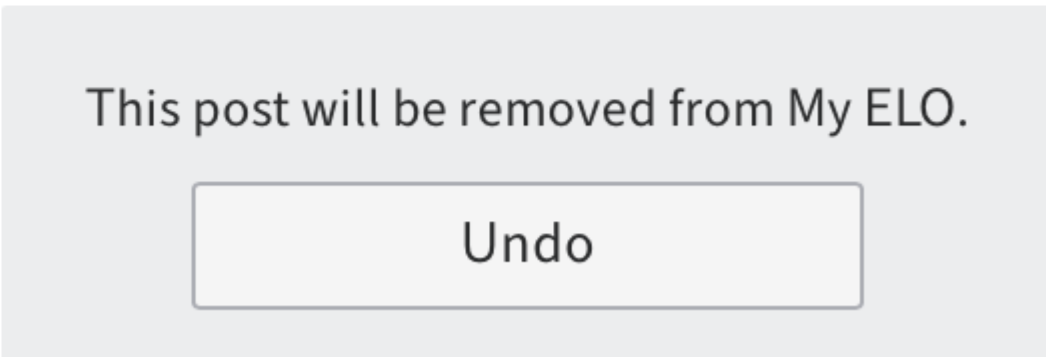
If you no longer want to see a post, you can hide it in the *My ELO* work area.

> **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

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

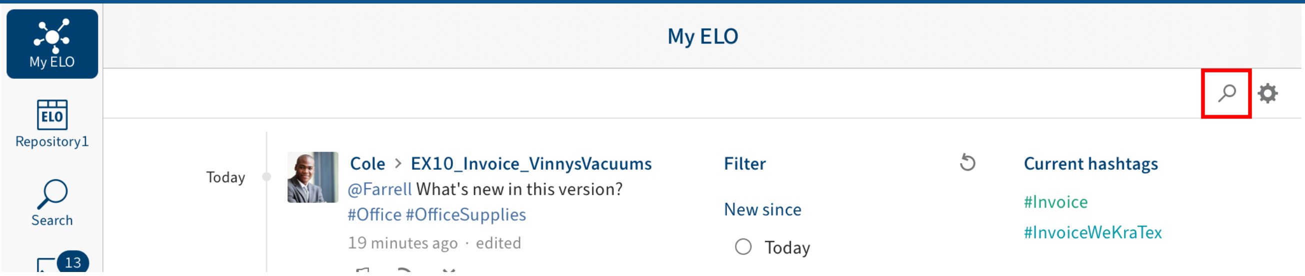
Information

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.

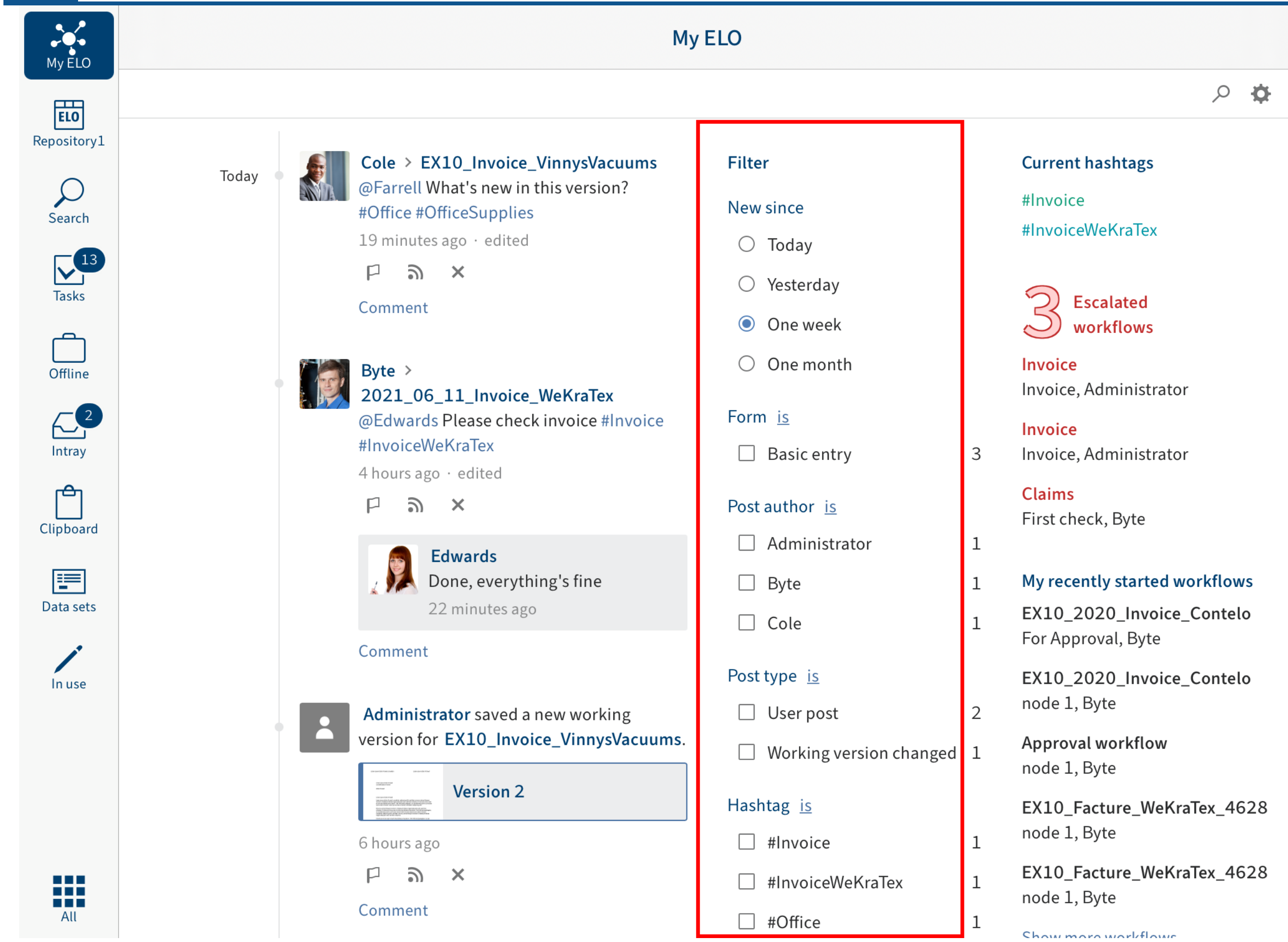
Result

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.



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 users 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 users (*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

With 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

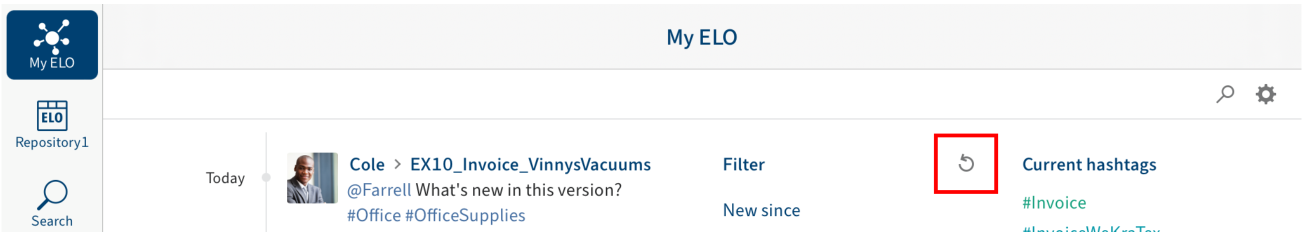
Method

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

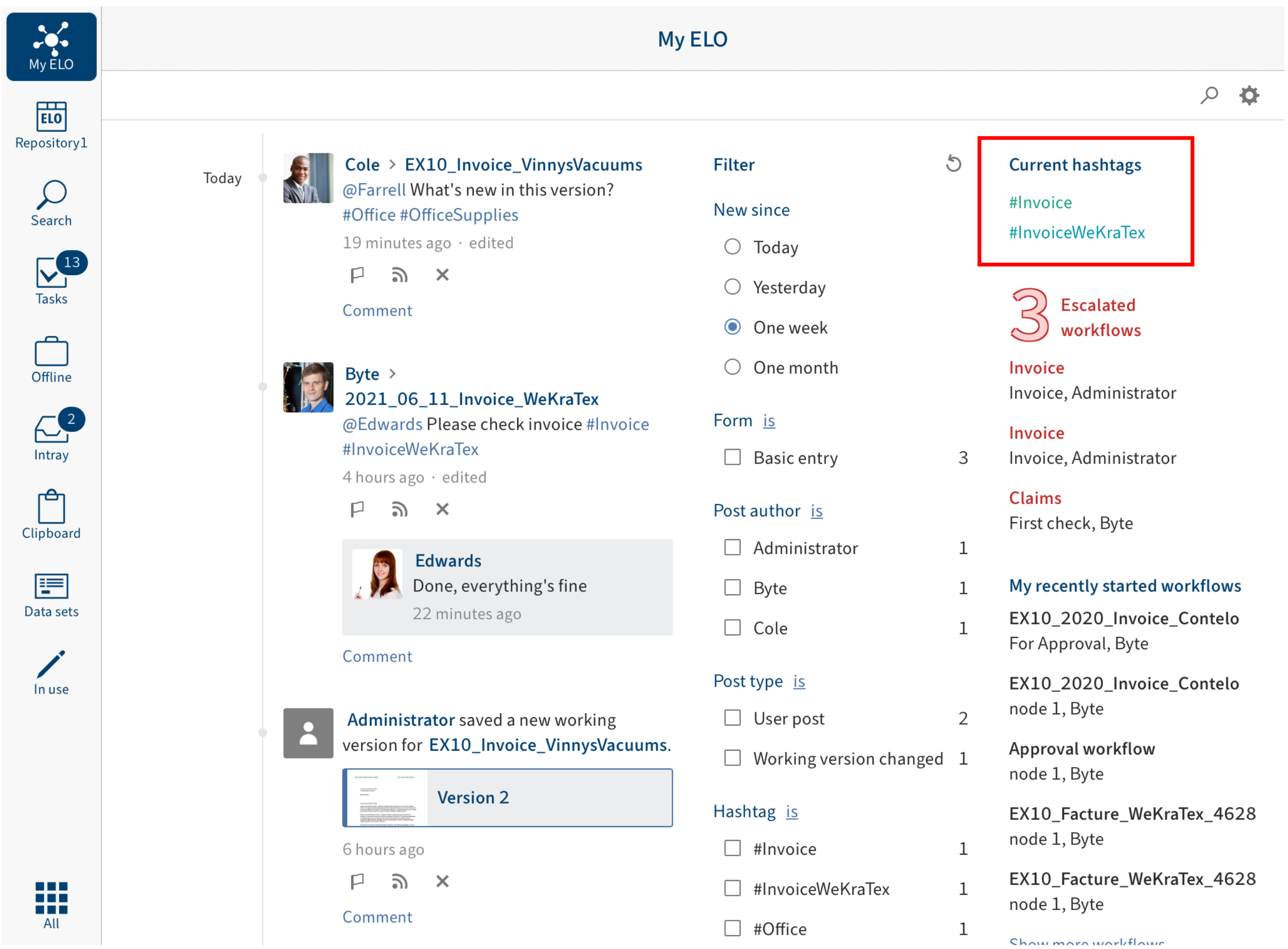
Result

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

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



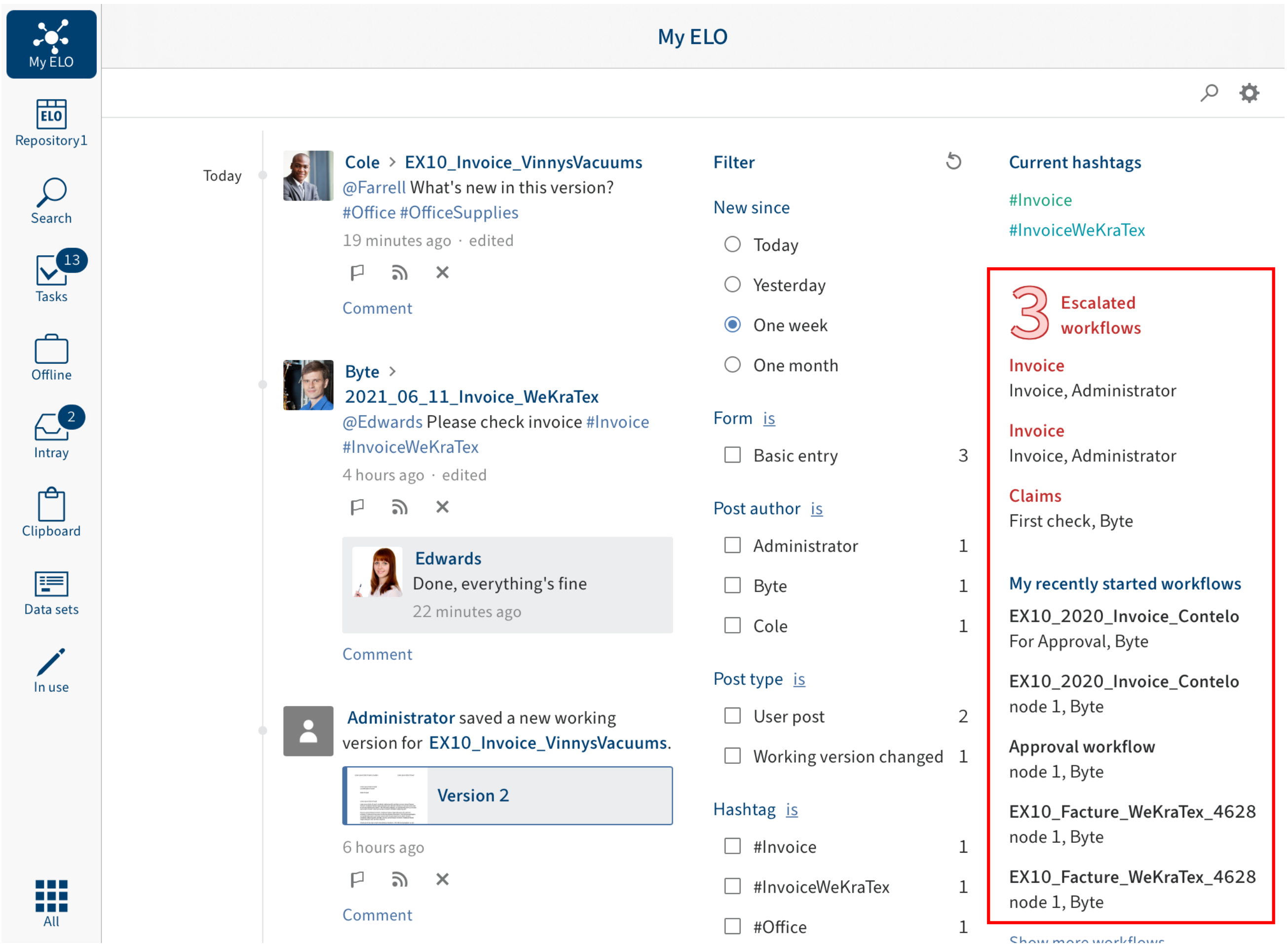
Hashtags



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



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.

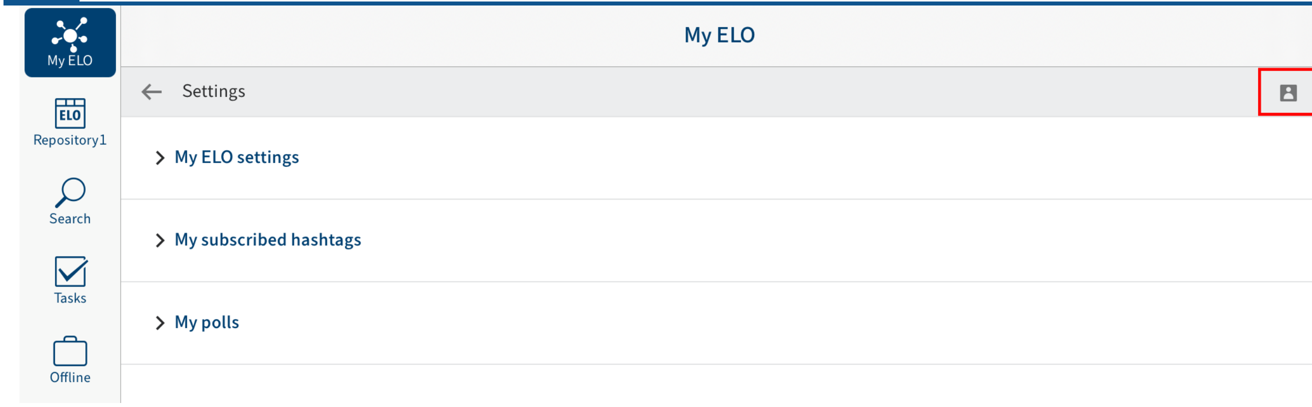
Tap a workflow to go to the entry in the repository.

Tapping an escalated workflow takes you straight to the *Tasks* work area.

Edit user profile

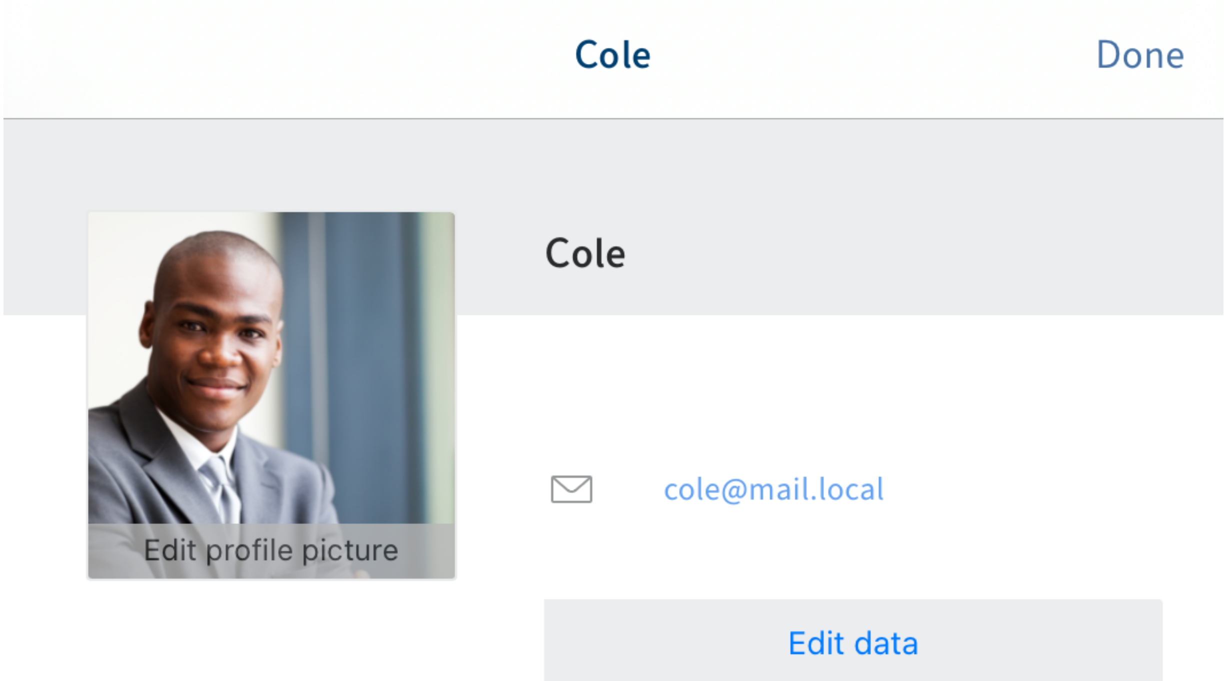
Feed posts are marked with the name and profile picture of the author. You can edit your profile.

Method



1. 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.



Your user profile opens.

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

   Editing mode is enabled.

3. Make the desired changes.

4. Tap *Save* to apply your changes.

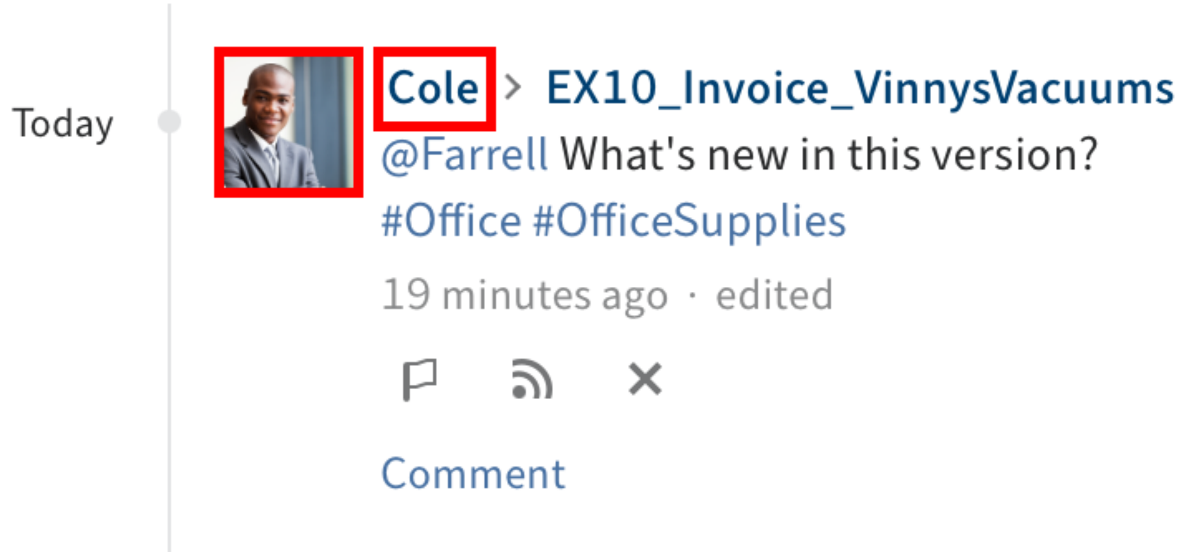
Result

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

View user profile

Feed posts are marked with the name and profile picture of the author. For more information on a user, you can view their profile.

Method



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

Result

The user profile opens.

Optional: To close the user profile, tap *Done*.

Administration

> **Information**
>
> This chapter is in progress. Additional content will follow.

Mobile device management (MDM)

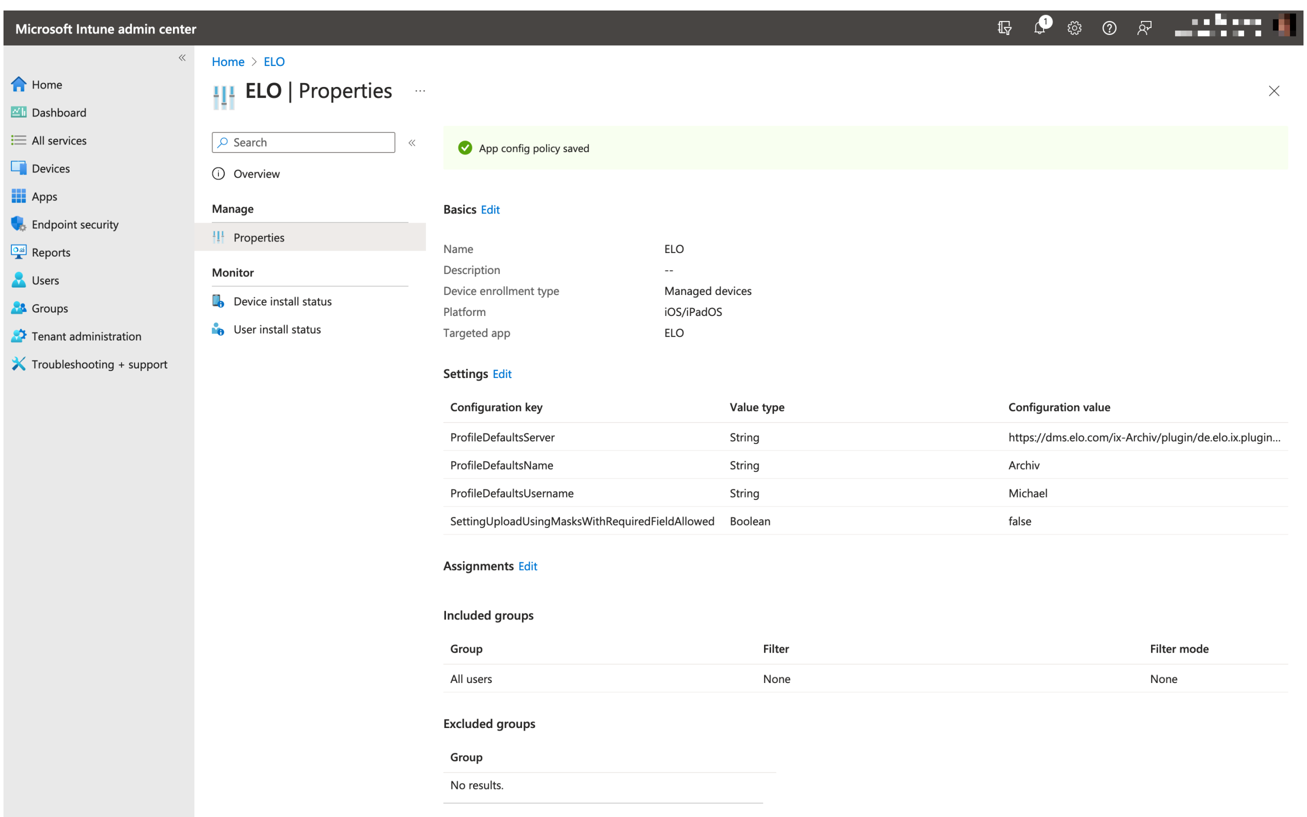
Configure profiles centrally

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

> **Please note**
>
> You should never add passwords or other sensitive data. Other apps may be able to access the information.

The entries vary depending on the provider.

Taking Microsoft Intune as an example:



Create a plist XML file with the following structure and replace the values `Server`, `Name`, `Username`, and `Password`:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0
<plist version="1.0">
<dict>
   <key>DefaultProfileServer</key>
   <string>https://efmd11.elo.com/web-Demo11/</string>
   <key>DefaultProfileName</key>
   <string>Seida Sen</string>
   <key>DefaultProfileUsername</key>
   <string>Seida Sen</string>
   <key>DefaultProfilePassword</key>
   <string>e</string>
</dict>
</plist>
```

You can make the settings with the mobile device management:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0
<plist version="1.0">
<dict>
   <key>SETTINGS_DELETE_SORD</key>
   <true/>
</dict>
</plist>
```

The following table lists general settings that you can define:

Setting	Type	Default	Description
ProfileDefaultsServer	String		Prefilled server URL if a new profile is cr
ProfileDefaultsName	String		Prefilled profile name if a new profile is
ProfileDefaultsUsername	String		Prefilled user name if a new profile is cr
ProfileDefaultsPassword	String		Prefilled password if a new profile is cre recommend setting this value as it is no own risk.
DefaultProfileServer	String		Server URL for the demo profile. This pr other profile exists (e.g. if all the profile user).
DefaultProfileName	String		Name of the demo profile
DefaultProfileUsername	String		User name of the demo profile

Setting	Type	Default	Description
DefaultProfilePassword	String		Demo profile password
SettingBrowseDocumentsEnabled	Boolean	true	Prevents the browser from opening if a
SettingTaskListIncludeGroup	Boolean	true	The group tasks are shown in the task l
SettingTaskListIncludeSubstitution	Boolean	true	The substitution tasks are shown in the
SettingTaskListIncludeEscalated	Boolean	true	Escalated tasks are shown in the task li
SettingDeleteSord	Boolean	true	The *Delete* function is available in the r
SettingSearchOptionShortName	Boolean	false	The *Short name* field is searched.
SettingSearchOptionFullText	Boolean	true	The *full text* is searched.
SettingSearchOptionIndexFields	Boolean	true	The fields are searched
SettingSearchOptionExtraText	Boolean	true	The *Extra text* is searched
SettingSearchOptionVersionComment	Boolean	false	The *version comments* are searched
SettingOfflineWwanDownload	Boolean	false	ELO connects via the cellular network if available
SettingSpotlightOfflineSearch	Boolean	true	Search of documents filed offline using search
SettingMenuArchiveWeight	Integer	10	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets this value to `0`. *0* means that
SettingMenuSearchWeight	Integer	20	Sorting the work areas. The lower the d the position on the work area toolbar. T work area `webclient.efmd.disable.reg` `true` sets this value to `0`.
SettingMenuTaskWeight	Integer	25	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets this value to `0`.
SettingMenuOfflineWeight	Integer	30	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets the value to `0`.
SettingMenuClipboardWeight	Integer	70	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `== true` sets this value to `0`.
SettingMenuPostboxWeight	Integer	60	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets this value to `0`.

Setting	Type	Default	Description
SettingMenuSettingsWeight	Integer	0	Sorting the work areas. The lower the d the position on the work area toolbar. T work area.
SettingMenuDatasetsWeight	Integer	80	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets this value to `0`.
SettingMenuDashboardWeight	Integer	1	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets this value to `0`.
SettingMenuInUseWeight	Integer	90	Sorting the work areas. The lower the d the position on the work area toolbar. T work area.
SettingMenuQrcodeWeight	Integer	0	Sorting the work areas. The lower the d the position on the work area toolbar. T work area. `webclient.efmd.disable.reg` `true` sets this value to `0`.
SettingTileArchiveWeight	Integer	10	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.
SettingTileSearchWeight	Integer	20	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.
SettingTileTaskWeight	Integer	25	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` value to `0`.
SettingTileOfflineWeight	Integer	30	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.
SettingTileClipboardWeight	Integer	65	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` sets this value to `0`.
SettingTilePostboxWeight	Integer	60	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.

Setting	Type	Default	Description
SettingTileSettingsWeight	Integer	80	Sorting the tiles. The lower the default position in the tile area. The value `0` hid
SettingTileDatasetsWeight	Integer	70	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.
SettingTileDashboardWeight	Integer	0	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.
SettingTileQrcodeWeight	Integer	75	Sorting the tiles. The lower the default position in the tile area. The value `0` hid `webclient.efmd.disable.region.REGION` this value to `0`.
SettingTileInUseWeight	Integer	72	Sorting the tiles. The lower the default position in the tile area. The value `0` hid
SettingFunctionVisibleAcceptWorkflow	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_ACCEP` sets the value to `0`.
SettingFunctionVisibleAddStructure	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_ADD_S` the value to `0`.
SettingFunctionVisibleAddFavorite	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_ADD_F` the value to `0`.
SettingFunctionVisibleAddToClipboard	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_ADD_T` sets the value to `0`.
SettingFunctionVisibleCheckin	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleCreateNote	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_CREAT` the value to `0`.
SettingFunctionVisibleDelegateWorkflow	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_DELEG` sets the value to `0`.
SettingFunctionVisibleDeleteReminder	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleDataSetDownloadForms	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleDataUpload	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleDataSetAdd	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleEditAction	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_EDIT_`

Setting	Type	Default	Description
SettingFunctionVisibleEditNote	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_EDIT_
SettingFunctionVisibleEditWorkflow	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleExecuteAction	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_EXECU
SettingFunctionVisibleForwardTask	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_CONFI
SettingFunctionVisibleFileDocument	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleGoto	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_GOTO
SettingFunctionVisibleGotoTask	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleHandoffTask	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleInsertDocument	Boolean	true	Display the function in the menu (3 dot
SettingFunctionMarkAsUnseen	Boolean	true	Display the function in the menu (3 dot as unread.
SettingFunctionVisibleNewDocument	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.NEW_DOCUM
SettingFunctionVisibleNewSearch	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.NEW_SEARC
SettingFunctionVisibleNewVersion	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.NEW_VERSI
SettingFunctionVisibleOffline	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.TO_OFFLIN
SettingFunctionVisibleOpenDocument	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_OPEN_
SettingFunctionVisibleOpenImagePreview	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_OPEN_
SettingFunctionVisibleOpenIn	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleRefresh	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_REFRI
SettingFunctionVisibleRefreshOffline	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.fct_REFRI
SettingFunctionVisibleRefreshSearch	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_REFRI
SettingFunctionVisibleRemove	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_REMOV
SettingFunctionVisibleRemoveAction	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_ACTIO
SettingFunctionVisibleRemoveFavorite	Boolean	true	Display of the function in the menu (3 c webclient.efmd.disable.fct.FCT_REMOV

Setting	Type	Default	Description
SettingFunctionVisibleRemoveFromClipboard	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_REMOV`
SettingFunctionVisibleRemoveFromOffline	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_REMOV`
SettingFunctionVisibleRemoveSearch	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_REMOV`
SettingFunctionVisibleQrcode	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleSendAsEcd	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_SEND_`
SettingFunctionVisibleSendDocument	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_SEND_`
SettingFunctionVisibleShare	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_SHARI`
SettingFunctionVisibleShowForm	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_SHOW_`
SettingFunctionVisibleShowIndexForm	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_SHOW_`
SettingFunctionVisibleShowMetadata	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_SHOW_`
SettingFunctionVisibleStartWorkflow	Boolean	true	Display of the function in the menu (3 d `webclient.efmd.disable.fct.FCT_START`
SettingFunctionVisibleStartAdHocWorkflow	Boolean	true	Display the function in the menu (3 dot
SettingFunctionVisibleTransferDocument	Boolean	true	Display the function in the menu (3 dot
SettingKeywordOnFiling	String	"configure"	*Enter metadata on filing*: The values `"c` *metadata forms with form*), `"none"` (*Do* `"always"` (*Always use the form*) allow y options for entering the metadata wher
SettingSordFetchLimit	Integer	100	Configuration of the number of SORDs t reported.
SettingDisplayMode	String	"default"	Configures the display of the app. Possi `"default"`, `"large"`, and `"full"`. Only fo
SettingUploadUsingMasksWithRequiredFieldAllowed	Boolean	false	If it was set to true, the metadata forms contain the mandatory fields can be us documents.

Create profile automatically (identity provider)

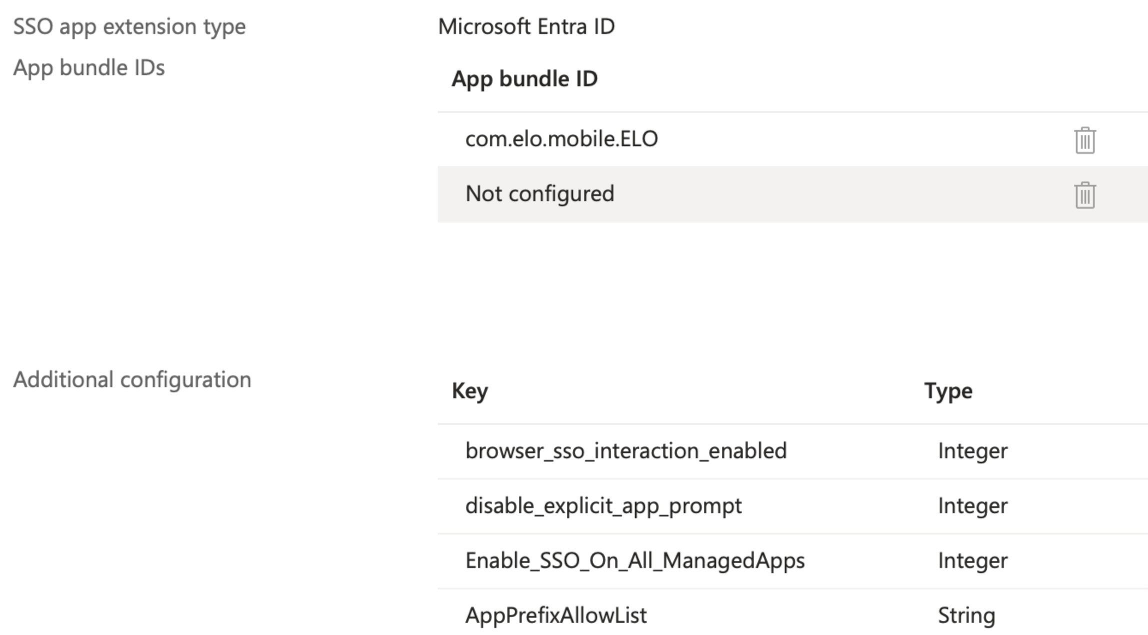
The following table lists the settings that you can use to create a profile automatically:

Setting	Type	Default	Description
Profile ID	String		ID of the profile. It can be used to update an existing profile (required).
Profile type	String		Type of profile. Valid values: `"eloAuth"`, `"msal"` (required).
ProfileName	String		Name of the profile (required).
ProfileServer	String		Server URL. It must be an HTTPS URL (required).
ProfileConfigId	String		ClientId that was specified for the ELO server in the ELOauth config (required for *eloAuth* and *msal* types).
ProfileClientId	String		"Application ID" that was entered for the enterprise application in the Azure Portal (required for the *msal* type).
ProfileTenantID	String		Must be set if users are in several organizations. The tenant ID ensures that the user is only logged on to the correct organization.

Enterprise SSO (Intune)

Configure Enterprise SSO in Microsoft Intune. If Enterprise SSO was configured in Microsoft Intune, authentication is carried out automatically for web views.

Configure Enterprise SSO in Microsoft Intune under *Configuration settings > Single sign-on app extensions*.



The following values must be entered:

Area	Value
App bundle IDs	`com.elo.mobile.ELO`
Additional configuration	You must add `com.elo.` in the *Value* column under *AppPrefixAllowList*.

For more information about configuration in Microsoft Intune, refer to the Deploy the Microsoft Enterprise SSO plug-in for Apple Devices documentation.

Azure Application Proxy

> **Information**
>
> We recommend that you do not use the Azure Application Proxy.

For more information about the app proxy, please refer to the Azure Application Proxy documentation.

You normally create the MSAL account via MDM. It is also possible manually in the app. This requires briefly shaking the device. You need to be in the *New profile* area in the configuration. After shaking, the hidden menu item for creating the MSAL account appears.

Requirements

- Configure Enterprise SSO with mobile device management
- Microsoft Authenticator app
- ELO Web Client: Latest version 23.0

Take the following into account when setting up the app proxy for the iOS app:

- You need a URL with a valid SSL certificate.
- The *Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)* radio button must be enabled under *Azure App Registration > Authentication*.
- The area under *Azure App Registration > Authentication > iOS/macOS* is required for MSAL.
- You can create a group that includes all the users who can authenticate themselves with MSAL under *Azure App Registration > Users and groups*.
- Take the following into account under *Properties*:
  - The *application ID* is the client ID when creating a new profile (MSAL proxy).
  - The *config ID* (in the app) is the ID you configure in ELOauth under `"azureadproxy"`.

  For more information on the *config ID*, refer to the *Manual configuration* chapter of the ELOauth plug-in documentation.

MSAL configuration

Requirements

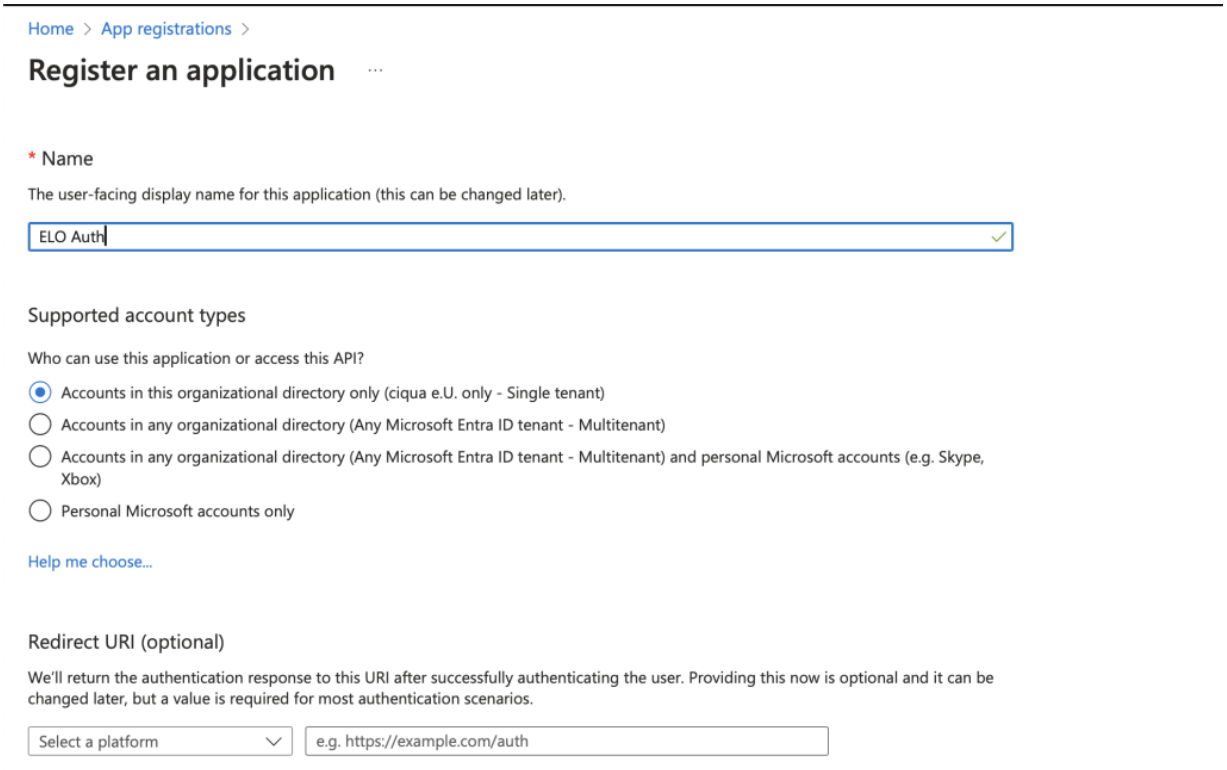
- ELO server version 20 or higher
- ELOauth: The ELOauth plug-in must exist in `prog/webapps/ix-plugins`
- ELO server URL in this example: `elo.example.com`
- ELO repository path: `ix-Repository`

ELOauth with Entra ID (Azure Active Directory)

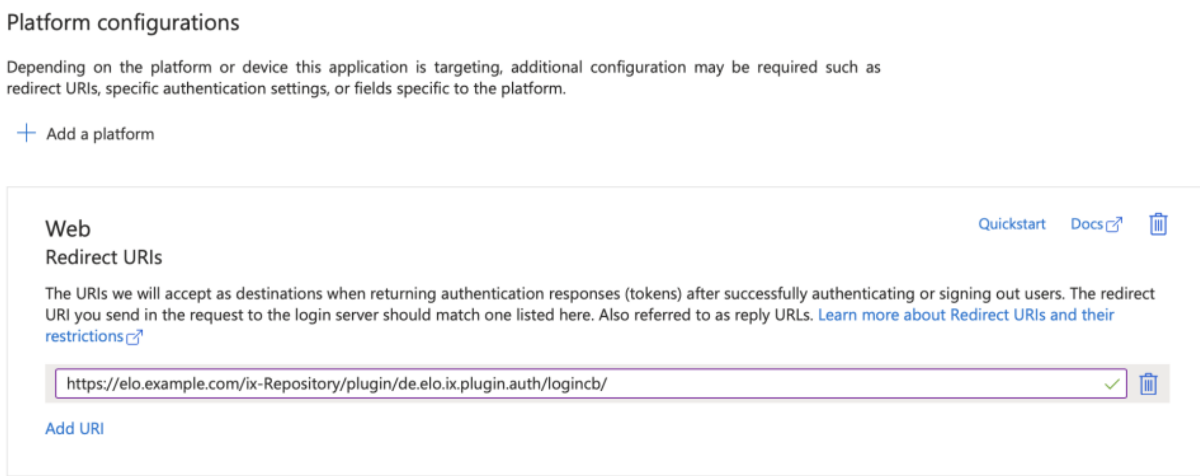
Register app in Azure

Method

1. Open `https://portal.azure.com`.

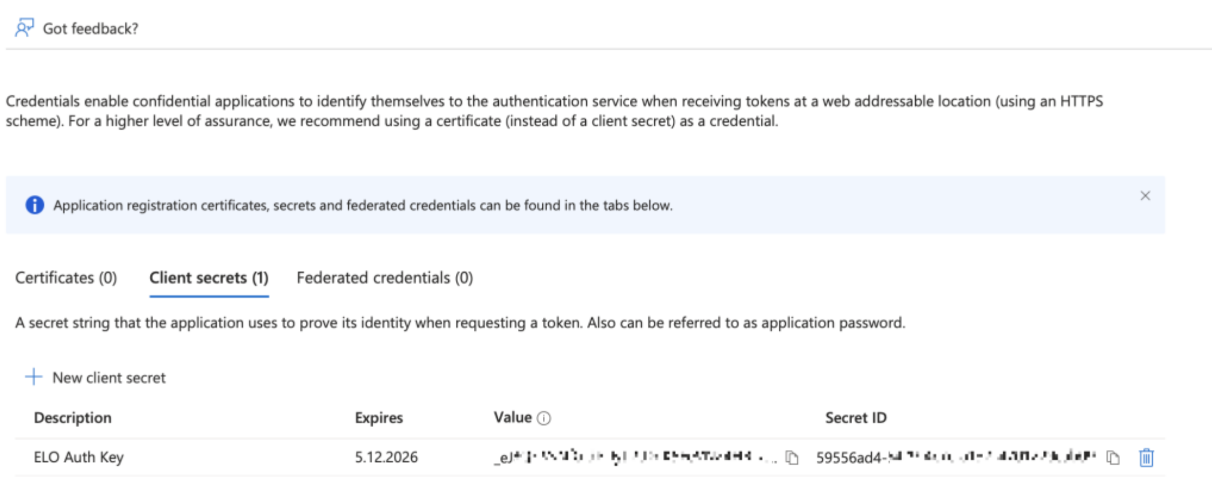


2. Enter a name for the app.
3. Navigate to the *Manage > Authentication* area.
4. Select *Add a platform*.
5. Enter the redirect URL. In this example: `https://elo.example.com/ix-Repository/plugin/de.elo.ix.plugin.auth/logincb/`



1. Navigate to the *Certificates & secrets* area.

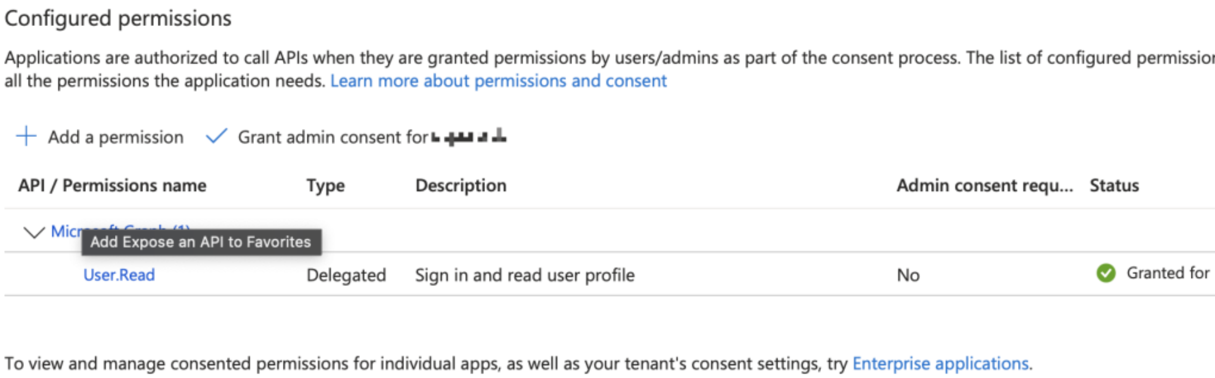
2. Select *Add new Client Secret*.



3. Save the content of the `value` column. You will need this value later to configure ELOauth.

4. Open the *API Permissions* area.

5. Under *Configured Permissions*, configure *Grand admin consent for* as shown in the following screenshot.



6. Create the ELOauth configuration `de.elo.ix.plugin.auth.json` in `Server\config\ix-Repository\ELO-EXAMPLE-1`. The content should have the following structure:

```
   {
"azuread":
    {
    "mapping":"mail",
    "api":"azure",
    "appKey": "51162350-...",
    "azureTenant": "0bbc3a84-...",
    "appSecret": "...",
    "fixedCallbackUrl": "https://elo.example.com"
    }
}
```

   The list shows what the individual values stand for:

   - `appKey`: Application (client) ID
   - `azureTenant`: Directory (tenant) ID
   - `appsecret`: The value of the column `value`from step 8 (*Certificates & secrets* area)

7. Restart the ELO server to apply the configuration.

Test ELOauth in the browser

`https://elo.example.com/ix-Repository/plugin/de.elo.ix.plugin.auth/login/?clientUrl=https://elo.example.com/ix-Repository&configId=azuread`

Test in the ELO app

1. Open *Configuration > Add profile > Identity provider (via ELOauth)*.
2. Complete the *Name* field. You can use any name.
3. In the *Server URL* field, enter the URL to the ELO server, e.g. `https://elo.example.com/ix-Repository`.

The repository path is enough, you don't have to enter the complete web path.

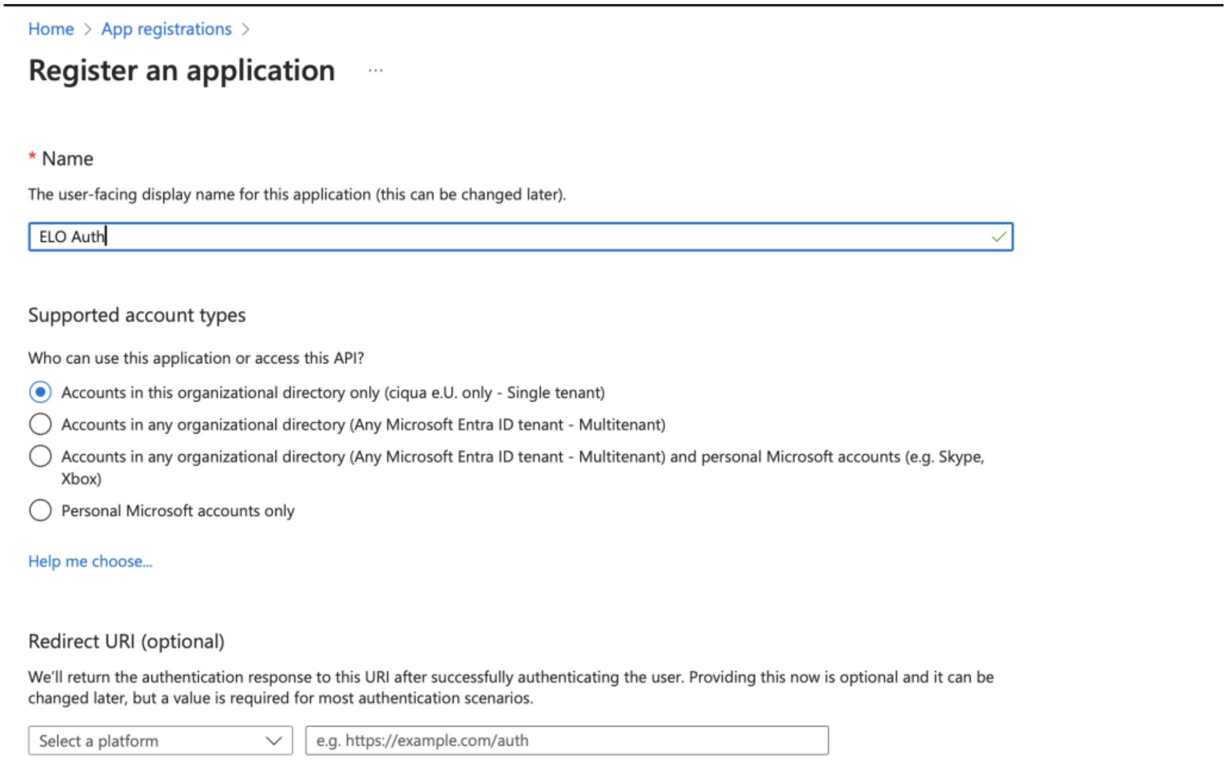
4. Enter the config ID.

   You entered the config ID previously in the ELOauth configuration file `de.elo.ix.plugin.auth.json`, e.g. under `azuread`.

MSAL

Register app in Azure

1. Open `https://portal.azure.com`.



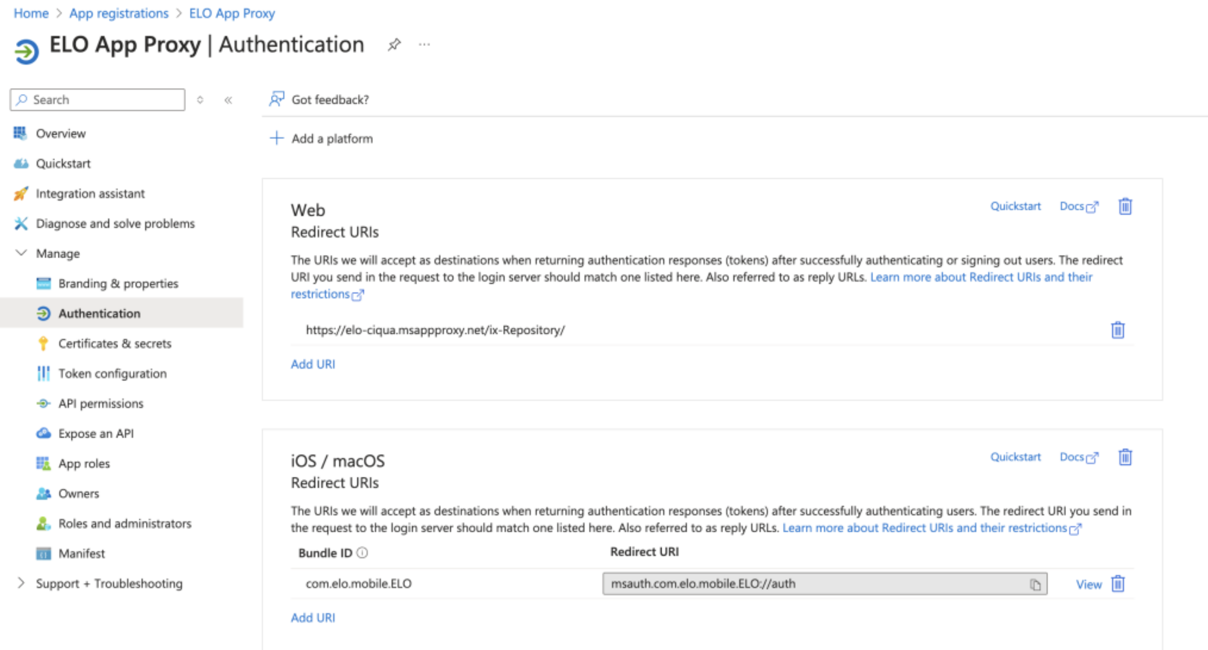
2. Enter a name for the app.

3. Navigate to the *Manage > Authentication* area.

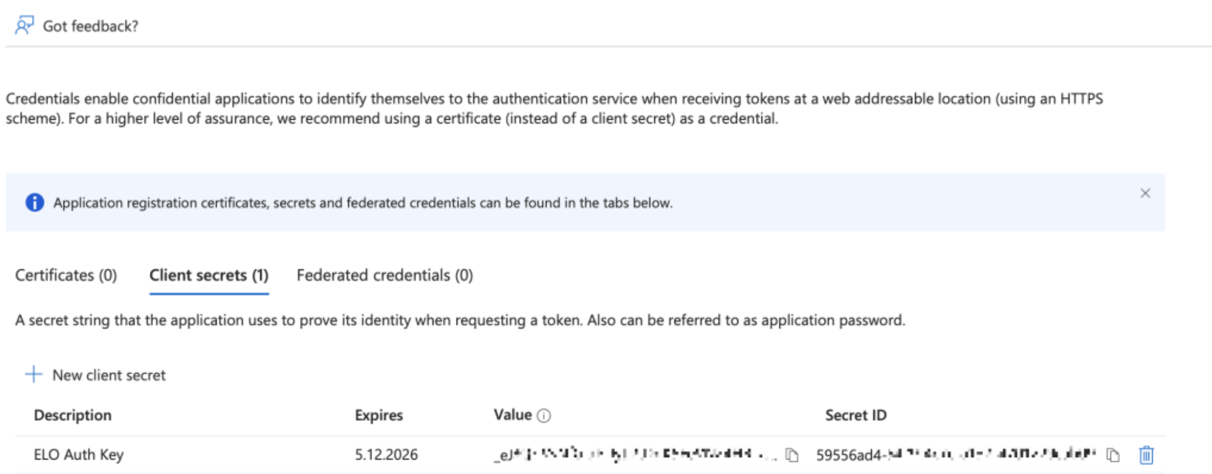
4. Select *Add a platform*.

5. Enter the redirect URL. In this example: `https://elo-example.msappproxy.net/ix-Repository/`

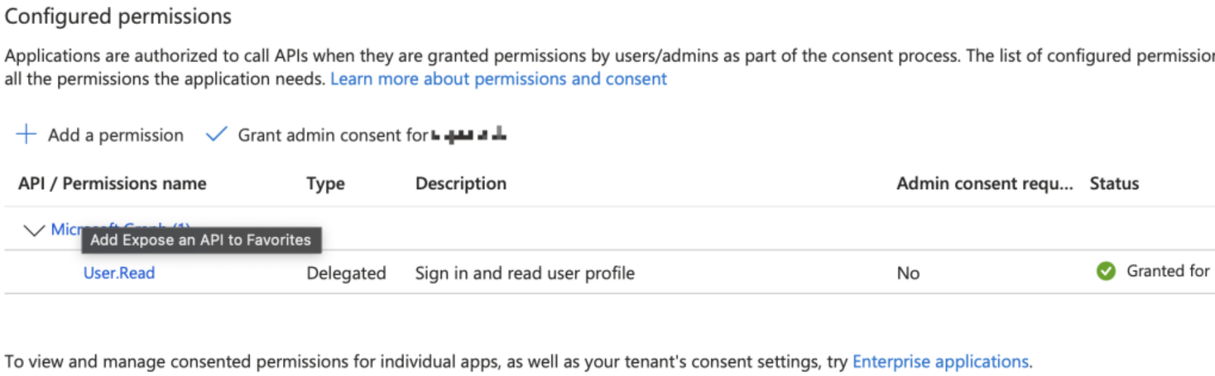
6. Select *Add a platform > iOS/macOS*.



7. Complete the following fields:
   - BundleId: `com.elo.mobile.ELO`
   - RedirectURI: `msauth:com.elo.mobile.ELO://auth`
8. Navigate to the *Certificates & secrets* area.
9. Select *Add new Client Secret*.

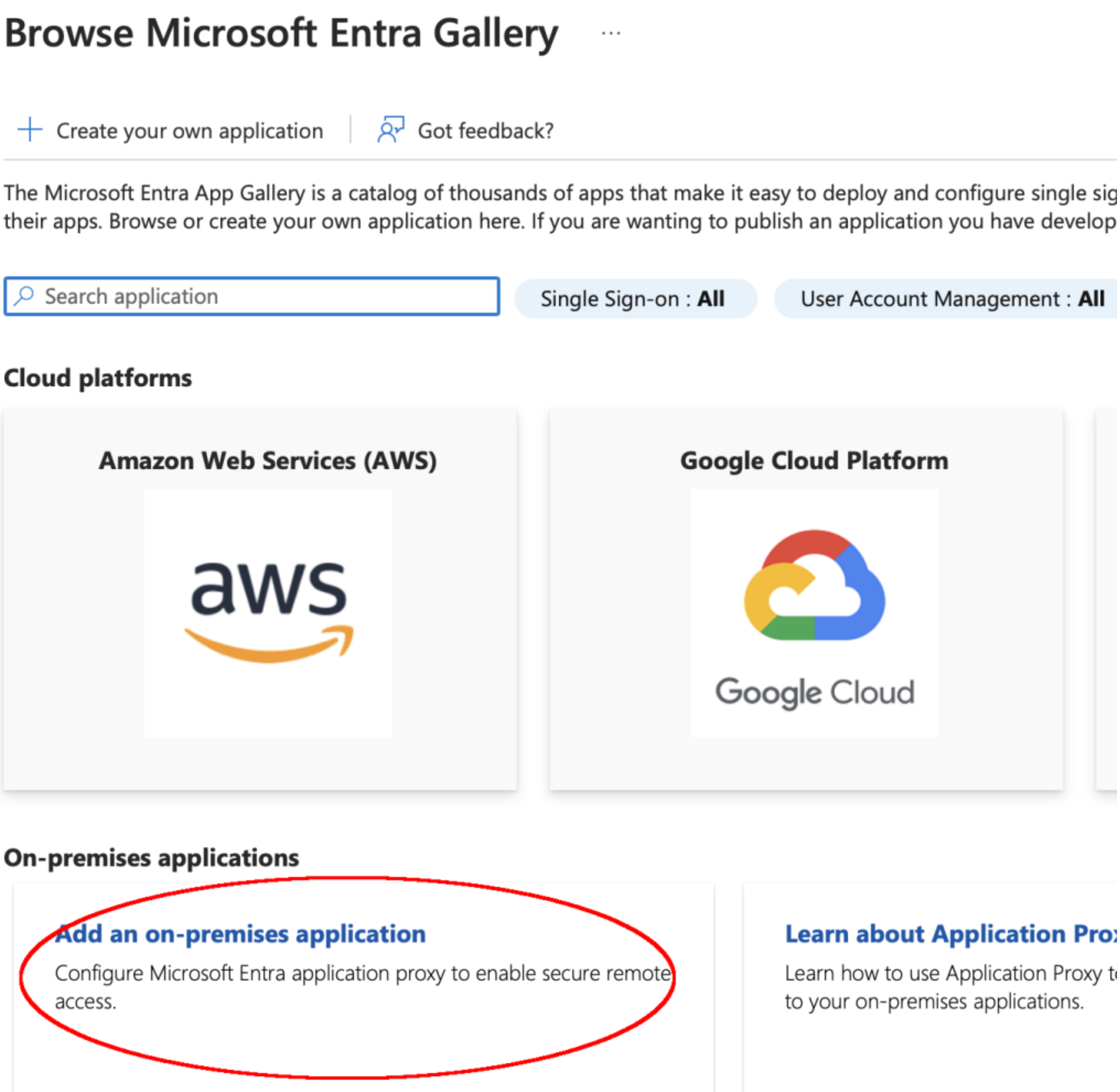


10. Save the content of the `value` column. You will need this value later to configure ELOauth.
11. Open the *API Permissions* area.
12. Under *Configured Permissions*, configure *Grand admin consent for* as shown in the following screenshot.

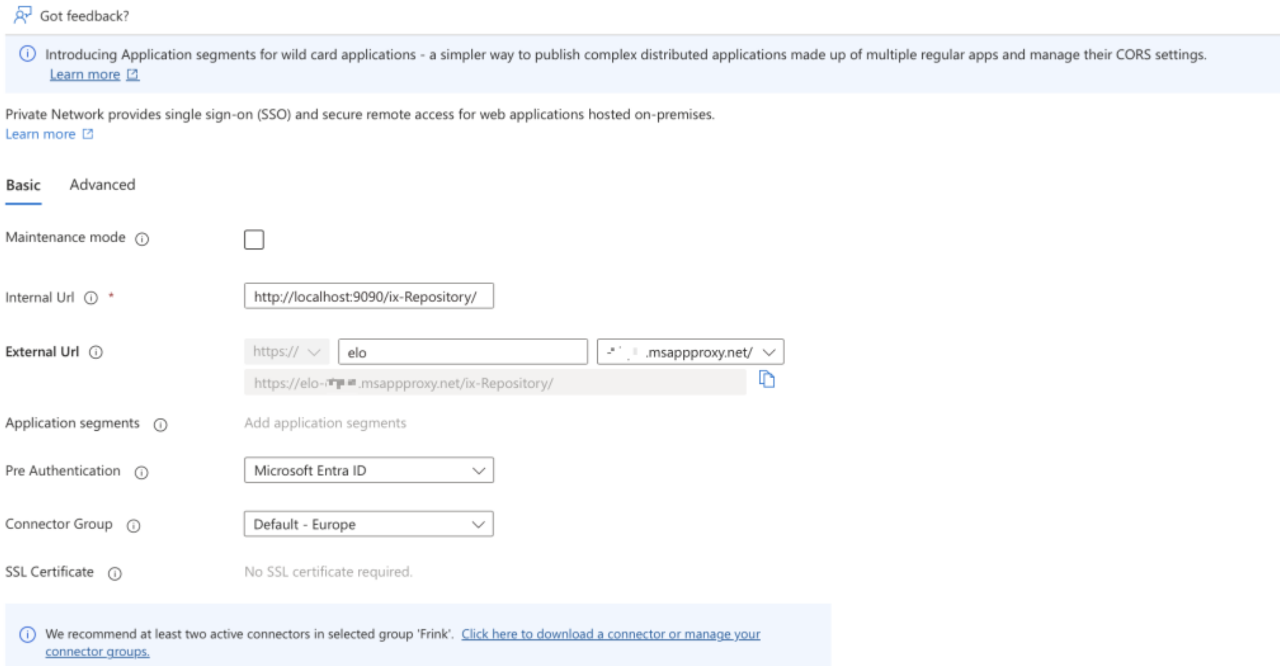

Configured permissions
Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissio
all the permissions the application needs. Learn more about permissions and consent
Add a permission
Grant admin consent for [redacted]
API / Permissions name
Type
Description
Admin consent requ...
Status
Add Expose an API to Favorites
User.Read
Delegated
Sign in and read user profile
No
Granted for
To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try Enterprise applications.

Configure connectors in the Azure Portal

'Enterprise applications' > '+ New Application' > 'Add an on-premises application'



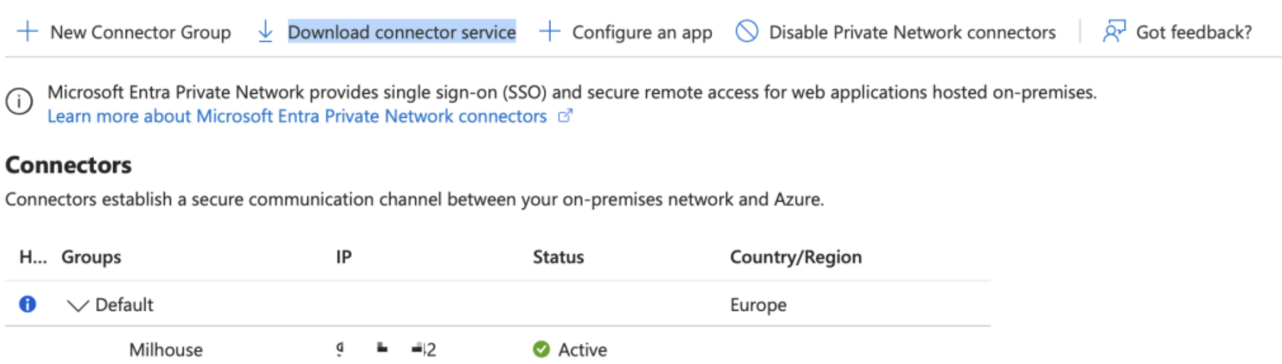
The internal URL is `http://localhost:9090/ix-Repository/` if the connector is running on the same computer as the ELO server. Otherwise, it has to be adjusted accordingly.



'App Proxy' > 'Download connector service'

1. Download the connector.
2. Install the connector on the computer with the ELO server. During installation, you will be prompted to enter the Azure account.

After installation, the connector is shown in the App Proxy:



Configure ELOauth

1. Open the configuration file `de.elo.ix.plugin.auth.json`.

2. Enter the values from the area *App registration > ELO App Proxy*:

    ◦

Application (client) ID in `appKey`
  - Directory (tenant) ID in `azureTenant`

3. Open the Azure Portal.

4. Navigate to the *Certificates & secrets* area.

5. Create a new secret.

6. Insert the content from the `value` column under `appSecret` in the configuration file.

```
{
"AppProxy":
    {
    "mapping":"mail",
    "api":"azure",
    "appKey": "533772b0-...",
    "azureTenant": "0bbc3a84-...",
    "appSecret": "3D...",
    "fixedCallbackUrl": "https://elo-example.msappproxy.net/ix-Repository"
    }
}
```

1. Restart the ELO server to apply the configuration.

Configure rights

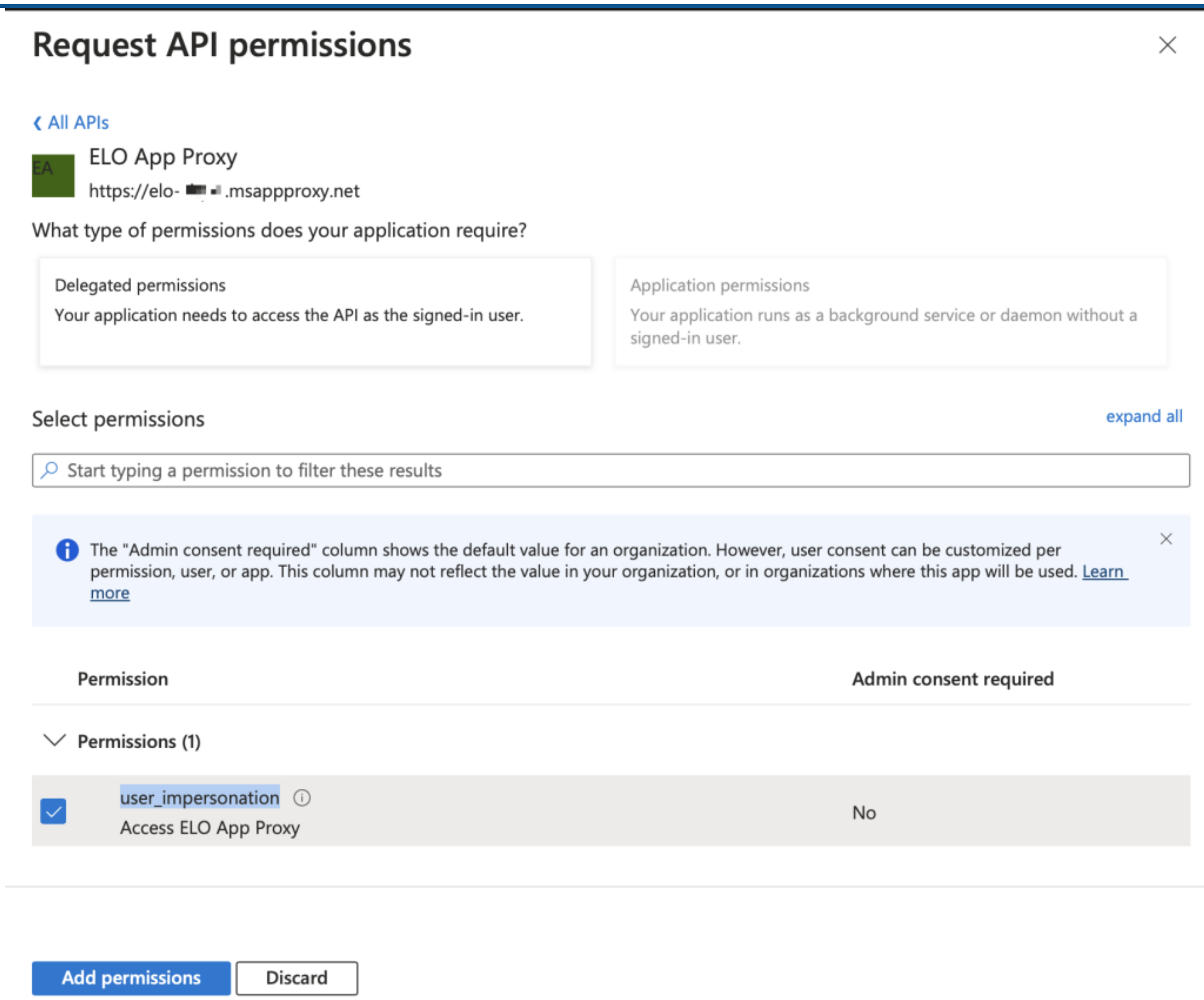
1. In the Azure Portal, navigate to *App registrations > ELO App Proxy*.

2. Under *API permissions*, select *+ Add Permission > APIs my organization uses*.

3. Enter the name of the registered app, e.g. *ELO App Proxy* and select it from the list.

4. Check the *user_impersonation* box.

5. Select *Add Permission*.



6. Select *user_impersonation* in the list.

7. Select *Grant admin consent for ...*.

Configure API

1. In the Azure Portal, navigate to *App registrations > ELO App Proxy*.
2. Select *Expose an API*.
3. Under "Application ID URI:", select the *Edit* button.
4. For the URL, enter the repository path, e.g. `https://elo-example.msappproxy.net/ix-Repository`.

Test in the browser

For the URL, enter the repository path, e.g. `https://elo-example.msappproxy.net/ix-Repository/ix?__cmd__=status`

Test in the ELO app

1.

Open *Configuration > Add profile> (Carefully) shake your device > MSAL Identity Provider (per ELOauth)*.

2. Complete the *Name* field. You can use any name.

3. In the *Server URL* field, enter the URL to the ELO server that you configured in *App registrations > ELO App Proxy*, including the repository path. For example, `https://elo-example.msappproxy.net/ix-Repository`.

   The repository path is enough, you don't have to enter the complete web path.

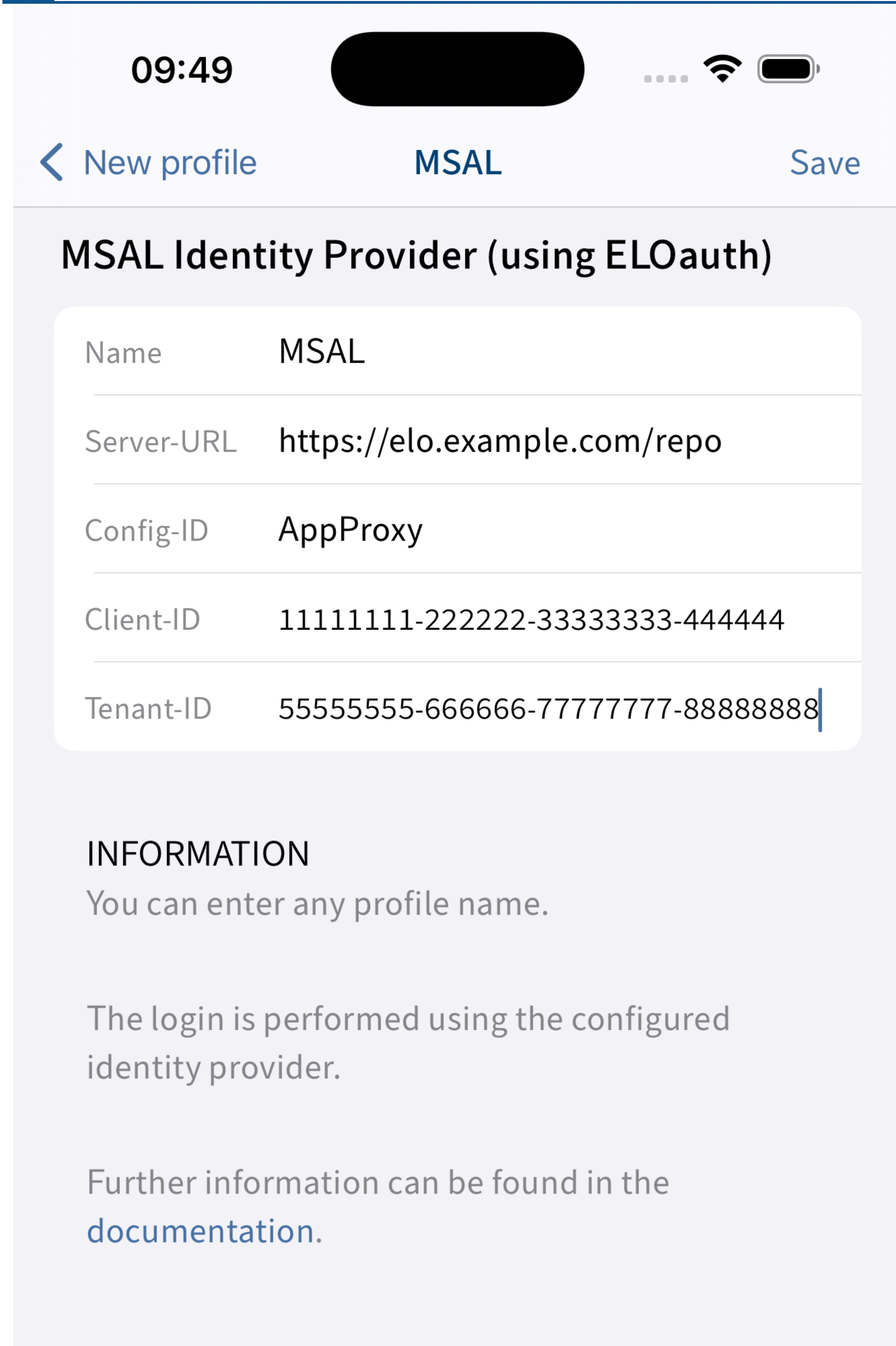
4. Enter the config ID.

   You entered the config ID previously in the ELOauth configuration file `de.elo.ix.plugin.auth.json`, e.g. under `AppProxy`.

5. Enter the *Client ID*. This is the `Application (client) ID` from *App registrations > ELO App Proxy*.

6. Enter the *Tenant ID*. This is the `Tenant (client) ID` from *App registrations > ELO App Proxy*.

   You will need it if multiple tenants are configured. Set it to avoid errors.


09:49
New profile
MSAL
Save
MSAL Identity Provider (using ELOauth)
Name
MSAL
Server-URL
https://elo.example.com/repo
Config-ID
AppProxy
Client-ID
11111111-222222-33333333-444444
Tenant-ID
55555555-666666-77777777-88888888
INFORMATION
You can enter any profile name.
The login is performed using the configured identity provider.
Further information can be found in the documentation.

MDM

Deploy ELO app in Intune

1. Open Microsoft Intune.
2. Navigate to *Apps > iOS/iPadOS > + Add*.
3. Select *iOS store App > Select*.
4. Open *Search the App Store*.
5. Enter *ELO Digital Office*.
6. Select the ELO app.
7. Select *Next*.
8. Under *Assignments*, assign the app to users/groups that the app will be rolled out for. You can change this later as well.
9. Select *Next*.
10. Select *Create*.

You have to do the same thing for the Microsoft Authenticator app as well. This app is required for Enterprise SSO among other things.

Automatic creation of MDM profile with Intune

1. In Microsoft Intune, navigate to *App > App configuration policies > + Create > Device Managed*.

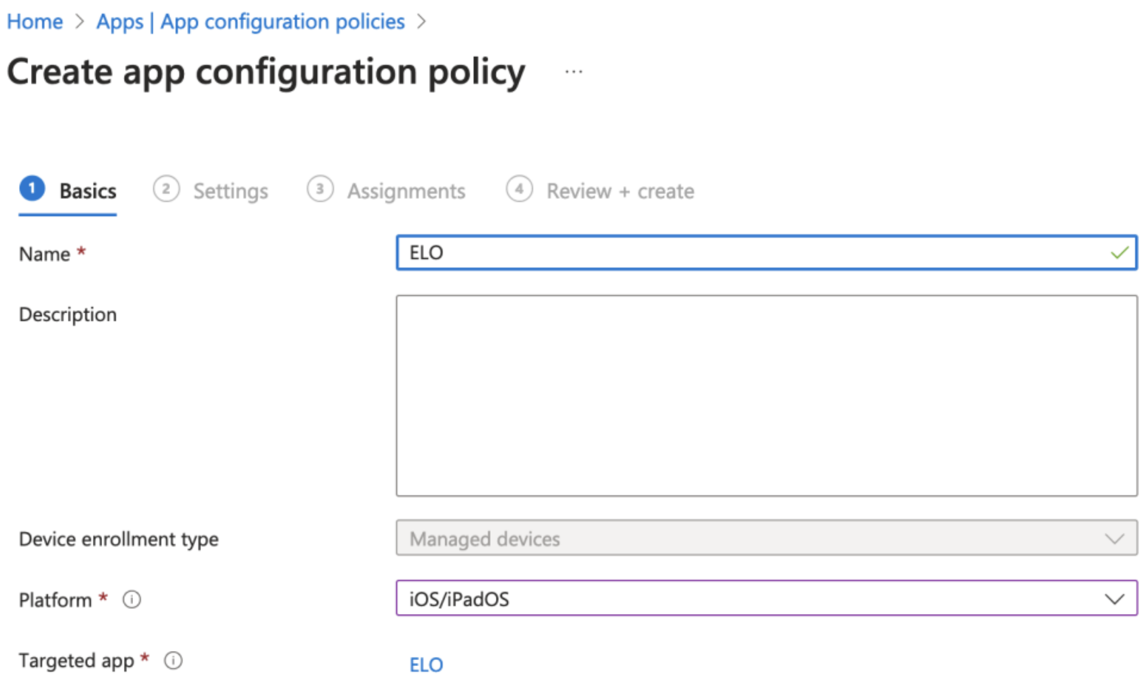
2. Select *Basics*.

3. Enter a name, e.g. `ELO with AppProxy`.

4. Select *Platform > iOS/iPadOS*.

5. Select *Target app > Select App > ELO*.

   Here, you will find the ELO app, since you deployed it in Intune in the previous step.



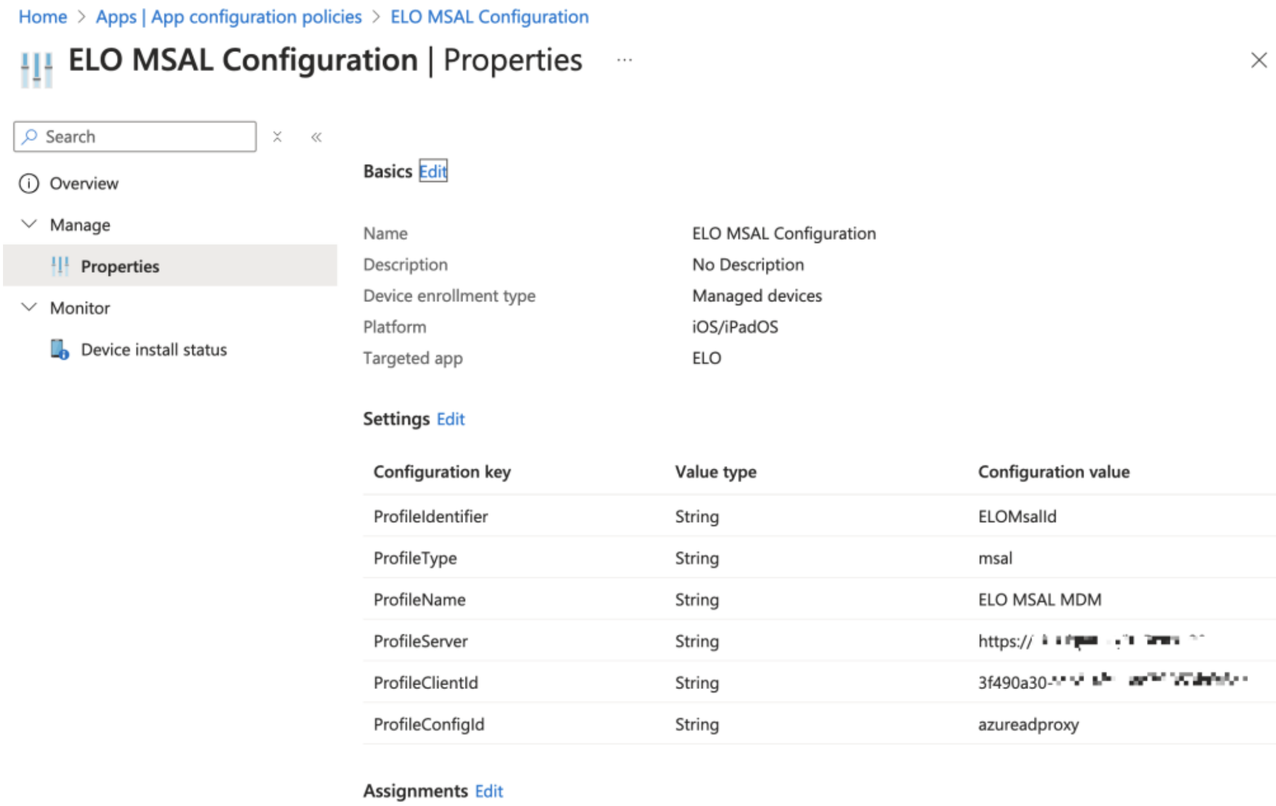
6. Navigate to *Settings > Use configuration designer*.

Configuration Key	Value Type	Configuration Value
Profile ID	String	ID of the profile. You can use any name you want.
Profile type	String	msal
ProfileName	String	Profile name. You can use any name you want.
ProfileServer	String	ServerURL. e.g. `https://elo-example.msappproxy.net/ix-Repository`
ProfileConfigId	String	ClientId that was entered for the ELO server in the ELOauth config, e.g. `AppProxy`
ProfileClientId	String	"Application ID" that was entered for the enterprise application in the Azure Portal: `533772b0-...`
ProfileTenantID	String	Optional. The tenant ID ensures that the user is only logged on to the correct organization, e.g. `0bbc3a84-...`

7. Unter *Assignments*, select the users/groups you want to automatically assign this configuration on the device.

8. Select *Next*.

9. Select *Create*.



Enterprise SSO

We recommend using Enterprise SSO. Otherwise, a login is shown for all forms, such as the feed, My ELO etc. that would have to be completed to be able to use the form.

If you have configured Enterprise SSO, SSO ensures correct authentication.

Perform the following steps:

1. Navigate to *Devices > Configuration > + Create > + New Policy*.
2. Select *Create a profile*.
3. Select *Platform > iOS/iPadOS > Profile type > Templates*.
4. Select *Device features > Create > Basics*.
5. Enter a name, e.g. `Enterprise SSO`. You can use any name.
6. Select *Next*.
7. Navigate to *Configuration settings*.
8. Select *Single sign-on app extension*.
9. Select *SSO app extension type > Microsoft Entry ID > App Bundle ID > com.elo.mobile.ELO*.
10. Select *Additional Configuration*.

Key	Type	Value
`browser_sso_interaction_enabled`	Integer	1
`disable_explicit_app_prompt`	Integer	1
`Enable_SSO_On_All_ManagedApps`	Integer	1
`AppPrefixAllowList`	String	com.elo.,com.apple.,com.microsoft.

11. Unter *Assignments*, select the users/groups you want to automatically assign this configuration on the device.

12. Select *Next*.

13. Select *Create*.

Test

If you now "roll out" devices with the *Microsoft Intune Company Portal*, the ELO app should automatically be installed and configured correctly.

When opening the ELO app, the user is prompted to authenticate via Entry ID.