ELO Java Client

January 2021

[14.01.2021-09:32]

Table of Contents

Introduction

Copyright notices

Trademarks

Please note

We have made every effort to supply product documentation that is as accurate as possible. However, since we are continuously developing the ELO Java Client and create several versions at the same time, the program can undergo changes very quickly. For this reason, there may be minor discrepancies between the descriptions and images in the manual and in the program. We ask for your understanding if this occurs.

Conventions

The following conventions apply for this manual:

Notes

The following types of notes are used in this manual:

Information: This is additional information that can make it easier to use ELO.

Please note: Take this note into account to ensure the program runs without any problems.

Warning: It is essential that you heed this information to avoid significant restrictions in the operation of your program.

Formatting

Syntax	Use	Example
Italics	Menus, options, dialog boxes, dialog box fields, folders, chapter references, paths, buttons	Click *Configuration*.
UPPERCASE	Keyboard shortcuts	Press ALT+C.
`Courier`	Program code, program outputs, inputs	Enter `Supplier` to the index field.

Paths

Syntax	**Use**	**Example**
... > ... >	Navigation paths in ELO	Click *ELO > Configuration > Quick access to functions > Barcode recognition*.
// ... // ...	Filing paths in ELO	Save the document to *//Filing//Year//Month*.
... \ ... \ ...	Storage paths in the file system	Save the document to *C:\Documents\Vacation*.

Notes

Use

The ELO Java Client, also called client in the following, is used for accessing the ELO repository. You need the client to file, search, and find documents. In addition, use the client to create workflows and reminders and to display documents.

Operating system

In this manual, the functions and examples are displayed based on a Microsoft Windows operating system.

The ELO Java Client, however, can also be used on other operating systems provided a corresponding Java environment is available for the operating system.

Target audience

This manual is aimed at ELO Java Client users.

The *Administration* chapter is an exception since it is aimed at system administrators and contains information on the installation and configuration of the ELO Java Client.

Start the ELO Java Client

Logon

1. Double-click the ELO Java Client icon on the desktop.

Alternatively: Run the `EloClient.exe` file in the program directory of the client.

The logon dialog box appears.

2. Enter your user name and password.

Please note: You need your ELO user password to log on. Your ELO user password may differ from your Microsoft Windows password.

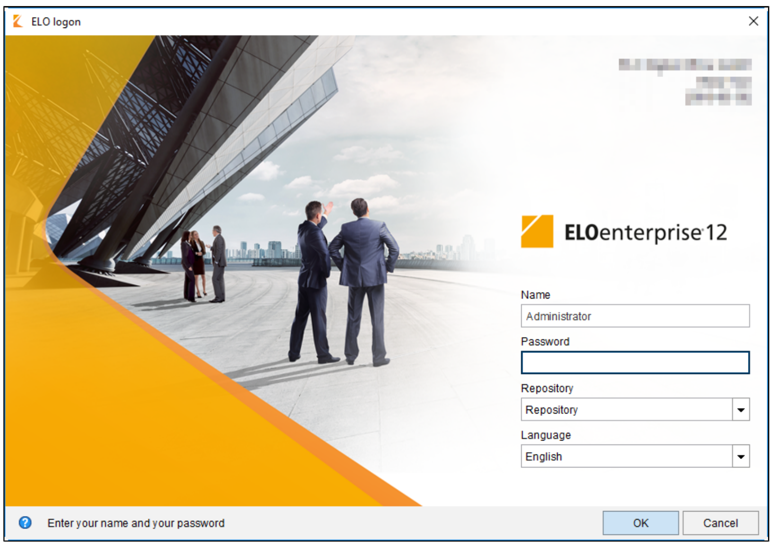


Fig. 1: Enter a user name and password

3. Select a repository in the *Repository* drop-down menu.

4. Use the *Language* drop-down menu to select a language for the client interface.

5. Click *OK*.

The ELO Java Client program interface appears.

Information: If the client does not start, please check the data you entered and contact the system administrator if required.

Error messages

The ELO Java Client distinguishes between internal errors and external errors.

The error messages are shown at the bottom of the logon dialog box.

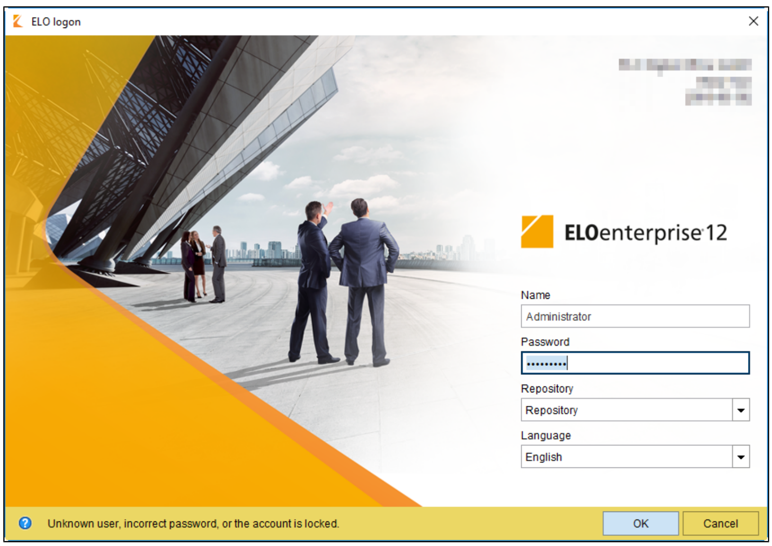


Fig. 2: Internal error

Internal errors are shown highlighted in yellow. This means that either an unknown user or incorrect password was entered, or the account has been locked. Re-enter your logon information. Contact your system administrator if your account is locked.

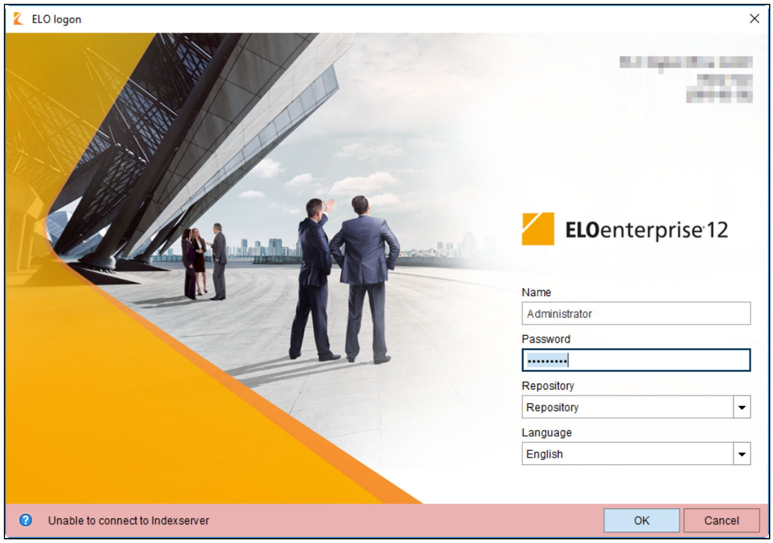
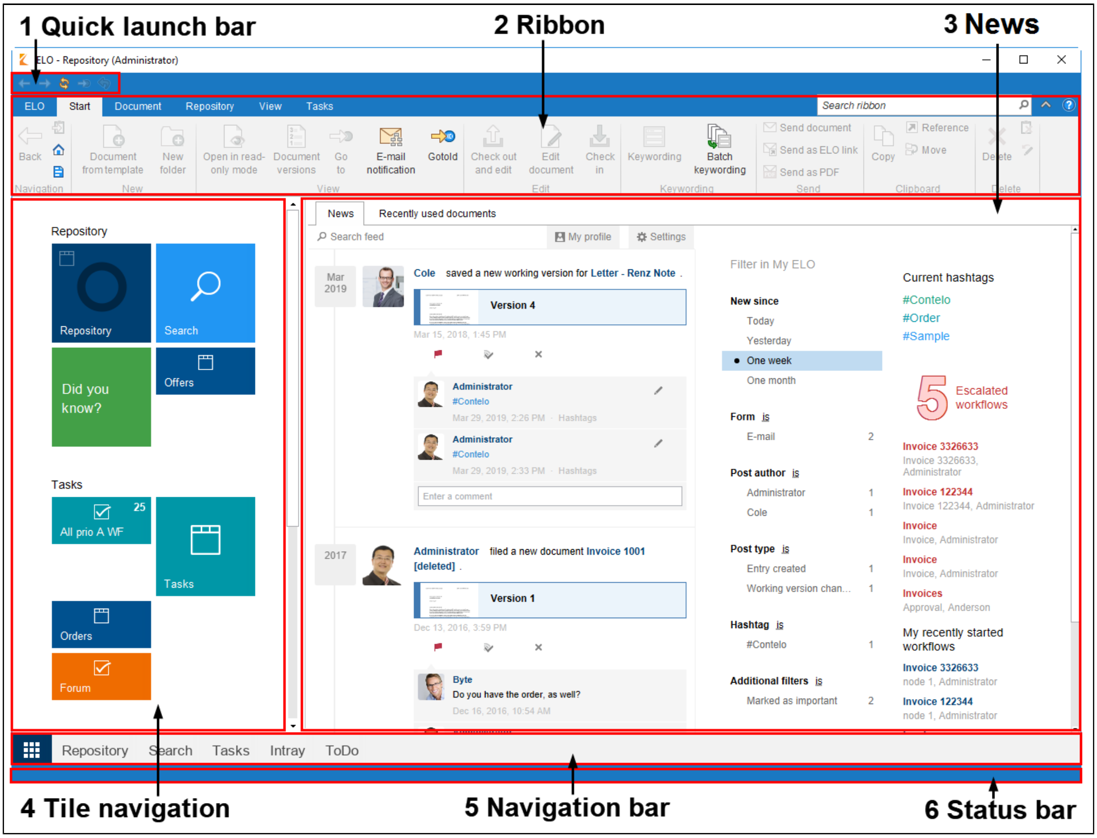


Fig. 3: External error

External errors are displayed in red. In this case, there is an issue with the server connection. Please contact your system administrator.

Program interface

The ELO Java Client opens to the *My ELO* work area. The areas are described briefly in the following.



(1) Quick launch toolbar

The quick launch toolbar contains frequently used functions that need to be called quickly.

You can adjust the quick launch toolbar to your individual needs. Refer to the *Administration* chapter, *Configuring the quick launch toolbar* section for additional information.

(2) Ribbon

The ribbon is a combination of menu control and toolbar. It is divided into groups that sort functions by topic.

You can switch between the different menu areas using the tabs above the ribbon. To improve usability, some tabs are only shown when needed. For example, the *Filing* tab is only shown when you are in the *Intray* work area.

(2 a) The ELO tab

The *ELO* tab is located on the ribbon. The *ELO* tab contains functions for configuring the client as well as general functions such as *About*.

(2 b) Search ribbon

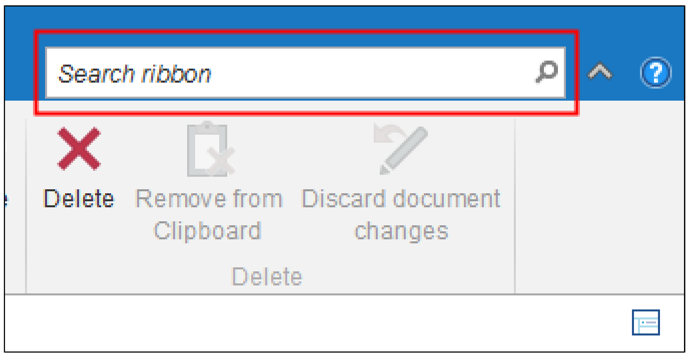


Fig. 5: 'Search ribbon' field

Use this field to search for functions on the ribbon. You will only be shown functions that are available in the specific context.

(2 c) Collapse/expand the ribbon

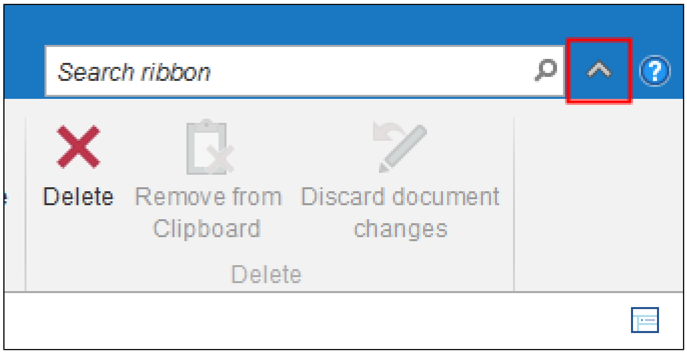


Fig. 6: 'Collapse the ribbon' button

Clicking the arrow icon on the right side of the ribbon expands or collapses the ribbon. ELO saves your settings according to the work area or view filter you are currently using.

Information: Alternatively, use the keyboard shortcut CTRL+F1.

(3 a) News

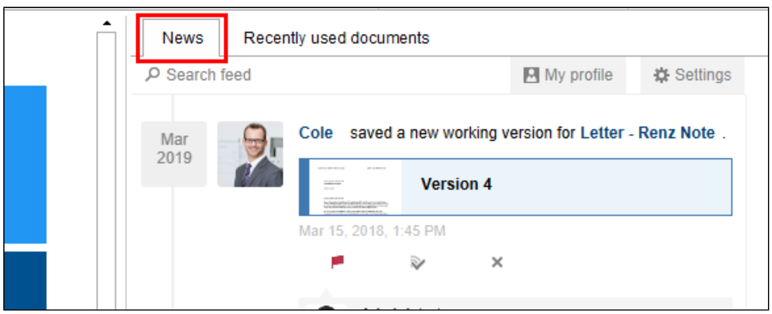


Fig. 7: 'News' tab

Feed posts from different entries are displayed in the *News* tab. This applies to feeds such as those that a user has subscribed to or in which they are mentioned by another user. Escalated or recently started workflows that are relevant for the user are also shown in this work area.

(3 b) Recently used documents

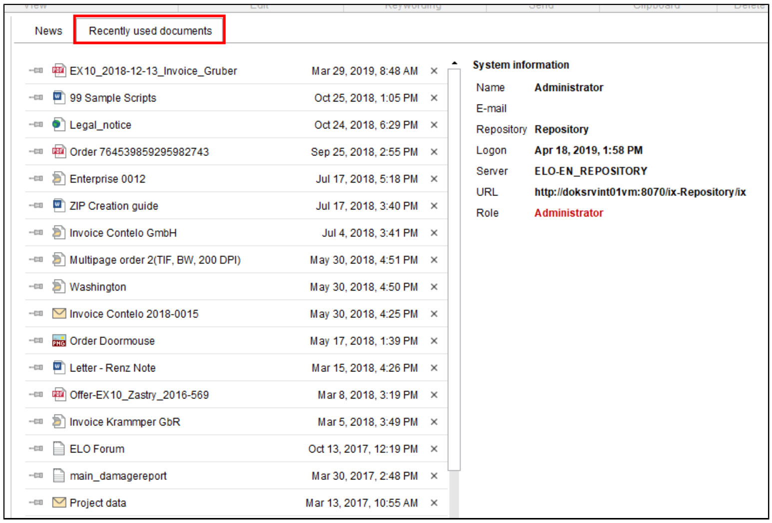


Fig. 8: 'Recently used documents' tab

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

You can pin documents to the top of the list with the *Pin document* (pin icon) function.

Information: The maximum number of documents in the list of *Recently used documents* is 30 by default. You can change this value in the configuration (*Ribbon > ELO > Configuration > Display > Maximum number of documents in the list of "Recently used documents"*).

(4) Status bar

The status bar contains information on the currently selected repository entry. This includes the number of available entries or the repository path.

(5) Navigation bar

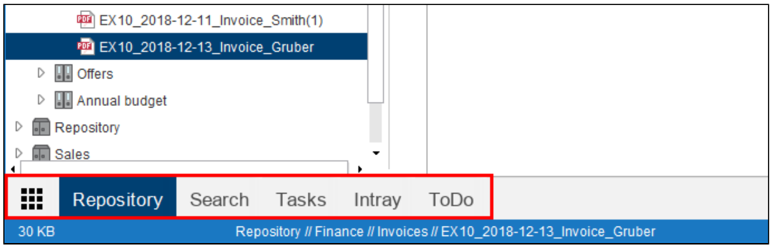


Fig. 9: The navigation bar

The navigation bar gives you quick access to several areas in the ELO repository and tells you which area you are currently in.

(5 a) My ELO button

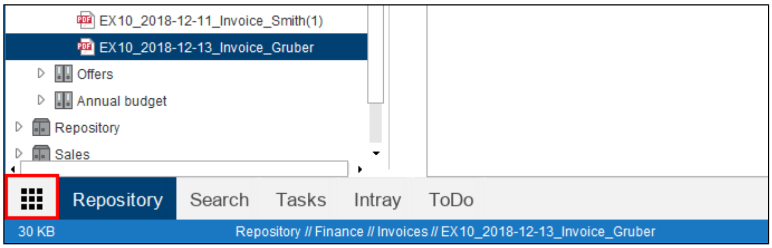


Fig. 10: The 'My ELO' button

Click the *My ELO* button to open the *My ELO* work area. The *My ELO* button (tile icon) is locked in the navigation bar and cannot be removed from it.

Information: Alternatively, use the keyboard shortcut CTRL+Windows.

(6) Tile navigation

The tile navigation contains all available tiles. Tiles can be used to represent work areas, view filters, and ELO apps. The following tiles appear by default:

- Repository
- Search
- Did you know?
- Tasks
- Intray
- In use
- Clipboard

More information on the different work areas will be provided later on in the *Work areas* section.

Groups

By default, the tile navigation area is divided into the groups *Repository*, *Tasks*, *Other*, and *Hidden tiles*.

The groups can be edited using the context menu. Right-clicking a group name opens the context menus for groups. The following functions are available:

Add group: Use the *Add group* menu item to create your own groups in the tile navigation area.

Rename group: Use the *Rename group* menu item to change the respective group name. This function is only available for your own groups.

Delete group: Use the *Delete group* menu item to delete the respective group. All tiles in the deleted group are moved to the *Hidden tiles* group.

Restore default settings

If you make changes (to tiles and groups) in the tile navigation area, you can restore the default values from the context menu.

1. Right-click a group name to open the context menu for groups.

2. Click the menu item *Restore default settings*.

The *Restore default settings* dialog box appears.

3. Click one of the options.

Default client settings: Restores all settings in the tile navigation area to the default values on installation.

Same settings as at the start of the current session: Discards all changes made since the last time you started the ELO Java Client. Changes made prior to that session are retained.

Edit tile

You can customize tiles in ELO to your individual requirements.

Information: Different settings are available depending on the type of tile you want to edit.

Tile settings

To edit a tile, you usually need to switch to the *Tile settings*. Proceed as follows:

1. Right-click the tile to open the context menu.
2. Click *Settings*.

Edit mode

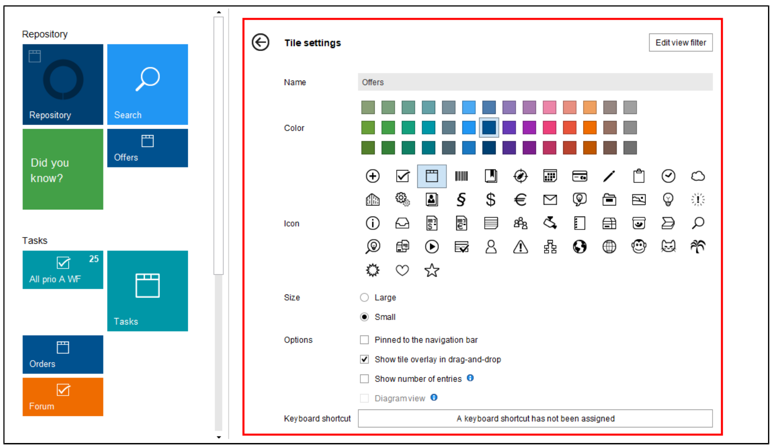


Fig. 11: The 'Tile settings' area

This opens the *Tile settings* pane. You are now in tile editing mode.

Information: When you click another tile in edit mode, you switch to edit mode for the tile you clicked.

In edit mode, you can change the tile settings. The individual settings are described in more detail below.

Save changes

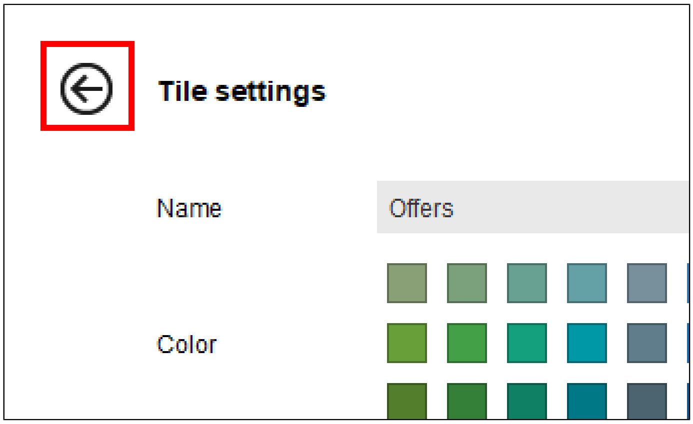


Fig. 12: Arrow icon in the 'Tile settings' pane

To close edit mode and confirm your changes, click the arrow pointing left in the *Tile settings* pane.

Edit name

You can change the name of tiles that you created (view filters and tasks view filters).

The following example shows how this is done with a view filter tile.

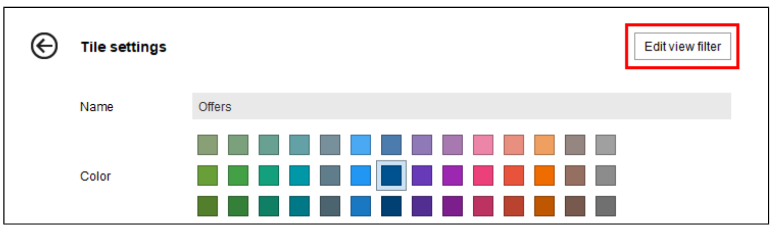


Fig. 13: 'Edit view filter' button

1. Click *Edit view filter*.

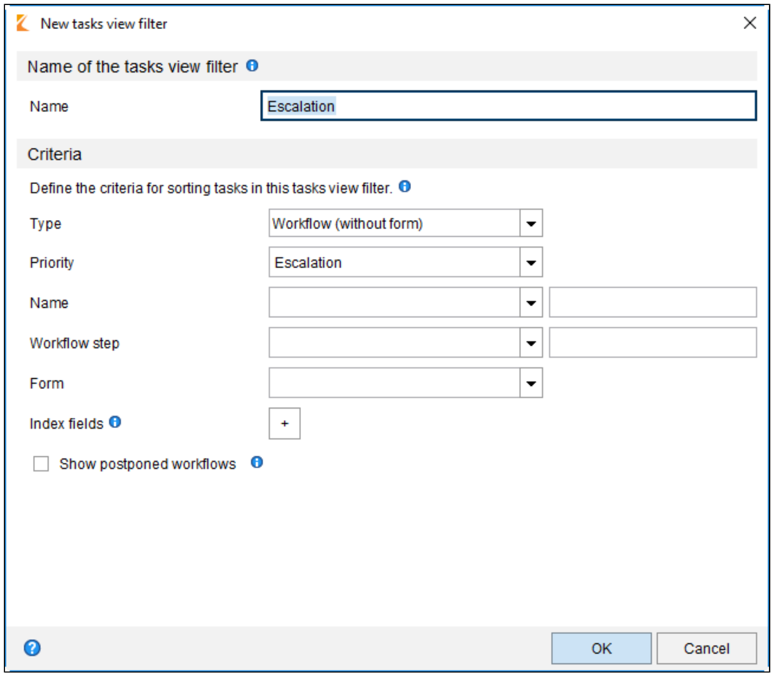


Fig. 14: 'Edit view filter' dialog box

This opens the *Edit view filter* dialog box. The cursor is positioned in the *Name* field and the text is selected.

2. Enter the new name.

The old name will be overwritten.

Alternatively: If you don't want the name to be overwritten, first click the *Name* field and then make the changes you want.

3. Click *OK* to confirm.

The dialog box closes. The name of the tile changes.

Change color/icon

You can change the color of all tiles as well as the icons of most tiles.

The following example shows how to change the color of a tile. The method for changing the icon is similar.

1. Open the *Tile settings* pane as described above.

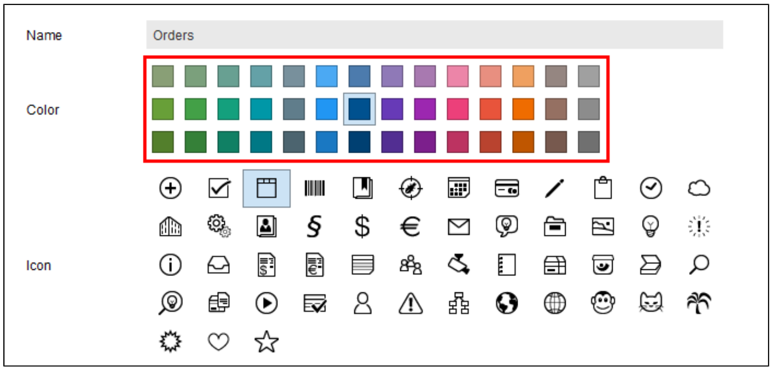


Fig. 15: 'Color' options

2. Select the desired color in the *Color* options.

The color of the tile changes.

Change size

You can change the size of all tiles.

The following example shows how this is done with a view filter tile.

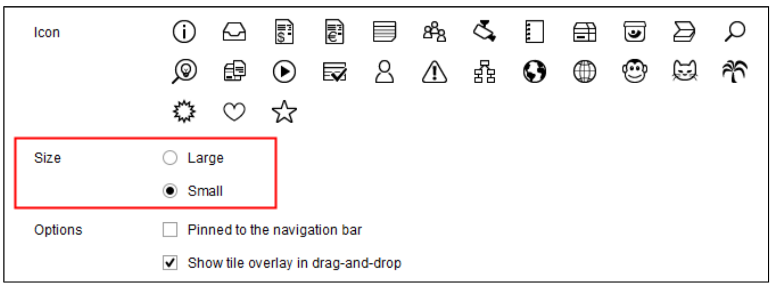


Fig. 16: 'Size' options

1. Select one of two *Size* options:

- **Large**: The tile is square.
- **Small**: The smaller tile is rectangular and half the size of the large tile.

The size of the tile changes.

Options

You can select different options depending on the type of tile you are editing.

The following example shows how this is done with a view filter tile.

Fig. 17: 'Options' area

1. Click the check boxes of the *Options* you want to enable:

Pinned to the navigation bar: Click this option to pin the tile to the navigation bar.

Show tile overlay in drag-and-drop: If this option is enabled, the tile appears as an overlay when you drag and drop an entry to the repository. Drop the entry onto the overlay to move it to the respective area.

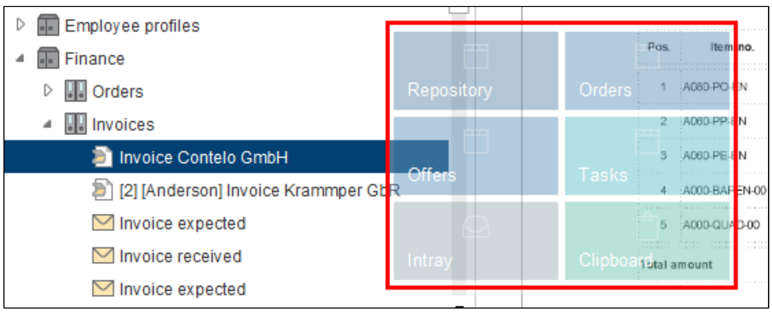


Fig. 18: Tile overlay

Show number of entries: When this option is enabled, the number of entries in an area is displayed at the top right of the tile.

Diagram view: When you enable this option, a circular diagram is depicted on the tile. Depending on the entries in that particular work area or view filter, the diagram is made up of several segments in different colors. The colors relate to the font color selected for the entries.

Information: The *Diagram view* option only works when the tile size is set to *Large*.

The selected options are applied.

Keyboard shortcut

You can assign a keyboard shortcut to any tile.

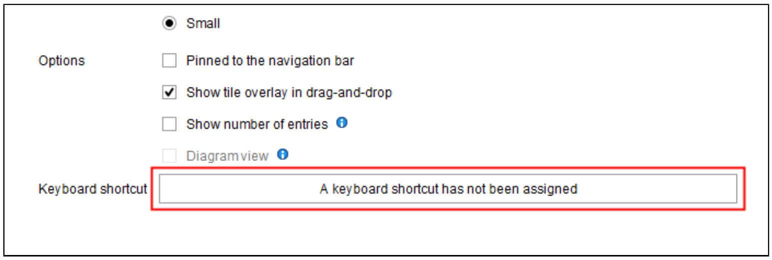


Fig. 19: 'Keyboard shortcut has not been assigned' button

1. Click the *Keyboard shortcut has not been assigned* button.

The button label changes to *Enter the desired keyboard shortcut*.

3. Enter the desired keyboard shortcut, e.g. ALT GR+E.

Information: Make sure not to use a keyboard shortcut that has already been assigned. An error message will appear if the keyboard shortcut is already being used in ELO. The keyboard shortcut will not be saved in this case.

Keyboard shortcuts that are in use in other programs will not be assigned either. However, you will not see an error message in such cases.

The keyboard shortcut is now displayed on the button label and can be used for the tile in question.

Edit via the context menu

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

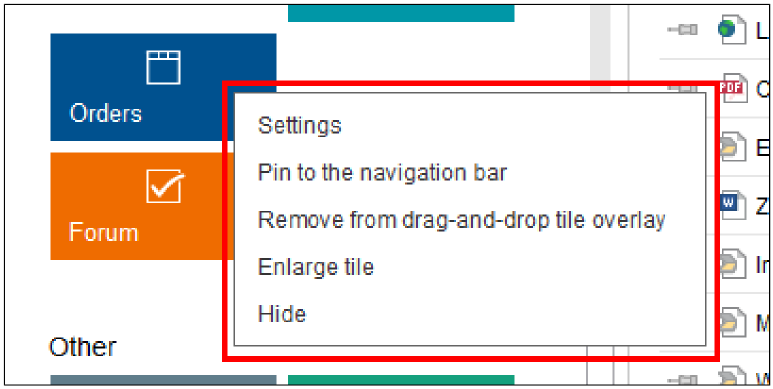


Fig. 20: Tile context menu

You can make a number of tile settings straight from the tile's context menu.

Information: Hidden tiles are moved to the *Hidden tiles* group. To restore the tile, drag it to the target location in the tile navigation.

Edit the navigation bar

You can pin all view filters that you have added as tiles (work areas, repository view filters, tasks view filters, etc.) to the navigation bar.

Pin tile

1. Right-click the tile to open the context menu.

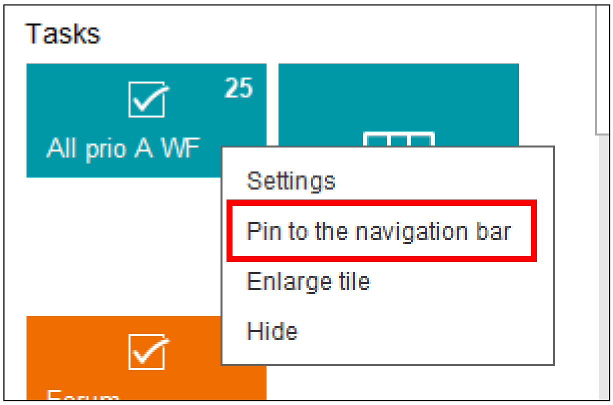


Fig. 21: Tile context menu; 'Pin to the navigation bar'

2. Click *Pin to the navigation bar*.

Alternatively: You can also call the *Pin to the navigation bar* function from the context menu in the navigation bar. To do so, click the tile you want to pin.

The tile now appears on the navigation bar.

You can also unpin tiles from the navigation bar.

Unpin tile

1. Right-click the view filter to open the context menu.

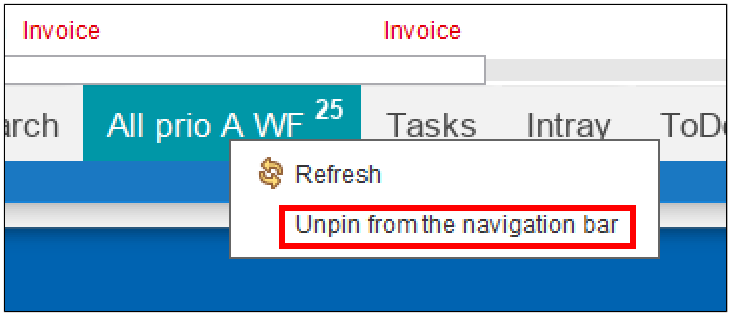


Fig. 22: Navigation bar context menu; 'Unpin from the navigation bar'

2. Click *Unpin from the navigation bar*.

Alternatively: You can also call the *Unpin from the navigation bar* function from the context menu in the navigation bar.

The tile is no longer displayed in the navigation bar.

Adjust the layout and color scheme

You can adjust the program interface to your individual needs.

Adjust layout

The layout settings are located on the ribbon under *ELO* > *Configuration* > *Display* > *Repository layout*.

1. Go to the *ELO* tab on the ribbon.

2. Click *Configuration*.

The *Configuration* dialog box opens.

Optional: Click *Display* if it is not already selected.

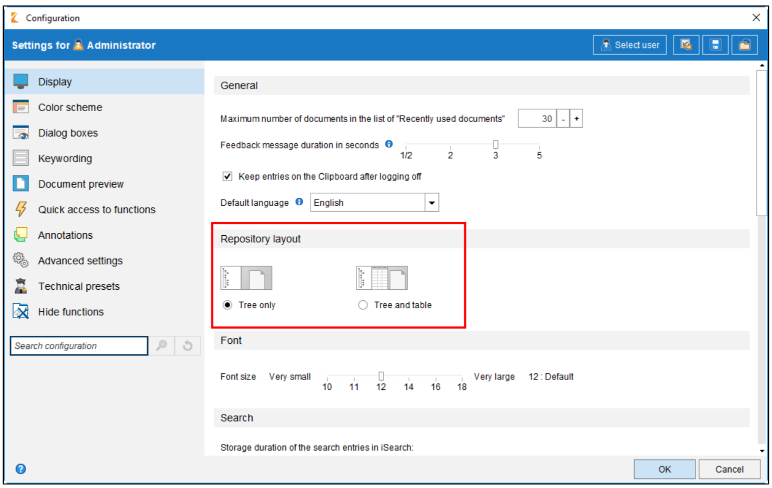


Fig. 23: Configuration - 'Display' area

You see which layout is currently selected under *Repository layout*.

3. Select the corresponding radio button to select a different layout.

4. Click *OK* to accept the changes.

The selected layout will be used.

Layouts

The following layouts are available for displaying folders and documents in the repository:

- Tree only
- Tree and table

Information: The *Tree only* setting was used to create the screenshots in this manual.

The different layouts are briefly described in the following.

Tree only

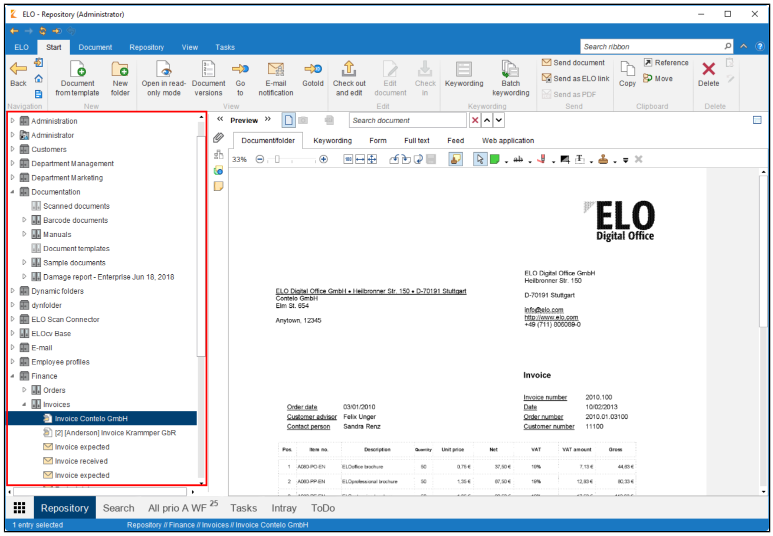


Fig. 24: 'Tree only' layout

When the *Tree only* option is selected, the repository or selected view filter is displayed as a tree on the left-hand side of the screen. The selected document or content of the selected folder is displayed in the viewer pane.

Tree and table

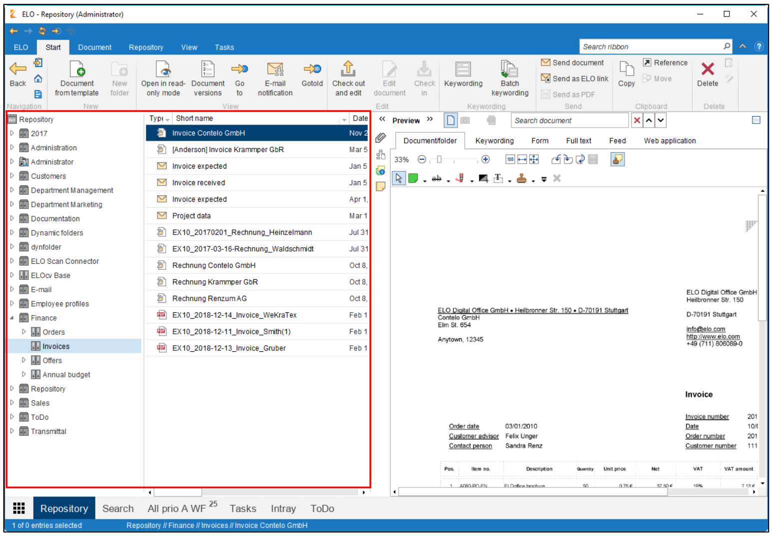


Fig. 25: 'Tree and table' layout

When you enable the *Tree and table* layout option, you will only see the folders of the selected work area in the tree view. The content of the selected folder is displayed in a separate table on the right. Documents highlighted in the table are displayed in the viewer pane.

Adjust color scheme

The settings for the color scheme are located on the ribbon under *ELO* > *Configuration* > *Color scheme*.

Please note: When you change the color scheme, the client will restart automatically.

1. Go to the *ELO* tab on the ribbon.
2. Click *Configuration*.

The *Configuration* dialog box opens.

3. Click *Color scheme*.

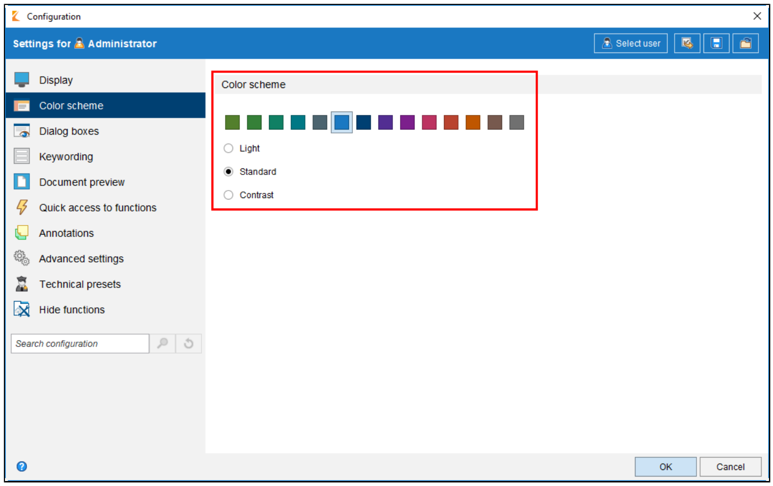


Fig. 26: 'Color scheme' area

You see which color scheme is currently selected under *Color scheme*.

4. To select another color scheme, click the desired color.

Optional: You can also change the color depth by clicking the *Light*, *Standard*, or *Contrast* options.

- **Light**: Lighter version of the main color with white borders
- **Standard**: Main color with gray borders
- **Contrast**: Darker version of the main color with contrasting borders in a lighter color

5. Click *OK* to apply the changes.

This restarts the ELO Java Client. The selected color scheme will be used.

Preview profiles

Use preview profiles to configure the viewer pane for documents.

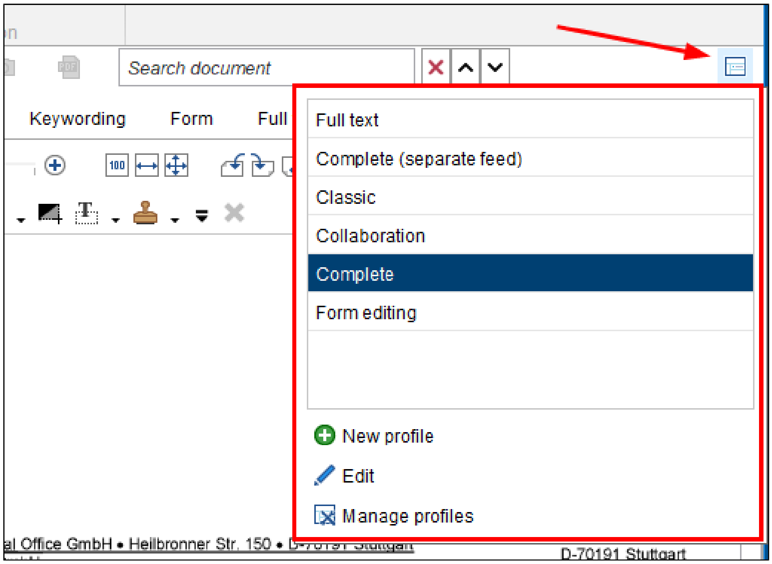


Fig. 27: 'Select and configure preview profiles' button, drop-down menu

To define the settings for the viewer pane, you need to define a preview profile. The button for opening the *Select and configure preview profiles* menu is located directly below the ribbon on the right-hand side of the screen.

Add a preview profile

1. Click the *Select and configure preview profiles* button.

A drop-down menu appears.

2. Select *New profile* in the menu.

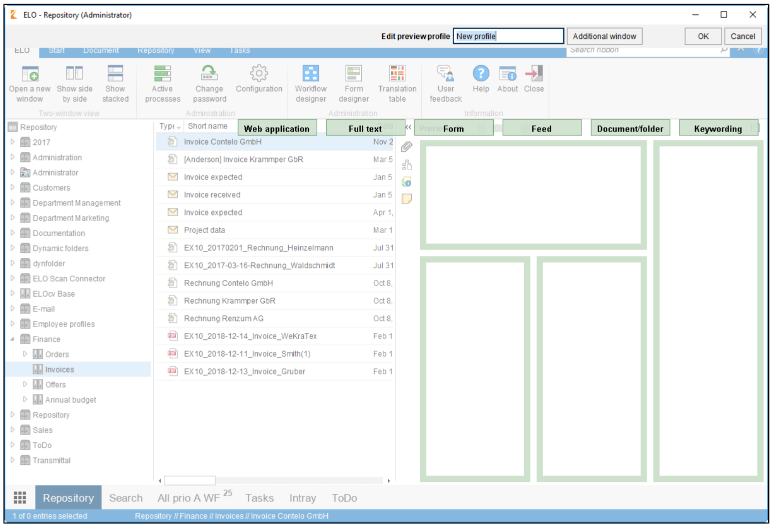


Fig. 28: Add a preview profile

The client switches to the mode for creating a new preview profile.

In the viewer pane, you see the preview elements and four subpanes which you can assign preview elements to. The following elements are available for selection:

- Web application
- Full text
- Form
- Feed
- (Viewer pane for) document/folder
- Keywording

3. Click one of the preview elements.

4. Drag the preview element to any part of the subpane.

The preview element is assigned to the subpane.

Information: Try out the different viewing options. The size of the individual preview elements may change. The size of the panes is adjusted automatically.

Optional: You can also assign multiple preview elements to a sub-pane. In this case, the individual preview elements are displayed as tabs. You can change the order of the tabs.

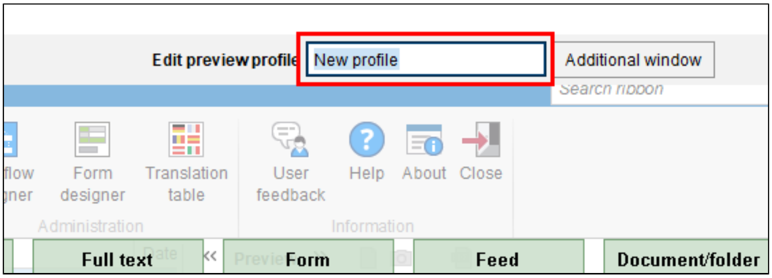


Fig. 29: Entering the name for the preview profile

5. Enter the name of the profile in the *Edit preview profile* field.

Optional: Click the *Additional window* button to open the *Preview* dialog box. In this dialog box, you can see what the preview elements would look like. To do so, drag the desired preview element onto the *Preview* dialog box.

Please note: The settings you make in the *Preview* dialog box are not applied to the preview profile.

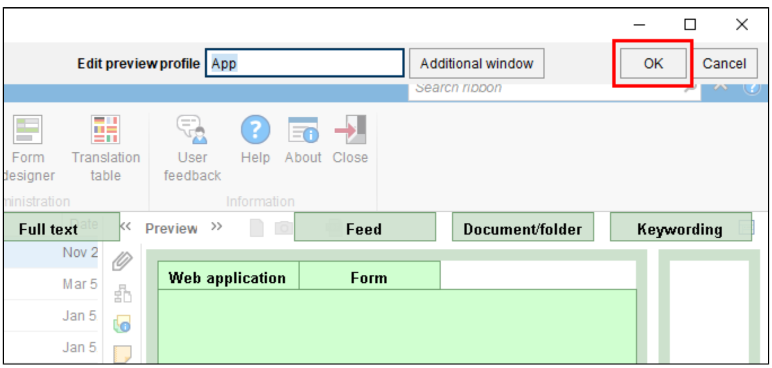


Fig. 30: Save preview profile

6. Click *OK* to save the preview profile.

The new preview profile is created.

Manage preview profiles

Existing preview profiles for the viewer pane are managed using the *Manage profiles* function.

1. Click the *Select and configure preview profiles* button.

A drop-down menu appears.

2. Click *Manage profiles* in the menu.

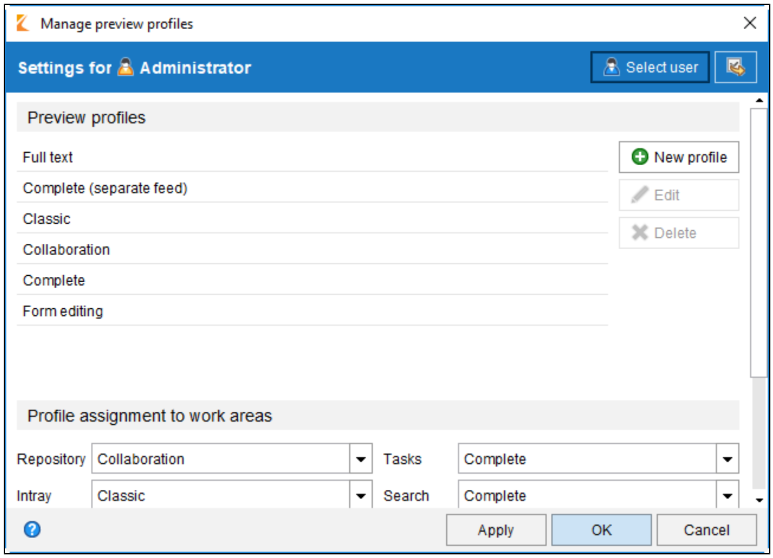


Fig. 31: Menu for preview profiles

The *Manage preview profiles* dialog box appears.

The existing preview profiles are managed in the top dialog box area.

You can assign a separate preview profile for each work area in the *Profile assignment to work areas* area.

New profile: Define a new profile for the viewer pane here.

Edit: Click *Edit* to edit a preview profile selected in the list.

Delete: Delete a selected preview profile.

Assign new preview profile

You can assign preview profiles to a work area and/or a keywording form. The default settings are used by the program for the layout of the viewer pane.

1. Click the *Select and configure preview profiles* button.

A drop-down menu appears.

2. Click *Manage profiles* in the menu.

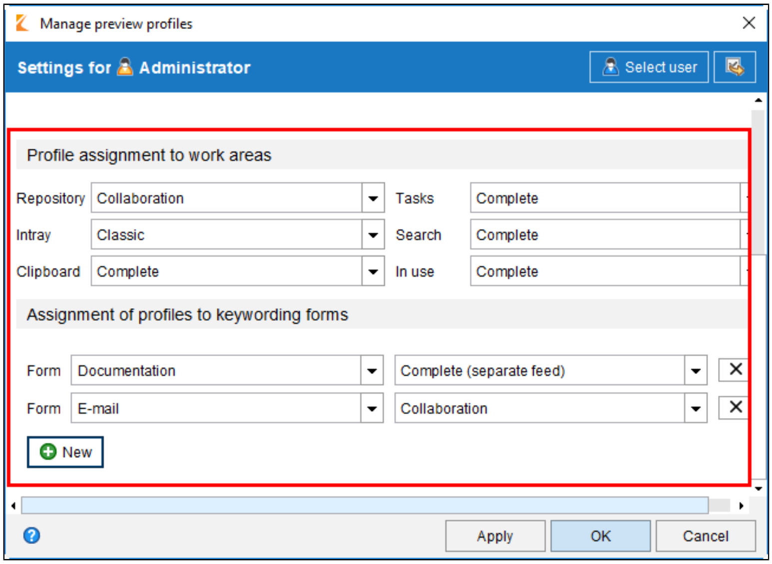


Fig. 32: 'Manage preview profiles' dialog box

The *Manage preview profiles* dialog box appears.

The existing preview profiles are displayed in the *Preview profiles* list. You can assign preview profiles for work areas in the *Profile assignment to work areas* options.

2a. To assign a a preview profile to a work area, choose the preview profile in the corresponding drop-down menu.

2b. To assign a preview profile to a keywording form, click *New* and then select the keywording form and the corresponding profile.

3. Click *OK* to save the settings.

The selected preview profile is assigned as configured.

Work areas

The client has the following work areas: *My ELO*, *Repository*, *Search*, *Tasks*, *Intray*, *Clipboard*, and *In use*.

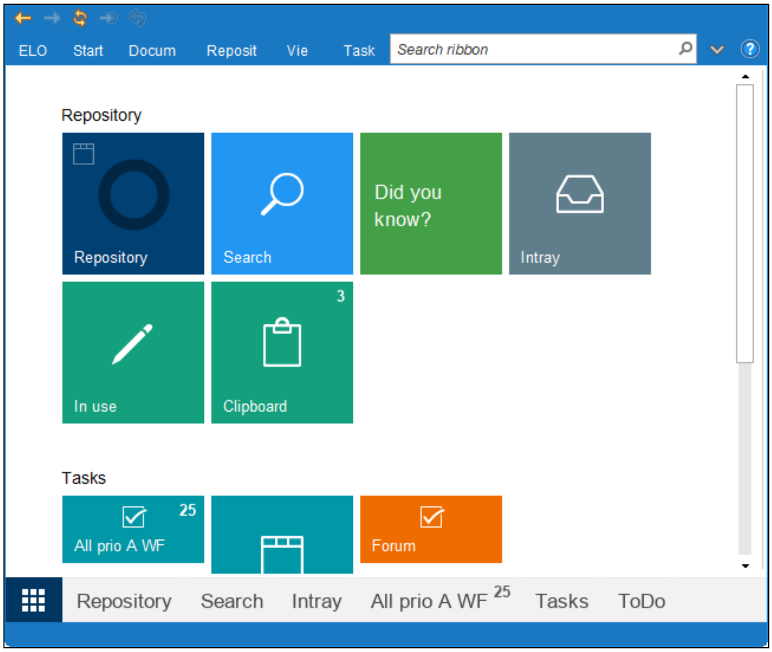


Fig. 33: Tiles for work areas in My ELO

The work areas are explained in the following:

My ELO

The *My ELO* work area is on the start page when you run ELO. From here, you can access the main areas of the ELO repository using tiles.

Feed posts relating to different entries (folders and documents) are displayed in the *News* tab. This applies to feeds such as those that a user has subscribed to or in which they are mentioned by another user. Escalated or recently started workflows that are relevant for the user are also shown in this work area.

Information: If no posts appear in the *My ELO* work area, check your filter settings. There may be no posts for the selected period (under *New since*).

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

Repository

The *Repository* work area is the central work area of the client where you file and manage your documents and data. For example, you can create new documents and folders, open documents for viewing, or send documents in different formats.

Search

The search results are displayed in the *Search* work area. A new search view filter is created for every search query, which can be called up any number of times via the button. The search view filters remain in place until the client is closed. Use the *Delete view filter* function to remove an existing search view filter from the *Search* work area.

iSearch

ELO iSearch is the standard search tool in the ELO Java Client. ELO iSearch uses special search algorithms that improve the search function.

Keywording search

In addition to ELO iSearch, you can also use the keywording search. The keywording search function searches the index fields in keywording forms. You can find the keywording search on the *Search tools/Search* tab on the ribbon. The *Search tools/Search* tab is only available when you are in the *Search* work area.

Tasks

The *Tasks* work area contains an overview of your workflows and reminders. The functions of the *Tasks* tab are used for editing workflows and reminders. This tab contains options for starting new workflows, editing and organizing workflows, setting up substitution rules, and viewing your existing tasks.

You can create additional view filters for the *Tasks* work area. With the filter function, you can show a part of the tasks in each of the view filters. You can define different view filters so that you are only shown reminders or workflows, for example.

Intray

The *Intray* is the central work area for incoming documents. You can drag any document onto the *Intray* work area. Documents are usually filed to the ELO repository via the *Intray* work area unless they are dragged to the repository.

Before you file documents to the repository from the *Intray* work area, you need to keyword them. You can automate this process. Alternatively, you can specify the filing location in a dialog box every time you file a document.

In addition, the *Intray* work area includes scan functions since scanning is an important medium for transferring documents to the repository.

Clipboard

The *Clipboard* is a work area where you can store documents temporarily or you can use it create a kind of favorites list.

In use

The *In use* work area shows documents that were checked out or that are in use. Documents are locked for all other users while they are in the *In use* work area.

Examples of use

This chapter uses practical examples to introduce you to the different functions in the ELO Java Client.

In the individual sections, you will be provided with information on the following items at the beginning of the example:

- Description of the example (objective)
- Notes regarding the installation or other important information (requirements)
- Description of the actions (step by step)
- Description of the results

File a document from the file system to ELO

Objective

To drag and drop a document to the repository from Microsoft Windows Explorer.

Requirements

- You need the file or a document that you want to file to the repository. The file or document must be a directory on your computer, on a USB stick, etc.
- The file or document will always be referred to as the **document** in the following.
- You must know where the document is stored in the repository.

Step by step

1. Open Microsoft Windows Explorer.

2. Open the ELO Java Client.

3. Minimize both windows and arrange the windows next to each other.

4. Open the *Repository* work area in ELO.

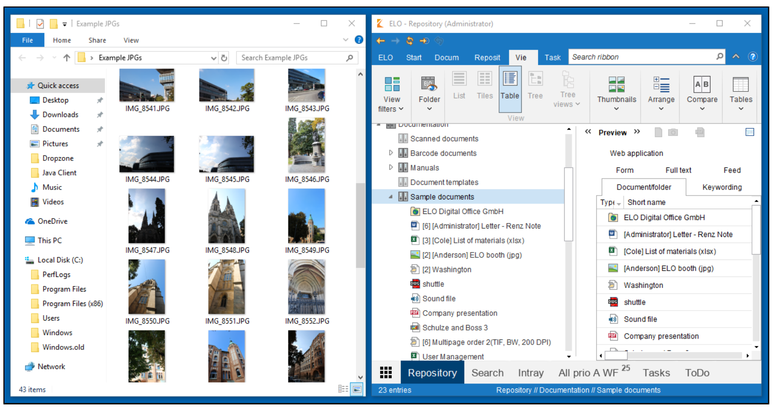


Fig. 34: Windows Explorer and ELO Java Client

5. Select the target folder in the ELO repository.

6. Click the document in Microsoft Windows Explorer and drag it to the selected folder.

7. Now release the mouse button.

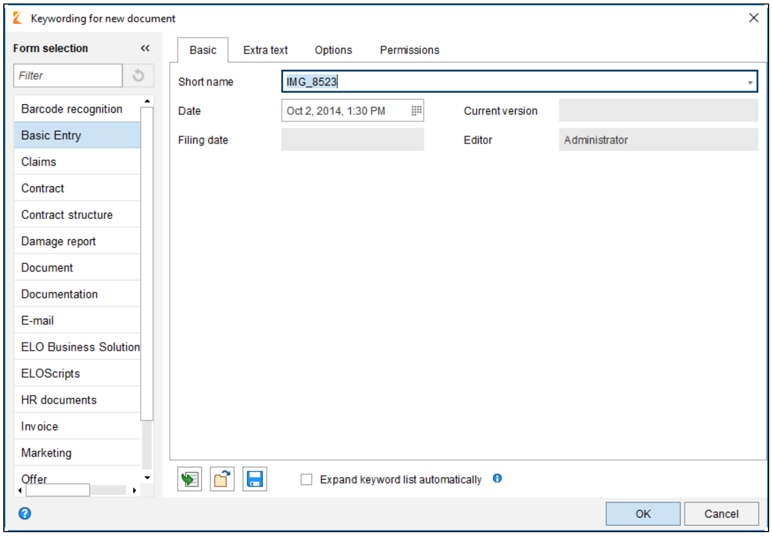


Fig. 35: 'Keywording' dialog box

The *Keywording* dialog box opens.

8. Select a keywording form in the *Form selection* column.

9. Enter a short name.

Optional: Enter additional keywording information.

10. Click *OK* once you have entered all information.

Information: The more precise the information is that you enter for a document, the easier it is to find the document later on.

Result

The document has been filed to the repository.

Scan a document to the Intray and file it

Objective

To scan a document and file it to the repository.

Requirements

- A scanner needs to be connected to the computer.
- You will need a document (e.g. letter, invoice, delivery note etc.) that you want to scan and file in the repository. The file created by the scanner will be referred to in the following as the **document**.
- You must know where the document is stored in the repository.

Please note: If you are using the 64-bit version of ELO, you will need to use the ELOscanTool for scanning. You can find this setting under *Ribbon > ELO > Configuration > Technical presets > General > Use as scan method > ELOscanTool TWAIN (Windows)*.

Step by step

1. Switch to the *Intray* work area.

The *Intray/Filing* tab is activated automatically.

2. Place the document in the scanner.

3. Click the *Scan document* button to start the scan process.

Optional: A dialog box may appear. Make the desired settings and click *Scan*.

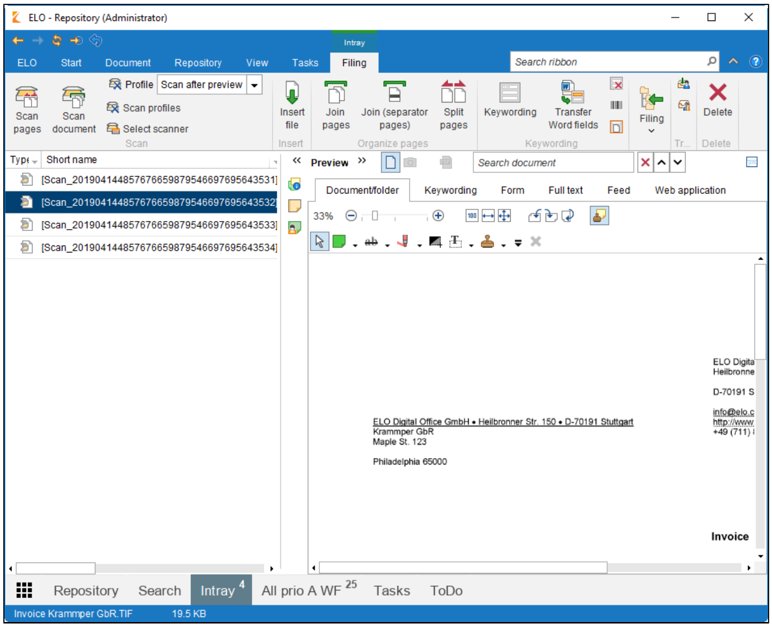


Fig. 36: Intray with scanned documents

The scan is performed.

The scanned document opens in the viewer pane.

Join pages

If you scan a document with multiple pages, all pages are shown separately in the Intray. Use the *Join pages* function to merge pages into a document. This function is located on the *Intray/Filing* tab of the ribbon.

1. Hold down the Ctrl key and select the pages you want to join.
2. Click *Join pages*.

The individual pages are merged into one document.

Information: Use the *Split pages* function to separate a multi-page document in the Intray into individual pages. The function is only available for TIFF and PDF documents.

File document

Follow these steps to file the scanned document to the repository.

1. Select the scanned document in the *Intray* work area.

2. Now click *File to repository*.

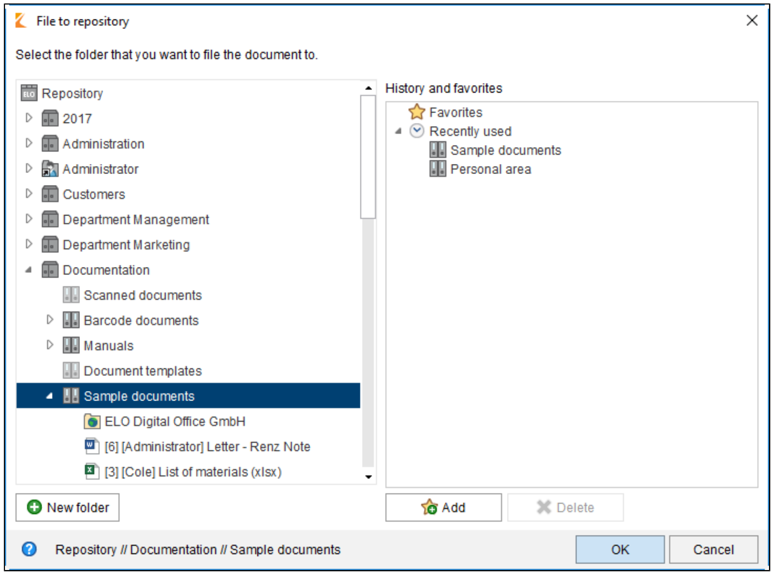


Fig. 37: 'File to repository' dialog box

The *File to repository* dialog box appears.

3. Select the folder that you want to file the scanned document to.

4. Click *OK*.

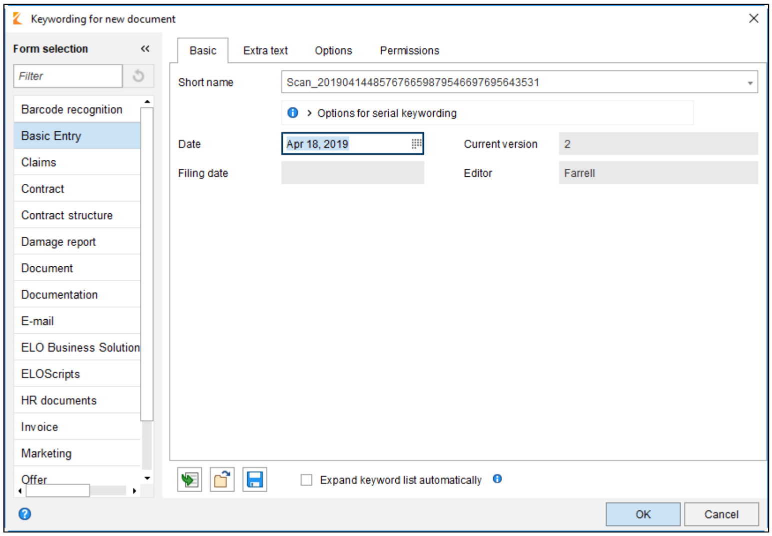


Fig. 38: 'Keywording' dialog box

The *Keywording* dialog box opens.

5. Enter the keywording information for the document.

6. Click *OK*.

Result

The scanned document was filed to the repository.

Document templates

Objective

To create a new document using a document template.

Requirements

- Templates must be created in an application such as Microsoft Word.
- There must be a document template in the repository, such as for Microsoft Word documents.
- You must know the name of the folder with the document templates in the repository.
- You must know where the document is stored in the repository.

Information: Assuming you have the corresponding permissions, you can define a central folder for templates in ELO. To do this, you need to select the template folder in the *Configuration* dialog box. You find this menu item under *Ribbon* > *ELO* > *Configuration* > *Technical presets* > *Folder for document templates*.

Step by step

1. Open the *Repository* work area.
2. Select the folder in the tree view in which you want to file the document.
3. Click the *Start* tab on the ribbon.

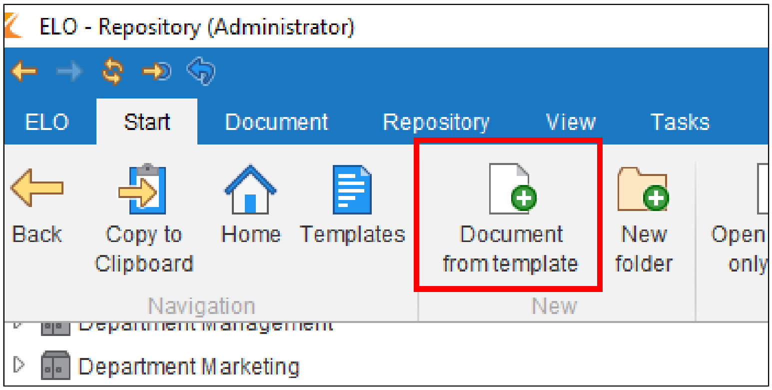


Fig. 39: 'Document from template' button

4. Click *Document from template*.

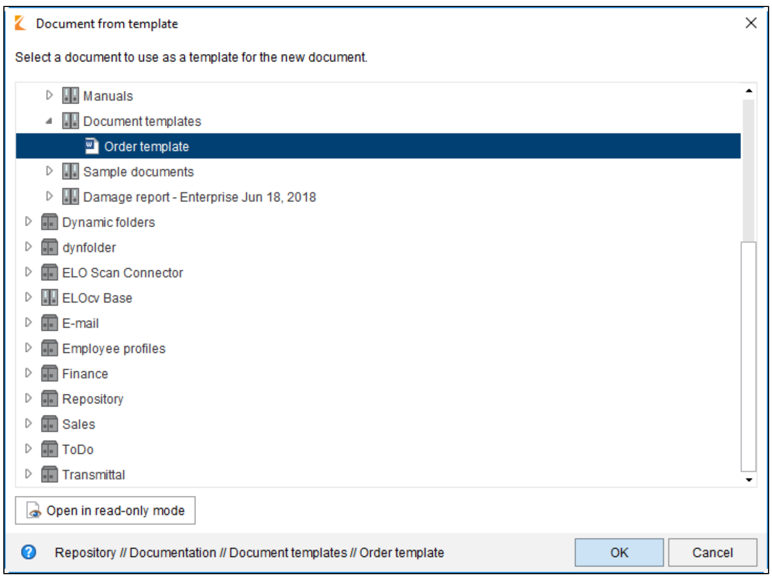


Fig. 40: 'Document from template' dialog box

The *Document from template* dialog box appears.

5. Open the folder with the document templates and select the appropriate template.

6. Click *OK*.

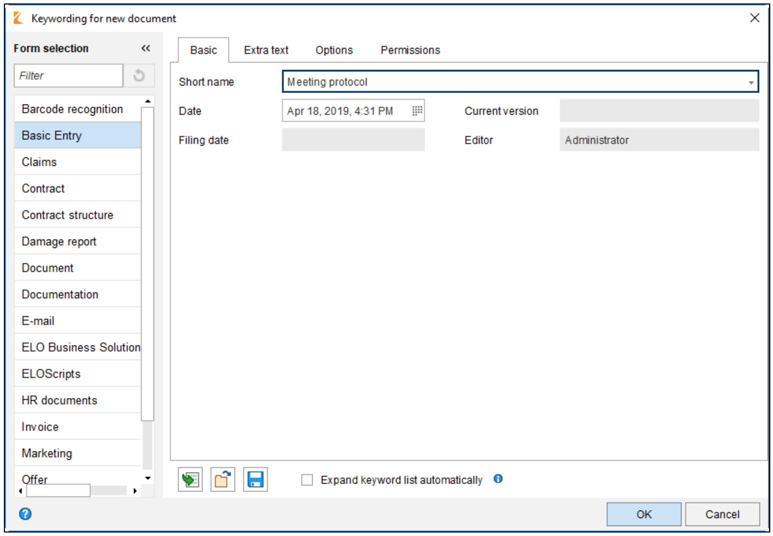


Fig. 41: 'Keywording for new document' dialog box

The *Keywording for new document* dialog box appears.

7. Enter the keywording information for the new document and click *OK*.

The dialog box closes. The corresponding external application will start and the document template will be displayed.

8. Make the desired changes.

9. Save the document and close the external application.

The document is now located in the designated folder in the repository.

10. Click the document.

11. Click the *Check in* button on the ribbon.

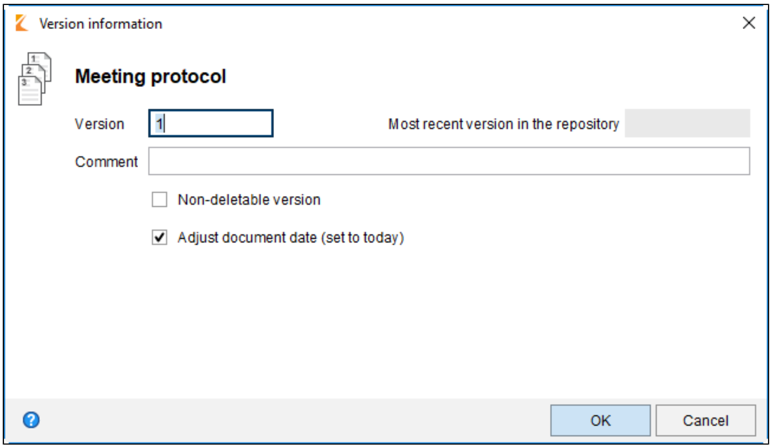


Fig. 42: 'Version information' dialog box

The *Version information* dialog box may appear.

Optional: Enter a version number and version comment.

12. Click *OK*.

Result

The new document was filed to the desired location in the repository and is no longer marked as checked out.

Search for documents

Objective

To find a document that was filed to the repository.

Requirements

- You must know which document you are looking for in the repository.

Step by step

There are different ways to find documents in the repository. You can either use ELO iSearch or the keywording search.

iSearch

ELO iSearch is the default search tool in the ELO Java Client.

1. Start the client.

2. Switch to the *Search* work area.

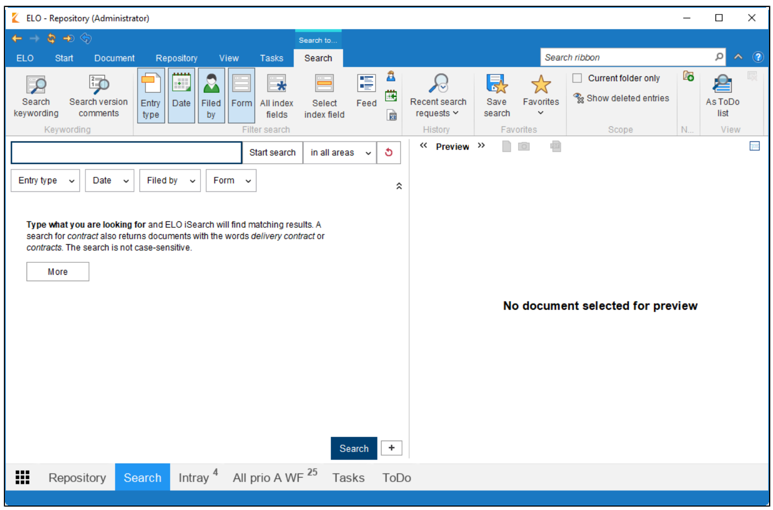


Fig. 43: 'Search' work area

The *Search tools/Search* tab is automatically activated on the ribbon.

Information: On the *Search tools/Search* tab, you can switch to the keywording search or configure the search settings.

3. Enter a search term in the search field.

4. Click *Start search*.

Result

The search term appears as a name of the button of the work area. The search results are shown in a list.

Search keywording

The keywording search function searches the index fields in keywording forms. You can find the *Search keywording* function on the *Search tools/Search* tab of the ribbon.

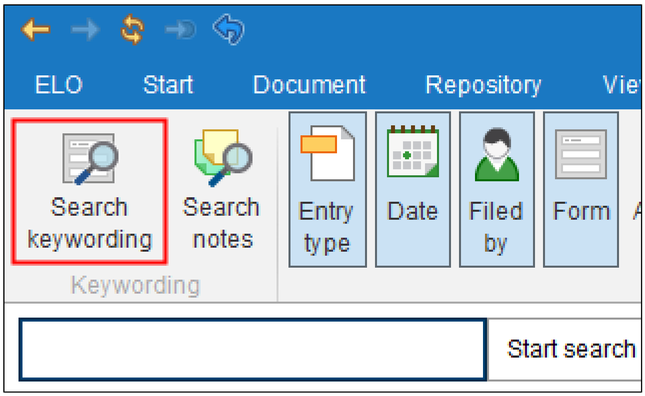


Fig. 44: 'Search keywording' button

1. Click the *Search keywording* button.

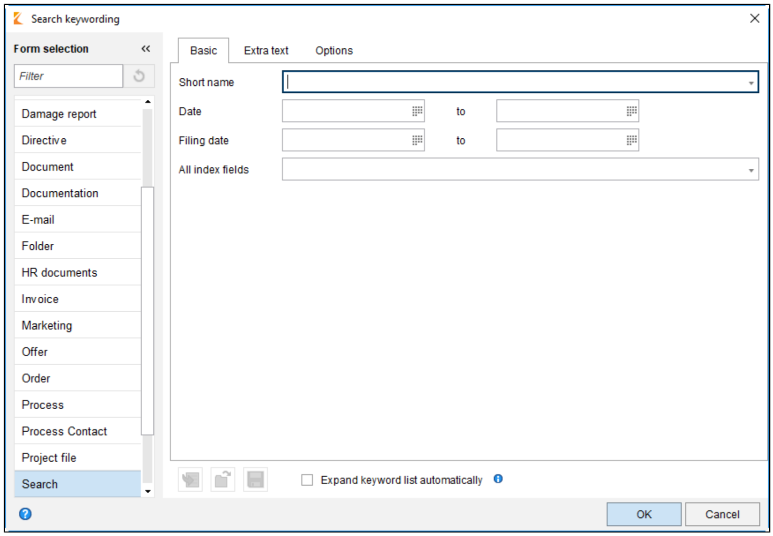


Fig. 45: 'Search keywording' dialog box

The *Search keywording* dialog box appears.

2. Select a search form in the column on the left.

3. Select a search field and enter a search term.

Information: To search all index fields, enter a term in the *All index fields* field.

4. Click *OK*.

Result

The search results are displayed.

Add and search annotations

Objective

Annotations include sticky notes, text notes and stamps. Annotations are affixed to a single page of a document. However, you cannot place sticky notes, text notes and stamps on all document formats. This is only possible for documents that can be displayed in the document viewer (PDF, TIFF, JPEG, ...).

Please note: If you want to use the stamp tool, you must have been assigned permission to at least one stamp in the ELO Administration Console.

Information: Margin notes are not the same as annotations. Margin notes are placed next to the document on the split bar and refer to **all** pages of a document.

Requirements

- You require a PDF or TIFF document.

Information: The following example shows how to do this using a sticky note. The method is similar for other types of annotations.

Step by step

1. Start the client.

2. Open the *Repository* work area.

3. Open the folder with the document you would like to place an annotation on.

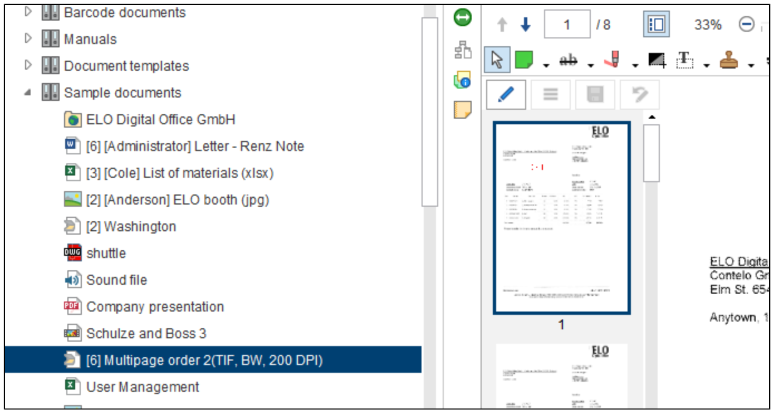


Fig. 46: Selecting a document for adding annotations

4. In the tree view, click the document you want to place an annotation on.

The document is shown in the viewer pane.

Information: You can assign permissions so that not all users can see or edit annotations.

The permissions settings for sticky notes and text notes are located under *ELO* > *Configuration* > *Annotations*. You define the permission settings for stamps in the *Stamps overview* dialog box. Open the *Stamps overview* dialog box via the *Stamps* drop-down menu in the document viewer toolbar.

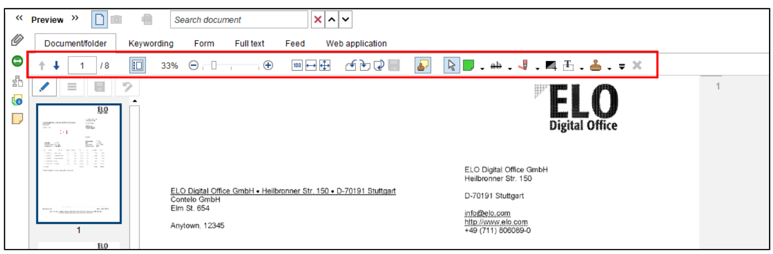


Fig. 47: Document viewer toolbar

The document viewer toolbar is displayed above the document in the document viewer.

Apply a sticky note

5. Click the sticky note icon on the document viewer toolbar to activate the *Sticky note* function.

Information: To use an annotation function multiple times in succession, hold down the ALT GR key as you click the function. To return to normal mode, click the *Select* function (cursor icon).

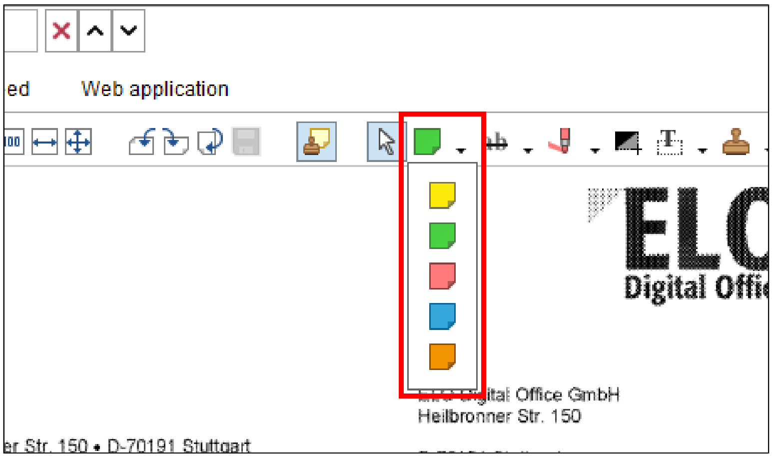


Fig. 48: Color selection for sticky notes

Optional: To change the color, click the triangle next to the sticky note icon and select a different color from the drop-down menu.

The cursor turns into a sticky note in the color you selected.

6. Click the part of the document you want to place the sticky note on.

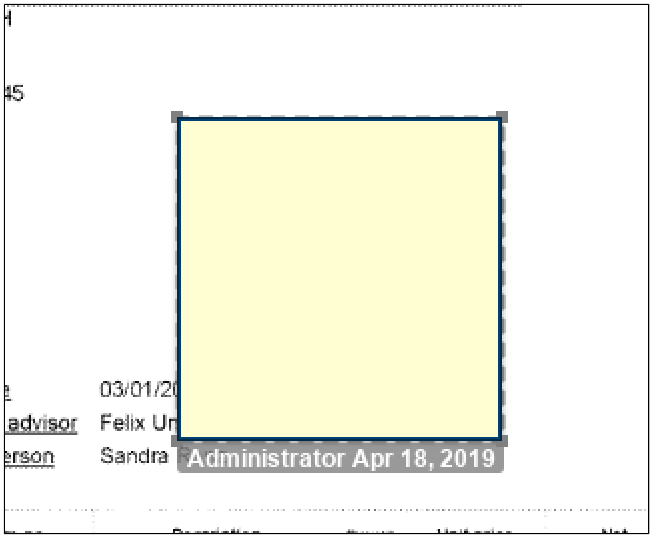


Fig. 49: Sticky note in edit mode

The sticky note is created. The dotted border indicates that the sticky note can be edited. The editor and the current date are displayed below the sticky note.

7. Enter text.

8. Click the area outside of the sticky note.

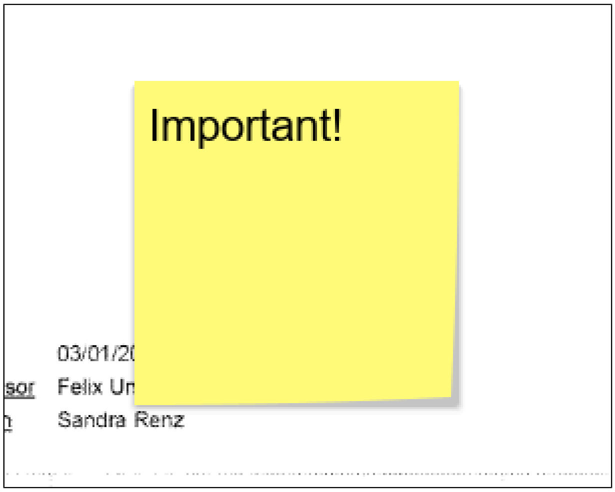


Fig. 50: Sticky note on a document

Result

The text entered is saved. The sticky note is displayed on the document.

Information: Double-click the sticky note to edit it. To delete a sticky note, select the sticky note with the selection tool and then click *Delete* in the document viewer toolbar.

Search notes

The *Search keywording* function is used to search for margin notes and annotations.

Requirements

- There must be at least one document in the repository that contains an annotation or margin note.

Step by step

1. Switch to the *Search* work area.

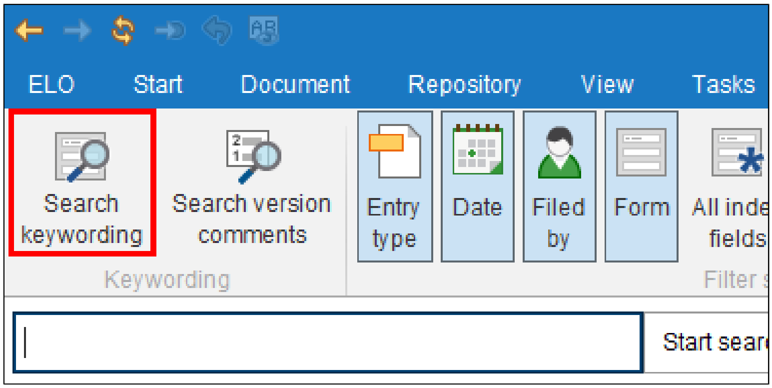


Fig. 51: 'Search keywording' button

2. Click the *Search keywording* button on the ribbon.

The *Search keywording* dialog box appears. The default search form is selected.

Optional: Select a different search form if required.

3. Click the *Options* tab.

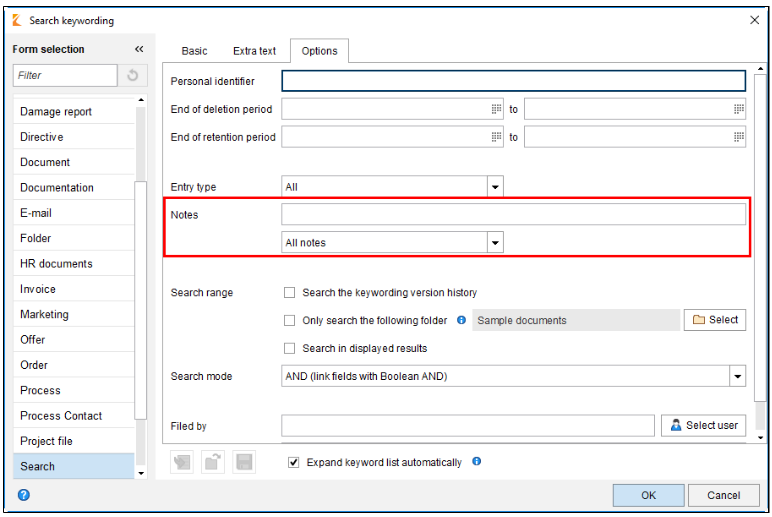


Fig. 52: 'Search keywording' dialog box

4. Enter a search term to the *Notes* search field.

Information: If you want the search to include annotations that do not contain any text, enter an asterisk (*) in the search field.

Optional: You can select the type of notes you want to search for from the drop-down menu under the *Notes* field.

5. Click *OK*.

Result

The search starts. The search results appear in the *Search* work area.

Create folder

Objective To create a new folder in the repository.

Requirements

- You must know which folders you want to create in the repository.

Step by step

1. Start the client.
2. Open the *Repository* work area.

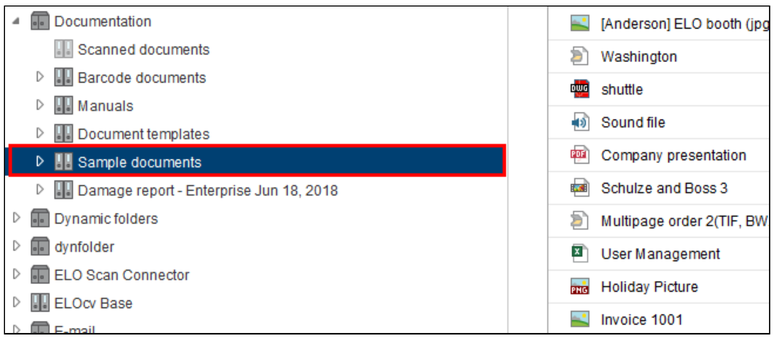


Fig. 53: Selected folder

3. Select the folder in the repository that you want to create the new folder in.
4. Click *New folder* (on the *Start* tab of the ribbon).

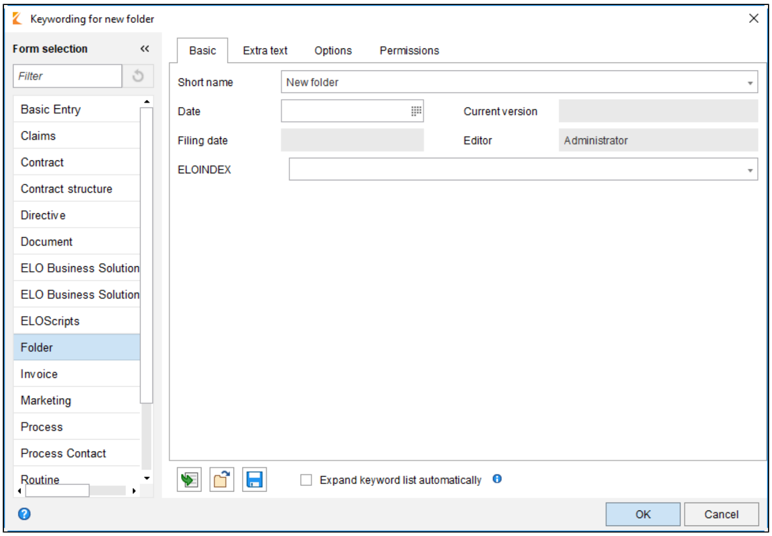


Fig. 54: 'Keywording for new folder' dialog box

The *Keywording for new folder* dialog box appears. The *Folder* keywording form is set by default.

Information: When keywording folders, you will only see the keywording forms in the *Form selection* column which the option *Use as folder form* has been enabled for in the keywording forms manager of the ELO Administration Console.

5. Enter a short name for the new folder.

Information: The more detailed your keywording entries are, the easier it will be for you to search for the document later on.

6. Click *OK* after entering all information.

Result

The new folder was created in the repository. The folder can be used for filing documents or for creating additional child folders.

Creating multiple folders

Use the *Insert default index* function to set up multiple folders at the same time. Use the *Save as default index* function to store an existing folder structure as the default index.

Information: There are no default indexes if you are installing the software for the first time. You may need to create a default index before you can perform the following steps (see below).

Step by step

1. Open the *Repository* work area.
2. Select a folder that you want to add a default index to.

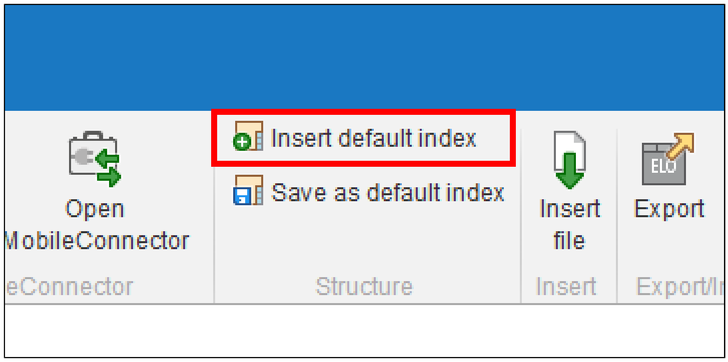


Fig. 55: 'Insert default index' button

3. Click the *Insert default index* button (*Ribbon* > *Repository*).

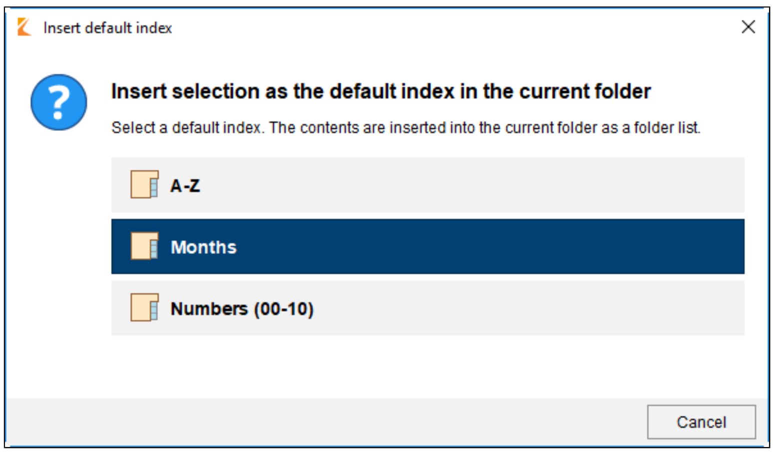


Fig. 56: 'Insert default index' dialog box

The *Insert default index* dialog box appears.

4. Click the desired default index.

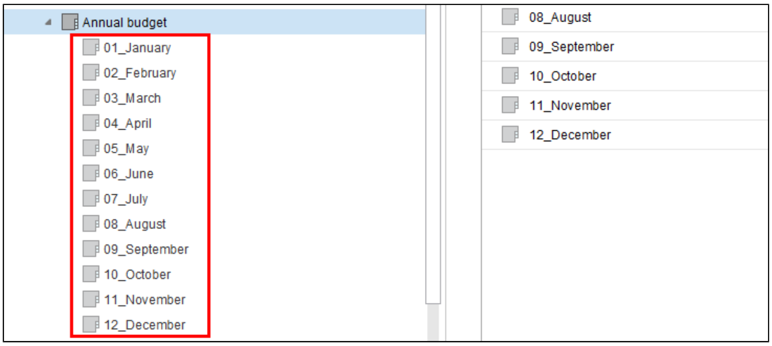


Fig. 57: New default index

Result

The default index is inserted. A default index was selected for the calendar months in this example.

Creating a default index

You can store the existing child structure of a folder as the default index. This lets you create a folder structure once and reuse it as often as you wish.

Step by step

1. Click the folder in the repository that contains the child structure that you would like to save as a default index.
2. Click *Save as default index* (*Ribbon* > *Repository*).

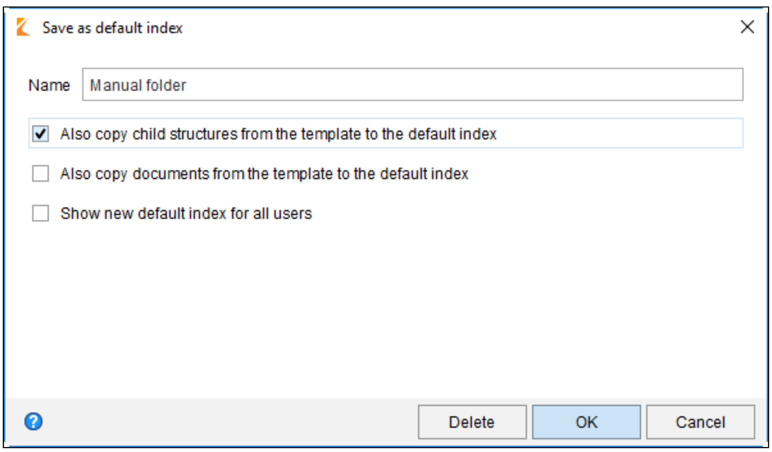


Fig. 58: 'Save as default index' dialog box

The *Save as default index* dialog box appears.

3. Enter a name for the new default index.

Optional: Select the desired options.

4. Click *OK*.

Result

The default index is stored and is available to you via the *Insert default index* function.

Edit document

Objective

To edit an existing document and file the new version to the repository.

Requirements

A document is available for editing.

Step by step

1. Start the client.
2. Open the *Repository* work area.
3. Open the folder with the document that you would like to edit.
4. Click the document.

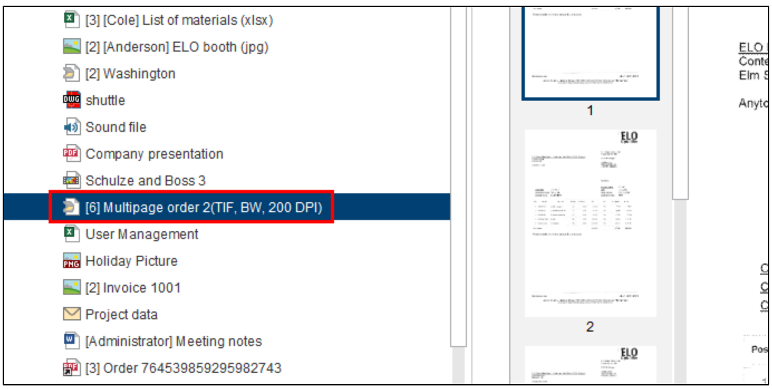


Fig. 59: Selected document

The preview of the document is displayed in the viewer pane.

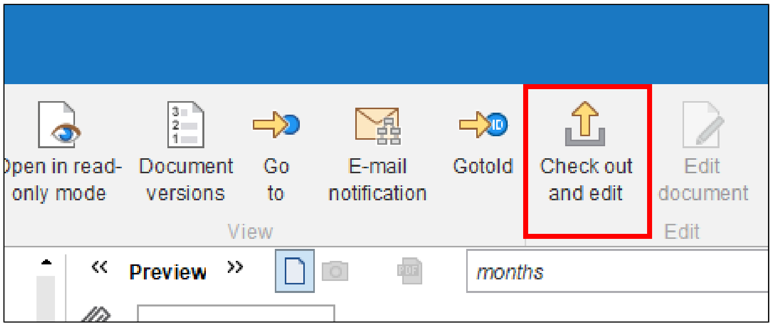


Fig. 60: 'Check out and edit' button

Check out

5. Click the *Check out and edit* button (*Ribbon* > *Start*).

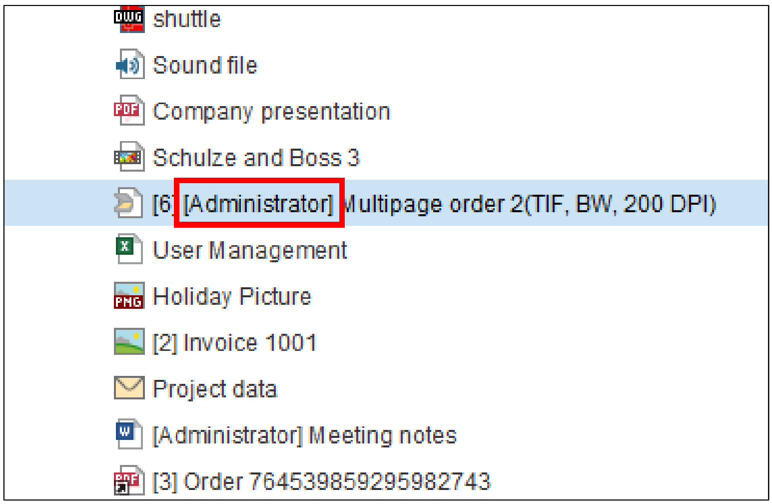


Fig. 61: Checked out document

The document is opened in the corresponding application and can be edited.

Information: The user editing the document is displayed in square brackets in front of the name of the document in the repository. The document is locked for other users.

Edit

6. Edit the document.

7. Save the document in an external application.

8. Close the external application.

The document is now in the *In use* work area.

Optional: Open the *In use* work area.

9. Select the document.

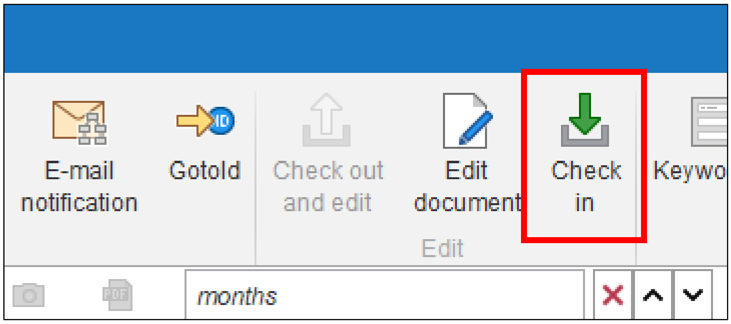


Fig. 62: 'Check in' button

Check in

10. Click *Check in* to transfer the document back to the repository.

Alternatively: Right-click a document in the repository and select *Check in* from the context menu.

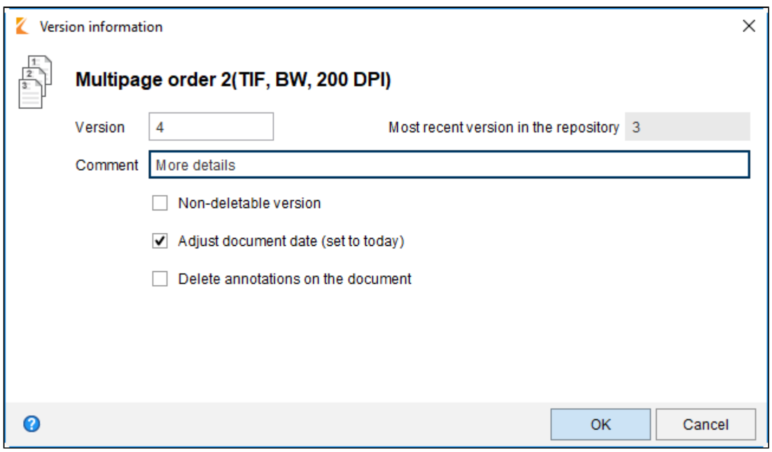


Fig. 63: 'Version information' dialog box

The *Version information* dialog box appears.

Optional: Enter a version number and version comment.

Information: If you want to update the document date in the repository to the current date, select *Adjust document date (set to today)* option.

Information: Users with the necessary permissions can delete versions of a version-controlled document. If you do not want your version to be deleted, select the *Non-deletable version* option.

11. Click *OK*.

Result

The document is checked back into the *Repository* work area with a new version number.

Check out and edit folder

It is possible to check out entire folders from ELO. This allows multiple documents to be locked at once.

Please note: If you check out a folder with all the references, you cannot check in the references separately. Instead, you need to check in the entire folder. In addition, you cannot check in the original documents that are linked to the references until you have checked in the entire folder.

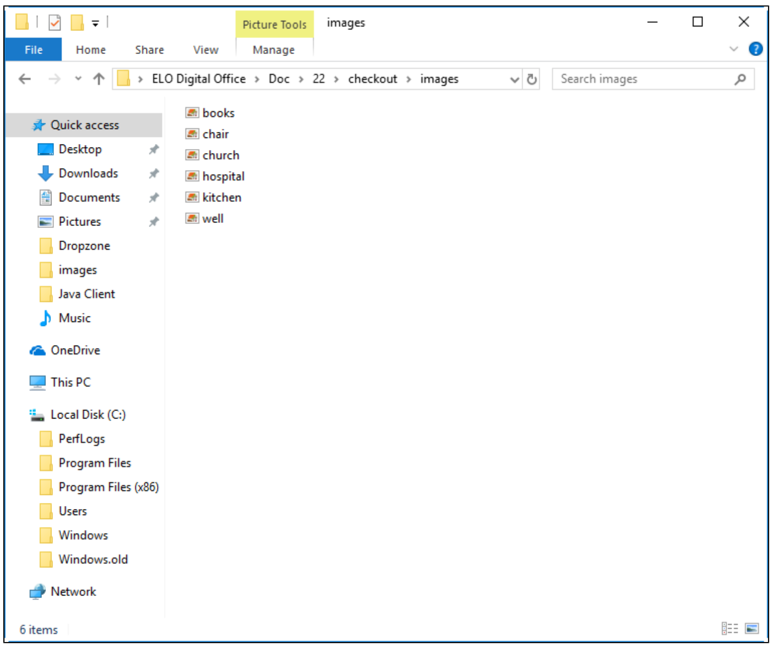


Fig. 64: Checkout directory

In principle, this works the same as when checking out documents (see above). The folder is saved in a checkout directory. The individual documents can be opened and edited from there.

Information: Child folders are not checked out. A file in ES8 format is created for each document. Files in ES8 format are used for saving keywording information. The Microsoft Windows Explorer default settings hide ES8 files.

The entire folder appears as checked out in the *In use* work area.

During check-in, ELO recognizes which documents have been changed. With the default settings, the *Version information* dialog box appears for every changed document.

Function overview

This chapter contains an alphabetical overview of the ELO Java Client functions.

Information: Some functions can be called in other ways, such as from the context menu for a specific work area. To keep the descriptions short and to the point, not all methods are described.

Functions

About...

Available in: *Ribbon* > *ELO*

Use this function to open the program information and version number of the ELO Java Client. This information on the version number is particularly important for support requests.

Fig. 65: 'About' dialog box

Accept substitution

Available in: *Ribbon* > *Tasks*

This function enables you to accept a substitution request from another user. To do so, you must be set as a substitute for that user. Depending on the substitution scope, their tasks are displayed in your *Tasks* work area. Use the *Substitution tasks* function to show substitution tasks.

Accept workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to accept a workflow node that was assigned to a group. You are then entered as a user in the workflow node. The workflow is **no longer** displayed as a group task in the *Tasks* work area. Use the *Return workflow* function to undo accepting the workflow.

Active processes

Available in: *Ribbon* > *ELO*

Use this function to open an overview of the currently active processes. Among these, for example, are import processes running in the background.

Ad hoc workflow

Available in: *Ribbon* > *Tasks*

Start a new ad hoc workflow with this function. An ad hoc workflow is ideal for distributing information or passing through simple approval procedures.

Add attachment

Available in: *Ribbon* > *Document* > *Attachment*

Use this function to attach a file to the selected document. A file from the local file system is copied to the repository as an attachment and connected to a document filed to the repository via the *Attachment* (paper clip icon) on the split bar. Double-click the paper clip icon and open the attached document.

Information: If you add a second attachment to a document, you can only access the first attachment using the *Attachment versions* function.

Add folder

Available in: *Ribbon* > *Repository*

With the *Add folder* function, you can add a repository folder for synchronization (ELO MobileConnector) with a folder outside of ELO or add a copy.

Add main repository view

Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*.

Use this function to create a work area that displays the entire repository. The function is only active if an entire work area was deleted.

Add pages

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Information: Alternatively, the same function is also available when you drag a TIFF or PDF file to the repository and drop it on another TIFF or PDF document.

Use this function to add a TIFF or PDF document selected in the *Intray* work area to a document in the *Repository* work area.

1. Select a TIFF or PDF document in the *Intray* work area.

2. Click *Add pages*.

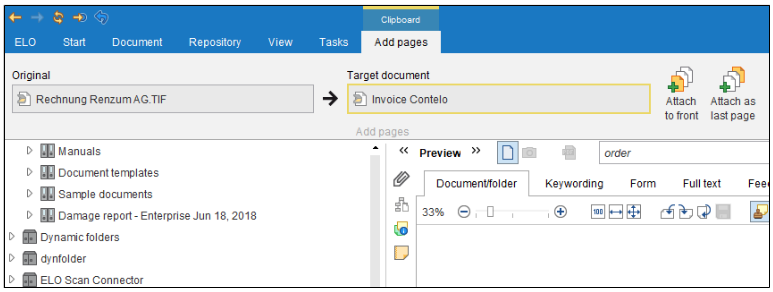


Fig. 66: 'Add pages' dialog box

The *Clipboard/Add pages* tab appears.

3. Select the TIFF or PDF document in the ELO repository that you want to add the pages to.

4. To attach the original document at the beginning of the target document, click *Add as page 1*. To attach the original document at the end of the target document, click *Attach as last page*.

The pages are added.

Add to full text database

Available in: *Ribbon* > *Repository*

Use this function to add the contents of a document to the full text database. The document must contain full text information. The full text information is written to the full text database and will be used when searching for documents.

All index fields

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *All index fields* function to add a filter to the current search. You have the option to look for a search term in all index fields.

Approval document

Available in: *Keywording* dialog box > *Options* tab

In the *Keywording* dialog box, a document can be turned into an *approval document*.

The user must have the *Author for approval documents* right.

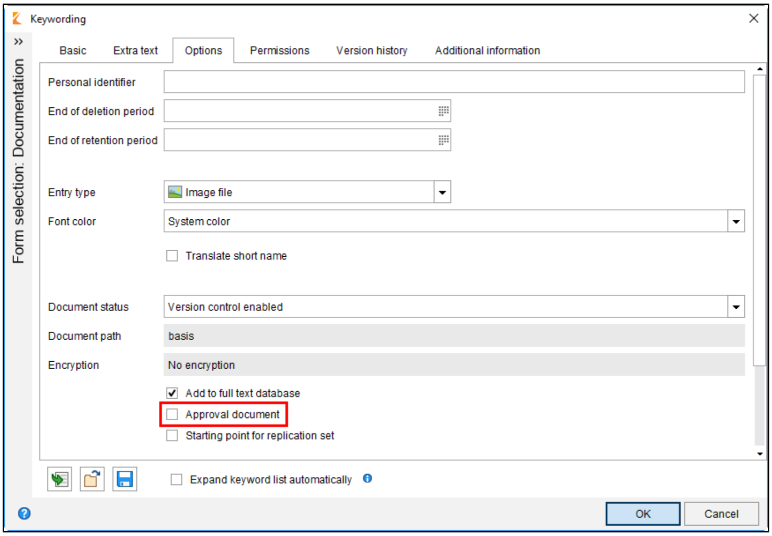


Fig. 67: Keywording form, 'Options' tab

Information: The *Approval document* function should primarily be used for workflows. Workflows are the best way to handle specific approval scenarios.

Two attributes separate an approval document from a normal document.

- After editing, a new version is created when checking in a document. The new version is not automatically set as the working version. To set a document version as the working version, open the *Document versions* dialog box and check the box in the *Approved version* column (*Ribbon* > *Start* > *Document versions*).
- Before editing an approval document, the users are asked whether they want to check out and edit the working version, or the newest document version, i.e. the approval version.

For more information on editing documents, refer to the chapter *Edit document*.

Assign replication sets

Available in: *Ribbon* > *Repository*

Use this function to open a dialog box in which you assign a replication set to the individual objects in the repository.

Requirement: The ELO REPLICATION module must be installed.

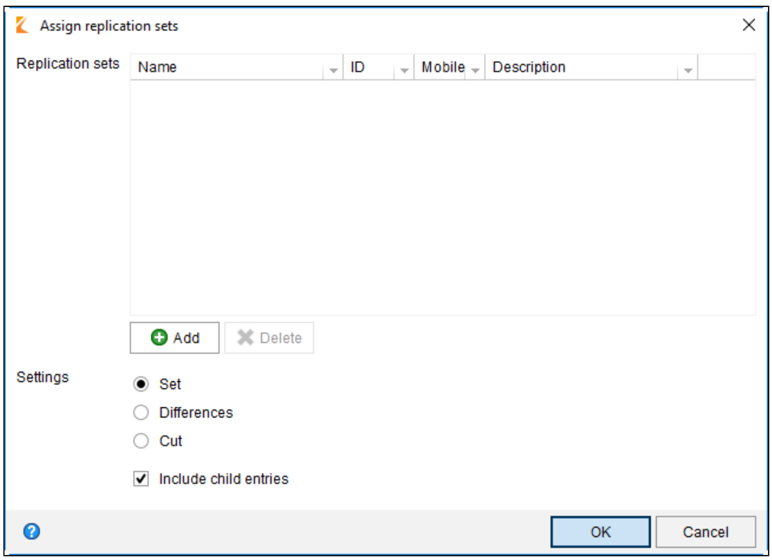


Fig. 68: 'Assign replication sets' dialog box

Assign substitute

Available in: *Ribbon* > *Tasks*

Use this function to create substitution rules for yourself. Define which users have the right to act as a substitute and which users are active substitutes.

Please note: If you want to view, copy, or retrieve documents from another user's Intray, these documents must already have been saved on the server. You can check this option under *Configuration > Advanced settings > Settings for the Intray work area > Save Intray on server when logging off*. If necessary, contact your system administrator.

Please note: A substitution rule can only be changed or deleted by the creator, the main administrator, the sub-administrator, or the supervisor of the user being substituted.

Information for administrators: When upgrading from ELO 11 or older versions, the active substitution rules are transferred and applied. This means that substitutions remain active for an unlimited period of time, substitution rights remain inactive with the right *May activate/deactivate outside a scheduled period*. This requires ELO Indexserver 12.05 or a higher version.

Attach as last page

Available in: *Ribbon > Clipboard/Add pages*

This function adds pages to the end of a PDF or TIFF document that was already filed to the ELO repository. For the function to work, you must have placed the pages in the *Intray* work area.

You need to click the *Add pages* function in the *Intray* work area to activate the *Clipboard/Add pages* tab.

Attach to back

Available in: *Repository > Ribbon > Document*

This function adds pages to the end of a TIFF document that was already filed to the ELO repository. You need to scan the pages.

Please note: You need to have a compatible scanner installed and selected. To check whether a scanner is installed, click the *Select scanner* button (*Intray work area > Ribbon > Intray/Filing*).

Attach to front

Available in: *Ribbon > Clipboard/Add pages*

This function adds pages to the front of a PDF or TIFF document that was already filed to the ELO repository. For the function to work, you must have placed the pages in the *Intray* work area.

You need to click the *Add pages* function in the *Intray* work area to activate the *Clipboard/Add pages* tab.

Attach to front

Available in: *Repository > Ribbon > Document*

This function adds pages to the front of a TIFF document that was already filed to the ELO repository. You need to scan the pages.

Please note: You need to have a compatible scanner installed and selected. To check whether a scanner is installed, click the *Select scanner* button (*Intray work area > Ribbon > Intray/Filing*).

Attachment versions

Available in: *Ribbon > Document > Attachment*

Use this function to open an overview of the attachment versions. You can open, store, compare or delete individual attachments. In addition, you can check the signature of an attachment and restore a deleted attachment.

Automatic filing

Available in: *Intray work area > Ribbon > Intray/Filing*

Use this function to automatically file a document to the repository. The filing target does not have to be selected manually. To use this function, the document must be keyworded using a keywording form that contains a filing definition.

Information: Please note that you **cannot** edit keywording forms in the ELO Java Client. You can only edit keywording forms in the ELO Administration Console. Contact your system administrator if necessary.

Back

Available in: *Ribbon > Start*

Use this function to go one step back in the viewing history of the document that you opened last.

Barcode recognition

Available in: *Intray work area > Ribbon > Intray/Filing*

This function starts the automatic recognition process for barcodes. To use this function, you need the ELO Barcode module. The ELO Barcode module allows you to evaluate barcode information in image files, such as in scanned invoices.

Cancel postponement

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to cancel postponement of a workflow. If a workflow has been postponed, it remains active but is hidden in the *Tasks* work area.

Add a new tasks view filter to show the hidden workflows. For example, you configure the view filter to only show postponed workflows.

Alternatively: Switch to the *Tasks* work area > *View* tab to show postponed workflows. Click *New view filter*. Create a new view filter in the dialog box, enter the name *Postponed workflows* and activate the *Show postponed workflows* option.

To cancel a postponement, select the corresponding workflow and click the *Cancel postponement* button.

Information: If the *Postponement date* column is not displayed, there are two options for showing the column: Right-click the row with the table heading and select the check box in the drop-down menu before the *Postponement date* column name.

Alternatively: Switch to the *View* tab and click *Restore table columns*. The table is reset to the default settings. The *Postponement date* column is shown again.

Change password

Available in: *Ribbon* > *ELO*

Use this function to change your password.

Check in

Available in: *Ribbon* > *Start* > *Check in*

Use this function to transfer the edited document back to the repository. The document is no longer locked for other users.

Information: The function is only active if there is at least one document in the *In use* work area.

Check out and edit

Available in: *Ribbon* > *Start*

Use this function to check out a document or folder for editing. The checked out documents are transferred to the *In use* work area and locked for other users. The editor is displayed in square brackets before the name of the documents in the *Repository* work area. You need to check documents you have checked out back into the repository.

Check signature Available in: *Ribbon* > *Document*

Use this function to check the digital signature of a document. The function is only available when the document has a digital signature.

Close Available in: *Ribbon* > *ELO*.

Close the Java Client with this function.

Configuration Available in: *Ribbon* > *ELO*

Use this function to open the *Configuration* dialog box. The *Configuration* dialog box contains the system settings that allow you to customize the client to suit your individual needs.

Copy Available in: *Ribbon* > *Start*

Use this function to copy the currently selected entry to the clipboard. You can copy an individual document, a folder or a folder structure with child folders. Use the *Insert copy* function to insert an entry in the desired location in the repository.

Copy to Clipboard Available in: *Ribbon* > *Start*

Use this function to transfer a document or a folder to the *Clipboard* work area. The *Clipboard* work area is used as a kind of favorites list in which you can collect frequently used documents. The documents remain in the repository.

Count entries Available in: *Ribbon* > *Repository*

Use this function to count entries in the currently selected folder. You can also see the amount of memory that the entries in the selected folder are using.

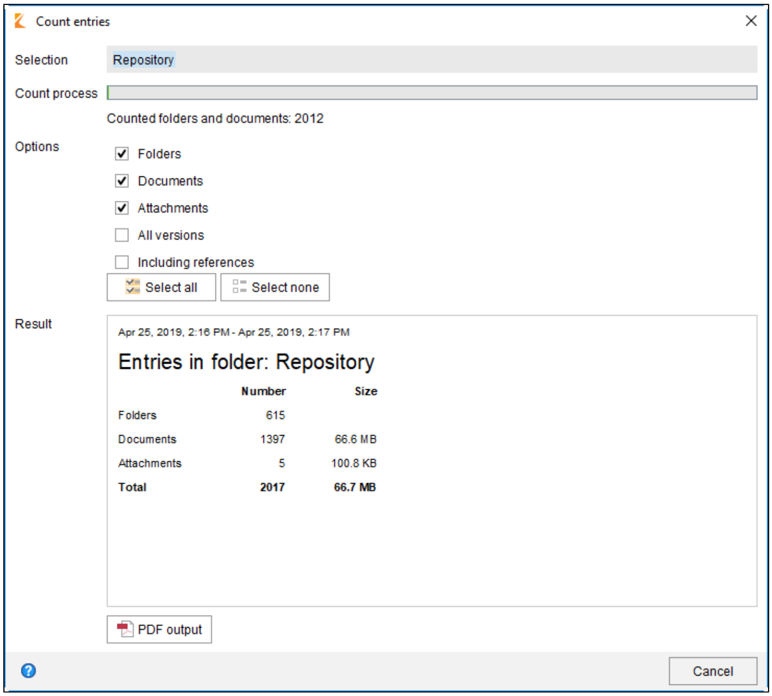


Fig. 69: 'Count entries' dialog box

Create external link

Available in: *Ribbon* > *Document*

This function allows you to create a link to one or multiple documents that you can send to recipients outside of the internal network, e.g. in an e-mail.

Information: If you have selected multiple documents, the *Copy to clipboard* function is not available.

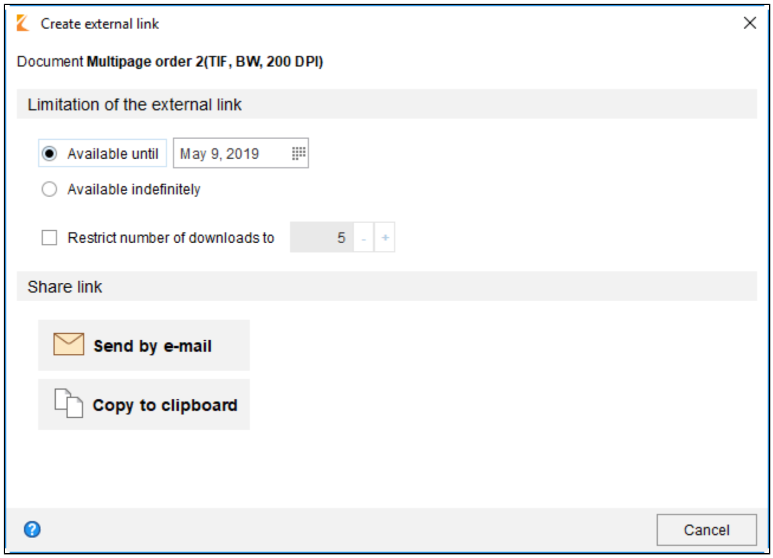


Fig. 70: Create external link

If required, copy the link to another application via the *Copy to clipboard* button. You can continue to use the link here.

Information: The function in ELO is always available in the internal LAN without additional configuration. Refer to the server manual for more information.

Create preview document

Available in: *Ribbon* > *Document*

Use this function to create a preview document in TIFF or PDF format for the currently selected document. The preview document is a special image document that is stored separately in the repository. Use this function to display a document for preview if there is no viewer for the original format. You can use this for CAD files, for example.

Information: You can display the preview document via the *Show preview document* function in the preview bar.

Create signature

Available in: *Ribbon* > *Document*

Use this function to digitally sign documents. The corresponding software and hardware must be installed on your computer.

Current folder only

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use this function to restrict the search to the folder displayed last in the repository. You need to click *Start search* again for the restrictions for a previously performed search to take effect. When you select the *Current folder only* option, the searched folder is displayed in a tooltip.

Date

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Date* function to add a filter to the current search. You have the option to only show search results for entries with a specific document date.

Delegate workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to delegate a workflow node to another user. The user is displayed in an **additional** node in the workflow. Use the *Delegate workflow* dialog box to define whether you want to be notified after completing the workflow task.

Information: Whereas in the *Hand off workflow* function, another user is assigned the workflow node, the *Delegate workflow* function creates an additional node for the user. The original assignment remains unchanged.

Delete

Available in: *Ribbon* > *Start*

Delete entries with this function. First, a deletion marker is set and the entries are hidden. Use the *Delete permanently* function to permanently delete deleted entries.

Please note: Documents in the Intray that have **not yet** been filed to the repository are permanently deleted with the *Delete* function. Only the task is deleted in the *Tasks* area. The associated entry remains.

Delete attachment

Available in: *Ribbon* > *Document* > *Attachment*

Delete an attachment with this function.

Delete expired documents

Available in: *Ribbon* > *Repository* > *Recycle bin*

Use this function to delete entries in the repository whose retention period has passed.

1. Click the *Delete expired documents* button.

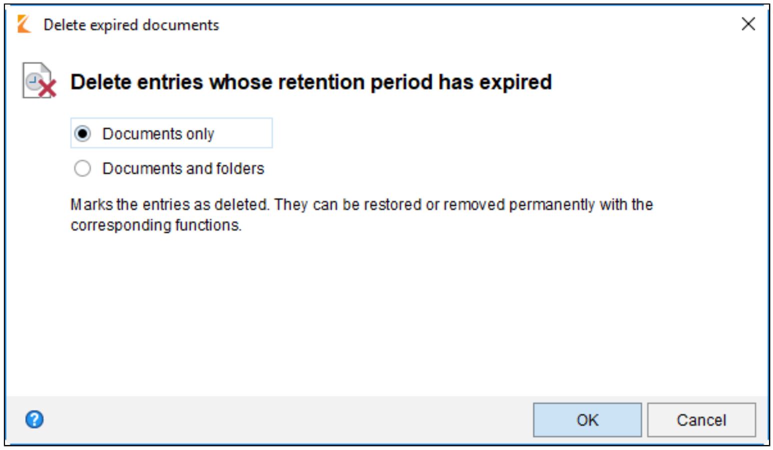


Fig. 71: 'Delete expired documents' dialog box

The *Delete expired documents* dialog box appears.

2. If you only want to delete documents, select the *Documents only* function.

Optional: If you want to delete documents and folders, select the *Documents and folders* option.

3. To delete the expired documents by assigning them a deletion marker, click *OK*.

Optional: Click Cancel to cancel the action. No ELO objects are deleted in the process.

Delete from full text database

Available in: *Intray* > *Ribbon* > *Repository*

Use this function to remove a document including its text contents from the full text database. This means that you **cannot** find the document with the full text search. This function is also available even if the selected document does not contain any full text information.

Delete keywording

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to delete the keywording information of a document in the *Intray* work area. You can edit the keywording but **not** delete it once a document has been filed to the repository.

Delete permanently

Available in: *Ribbon* > *Repository* > *Recycle bin*

Warning: Use this function to permanently delete selected documents from the repository. Permanently removed documents **cannot** be restored. You should be aware that even a differentiated backup concept only offers a limited option for restoring deleted options.

1. Click the *Delete permanently* button.

The *Delete permanently* dialog box appears.

2. To specify which entries are to be deleted permanently, enter a deletion date and click *OK*.

All entries that were deleted before the date entered will be removed from the repository.

Delete view filter

Available in: *Ribbon* > *View*

Use the *Delete view filter* function to delete the selected repository, tasks or search view filter.

Please note: The respective view filter is deleted without any further confirmation.

Discard document changes

Available in: *Ribbon* > *Start*

Use this function to delete the current working version of a document and restore the original version.

This function is only available for documents that you have checked out.

Document from template

Available in: *Ribbon* > *Start*

Use this function to create a new document based on a document template. Use the *Document from template* dialog to select a document to use as a template. The template is opened for editing in the corresponding application. After editing, the document must be saved and checked into the repository.

Information: Refer to the *Examples of use* chapter to learn how to work with document templates.

Document versions

Available in: *Ribbon* > *Start*

Use this function to open an overview of the existing document versions for the selected entry.

1. Select a document in the repository.

2. Click *Ribbon* > *Start* > *Document versions*.

Alternatively: Right-click a document in the repository and select *Document versions* from the context menu.

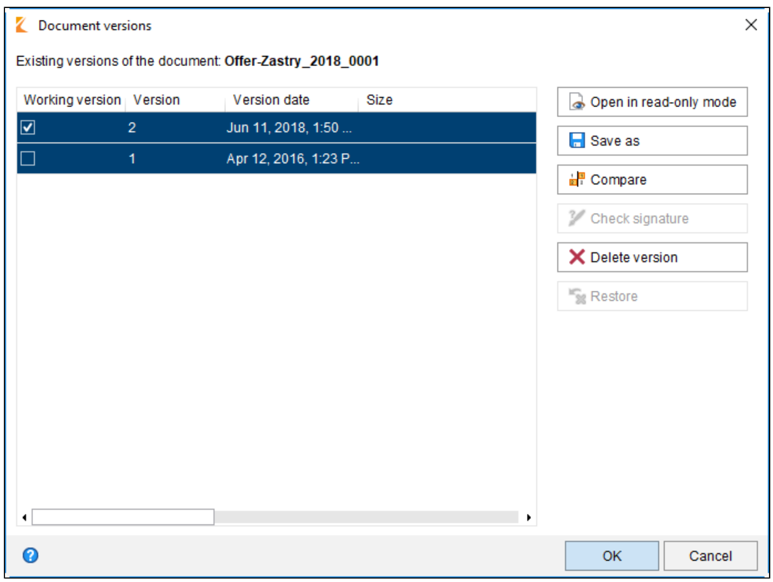


Fig. 72: 'Document versions' dialog box

The *Document versions* dialog box appears. This dialog box shows all existing document versions in a table.

Information: It is possible to select multiple documents.

The following functions are available:

Open in read-only mode: Use the *Open in read-only mode* button to view the selected version in an external application.

Save as: Use this function to save versions to your local file system.

Compare: Select two versions and click *Compare*. The versions are shown next to each other in a new window.

Check signature: Checks the signature of a selected version. The signature module must be installed.

Delete version: Deletes the selected version. The version is initially assigned a deletion marker and can be restored (as long as it has not been permanently deleted).

Information: To view deleted versions, enable the *Show deleted entries* function (*Repository* tab on the ribbon).

Restore: Removes the deletion marker from a deleted version.

Working version: To make a version a working version, select the check box in the *Working version* column. To edit the comment for a version, double-click the corresponding comment field.

Edit comment: To edit the comment for a version, double-click the corresponding comment field.

OK: Click *OK* to save your selection. The dialog box closes.

Cancel: Click *Cancel* to close the dialog box without saving the changes.

Dynamic folder

Available in: *Search work area > Ribbon > Search tools/Search*

Use the *Dynamic folder* function to create a dynamic folder from a search that was saved temporarily in the *Search* work area.

1. Switch to the *Search* work area.

2. Perform a search.

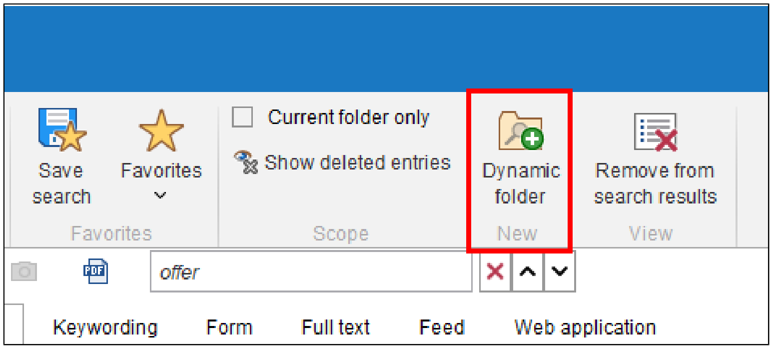


Fig. 73: 'Dynamic folder' button

The results are displayed in the *Search* work area.

3. Click *Search tools/Search* > *New* > *Dynamic folder*.

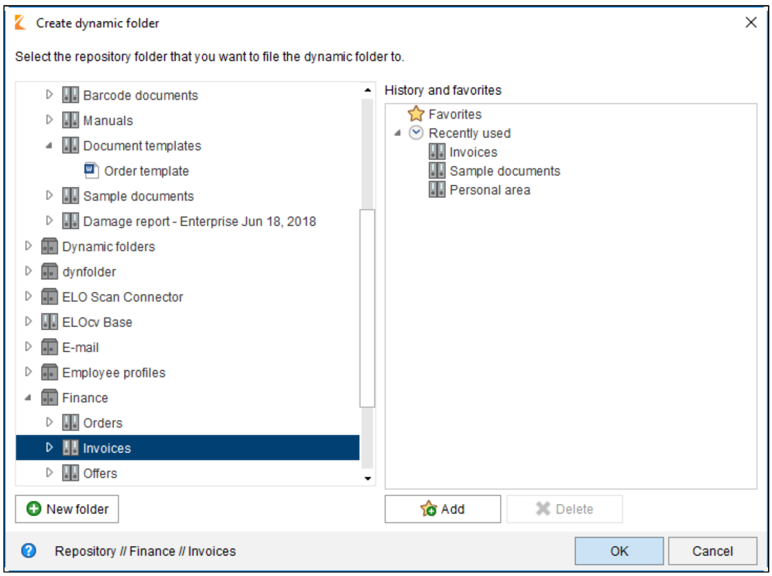


Fig. 74: Create dynamic folder

The *Create dynamic folder* dialog box appears.

4. Select the folder that you want to file the dynamic folder to.

5. Click *Add*.

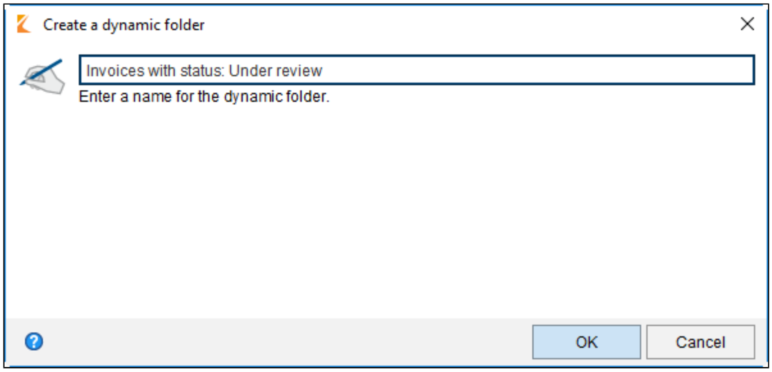


Fig. 75: Entering the name for a dynamic folder

The *Create dynamic folder* dialog box appears.

6. Enter a name for the new folder.

7. Click *OK.*

The dynamic folder is now located in the defined folder in the repository.

Edit document

Available in: *Ribbon* > *Start*

Use this function to open a document that is in the *In use* work area but is not currently open in the corresponding external application.

1. The document is opened in the corresponding external application.

2. Edit and save the document.

3. Close the application.

4. Transfer the edited document back to the repository.

Use the *Check in* function for this (*Ribbon* > *Start* > *Check in*).

Edit reminder

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to edit an existing reminder. You can view and edit the current settings.

Edit tree views

Available in: *Search work area* > *Ribbon* > *View* > *Tree views*

Use the *Edit tree views* function to change the tree view in the search. You can create and edit different tree views. For example, you can sort the search results list by customers.

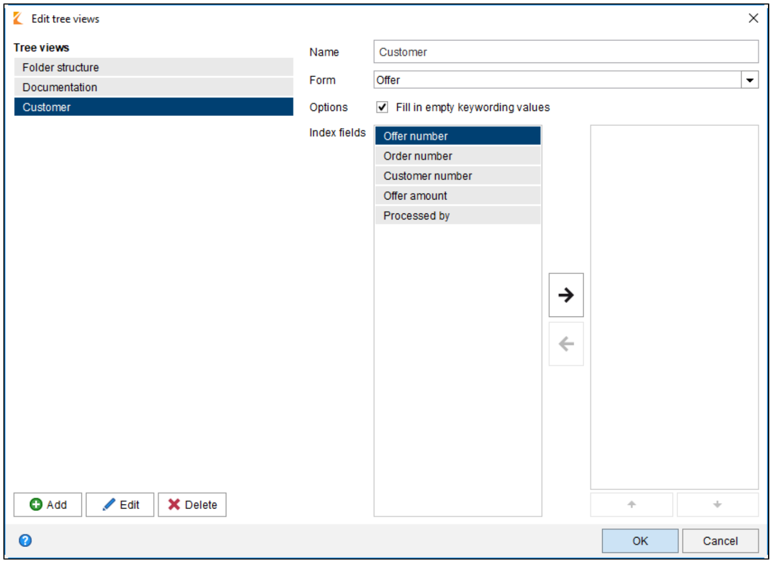


Fig. 76: 'Edit tree views' dialog box

Information: The *Fill in empty keywording values* option enables you to display index fields that do not contain any information. These index fields are filled with spaces.

The tree view is available in the *Tree views* drop-down menu.

Edit view filter

Available in: *Ribbon* > *View*

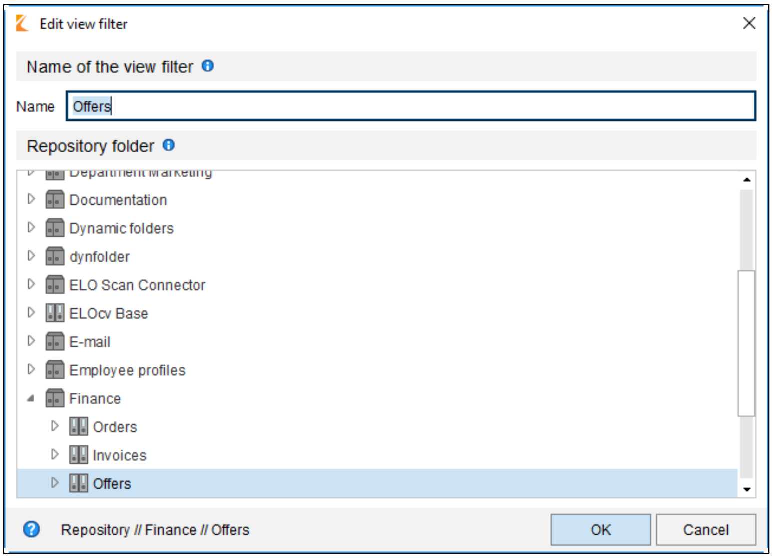


Fig. 77: 'Edit view filter' dialog box

Use the *Edit view filter* function to edit the settings of a repository, tasks or search view filter.

Editor

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Editor* function to add a filter to the current search. You have the option to only show search results for entries filed by a specific user.

Entry type

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Entry type* function to add a filter to the current search. You have the option to only show search results for entries of a specific type.

Escalations

Available in: *Ribbon* > *Tasks*

Use this function to display tasks with overdue deadlines and those for which you are entered as the responsible user in the *Escalation management* dialog box.

If a task is escalated, the entry *Escalation* appears in the *Priority* column in the task lists of the *Tasks* work area.

Expand branch

Available in: *Ribbon* > *View*

Use this function to open the child entries of a selected folder. All existing child entries are displayed.

Expand/Collapse

Available in: *Search work area* > *Ribbon* > *View*

Use this function to change the display of the search results in the list and tile view. You can select filter criteria for both views via the *Sort order* and *Group* drop-down menus. Use the *Expand/Collapse* function to switch between the view of the parent filter criteria and a view of the search results associated with the filter criteria.

Information: The function is only active if the search results are displayed in list or tile view. In addition, at least one *Group* filter criterion must be selected in the drop-down menu.

Export

Available in: *Ribbon* > *Repository*

Use this function to export a repository or part of a repository.

1. Select the document or the folder that you would like to export.

Alternatively: Select the topmost repository level to export the entire repository.

2. Click the *Repository* tab.

3. Click *Export*.

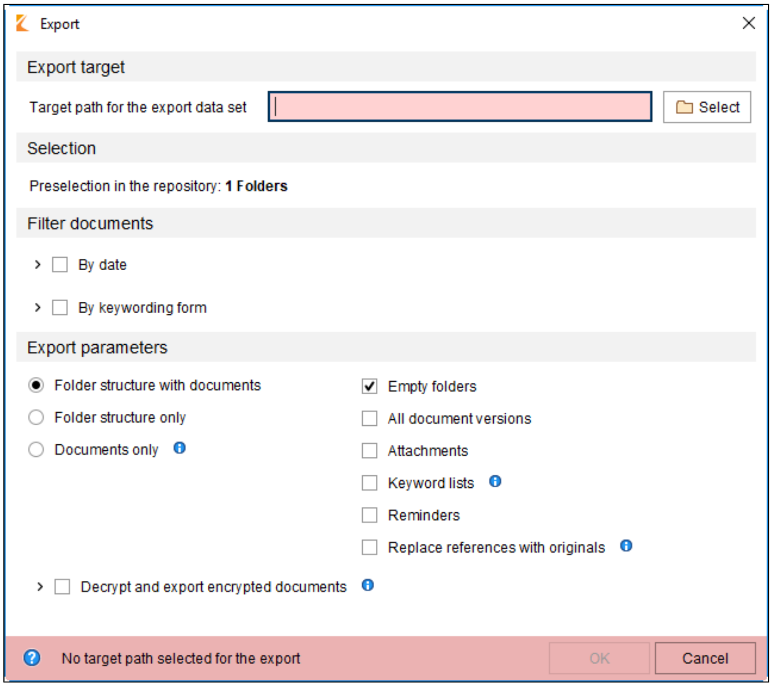


Fig. 78: 'Export' dialog box

The *Export* dialog box appears.

4. To select a target directory on your computer, click *Select*.

The *Select* dialog box appears.

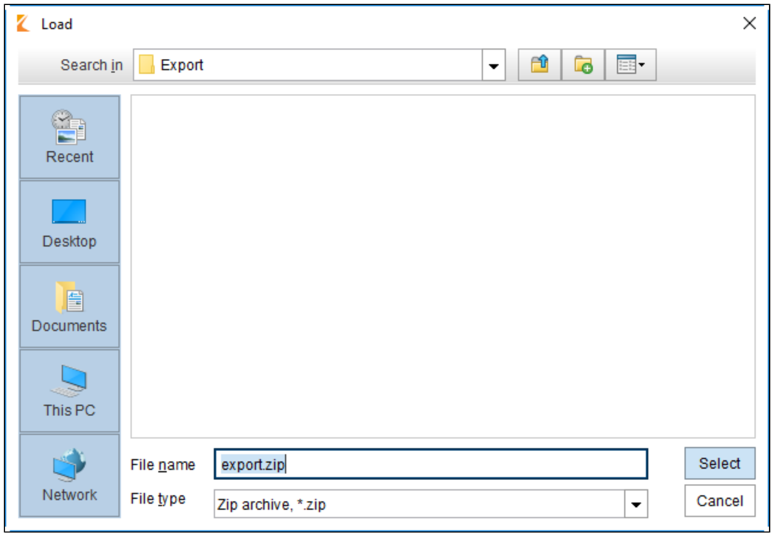


Fig. 79: Selecting a target directory

5. Select a target directory and click *Select*.

The target directory is displayed in the *Export* dialog box.

Optional: If necessary, change the export settings.

6. To start the export, click *OK*.

Extend workflow deadline

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to extend the processing deadline for a workflow. The function can only be used with workflows that have passed a deadline.

External links overview

Available in: *Ribbon* > *Document*

Use the *External links overview* function to open the *External links overview* dialog box. The *External links overview* dialog box lists all existing external links. You can also edit and delete external links in this dialog box.

Favorites

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Click the *Favorites* function to open the *Favorites* drop-down menu. The *Favorites* drop-down menu contains a list of your search favorites.

Fax document

Available in: *Ribbon* > *Document*

Use this function to send a document as a fax. The fax printer set in the *Configuration* dialog box (*Ribbon* > *ELO* > *Configuration* > *Technical presets* > *General* > *Use as fax printer*) is used for this.

Information: If there is only a printer without a fax function, the document will be printed.

Feed

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Feed* function to add a filter to the current search so that you can search for entries in the ELO feed.

File size

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *File size* function to add a filter to the current search. You have the option to only show search results for entries of a certain file size.

File to repository

Available in: *Intray work area* > *Ribbon* > *Intray/Filing* > *File to repository*

Use this function to file a document from the *Intray* work area to the repository. Choose the desired filing location in the repository via the selection dialog box. Use the *Go to* function to show the filing location in the repository.

Filed by

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Filed by* function to add a filter to the current search. You have the option to only show search results for entries filed by a specific user.

Filing date

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Filing date* function to add a filter to the current search. You have the option to only show search results for entries filed within a specific date range.

Font color

Available in: *Ribbon* > *Repository*

Change the font color of a selected document or folder with this function via a drop-down menu.

The following font colors are available by default:

- System color (= black)
- Red
- Green
- Blue

Form

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Form* function to add a filter to the current search. You have the option to only show search results for entries filed with a specific keywording form.

Form designer

Available in: *Ribbon* > *ELO*.

Use this dialog to create forms to use in a form-based workflow.

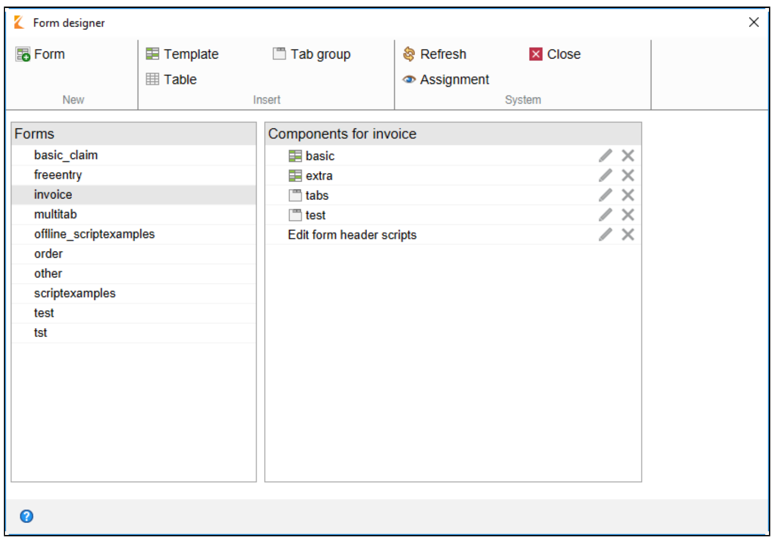


Fig. 80: Form designer for the form-based workflow

Forward

Available in: Quick launch toolbar

Use this function to go one step forward in the viewing history of the document. You must have used the *Back* function at least once to be able to do this.

General margin note

Available in: *Split bar context menu*

Use this function to create a general margin note on the split bar. The general margin note is yellow. Point to a margin note with the cursor, to display the creation date and the editor in addition to the text. A general margin note can be seen and edited by all users.

Go to

Available in: *Ribbon* > *Start*

This function opens the filing location of the currently selected document or folder. Use this function to open the filing location of an entry in the list of search results, for example.

Group

Available in: *Search work area* > *Ribbon* > *View*

Use this function to sort the list of search results in the list and tile view. Use the *Group* drop-down menu to select whether to group the list by *Date*, *Filed by*, *Filing date*, *Keywording form* or *Type*.

The search results are grouped by categories, e.g. by the year in which they were filed. This function can be combined with the *Sort order (search results)* function.

Information: The function is only active if the search results are displayed in list or tile view.

Group tasks

Available in: *Ribbon* > *Tasks*

Use this function to add the group tasks to the list in the *Tasks* work area. Group tasks are tasks that were assigned to multiple persons, e.g. a department. To display group tasks in your task list, you need to be a member of the corresponding group.

Hand off workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to transfer an active workflow node to another user. The user is displayed in the node and the workflow appears in the user's *Tasks* work area. The new user is set in place of the original user.

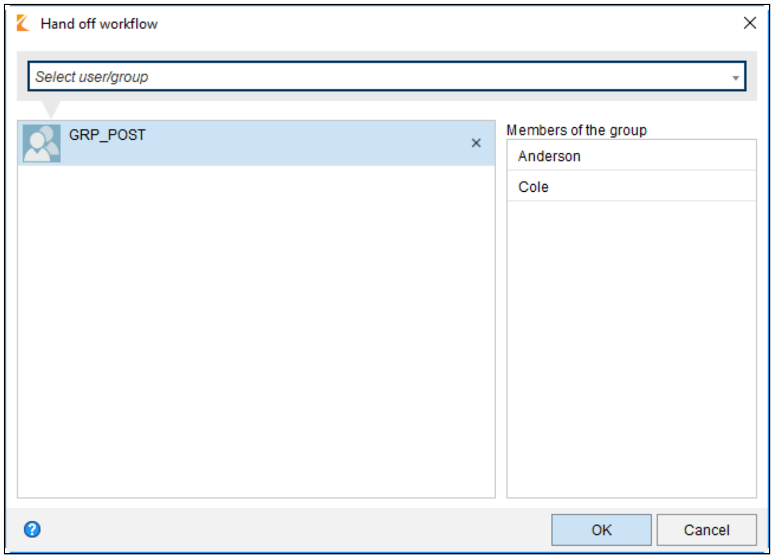


Fig. 81: 'Hand off workflow' dialog box

Help

Available in: *Ribbon* > *ELO*

This function launches the ELO in-program help function.

Home

Available in: *Ribbon* > *Start*

Use this function to go to the top repository level, which is called Home.

Import

Available in: *Ribbon* > *Repository*

Use this function to import the data sets into the repository.

1. Open the *Repository* work area.
2. Click the *Repository* tab.
3. Click *Import*.

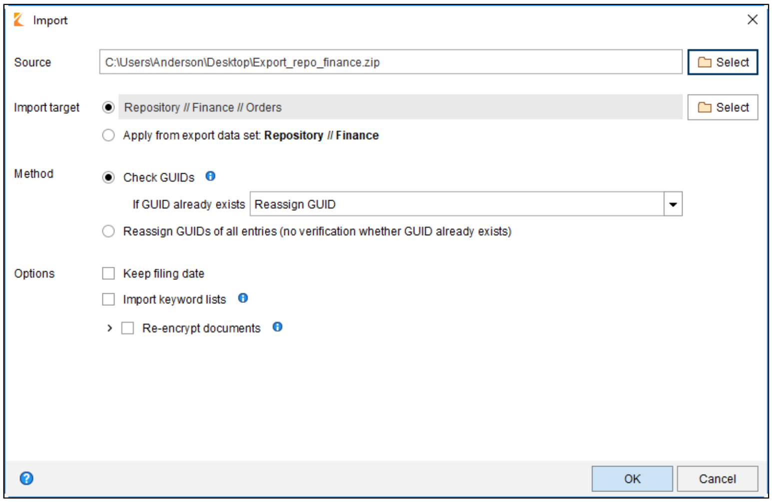


Fig. 82: 'Import' dialog box

The *Import* dialog box appears.

4. Select a source for the import.

5. Specify whether you want to copy the import target from the data set or whether to use another import target.

6. Click *OK* to start the import.

Insert copy

Available in: *Ribbon* > *Clipboard/Copy/Paste*

Use this function to insert an entry copied to the clipboard to another location in the repository.

1. Select the entry in the repository that is to be copied.

2. Click *Copy* in the context menu.

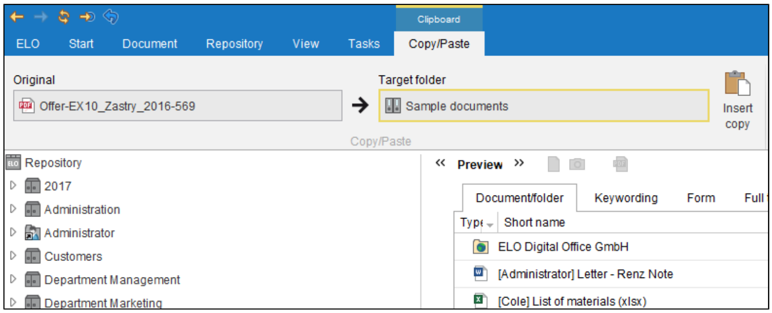


Fig. 83: 'Clipboard/Copy/Paste' tab

The *Clipboard/Copy/Paste* tab appears.

3. Select the target folder in the repository.

The target folder is applied to the *Target folder* input field in the tab.

4. Click *Insert copy*.

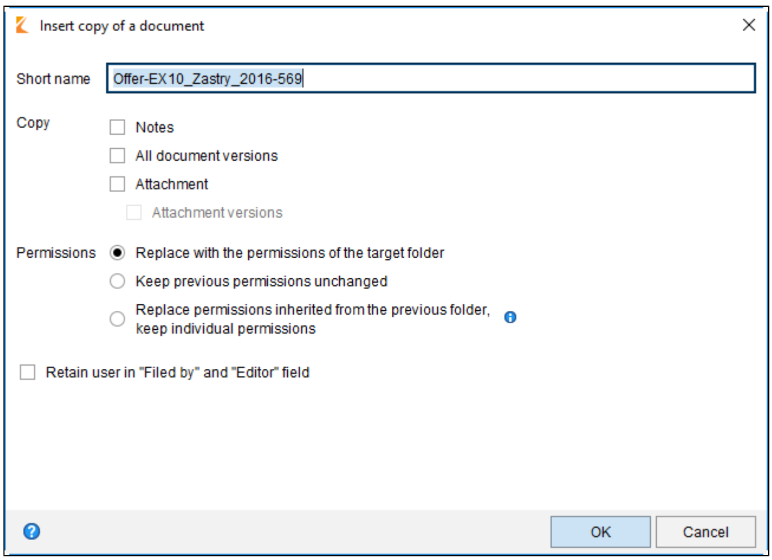


Fig. 84: 'Insert copy of a document' dialog box

The *Insert copy of a document* dialog box appears.

When copying documents or folders, you can choose from various options. You can determine whether you would like to keep notes, the references or the original owner, for example.

5. Click *OK* to insert the copy.

Insert default index

Available in: *Ribbon* > *Repository*

Use this function to add a default index to a folder in the repository. A default index is a predefined child structure within a folder, such as a tab with a customer name.

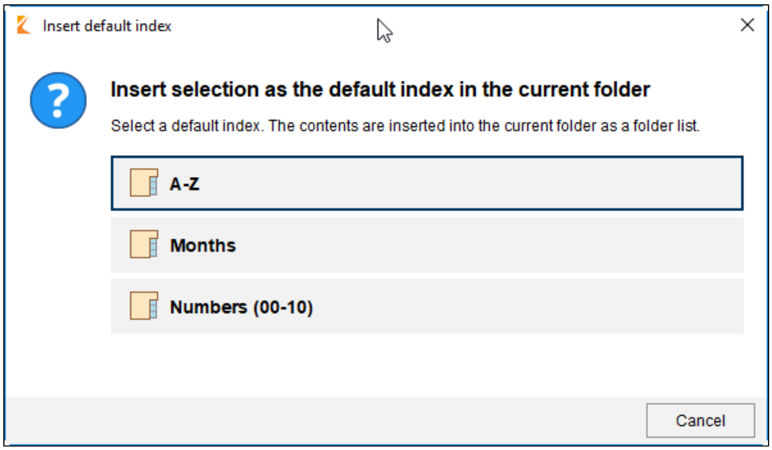


Fig. 85: 'Insert default index' dialog box

You can insert and delete default indexes via the *Insert default index* dialog box. Use the *Save as default index* function to create a new default index.

Insert file

Available in: *Ribbon* > *Repository*

Use this function to transfer a file from your local file system to the repository. The file is filed to the currently selected folder. If you are in the *Intray* work area, the file is transferred to the *Intray* work area.

Join (separator pages)

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

You need this function for scanning documents with multiple pages. To select the start and end of a document, add separator pages to the stack during scanning.

Use empty pages or pages with a black bar as separator pages. Print the separator pages via the *Scan profiles* dialog box.

When the *Join (separator pages)* function has been activated, the separator pages are automatically recognized and the documents are combined into multi-page documents.

Information: This function is only available for TIFF and PDF files.

Choose from two different merge options for separator pages:

- Join using black bar separator pages
- Join using blank pages as separator page

The settings for the merge options can be found on the ribbon (*ELO > Configuration > Advanced settings > Settings for the Intray work area*).

Join pages

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to join multiple TIFF or PDF files into a multi-page file in the *Intray* work area. The topmost selected document will be the first page of the new document. The function is only available for TIFF and PDF documents.

Keywording

Available in: *Ribbon* > *Start*

Use this function to open the *Keywording* dialog box. Use the *Keywording* dialog box to edit the keywording information of an entry. The keywording information contains information that enables you to find a document again later. This includes the short name, the document and filing date, the version number and the editor.

Link

Available in: *Ribbon* > *Repository*

Use this function to create and manage links between entries in the repository. If two entries are linked, the *Link* icon (green circle with a white double arrow) will be displayed on the split bar.

Information: You can also display the *Link* column in the table view. A link icon appears in this column when there is a link for an entry.

1. Select a document in the *Repository* work area.

2. Click the *Repository* tab.

3. Click *Link*.

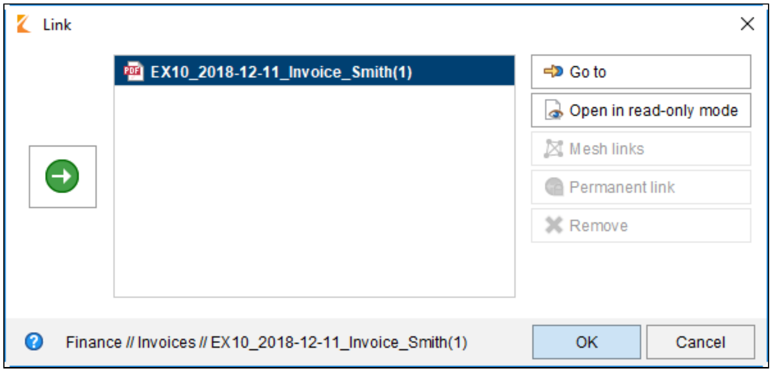


Fig. 86: 'Link' dialog box

The *Link* dialog box appears.

3. Select a second document in the *Repository* work area and click the green icon with the arrow facing right to add the selected entries as links.

The second document is added as a link.

Click the *Link* icon on the split bar to edit an existing link.

Link with drag-and-drop

Available in: *Ribbon* > *Document*

Enable this function to create an ELO link with a drag-and-drop action.

1. Click the entry you want to create an ELO link for.

2. Drag and place the entry elsewhere, such as on your desktop.

3. Now release the mouse button.

The ELO link is created.

4. Click the link to open the corresponding entry.

List

Available in: *Search work area* > *Ribbon* > *View* > *List*.

Use this function to change how the search results are displayed in the *Search* work area. The search results are displayed as a list. On the left-hand side is a document icon or a thumbnail of the document; the *Short name*, *Editor*, *Date* and search word highlighting are displayed on the right. This only alters how the search results are displayed. The entries remain unchanged.

List permissions

Available in: *Intray* > *Ribbon* > *Repository*

You can display the permissions for each folder in the repository via the *List permissions* function. This function helps administrators to quickly find information on the permission structures in the repository.

Information: The function is **not** available at the document level. You will find information on the permissions of a document on the *Permissions* tab in the *Keywording* dialog box.

Load new version

Available in: *Ribbon* > *Document*

Use this function to load a file from your local file system and file it as a new version of a document in the *Repository* work area. Using this option on version-controlled documents creates a new entry in the version history and makes this new version the current working version. For documents that are not version controlled, the previous version is overwritten.

Manage favorites

Available in: *Search work area* > *Ribbon* > *Search tools/Search* > *Favorites*

Use this function to rename or delete a search favorite, or to add it to the ribbon.

Manage view filters

Available in: *Ribbon* > *View*

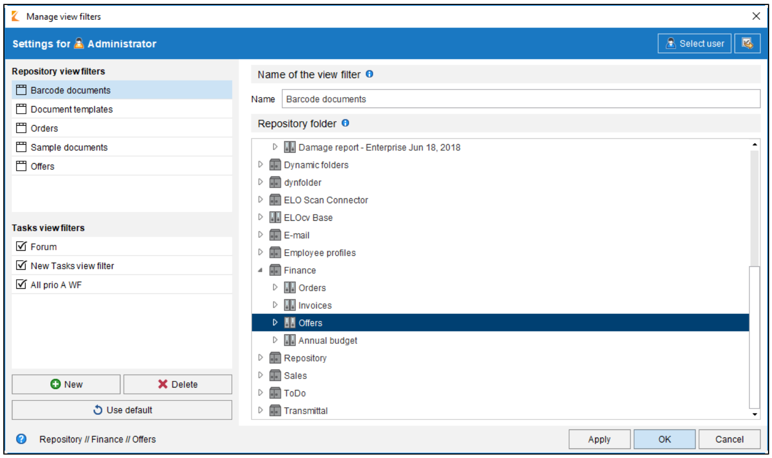


Fig. 87: 'Manage view filters' dialog box

Use the *Manage view filters* function to open the *Manage view filters* dialog box for editing repository and tasks view filters. Existing view filters are listed in the left column of the dialog box. Edit the selected view filter in the right column of the dialog box.

Minimize/maximize navigation

Available in: *Preview bar* in the viewer pane

This function minimizes or maximizes the tree view, or the tree and table view depending on the layout you have selected.

Minimize/Maximize preview

Available in: *Preview bar* in the viewer pane

This function minimizes or maximizes the viewer pane.

Monitor changes

Available in: *Ribbon* > *Tasks*

Use this function to monitor documents and folders in the repository. If another user creates a new version of the monitored document or if another user adds an entry to the monitored folder, you will be notified in the *Tasks* work area.

1. Open the *Repository* work area.

2. Click the *Tasks* tab.

2. Select a document or folder.

3. Click *Monitor changes*.

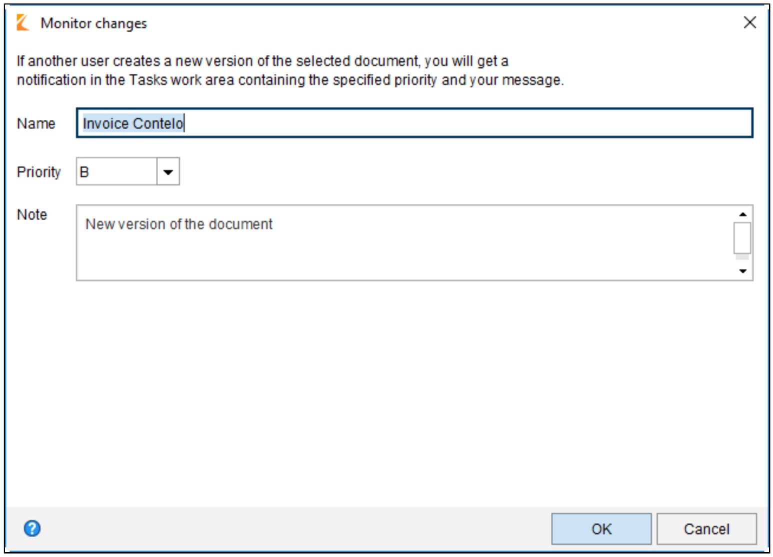


Fig. 88: 'Monitor changes' dialog box

The *Monitor changes* dialog box appears.

You can enter a name for the monitored entry. In addition, you can select the priority with which the entry is displayed in your task list. If needed, you can enter a note for the monitored changes.

4. Click *OK*.

Monitoring is started. If the monitored entry is changed, you will receive a notification.

Monitoring overview

Available in: *Ribbon* > *Tasks*

Open an overview of your currently monitored entries. You can show the filing location, open the entries for viewing, click *Edit monitoring* or *End monitoring*.

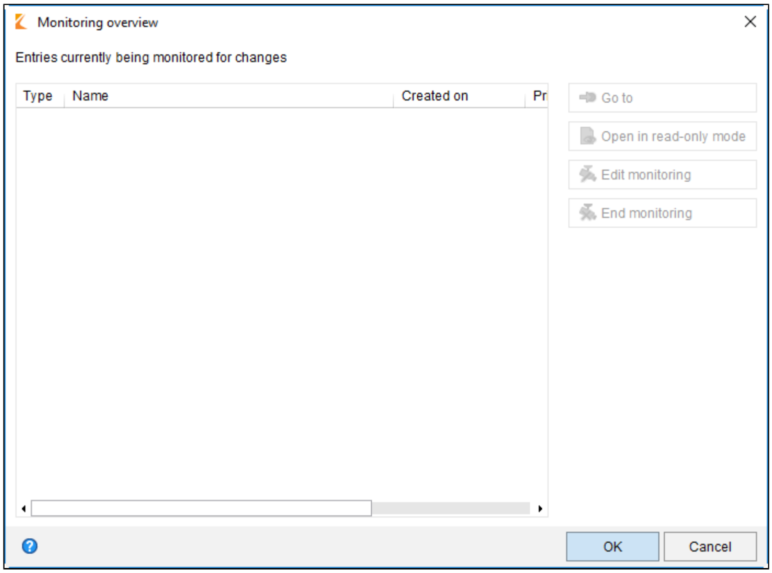


Fig. 89: 'Monitoring overview' dialog box

Move document files

Available in: *Ribbon* > *Repository*

Use the *Move document files* function to move files, file versions, attachments, and/or attachment versions to another medium (i.e. to a different document path). However, the repository structure remains the same.

Move entry

Available in: *Ribbon* > *Start*

Use this function to move a selected entry within the repository.

1. Select the entry that you want to move.

2. Click *Move entry*.

The *Clipboard/Move* tab appears. The selected entry is displayed in the *Original* field.

3. Select the target folder in the repository.

The selected folder is displayed in the *Target folder* field.

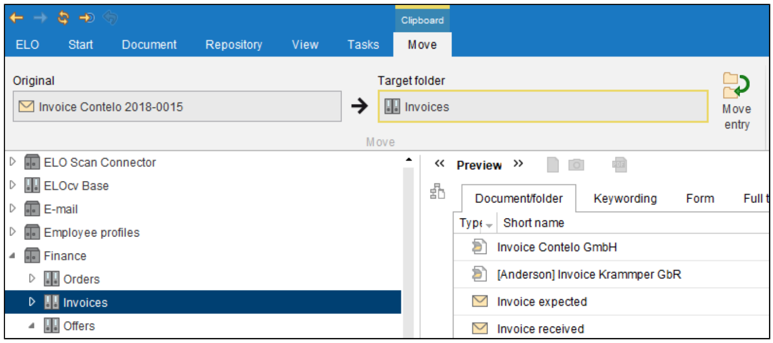


Fig. 90: Moving an entry - Defining target

4. Click *Move entry*.

The entry is moved to the target folder. The *Clipboard/Move* tab closes.

New folder

Available in: *Repository work area* > *Ribbon* > *Start* > *New folder*

Use this function to create a new folder in the repository.

New version

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to create a new version of a document from the *Intray* work area in the *Repository* work area.

1. Switch to the *Intray* work area.

2. Select the document that you want to add as a new version to a document in the repository.

3. Click *New version*.

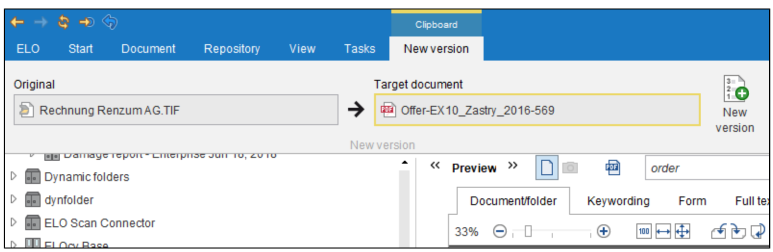


Fig. 91: 'New version' dialog box

The *Clipboard/New version* tab appears.

4. Select the document you want to create a new version of.

5. Click *New version*.

The document is filed as a new version of the selected document.

Information: You **cannot** create a new version for a locked or deleted document.

New view filter

Available in: *Repository*, *Tasks*, and *Search* work areas: *Ribbon* > *View*

Please note: In the *Search* work area, this function behaves differently than when it is used in the *Repository* and *Tasks* work areas.

In the 'Repository' and 'Tasks' work areas

Use the *New view filter* function to create a new repository view filter in the *Repository* work area or a new tasks view filter in the *Tasks* work area. The repository view filters and tasks view filter are added as tiles to the tile navigation.

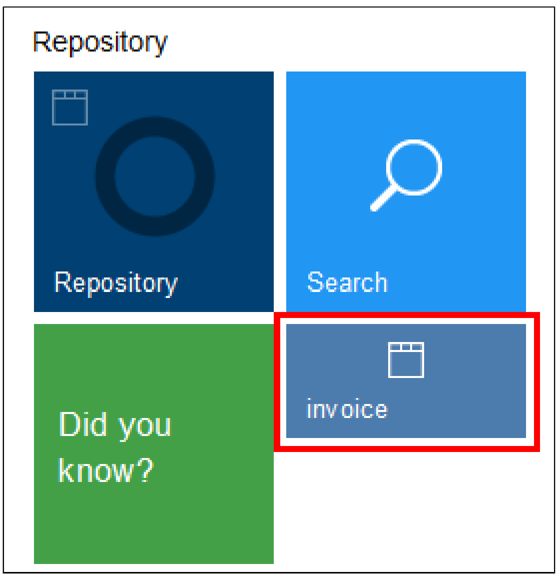


Fig. 92: 'Invoices' view filter

Repository view filter: A repository view filter is restricted to a certain part of the repository.

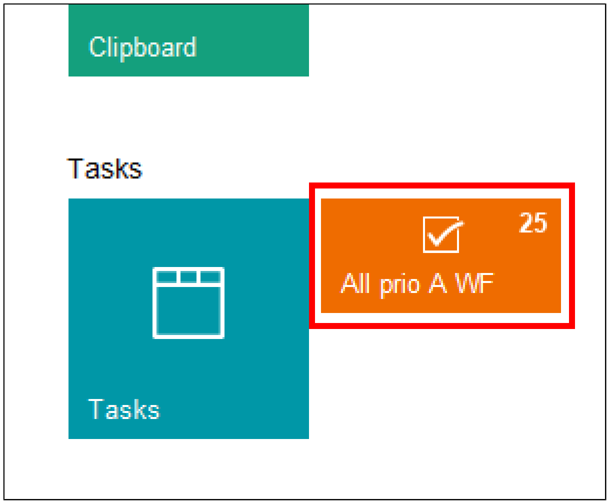


Fig. 93: Tasks view filter for escalations

Tasks view filter: A tasks view filter filters the task list according to specific criteria. The criteria are stored in the respective task view filter.

In the 'Search' work area

When you use the *New view filter* function in the *Search* work area, you create a temporary view filter.

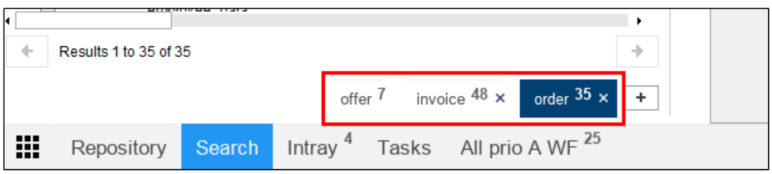


Fig. 94: Search views

A search view temporarily saves search results and search settings. Search views appear in a bar on top of the navigation bar.

Please note: These search views are deleted when you close ELO. If you want to save a search request, use the *Add favorite* function, which is located on the ribbon under *Search tools/Search > Save search* when you are in the *Search* work area. Tiles are automatically created for favorites. These tiles will appear in the *Hidden tiles* group of the tile navigation area in *My ELO* after you restart ELO.

Open a new window

Available in: *Ribbon* > *ELO*

Use this function to open a second ELO Java Client window.

Open attachment in read-only mode

Available in: *Ribbon* > *Document* > *Attachment*

Use this function to open an attachment in the corresponding external application, such as Microsoft Word.

Open Clipboard work area

Can be added via: *Ribbon > ELO > Configuration > Quick access to functions*.

Use this function to switch to the *Clipboard* work area.

Open in read-only mode

Available in: *Ribbon* > *Start*

Use this function to open a document selected in the repository in an external program.

Open In use work area

Can be added via: *Ribbon > ELO > Configuration > Quick access to functions*.

Use this function to switch to the *In use* work area.

Open Intray work area

Can be added via: *Ribbon > ELO > Configuration > Quick access to functions*.

Use this function to switch to the *Intray* work area.

Open MobileConnector

Available in: *Ribbon* > *Repository*

You can use the *Open MobileConnector* function to synchronize a repository folder with an assigned folder or mobile device or to create a copy of the repository folder. You can assign a folder to an external folder via *Ribbon* > *Repository* > *Add folder*.

Open My ELO work area

Can be added via: *Ribbon > ELO > Configuration > Quick access to functions*.

Use this function to switch to the *My ELO* work area.

Open next work area

Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*.

This function allows you to define a keyboard shortcut for switching to the next work area.

Open Repository work area

Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*.

Use this function to switch to the *Repository* work area.

Open Search work area

Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*.

Use this function to switch to the *Search* work area.

Open Tasks work area

Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*.

Use this function to switch to the *Tasks* work area.

Pass workflow forward

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to forward the selected workflow to the next workflow node. This ends your own work with the workflow and sends it to the next user.

PDF conversion

Available in: *Ribbon* > *Document*

Use this function to convert a document selected in the repository into a PDF document. The document is then filed to the repository as a new version.

Information: An ELO PDF Printer must be installed.

Permanent margin note

Available in: *Split bar context menu*

Use this function to create a permanent margin note on the split bar for a document. The permanent margin note is red. Point to a margin note with the cursor, to display the creation date and the editor in addition to the text. Unlike general and personal margin notes, permanent margin notes **cannot** be deleted.

Permissions

Available in: *Ribbon* > *Repository*

Use this function to determine the permissions of a folder or a document. The function opens the *Permissions* tab in the *Keywording* dialog box.

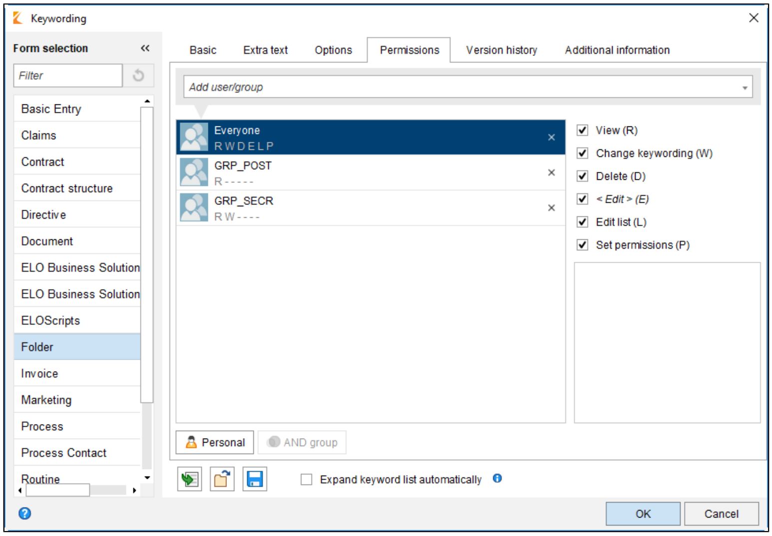


Fig. 95: 'List permissions' dialog box

Personal margin note

Available in: *Split bar context menu*

Use this function to create a personal margin note on the split bar. Personal margin notes are green. Point to a margin note with the cursor, to display the creation date and the editor in addition to the text. Personal margin notes can only be viewed or edited by the creator of the margin note.

Postpone workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

This function enables you to hide the workflow in the *Tasks* work area until a specific date. Once the date has been reached, the workflow is shown again. Use the *Cancel postponement* function to cancel a workflow postponement.

Print document

Available in: *Ribbon* > *Document*

Use this function to print a document selected in the repository.

Print keywording

Available in: *Ribbon* > *Document*

Use this function to print keywording information on a selected entry. For this, only the basic information is taken into account that is also displayed in the keywording preview.

Recent search requests

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Recent search requests* function to open a drop-down menu containing the last ten searches. Click a menu item in the drop-down menu to run the selected search again.

The drop-down menu contains previous ELO iSearch requests and keywording search requests.

Reference

Available in: *Ribbon* > *Start*

Use this function to create a reference to a document or folder selected in the repository. A reference establishes a connection between a copy of an original document, while the document only exists once physically. All changes to the document automatically apply to the references. This prevents duplicates.

1. Open the *Repository* work area.
2. Select a document or folder.
3. Click *Reference*.

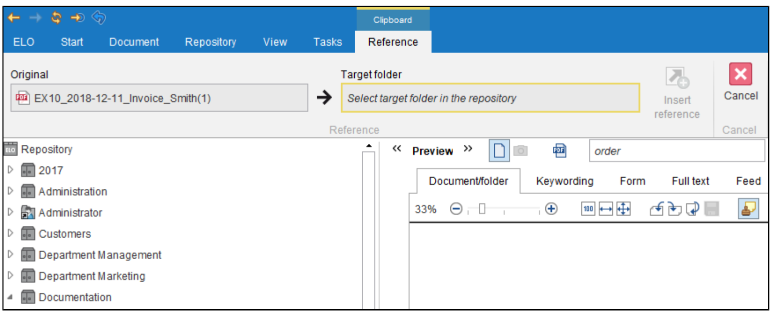


Fig. 96: Selected source document

The *Clipboard/Reference* tab appears.

The name of the selected document or folder is displayed in the *Original* field. You will be asked to select a target folder in the repository.

4. Select the folder in the repository that you want to create the reference in.

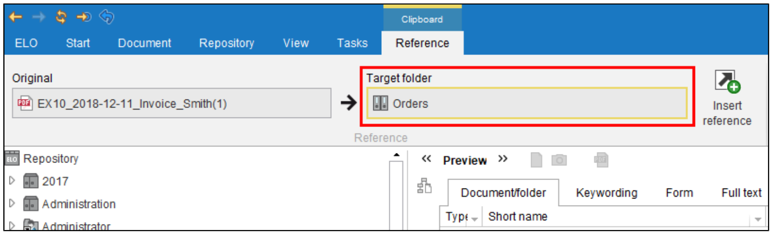


Fig. 97: Selected target folder

The folder is displayed in the *Target folder* field.

5. Click *Insert reference*.

The *Clipboard/Reference* tab closes. The reference is created in the selected target folder. An arrow icon indicates that it is a reference.

Refresh

Available in: *Quick launch toolbar*

The function updates the view of the current work area. The data is reloaded from the server.

Reminder

Available in: *Ribbon* > *Tasks*

Use this function to create a reminder for a document or a folder. A reminder defines a date on which the document or the folder appears in the *Tasks* work area of the user responsible.

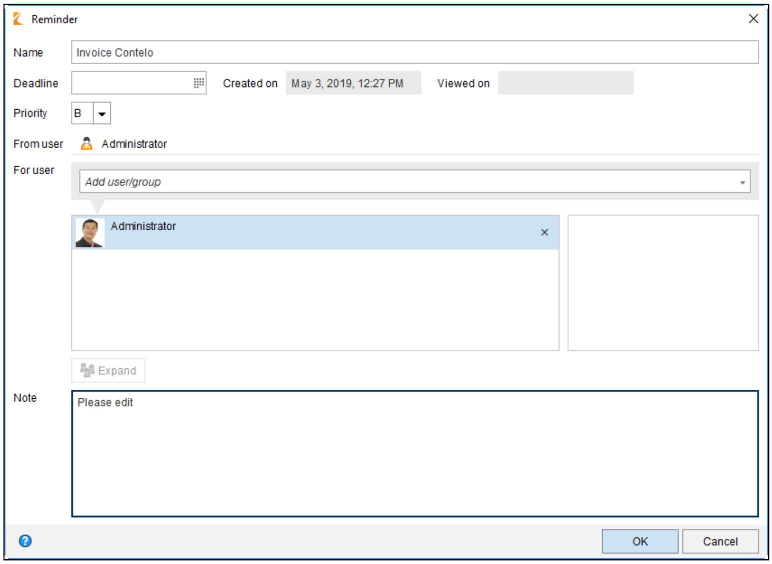


Fig. 98: 'Reminder' dialog box

Reminders for entry

Available in: *Ribbon* > *Tasks*

Use the *Reminders for entry* function to open an overview of the reminders that have been created for this entry.

Reminders overview

Available in: *Ribbon* > *Tasks*

The *Reminders overview* function opens the *Reminders overview* dialog box. This function shows you a list of your reminders.

Remove from Clipboard

Available in: *Clipboard work area* > *Ribbon* > *Start*

Use this function to remove the entry from the *Clipboard* work area. The entry remains in the repository unaltered.

Remove from search results

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use this function to remove individual entries from the list of search results. The entries remain unchanged in the repository.

Remove lock

Available in: *Ribbon* > *Repository*

Use this function to remove the lock from a document or folder. As a regular user, you can only remove your own locks. As an administrator, you can also remove locks from documents from other users.

Warning: Since the document may be locked for editing by another user, removing a lock may lead to loss of data or changes being overwritten. To unlock a locked document for all users, you should use the *Cancel editing* function in the *Check in* dialog box.

Report for entry

Available in: *Ribbon* > *Repository*

Use this function to open an overview with meta information on the currently selected entry. Use the *Configure report* dialog box to define which information will be contained in the overview. For example, you can define which actions will be reported or which period this report should refer to.

1. Select an entry.
2. Click the *Repository* tab.
3. Click *Report for entry*.

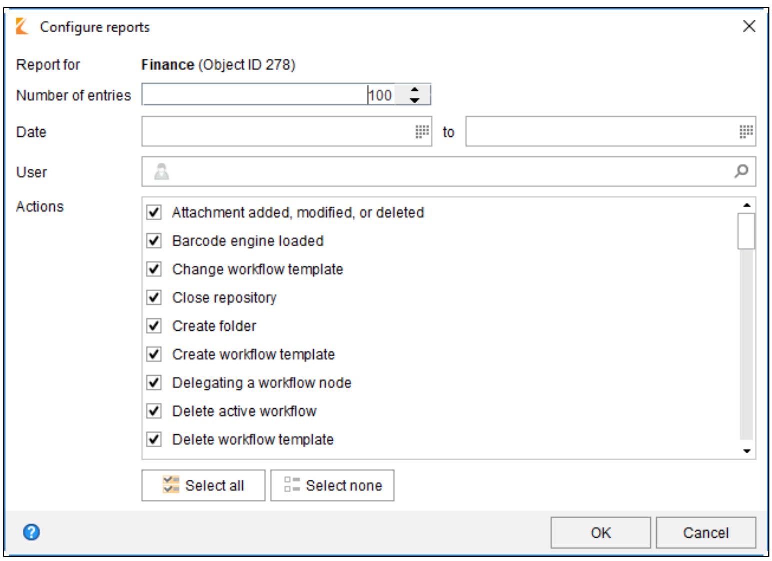


Fig. 99: 'Configure reports' dialog box

The *Configure reports* dialog box appears. Use this dialog box to define which information to include in the report.

4. Perform the desired settings and then click *OK*.

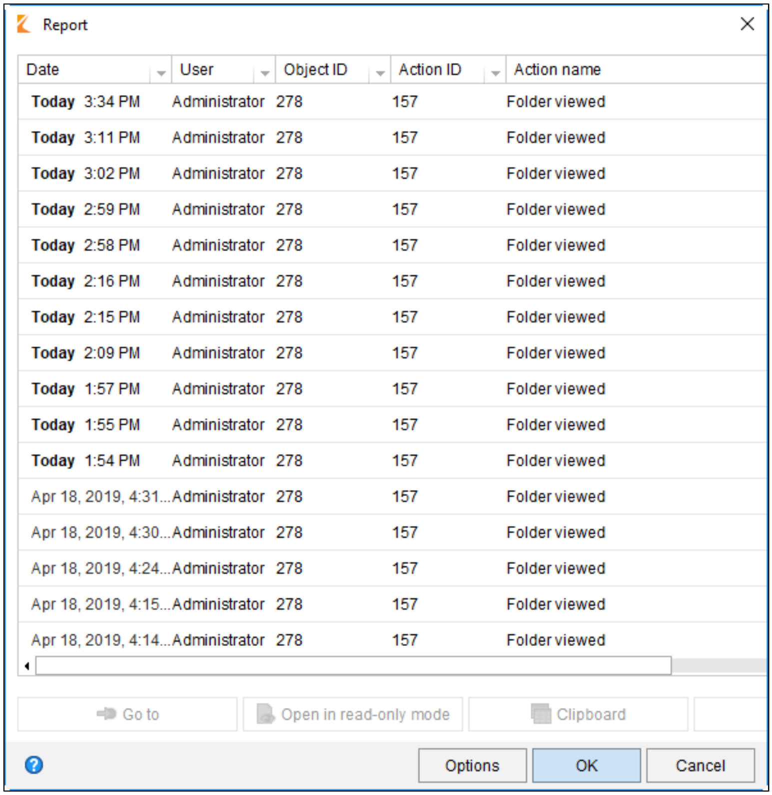


Fig. 100: 'Report' dialog box

The report is created and displayed.

Restore

Available in: *Ribbon* > *Repository* > *Recycle bin*

Use this function to remove the deletion marker from an entry in the repository. This allows you to undo the deletion of an entry. This is only possible if the entry has not been removed permanently. See *Delete permanently*.

1. Open the *Repository* work area.

2. Click the *Repository* tab.

3. Click *Show deleted entries*.

The entries with a deletion marker are shown. The *[deleted]* expression is shown after the entries.

4. Select a repository entry that has a deletion marker.

5. Click *Restore*.

The deletion marker will be removed. The entry can be seen in the repository again.

Restore table columns

Available in: *Ribbon* > *View*

Use this function to restore the default settings of the table columns in a work area. Manually set filters and sort orders are removed.

Return workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to return a workflow node to the group that was originally assigned the node. The group is displayed again in the workflow node.

Save as

Available in: *Ribbon* > *Document*

Use this function to store the currently selected document outside of the repository.

Save as default index

Available in: *Intray* > *Ribbon* > *Repository*

This function saves the folder structure of the selected folder as a default index. A default index is used as a template and can be used as often as desired.

You can enter the default index into other folders via the *Insert default index* function. Documents or child folders with more than two levels are **not** saved.

Save as ELO link

Available in: *Ribbon* > *Document*

Use this function to store the selected file as an ELO link in your local file system. The ELO link opens the filing location of the file in the repository. This enables you to give another user access to a document provided that the user has access to the repository.

Save attachment as

Available in: *Ribbon* > *Document* > *Attachment*

If a document has an attachment, you can use the *Save attachment as* function to save this attachment outside of ELO in your local file system or on another external storage medium.

Save search

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Save search* function to save your current search as a favorite. You can retrieve, run, and manage your search favorites with the *Favorites* function.

Save table to clipboard

Available in: *Ribbon* > *View*

Use this function to copy the currently selected table entries to the clipboard. The entries can then be inserted into an external program, such as Microsoft Excel.

Scan document

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to scan multiple pages and merge into one document. The scanned document will be displayed in the *Intray* work area. At least one scanner must be installed to use this function.

Scan pages

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to scan individual pages. The individual pages are filed to the *Intray* work area as individual documents.

Scan profiles

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to open the *Scan profiles* dialog box. Define profiles for scanning documents in the *Scan profiles* dialog box. For example, a scan profile lets you define which resolution to use or which format the scanned documents should be stored in. This way, you can set up a custom scan profile for each source document.

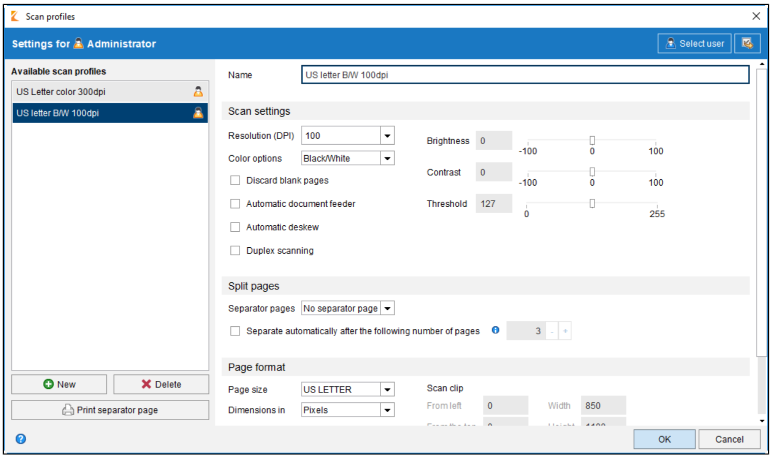


Fig. 101: 'Scan profiles' dialog box

Scan profiles are used to take the specific properties of documents into account, such as texts, color images, high-resolution images, different formats, etc.

Information: You will also find the *Print separator page* function in the *Scan profiles* dialog box. See *Join (separator pages)*.

Scan to repository

Available in: *Ribbon* > *Document*

This function enables you to scan documents straight to the *Repository* work area. The document needs to be keyworded after scanning. The scanned document is filed to the last selected folder in the ELO repository.

Please note: You need to have a compatible scanner installed and selected.

Search keywording

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use this function to search the index fields of the keywording forms in the ELO repository.

Search notes

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

The *Search notes* opens the *Search notes* dialog box. In the *Search notes* dialog box, you can search for entries with margin notes and annotations.

Information: To search for all entries with margin notes and annotations, use one of the wildcards * (asterisk) or ? (question mark).

Select index field

Available in: *Search work area* > *Ribbon* > *Search tools/Search*

Use the *Select index field* function to add a filter to the current search so that you can search specific index fields.

Select scanner

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to choose the scanner that you want to use. This function only applies when you use multiple scanners.

Send as ELO link

Available in: *Ribbon* > *Start*

Use this function to attach an ELO link to an entry selected in the repository to an e-mail. The recipient can open the filing location of the entry in the repository from the ELO link. The recipient must have access to the repository.

Send as PDF

Available in: *Ribbon* > *Start*

Use this function to convert a document selected in the repository to PDF format and attach the created PDF document to an e-mail.

Information: You can embed annotations when sending documents as PDF.

Send document

Available in: *Ribbon* > *Start*

Use this function to send the selected document as an e-mail attachment. A new e-mail opens in your e-mail program with the document attached. Enter any necessary additional information and send the document.

Send to another Intray

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to send a copy of a document to one or multiple users from the Intray. The document remains in the Intray for further processing.

Separator line

Can be added via: *Ribbon > ELO > Configuration > Quick access to functions*.

Use this function to add a separator line in the menus. The separator line is not really a function but a placeholder. In the quick launch bar, the separator line is used to define a group of buttons.

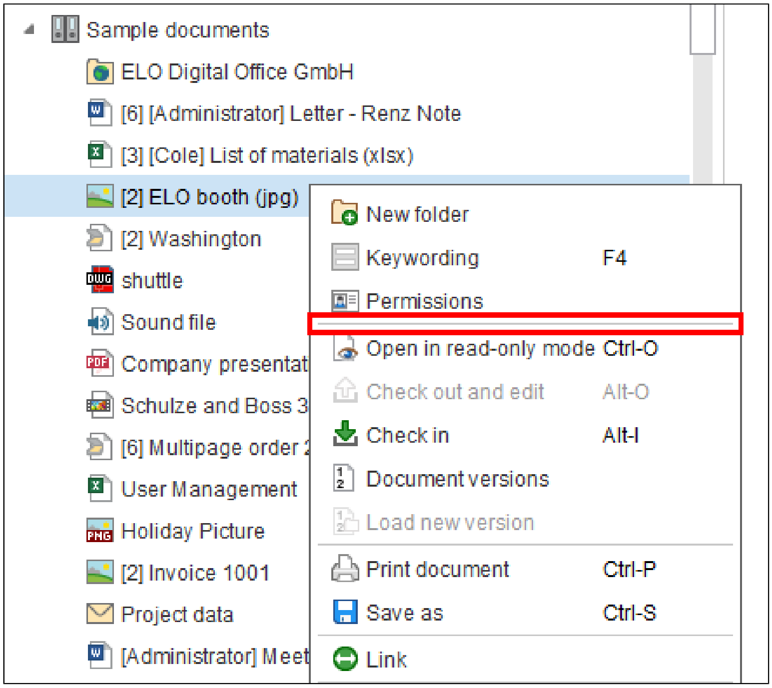


Fig. 102: Separator line

Information: You can insert separator lines in the quick launch toolbar and context menus.

Serial keywording

Available in: *Intray work area > Ribbon > Intray/Filing*

Use this function to file multiple documents to the repository from the *Intray* work area with predefined keywording.

Set default keywording form

Available in: *Intray work area > Ribbon > Intray/Filing*

The *Set default keywording form* function opens the *Set default keywording form* dialog box. In the *Set default keywording form* dialog box, you can select the keywording form to be used as the default for filing to the repository.

Show deleted entries

Available in: *Ribbon* > *Repository* > *Recycle bin*

Use this function to show deleted entries. Deleted entries are entries that have been removed with the *Delete* function and that have a deletion marker. The entries with a deletion marker are hidden in the repository.

If you show deleted entries, *[deleted]* is displayed after the name of the deleted entry. Use the *Restore* function to revert the deletion process and remove the deletion marker. Use the *Delete permanently* function to permanently erase deleted entries.

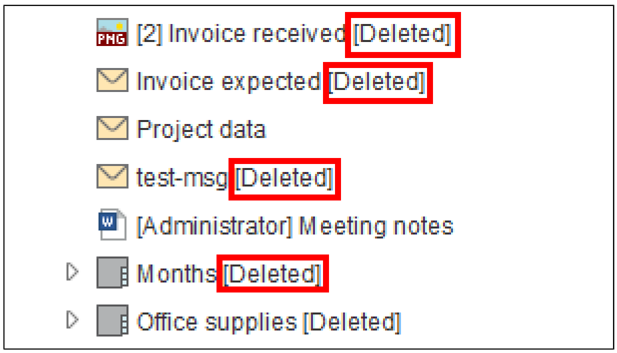


Fig. 103: Deletion marker in the repository

Show full text database content

Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*.

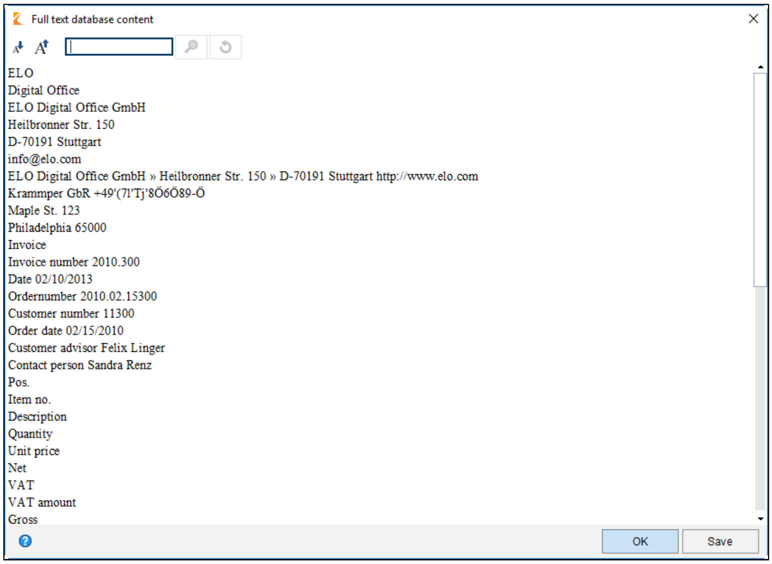


Fig. 104: 'Full text database content' dialog box

This function allows the option of displaying the full text information of a selected document.

Click the *Save* button to save the full text content as an HTML file.

Show side by side

Available in: *Ribbon* > *ELO*

Click the *Show side by side* function to view two ELO windows beside one another.

Information: If you don't already have a second window open, this function automatically opens one.

Show stacked

Available in: *Ribbon* > *ELO*

Click the *Show stacked* function to view two ELO windows beside one another.

Show workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to show and edit existing workflow tasks.

Sort order

Available in: *Intray* > *Ribbon* > *Repository*

Use this function to change the sort order within a selected folder. You can choose from the following sort orders via a drop-down menu:

- Filing date
- By filing date descending
- Alphabetical
- Alphabetical descending
- Date
- By date descending
- Manual

If you select the option *Manual*, you can sort the child entries in the folders later on.

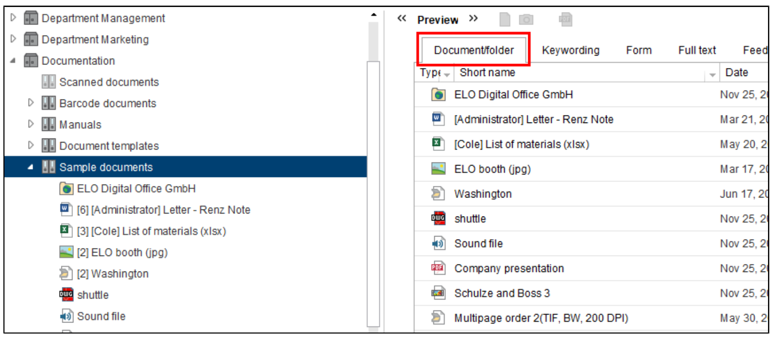


Fig. 105: 'Document/folder' preview element

1. Select a preview profile that includes the *Document/folder* preview option.

2. Click the folder that you have selected manual sorting for.

Optional: If you have not already done so, open the *Document/folder* preview element.

3. In the *Document/folder* preview element, click the entry (folder or document) that you want to move.

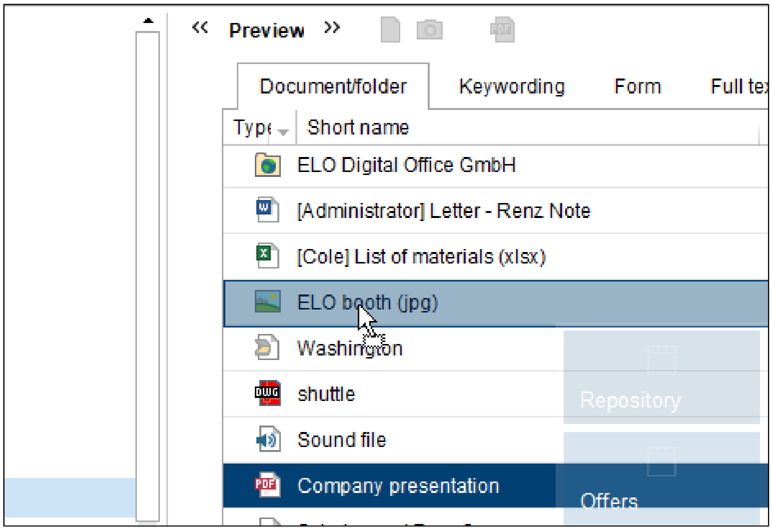


Fig. 106: Dragging and dropping an entry

4. Drag and drop the entry to the selected location.

The sort order is changed.

Sort order (search results)

Available in: *Search work area* > *Ribbon* > *View*

Use this function to sort the list of search results in the list and tile view. Use the *Sort order* drop-down menu to select whether to sort the list by *Date*, *Filing date*, *Type*, *Filed by*, *Short name* or *Keywording form*. This function can be combined with the *Group* function.

Split pages

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

Use this function to split the pages of a multi-page document in the *Intray* work area. The pages are numbered as individual documents in the *Intray* work area. The function is only available for multi-page TIFF and PDF documents.

Start workflow

Available in: *Tasks work area* > *Ribbon* > *Tasks*

This function starts a new workflow. Use the *Start workflow* dialog box to change a template for the new workflow. Enable the *Start workflow in edit mode* option to make changes to the template when starting the workflow (*Ribbon* > *ELO* > *Configuration* > *Advanced settings* > *Workflow*).

Substitution tasks	Available in: *Ribbon* > *Tasks* Enable this option to view substitution tasks in the *Tasks* work area. Substitution tasks are tasks of another user for whom you are set as the substitute, such as during vacation.
Switch to search input field	Can be added via: *Ribbon* > *ELO* > *Configuration* > *Quick access to functions*. This function allows you to define a keyboard shortcut that takes you straight to the search input field.
Table	Available in: *Ribbon* > *View* Use this function to change how the search results are displayed in the *Search* work area. The search results are displayed as a table. This only alters how the search results are displayed; the entries themselves remain unchanged. In all other work areas, the *Table* function is set by default and cannot be changed.
Templates	Available in: *Ribbon* > *Start* Use this function to jump to the folder with the document templates in the repository. Define the filing location of the folder with the document templates on the *ribbon* > *ELO* > *Configuration* > *Technical presets* > *Folder for document templates*.
Test checksum	Available in: *Ribbon* > *Document* This function verifies the checksum of the selected document. The checksum indicates whether the document has been transferred correctly to the repository.
Thumbnails	Available in: *Search work area* > *Ribbon* > *View* Use this function to enable a thumbnail view of the search results list. The function is only available for the list and tile views. Use the *Zoom* slider to adjust the size of the thumbnails.
TIFF conversion	Available in: *Ribbon* > *Document* Use this function to convert a document selected in the repository into a TIFF document. The document is then filed as a new version of the original document in the repository.

Information: An ELO TIFF Printer must be installed.

Tiles

Available in: *Search work area* > *Ribbon* > *View*

Use this function to change how the search results are displayed in the *Search* work area. The search results are displayed in the form of small tiles. This only alters how the search results are displayed. The entries remain unchanged.

Translation table

Available in: *Ribbon* > *ELO*

Use this function to open the *Translation table* dialog box. The dialog box lists all terms used in the repository in a table. These terms can be translated. If the repository is opened in another language, the index fields, for example, are automatically entered in the corresponding language. For this to work, the index fields must exist in the respective language in the translation table.

Tree

Available in: *Search work area* > *Ribbon* > *View*

This function displays the search results in a tree structure. The tree structure is set up according to the selected tree view. Use the *Edit tree views* function to define different tree views.

Tree view

Available in: *Search work area* > *Ribbon* > *View*

Use the *Tree view* function to switch between the existing virtual tree views. The tree views offer various sorting options for the documents displayed in the *Search* work area.

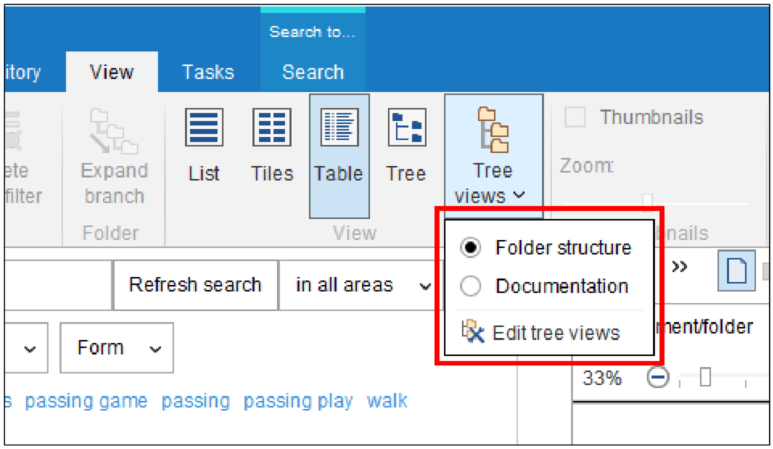


Fig. 107: 'Tree views' drop-down menu

The search results are ordered by the criteria defined in the virtual tree views. For more information, go to the *Edit tree views* section.

Undo

Available in: *Quick launch toolbar*

Use this function to undo the last editing step. The function is only available in the *Repository* and *Clipboard* work areas. In addition, the *Undo* function can only be applied to the *Move entry*, *Create reference* and *Delete* functions.

User feedback

Available in: *Ribbon* > *ELO*.

Use this function to open a dialog box in which you can submit feedback to the program. You can submit issues, ideas, and suggestions to ELO. Since your feedback is anonymous, you will not receive an answer. Use the existing support system for issues concerning the program.

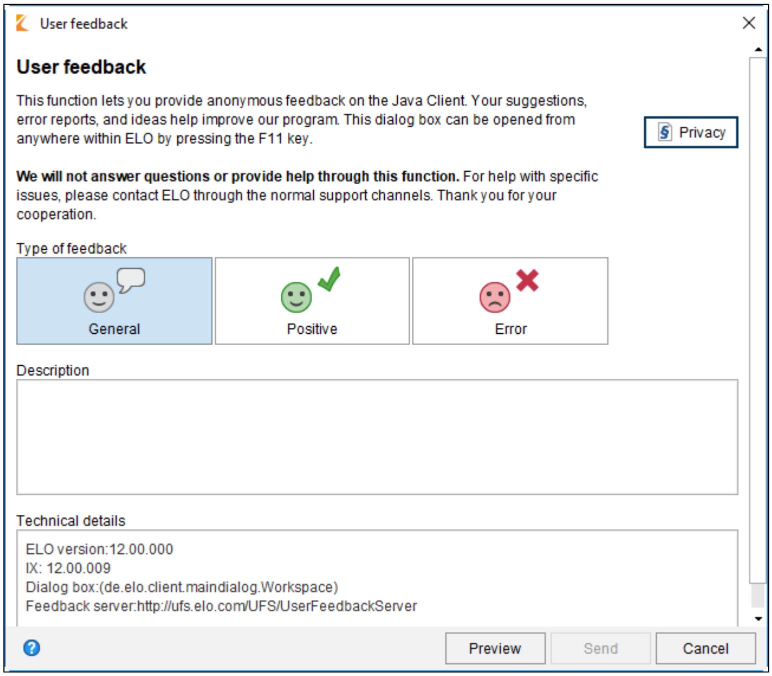


Fig. 108: 'User feedback' dialog box

Choose a type of feedback and enter a short description. Click *Send* to send your feedback to ELO Digital Office GmbH.

View substituted user's Intray

Available in: *Intray work area* > *Ribbon* > *Intray/Filing*

The *View substituted user's Intray* function lets you manage items in another user's Intray. You must be set up as an active substitute for that person.

Please note: If you want to view, copy, or retrieve documents from another user's Intray, these documents must already have been saved on the server. You can check this option under *Configuration* > *Advanced settings* > *Settings for the Intray work area* > *Save Intray on server when logging off*. If necessary, contact your system administrator.

Visual comparison

Available in: *Ribbon* > *View*

Use this function to open two documents next to each other in a new window. With this, you can compare both documents directly with each other.

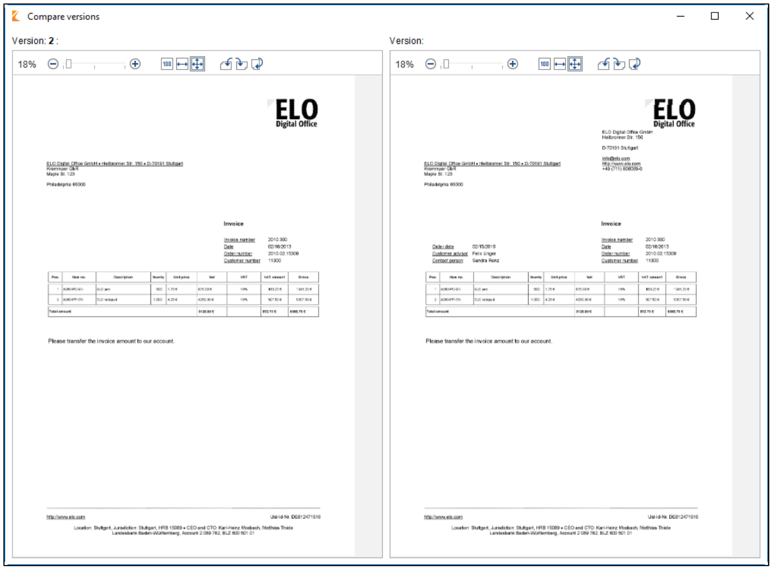


Fig. 109: 'Visual comparison' dialog box

Two documents must be selected in the repository to use the visual comparison.

Workflow designer

Available in: *Ribbon* > *ELO*

Use this function to open the *Workflow designer* dialog box. In the *Workflow designer* dialog box, you create and edit the templates for your workflows.

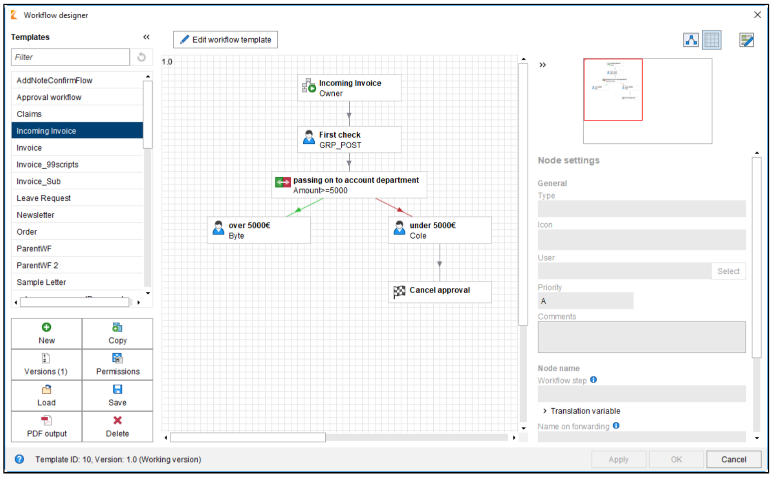


Fig. 110: 'Workflow designer' dialog box

Information: For detailed information on *workflows*, refer to the *ELO Java Client Workflow* manual.

Workflow overview

Available in: *Ribbon* > *Tasks*

Use this function to open an overview of all currently active workflows. You can filter the list by the following criteria:

- Status
- User
- Start date
- Display

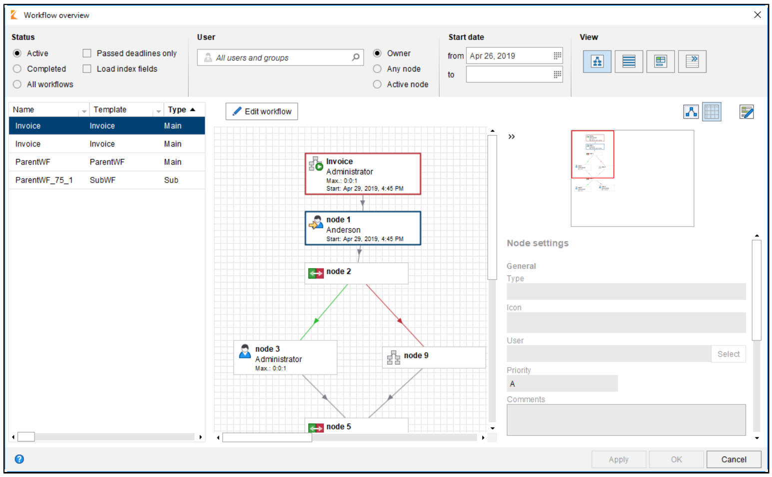


Fig. 111: 'Workflow overview' dialog box

Workflows for this entry

Available in: *Ribbon* > *Tasks*

Use this function to open an overview with all workflows that exist for this entry.

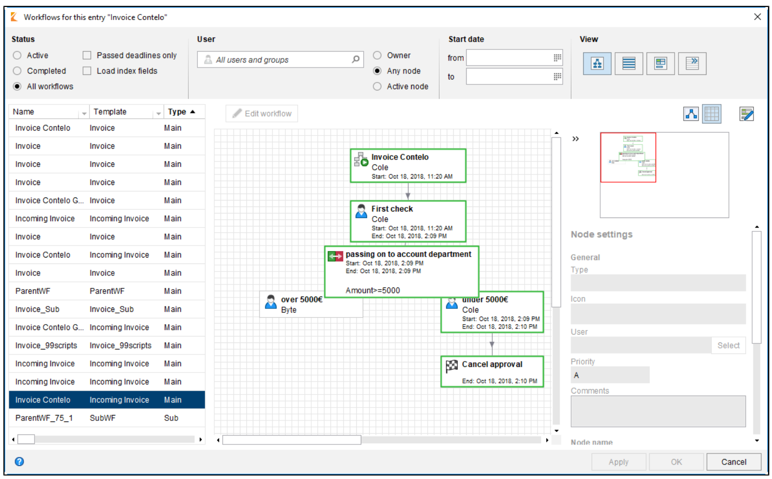


Fig. 112: Showing workflows for an entry

Keywording

Additional information is added to documents when they are filed. This information is entered and stored in what are known as keywording forms. In this chapter you will learn about the keywording of documents and how this document information is organized.

Keywording means assigning keywords to a document. The keywording information represents the document metadata. The quality of a repository is linked heavily to the quality of the keywording. Keywording forms allow you to organize documents in a standardized way and file them quickly to the repository. In addition, keywording information makes searching easier.

Information: ELO can extract keywording information from barcodes when the ELO Barcode module is installed. You can find more information on the ELO Barcode module and setting it up via the ELO Administration Console in the *ELO Barcode* user manual.

The 'Keywording' dialog box

Before you can file documents in the *Repository* work area, they have to be keyworded. This is done by using keywording forms, which contain corresponding input fields (called *Index fields*).

The *Keywording* dialog box is used to fill out and edit keywording information. The dialog box usually appears automatically when a document is filed. Use the following method to open the *Keywording* dialog box manually:

Please note: If the entry relates to a person, you are required to complete the *Personal identifier* and *End of deletion period* fields on the *Options tab*.

1. Select a document or folder in the repository.

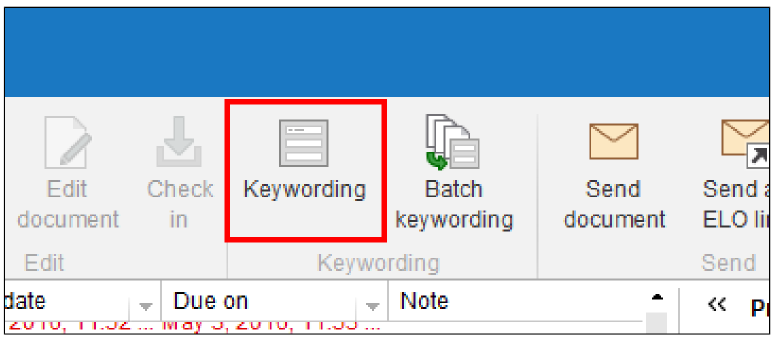


Fig. 113: 'Keywording' button

2. Click *Keywording* (on the *Start* tab).

Alternative 1: Right-click a document or folder and select *Keywording* from the context menu.

Alternative 2: Press the *F4* key.

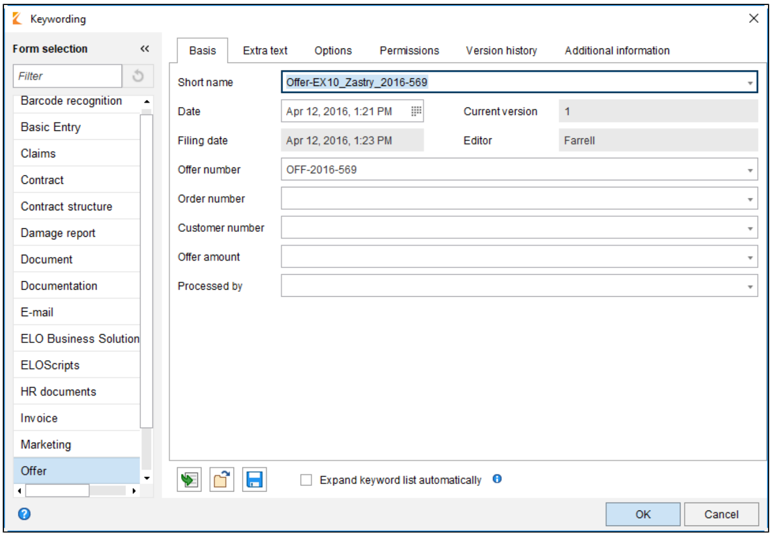


Fig. 114: Keywording dialog box for a document

The *Keywording* dialog box opens. The selected keywording form appears. If any keywording information is already available at this point, this will be written into the various fields in the keywording form.

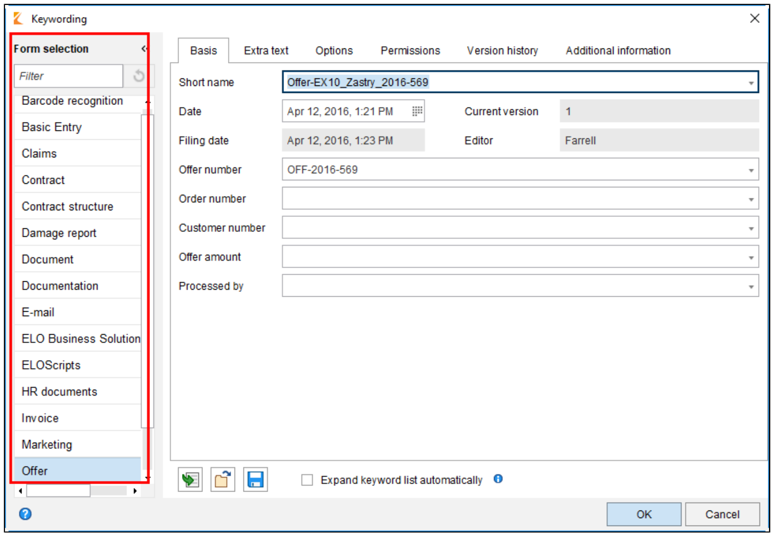


Fig. 115: 'Form selection' area

The *Form selection* area on the left-hand side of the dialog box shows a list of all the available keywording forms. The list contains either keywording forms for folders or for documents, depending on the type of entry selected in the repository.

Information: You can minimize the *Form selection* area by clicking the *Hide keywording forms* icon (double arrow icon pointing left). When it is minimized, you can click the *Show keywording forms* icon (double arrow icon pointing right) to make the list reappear.

Tabs

Keywording forms are subdivided into tabs. There are several default tabs:

- Basic
- Extra text
- Options
- Permissions
- Version history
- Additional information

The standard tabs are briefly described in the following. Additional tabs appear depending on the settings in the keywording form.

'Basic' tab

The *Keywording* dialog box opens to the *Basic* tab. It contains at least the following standard index fields:

Standard index fields

Short name: Document title. This is displayed in the tree view.

Date: The document date refers to the date of the file on which the entry is based. When changes are made to the document, the document date is refreshed.

You can also edit the document date manually using the calendar function. You can also enter information to this field using the following syntax:

- `+x` = today in X days
- `+xd` = today in X days (d for days)
- `+xm` = today in X months (m for months)
- `+xy` = today in X years (y for years)
- To enter a past date, use − (minus) instead of + (plus).

Example

Entering `+1m` on Dec 2, 2015 returns the date `Jan 2, 2016`. If you were to enter `-1y`, however, this would return the date `Dec 2, 2014`.

ELO also automatically completes the following entries:

- `05` is returned as <current month> 05, <current year>
- `Dec 5` is returned as Dec 5, <current year>

Example

Entering `31` on December 2, 2015 returns the date `December 31, 2015`.

Filing date: The filing date refers to the date the document is filed to the repository.

Current version: Shows the individual version number (if entered). This is not the internal version counter.

Editor: Shows the user who last edited the document.

Additional index fields

Additional index fields appear depending on the settings in the keywording form. There may be additional index fields on additional tabs.

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

Example: Text field

You can enter letters, numbers, and special characters in a text field. Text fields, however, can also be restricted, e.g. by limiting the maximum length you can enter.

Mandatory fields

Index fields can be configured in such a way that you have to enter a certain number of characters to successfully complete the keywording.

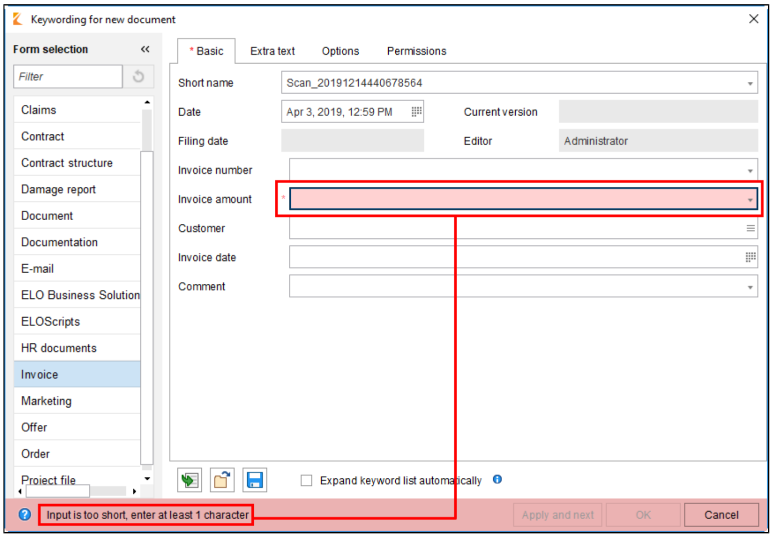


Fig. 116: Mandatory field

Index fields with a red background color are mandatory. In addition, the bottom line of the dialog box indicates if there are any conflicts.

Keyword lists

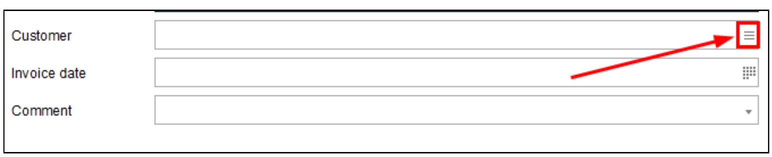


Fig. 117: Index field with keyword list

You can recognize index fields with keyword lists by the list icon after the respective index field.

Keyword lists are used to standardize keywording information and help you keyword documents faster.

Information: If a keyword list was created for an index field, you can configure the index field to only accept entries from the keyword list.

Expand keyword list automatically

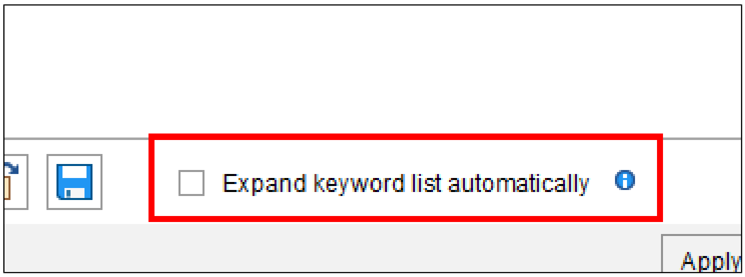


Fig. 118: 'Expand keyword list automatically' option

If the *Expand keyword list automatically* option is enabled, the keyword list opens as soon as you start to type text into an index field.

Information: You can can either click the check box to enable the *Expand keyword list automatically* option or use the keyboard shortcut Ctrl+K.

If the *Automatically expand keyword list* option is disabled, you need to click the list icon at the bottom of the index field to open the keyword list.

Alternatively: Open the keyword list using the F7 key.

'Extra text' tab

The *Extra text* tab serves various purposes.

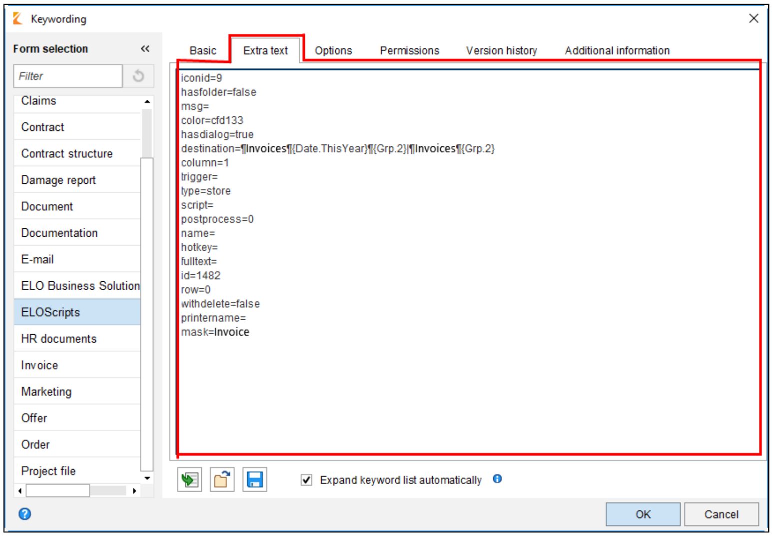


Fig. 119: The 'Extra text' tab

For example, the tab can be used as a text field for additional information. In certain cases, settings for scripts and other customizations are stored here.

'Options' tab

Defining the characteristics and behavior of a document is also part of keywording. These settings will be applied on the *Options* tab if they have not already been defined in the keywording form, or if the document is to vary from these defaults. Depending on whether you are keywording a document or a folder, various possible settings will be displayed.

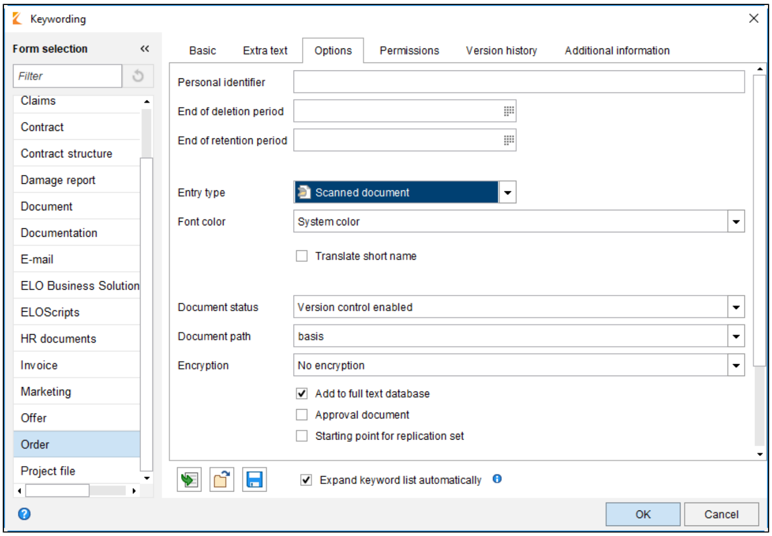


Fig. 120: 'Options' tab, settings for a document

General options

The following settings are always available on the *Options* tab regardless of whether you have selected a document or a folder.

- Object type
- Filed by
- Font color
- Retention period
- Starting point for replication set
- Translate short name
- Object ID and GUID

Entry type: This option defines the *object type* for the element. This setting defines how the document's icon will be displayed in the repository's list view.

Personal identifier: If the entry relates to a person, enter information that enables you to identify the relevant person in this field.

End of deletion period: In the "End of deletion period" field, you specify the date on which the entry must be deleted at the latest. You can enter the date using a calendar dialog box. To do so, click the button with the calendar icon to the right of the text field.

Please note: If you do not complete the *Personal identifier* and *End of deletion period* fields, a dialog box will appear indicating that no personal identifier has been specified.

End of retention period: In this field, you specify a retention period for the entry. You can enter the date using a calendar dialog box. To do so, click the button with the calendar icon to the right of the text field.

Please note: The retention period must end before the deletion period.

Font color: Select a color for the entry to improve the visual clarity of your repository structure.

Starting point for replication set: Use this option to define an entry as the starting point for replication. The next time replication takes place, the entry is placed in the *Replication base* of the target repository. The administrator has to insert the new folder at the desired location in the target repository. This enables you to replicate parts of repositories, even if they have not been filed in identical repository structures.

Translate short name: If the *Translate short name* option is enabled, the short name of the entry is translated into the selected display language.

Please note: The respective properties files need to be stored in the ELO repository for this function to work. You also need to configure the keywording form. You can also contact your system administrator if you need to.

Object ID and GUID: The first number in this field is the internal ELO object ID. This entry is primarily for information purposes and cannot be changed. The entry ID is required when testing the checksum.

The character string in brackets specifies the GUID of the entry. The GUID (= **G**lobally **U**nique **Id**entifier) is a unique identification number, which is automatically assigned and cannot be modified. This is automatically assigned and cannot be modified. This enables you to identify every entry even when you are not specifically using it in the repository.

Filed by: The user who created and keyworded the document is entered here.

Options for documents

The following options are only available for documents:

- Document status
- Document path
- Encryption key
- Add to full text database
- Approval document
- File name

Document status: Select the editing status of the entry:

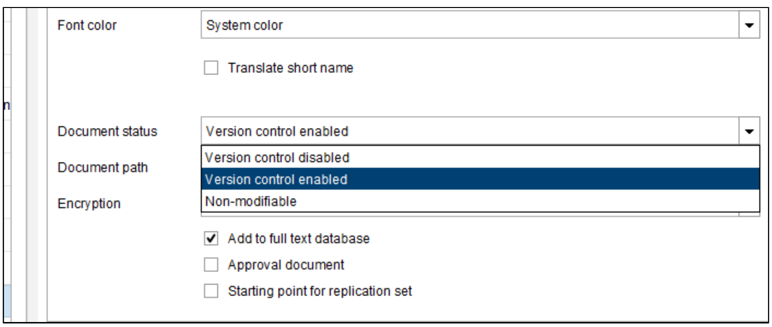


Fig. 121: 'Document status' drop-down menu

- **Version control disabled**: The document is not version-controlled. Changes to a document do not create a new version. It is not possible to access earlier edits.
- **Version control enabled**: If the document is edited, a new version is created. All changes are documented. Older versions can be restored.
- **Non-modifiable**: ELO does not allow changes to the document and its keywording.

Please note: The status *Non-modifiable* cannot be reversed.

Document path: This is the document path (storage path) that has been set for the entry.

Encryption key: The encryption key, which controls document encryption, is shown here. The user must have the password for the encryption key in order to view a document.

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

Approval document: If this option is enabled, users with the *Author approval documents* right are able to edit previous versions of the document without other users being able to view the document in the repository.

File name: The file name of the document as stored outside of ELO, for example.

Options for folders

The following options are only available for folders:

- Sort order
- Enable quick preview for documents in the folder

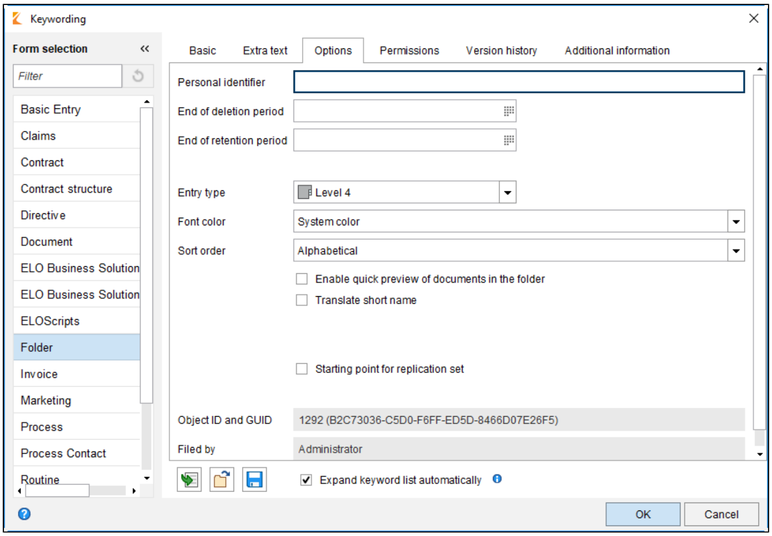


Fig. 122: 'Options' tab; settings for folders

Sort order: Here you can define how the contents of the corresponding folder will be sorted:

- **Filing date**: The entry with the most recent filing date is at the bottom.
- **By filing date descending**: The entry with the most recent filing date is at the top.
- **Alphabetical ascending**: The sort order ascends from A to Z.
- **Alphabetical descending**: Entries are sorted descending from Z-A.
- **Date**: The entry with the most recent document date is at the bottom.
- **By date descending**: The entry with the most recent document date is at the bottom.
- **Manual**: You can move the entries within the folder manually. To do so, the folder must be opened in the list view.

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

'Permissions' tab

The *Permissions* tab lists the users and groups that have access rights to the selected entry. Users with the corresponding rights are able to change the settings.

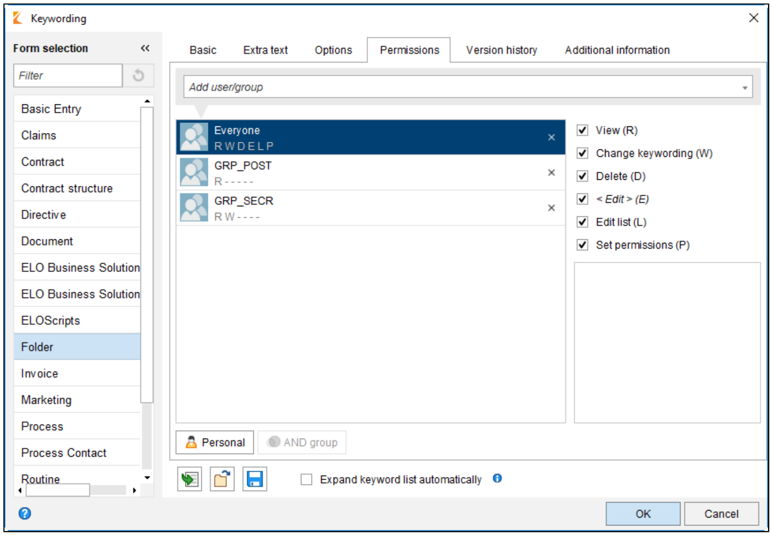


Fig. 123: 'Permissions' tab

User/group: Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternatively: If you click the triangle to the right of the *Add user/group* field, this will open a drop-down menu. The drop-down menu contains a list of the users and groups you selected recently.

In the middle column, you can see which users or groups have already been assigned permissions for the selected entry and which permission settings apply.

To edit the permissions settings, select an entry in the middle column and select or clear individual permissions.

The following options are available:

- **View (R)**: Users with *View* permissions have read access to the selected entry. They can view the content of the entry.
- **Change keywording (W)**: Users with *Change keywording* permissions can edit the keywording for the selected entry.
- **Delete (D)**: Users with *Delete* permissions can delete the selected entry.
- **Edit (E)**: Users with *Edit* permissions can edit the selected entry.
- **Edit lists (L)**: This permission only applies to folders. Users with this permission can change the content of the respective folder. For example, they can create documents in this folder or move documents from the folder.
- **Set permissions (P)**: A user with the right to *Set permissions* for an entry in the repository can change the permissions that other users have to this entry.

Information: Options that are not applicable are shown in italics and enclosed in pointy brackets.

Personal (orange user icon): Use the *Personal* button to grant yourself sole access to the respective entry. All other permissions will be removed.

AND group: AND groups are useful if you only want to assign permissions to the users in a group that are also members of another group. To create an AND group, select two groups in the middle column and click *AND group*.

Members of the group: If you select a group, you will see the group members in the *Members of the group* column.

Double-click the corresponding user in the *Members of the group* column to select a member of a group.

Remove permissions: To remove all permissions from a user or group, click the X icon next to the selected user or group.

'Version history' tab

For version-controlled documents, changes are documented in the keywording. This documentation is located on the *Version history* tab.

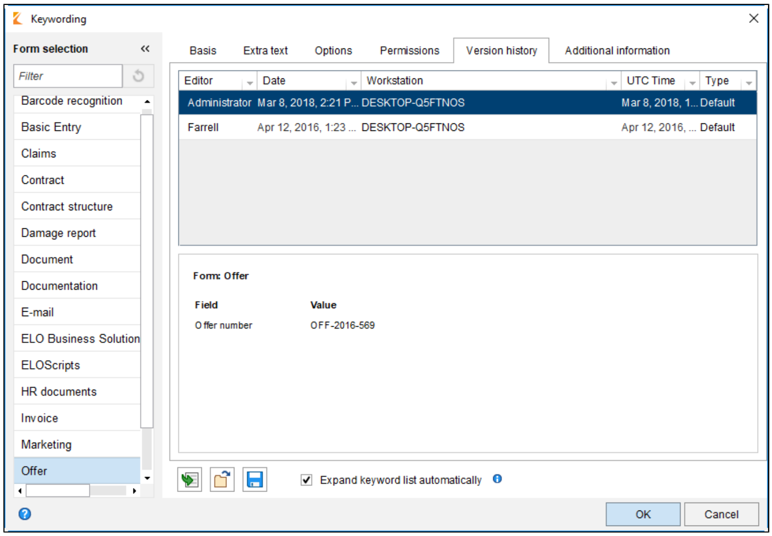


Fig. 124: 'Version history' tab

The version history contains two areas:

The upper pane shows which users have made changes at what times.

The changes that the selected user has made are shown in the lower pane.

'Additional information' tab

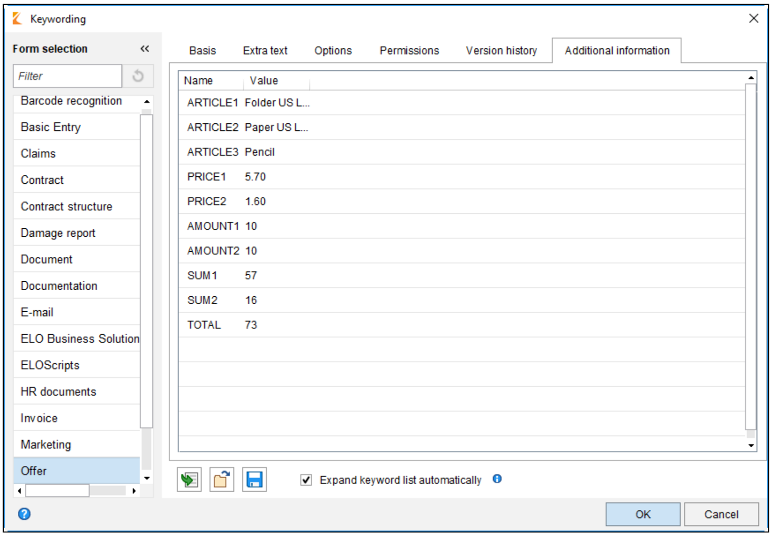


Fig. 125: 'Additional information' tab

Information: Only users with the right *Show "Additional information"* can see the *Additional information* tab.

The *Additional information* tab provides additional fields in the database (map fields). These fields can be used for scripts, workflows, and other purposes.

Additional functions

The *Keywording* dialog box offers you the following additional functions.

- Automatically enter keywording
- Pin function
- Use last entry
- Insert column index separator
- Undo
- Redo
- Load keywording
- Save keywording

The functions are briefly explained in the following section:

Automatically enter keywording

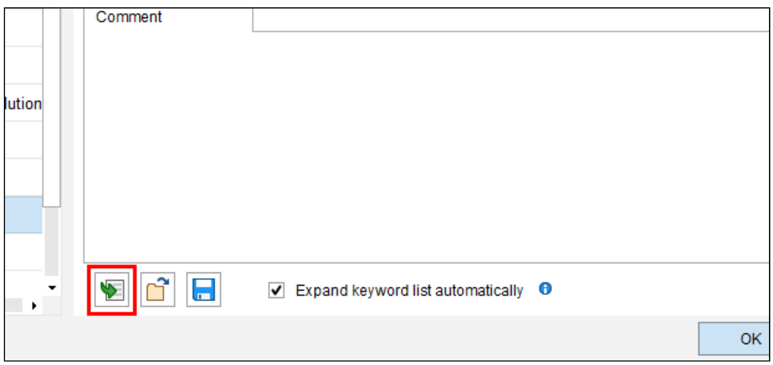


Fig. 126: 'Expand keyword list automatically' button

The *Enter keywording using the most recently saved/displayed entries [F3]* button (icon with the green arrow) helps you to keyword entries. This function applies the keywording information that you entered or viewed most recently to the current entry.

Alternatively: Call the function using the F3 key.

Pin (Intray only)

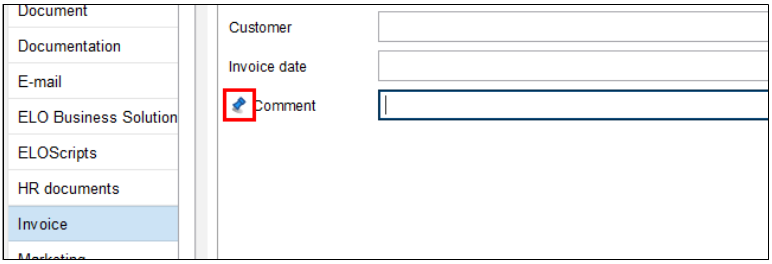


Fig. 127: Pin icon in the keywording form

To keyword an index field in multiple documents with the same value, enable the *Pin* function with the F8 key. This function is only available in the Intray.

Alternatively: Click the *Pin entry to index field* function in the context menu of the index field (right mouse button).

A pin icon appears.

As soon as you use the same index field to keyword the next document, the value you entered previously will be applied.

Please note: The value is only saved for the current session. The ELO Java Client does not "remember" the value once you have closed the program.

Use last entry

To re-use a value from an index field in the next keywording action, use the F9 key.

Please note: The value is only saved for the current session. The ELO Java Client does not "remember" the value once you have closed the program.

Insert column index separator

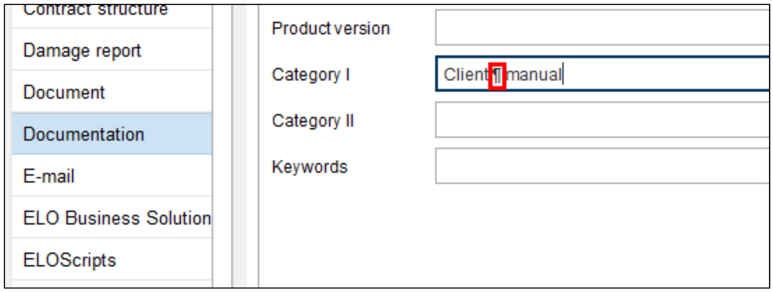


Fig. 128: Pilcrow character as a separator

To save multiple values to an index field, separate the values with a pilcrow character (¶). Use the keyboard shortcut CTRL+P.

Alternatively: Click the *Column index separator* function in the context menu of the index field (right mouse button).

Undo (Ctrl+Z)

The keyboard shortcut Ctrl+Z undoes the last action in an index field.

Alternatively: Click the *Undo* function in the context menu of the index field (right mouse button).

Redo (Ctrl+Y)

The keyboard shortcut Ctrl+Y reapplies the last action that was undone in an index field.

Alternatively: Click the *Redo* function in the context menu of the index field (right mouse button).

Load keywording

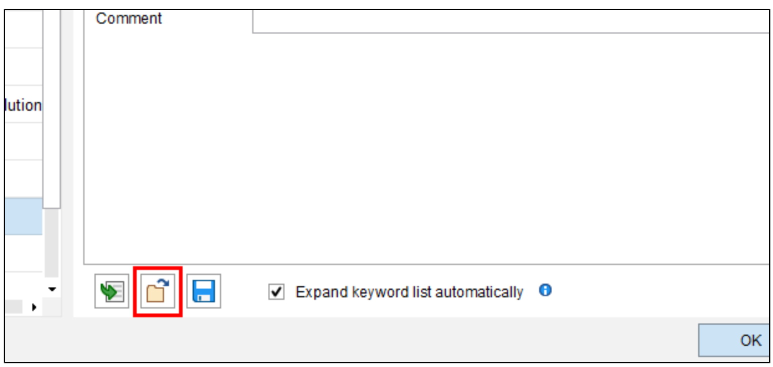


Fig. 129: 'Load keywording' button

Click the *Load keywording* button to load a keywording file (*.es8) into the keywording form for the document. Keywording information for an ELO entry is saved in ES8 files.

Alternatively: Call the function using the keyboard shortcut Ctrl+L.

Information: When you load an ES8 file into the keywording, the existing keywording will be overwritten without showing a confirmation request.

Save keywording

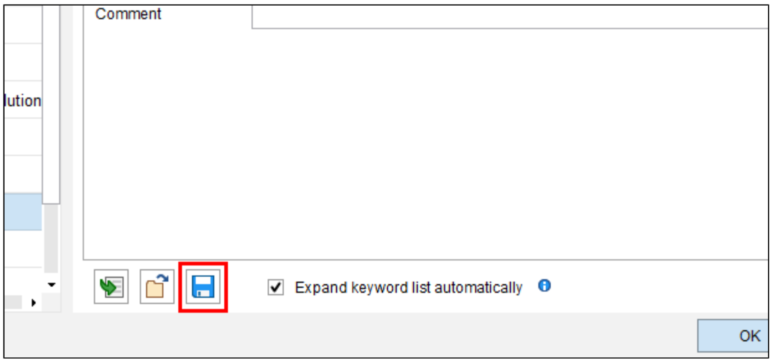


Fig. 130: 'Save keywording' button

Click *Save keywording* to save the keywording information of the current folder or document as an ES8 file.

Alternatively: Call the function using the keyboard shortcut Ctrl+S.

Keywording with ELO Click OCR

The integrated text recognition feature can be used as a keywording tool. ELO Click OCR transfers text from a document into the keywording form. The following example explains how to proceed.

Click OCR can be used in all work areas. In this example, we demonstrate how the function works in the *Intray* work area.

Information: An OCR service needs to be installed for ELO Click OCR to work.

1. Switch to the *Intray* work area.

2. Click the document that you want to edit the keywording of.

The document appears in the viewer pane.

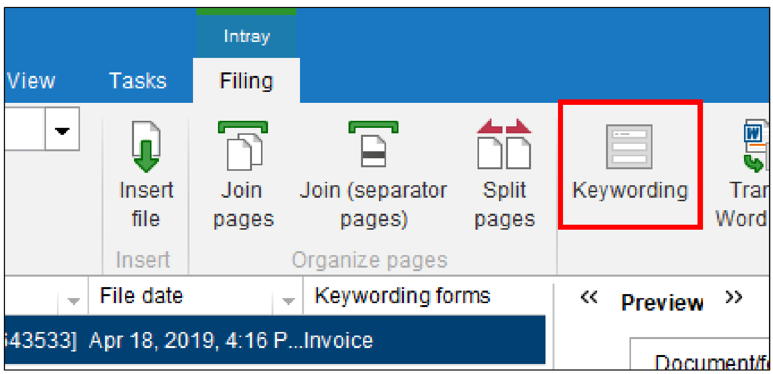


Fig. 131: 'Keywording' button

3. Click *Start* > *Keywording* on the ribbon.

The *Keywording* dialog box opens.

4. Select the desired keywording form.

5. Click the index field that you want to transfer the keywording information to.

The cursor blinks in the selected field.

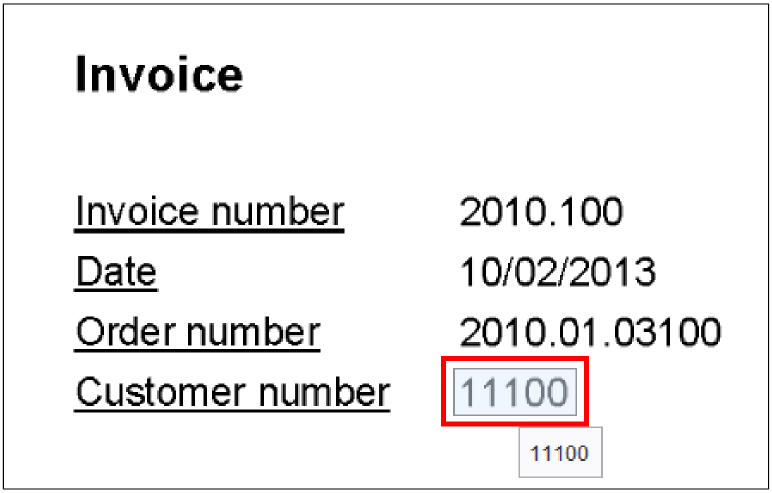


Fig. 132: Information recognized with OCR

6. Move the mouse pointer to the part of the document containing the information you require.

Information: If ELO Click OCR recognizes a text element (word or number), the element that has been found is highlighted in yellow and a tooltip with the recognized text appears.

7. Click the text you want to transfer to the keywording form.

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

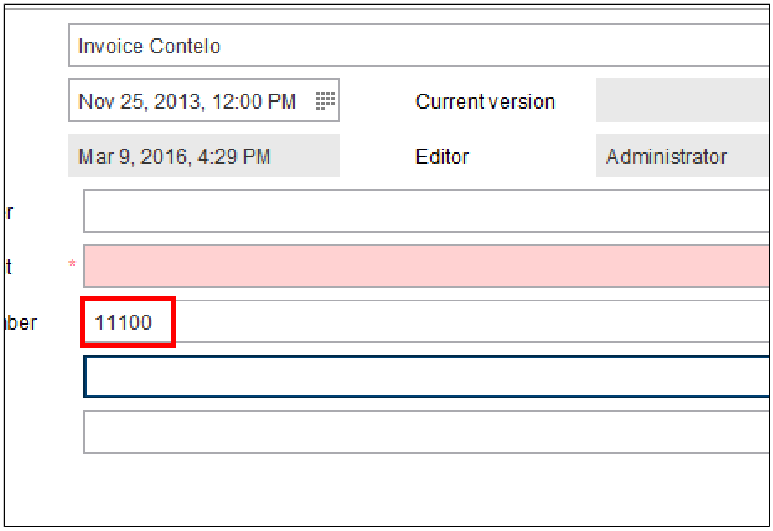


Fig. 133: Transferred text information in the selected index field

The recognized text information is transferred to the selected index field.

Serial keywording

Use the *Serial keywording* function to file multiple documents to the repository from the *Intray* work area with predefined keywording.

Requirements

Multiple non-keyworded documents in the *Intray* work area.

1. Switch to the *Intray* work area.

2. Select multiple documents.

3. Click *Serial keywording*.

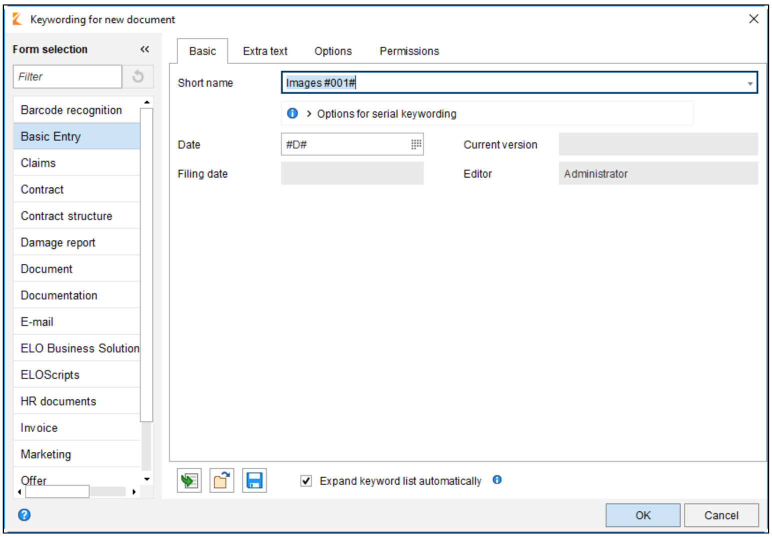


Fig. 134: 'Keywording for new document' dialog box

The *Keywording for new document* dialog box appears.

4. Define the settings for the serial keywording. For example, you can use variables to assign a consecutive number (##) during filing.

Information: You can find the possible variables in the tooltip below the short name.

5. Click *OK*.

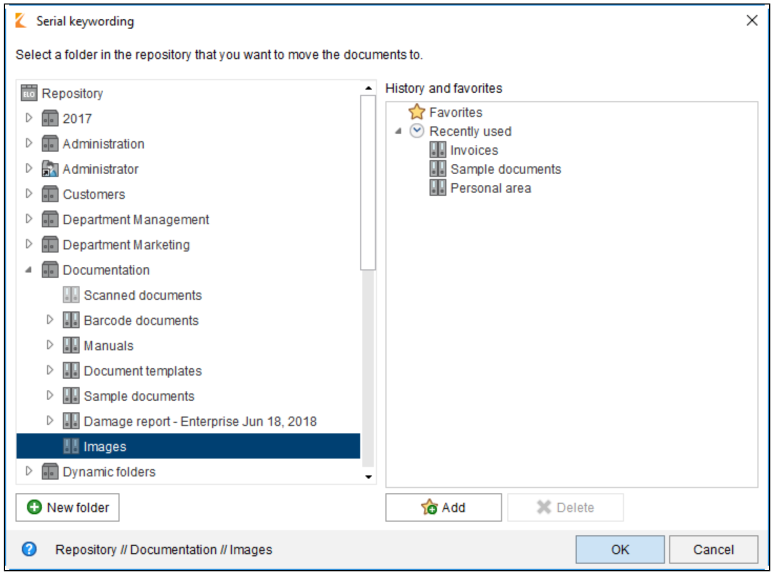


Fig. 135: 'Serial keywording' dialog box

The *Serial keywording* dialog box appears.

6. Choose the folder in the repository that you want to file the documents to.

7. Click *OK*.

The documents are filed to the repository.

Placeholders

You can use the following placeholders for the short name of the documents for serial keywording:

Placeholder	Function	Result example
#.#	The file name is inserted.	Invoice ELO, count result, Grenkeleasing
#F#	The file name is inserted with the file extension.	Invoice ELO.tif, count result.jpg, Grenkeleasing.doc
#E#	The file name is inserted.	tif, pdf, doc
#D#	The file date and time are inserted.	7/11/2012 3:28 p.m., 1/10/2013 2:15 p.m., 2/3/2013 8:15 a.m.
## or #1#	The documents are numbered, starting with 1.	1,2,3
#001#	The documents are numbered in groups of three, starting with 001.	001, 002, 003
Image #1# #E#	The placeholders can be combined with any text.	Image 1 png, Image 2 jpg, Image 3 gif

Fig. 136: Placeholders for serial keywording

Search

The program provides you with numerous ways to quickly find what you are looking for, even with large amounts of data. ELO also provides you with various options for restricting the search range.

ELO iSearch

ELO iSearch provides many ways to search for documents. ELO iSearch automatically provides search suggestions and is able to correct typos. By using ELO iSearch filters, the search results can be filtered by various criteria. The search results of the ELO iSearch can also be printed or output as a file.

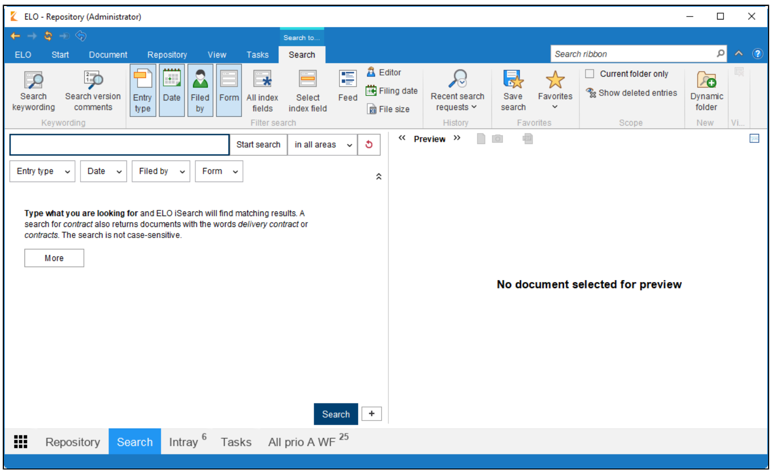


Fig. 137: ELO iSearch

Information: ELO iSearch uses its own dictionary in the background. There is no guarantee that all compound words will be identified correctly. In addition, the quality of the search result also depends on the quality in which the document's full text content was captured.

The ELO iSearch is located in the *Search* work area.

General use

Enter a search term to the search field, and click the *Start search* button. The search results are displayed in the left-hand column. In order to view a document or the contents of a folder in the list of search results, click the corresponding entry.

If the search results are not satisfactory, you can modify or cancel the search.

If you have refined the search options, by adding a filter for example, then click the *Refresh search* button.

To cancel the current search and start a new one, click the *Reset search settings* button (red arrow icon).

Components of ELO iSearch

The following tools are available in ELO iSearch:

- Autocomplete
- Autocorrect
- Boolean search functions
- Parentheses
- Exclude terms
- Phrase search
- Range search
- Synonyms
- Results text
- Highlighting in full text
- Filters
- Wildcard search

These tools are explained briefly in the following section.

Autocomplete

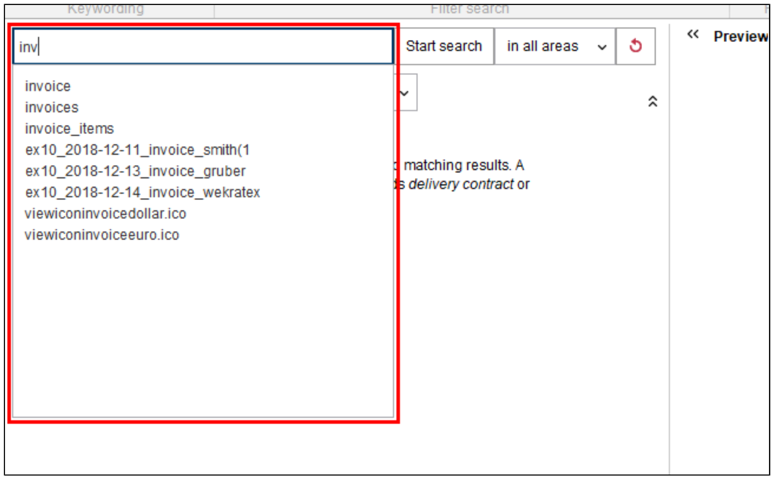


Fig. 138: Autocomplete suggestions

Autocomplete provides a list of possible search terms based on the characters already entered. The longer the term you enter, the more exact the suggestions are. ELO iSearch only suggests terms for matches in the repository. If no suggestions appear, there are no matches for the character string entered.

Autocorrect

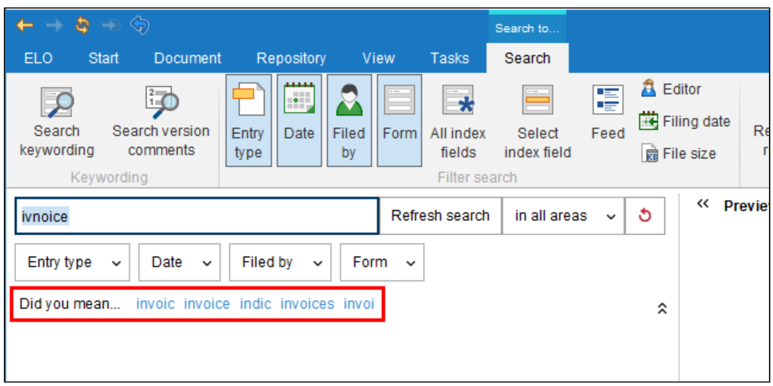


Fig. 139: Autocorrect suggestions

Autocorrect provides suggestions for search terms which return very few or no results. This can be especially useful if you made a typing error while entering the search term. If this is the case, ELO will suggest similar terms. A message appears underneath the search field: "Did you mean... " followed by the suggestions generated by ELO.

Click on one of the suggested terms in order to show the search results for the chosen term.

Boolean search functions

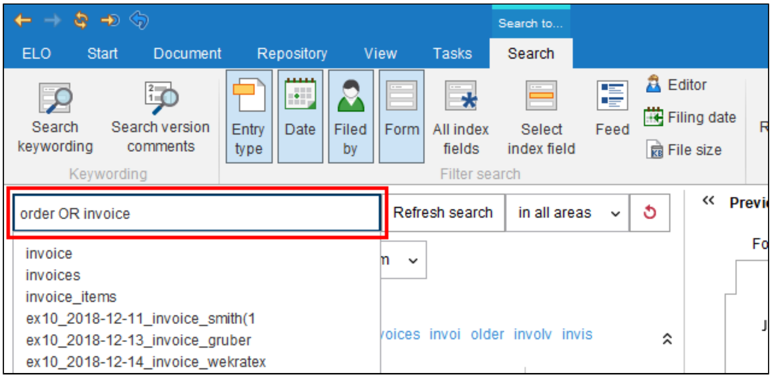


Fig. 140: Example of the OR operator

The Boolean search function - a form of complex search - enables you to formulate search queries using the AND and OR operators.

AND connections search for matches that contain both terms.

The operators for an AND search are:

- AND
- &&

Information: The AND connection is enabled by default. If you enter more than one term, the terms are automatically linked with AND unless you use another operator.

OR connections search for matches that contain at least one of the terms.

The operators for an OR search are:

- `OR`
- `,`
- `||`

Example: `Order, Invoice`

Parentheses

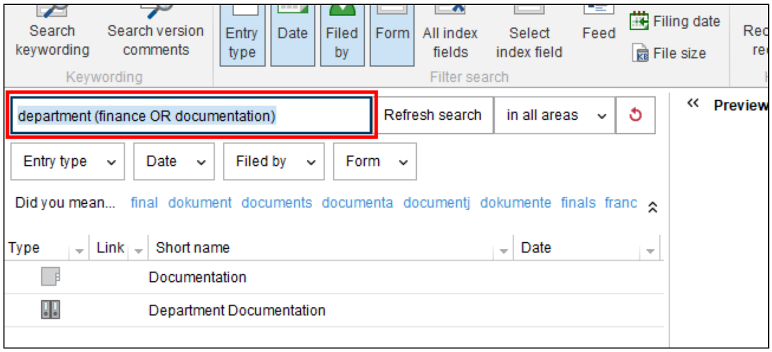


Fig. 141: Example of logical parentheses

You can use logical parentheses to enter an alternative search string. Logical parentheses define the terms that are searched in addition to the actual search term.

For example, you may be searching for an invoice, but you are not sure if it was filed as an invoice, bill, or receipt. In this case, enter the term which should first be used to search and then add the two alternative terms in parentheses, i.e. Invoice (bill, receipt).

Exclude terms

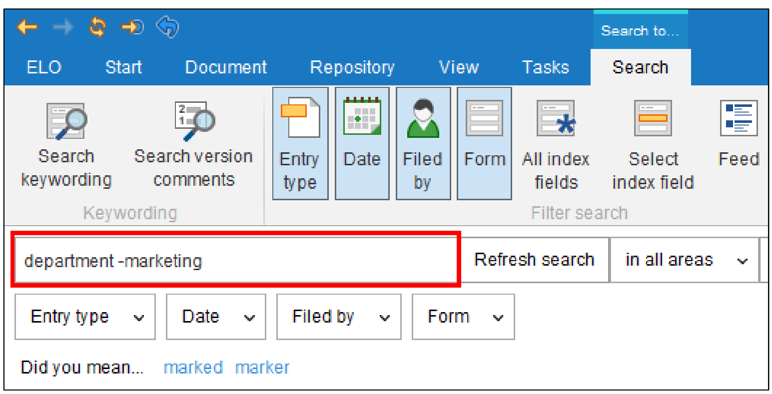


Fig. 142: Example of excluding terms

Search terms can also be excluded with ELO iSearch. The term that you want to exclude must be separated from the actual search term by a space and a hyphen (minus sign). If, for example, you search for the term *invoice* and exclude the term *receipt*, you must enter the following search command: `invoice -receipt`.

Phrase search

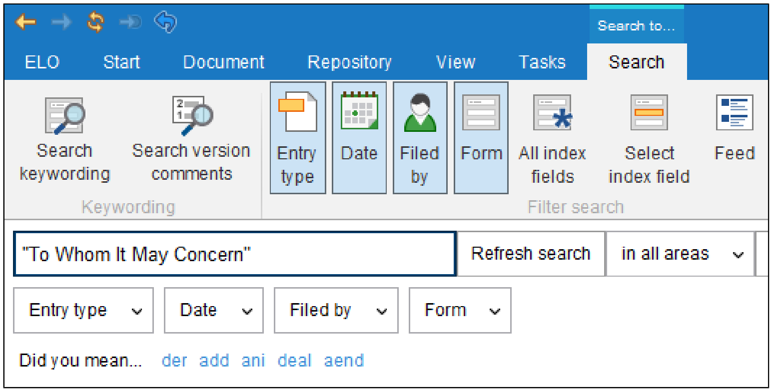


Fig. 143: Example of a phrase search

The phrase search works with groups of words which belong together exactly as entered. This can be a fixed expression, e.g. *write e-mails*. It can also be any possible grouping of words. For example, if you want to find all documents with the word combination **To Whom It May Concern,** type the following: `"To Whom It May Concern"`.

The range search makes it possible to limit the search to a specific range. This makes the search faster and significantly increases the accuracy of the results.

Range search

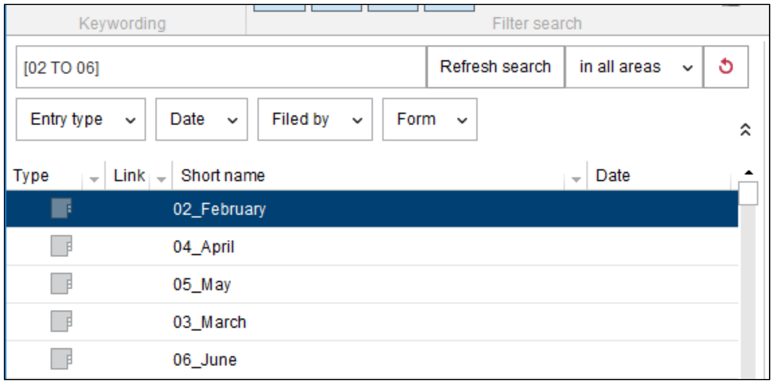


Fig. 144: Example of a range search

For example, you want to search all folders in the range 03-05. To do so, enter the search command `[03 TO 05]` in the search term field.

Case sensitivity

Upper and lower case lettering is ignored by iSearch.

Information: If you use a question mark as a wildcard character, the search will only work with lower case letters.

Synonyms

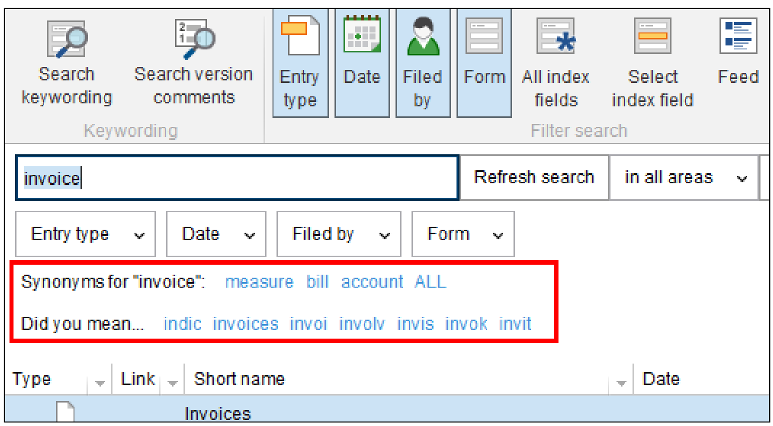


Fig. 145: Example of a suggestion for a synonym with ELO iSearch

ELO iSearch provides alternatives (synonyms) for many terms. Enter a space after the search term. ELO iSearch suggests corresponding synonyms if any are available.

To add a synonym to a search, click the desired suggestion.

Results text

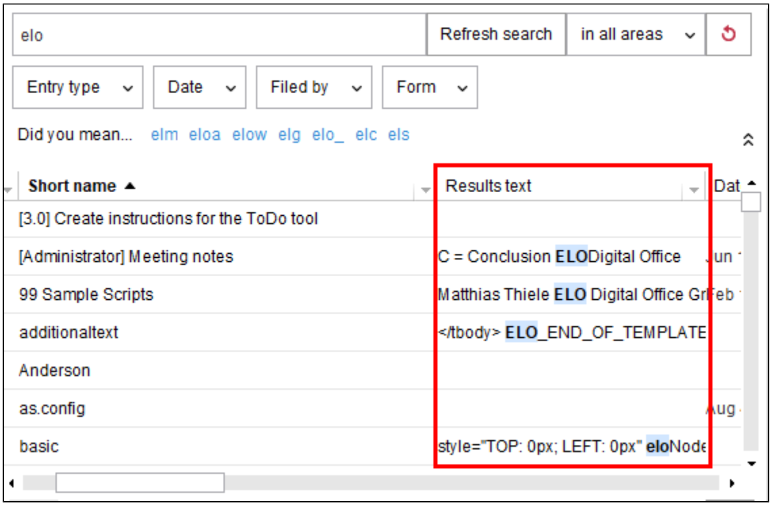


Fig. 146: 'Results text' column

Information: To use the *Results text* component, you need to enable the *Results text* option under *Configuration > Display > Search*.

A preview of the full text of the documents found by iSearch is displayed in the *Results text* column. Matches are highlighted.

Highlighting in full text

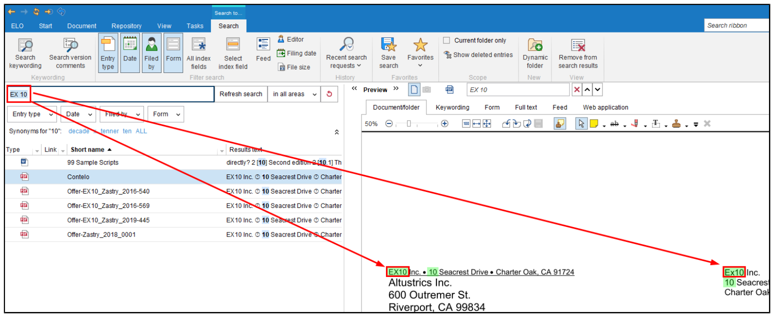


Fig. 147: Matches in full text

Besides being displayed in the *Results text* column, matches are also highlighted in the full text preview.

If the document contains more than one match, you can jump back and forth between the matches in the full text using the *Show next hit* (magnifying glass icon with arrow pointing downwards) and *Show previous hit* (magnifying glass icon with arrow pointing upwards) buttons.

Filters

ELO iSearch enables you to set filters to refine the search.

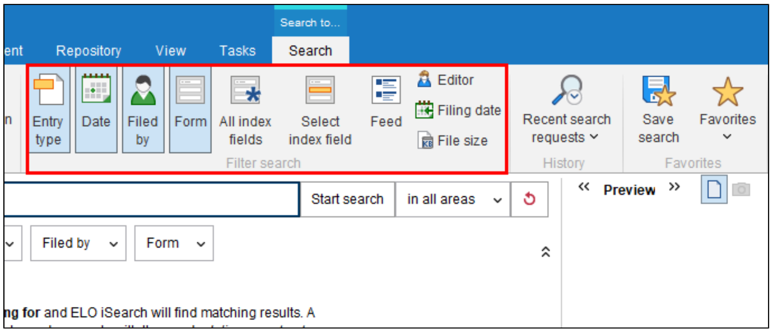


Fig. 148: Filters for ELO iSearch

ELO iSearch offers the following filters:

- **Entry type**: Filters the search by the selected entry type (e.g. folder, image document, Word document).
- **Date**: Filters the search by the selected document date.
- **Filed by**: Filters the search by the user that filed the repository entries.
- **Form**: Filters the search by the selected keywording form.
- **All index fields**: Enables the user to search in all index fields.
- **Select index field**: Enables the user to search an index field in a keywording form.
- **Feed**: Enables the user to search posts and hashtags within the ELO feed.
- **Editor**: Filters the search by the user entered in the keywording as the editor.
- **Filing date**: Filters the search by the selected filing date.
- **File size**: Filters the search by the selected file size.

Use filters

The various filters can be used according to a simple principle. We will demonstrate this in the following using the *Date* filter.

1. If you have not already selected the *Date* filter, click the *Date* button.

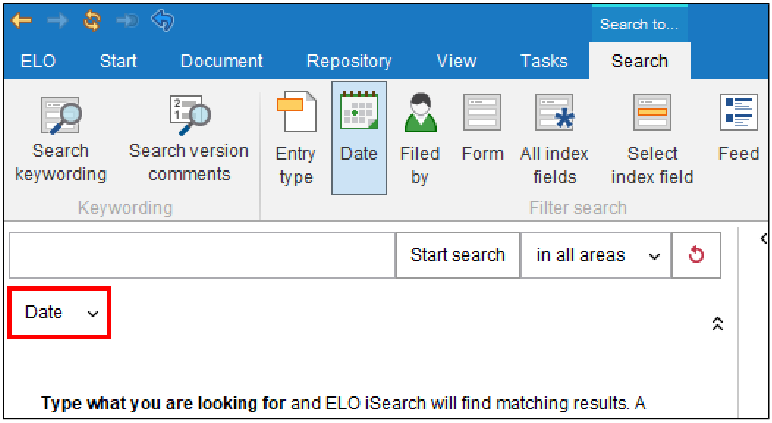


Fig. 149: 'Date' filter field

The *Date* filter field appears below the search field in ELO iSearch.

2. Click the arrow icon to the right of the field.

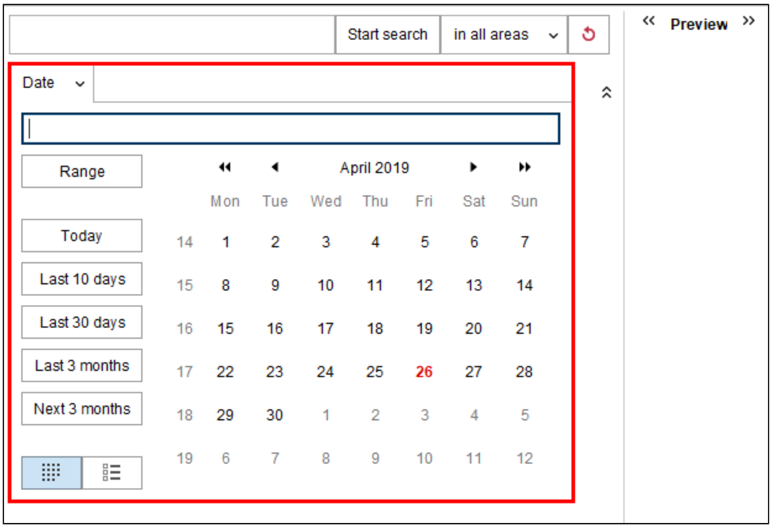


Fig. 150: Filter drop-down menu

A drop-down menu appears.

Information: The available options vary depending on the filter.

In the drop-down menu, you see a list of time periods as well as options to view a calendar or list of years.

3. Choose a date or a period.

Information: When the user clicks the *Select index field* filter, the *Select index field* dialog box appears. Use this dialog box to choose a keywording form and then an index field.

The selected setting appears in the filter field.

The filter becomes active when you start a search.

Alternatively: Click *Reset search* to filter the search results for a search that has already run.

Combine filters

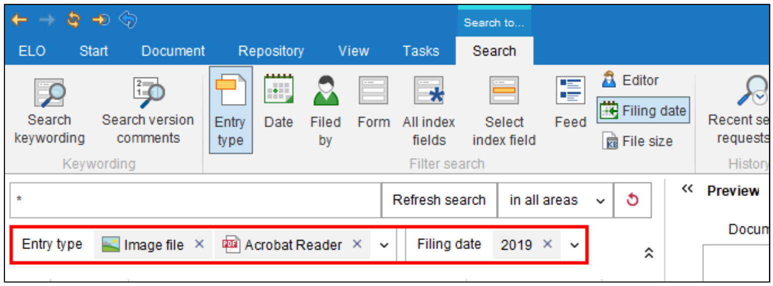


Fig. 151: Combination of several filters

You can use a combination of filters:

- **Several different filters**: By combining various filters, you can limit the search results using multiple criteria. This allows you to create precise search requests.
- **Multiple filters of one type**: Use multiple filters of the same type to expand the filter. For example, multiple *Entry type* filters allow you to perform a search filtered by multiple entry types.

Negate filters

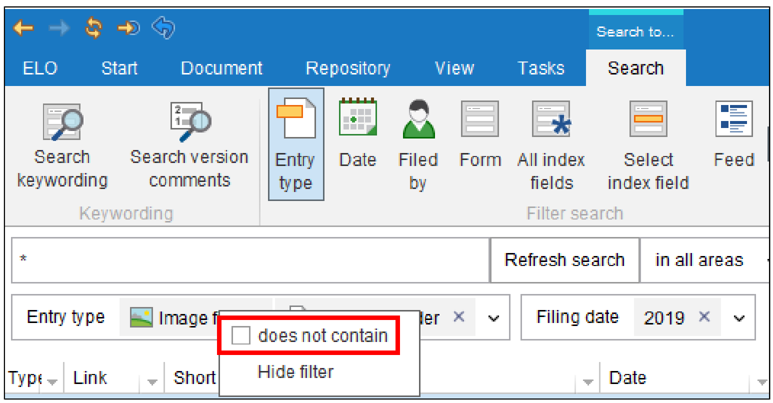


Fig. 152: 'Does not contain' check box

You can set filters to exclude specific values.

1. Select a filter value.
2. Right-clicking the filter opens its context menu.
3. Check the *does not contain* box.

The filter is now in *is not* mode.

Remove filters

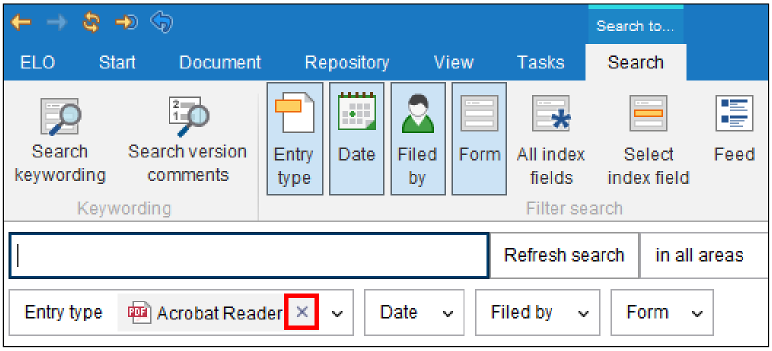


Fig. 153: Remove filters

To remove the filter, tap the X icon next to the selected filter value.

Search keywording

In addition to using the ELO iSearch, ELO allows you to search via keywording forms. This form of the search is useful when you want to search for specific keywording information.

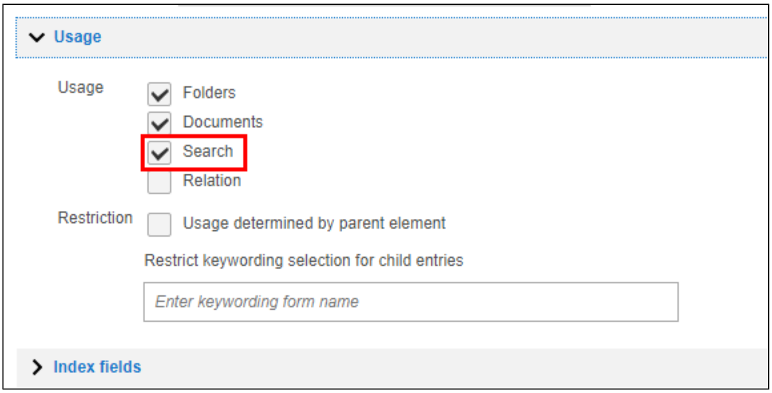


Fig. 154: ELO Administration Console, 'Search' option

Information: To be able to use a keywording form for the search as well, the *Search* option must be active. Enable this option in the keywording forms manager (*ELO Administration Console > Keywording forms > Usage*).

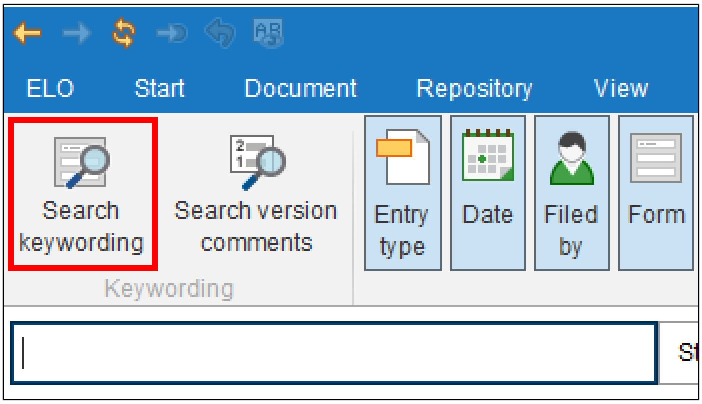


Fig. 155: 'Search keywording' button

Start the keywording search in the ELO Java Client by clicking *Search keywording*.

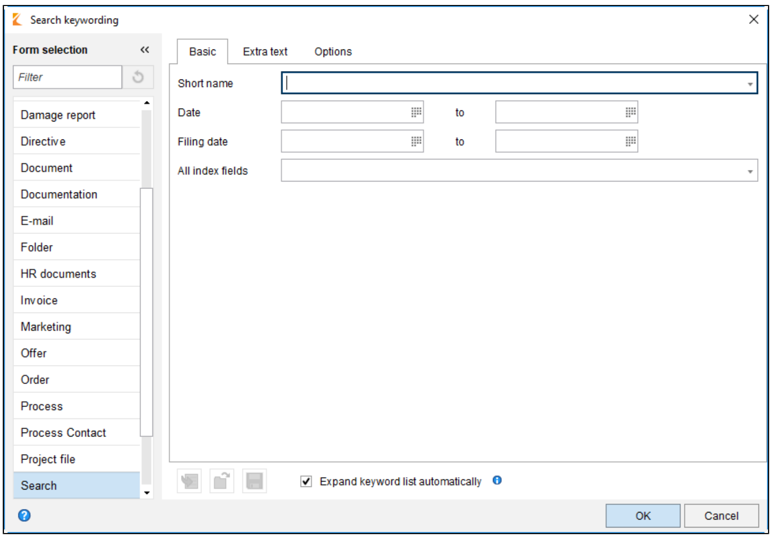


Fig. 156: 'Search keywording' dialog box

The *Search keywording* dialog box appears.

Form selection

All keywording forms that can be used as a search form will be displayed in the *Form selection* area. Select the keywording form that you used to keyword the document you are searching for, e.g. *Invoice*. This limits the search to documents keyworded with this form.

Information: The *Filter* field enables the user to browse or filter the *Form selection* area.

Search fields

The search fields of the keywording form are shown on the corresponding tab. They correspond to the index fields on a keywording form. The tabs and search fields that appear depend on the settings for the corresponding search form.

You can use the search fields to search specifically for the entries in these fields, such as for the *Invoice number* or the *Filing date*.

Information: When searching the keywording, it is possible to make entries to multiple fields of a search form. This allows you to create complex search queries.

For example, enter the name *Smith* to the `Customer` field. ELO will search the repository, but only for the *Customer* field in those documents filed with the *Invoice* keywording form.

Information: You can use keyword lists for entering search terms.

Options

The *Options* tab provides additional options to restrict the search to specific criteria.

Personal identifier: Use this field to search the contents of the *Personal identifier* index field.

End of deletion period: These two fields enable you to restrict the search to entries with a specific deletion period.

End of retention period: These two fields enable you to restrict the search to entries with a specific retention period.

Entry type: Allows users to restrict the search to specific entry types (e.g. *All folders* or *Web document*).

Notes: Allows users to search for notes. Select the note type from the drop-down menu.

Search range: The options in the *Search range* define what is to be searched.

Search mode: The search mode is important when you use multiple fields for the search. In the *Search mode* drop-down menu, define whether the fields are linked with Boolean AND or Boolean OR.

- **AND**: Only matches meeting **all** criteria are returned.
- **OR**: All matches meeting at least one of the criteria are returned.

Filed by: Allows users to restrict the search to entries by specific users.

File name: Allows users to restrict the search to entries with a specific file name.

Start search

Click the *OK* button when you have completed the search form.

Past searches

If you have already carried out several search requests, clicking *Enter keywording using the most recently saved/displayed entries [F3]* (icon with green arrow) will open a list of previous search requests. Both the search term and the used keywording form will be displayed.

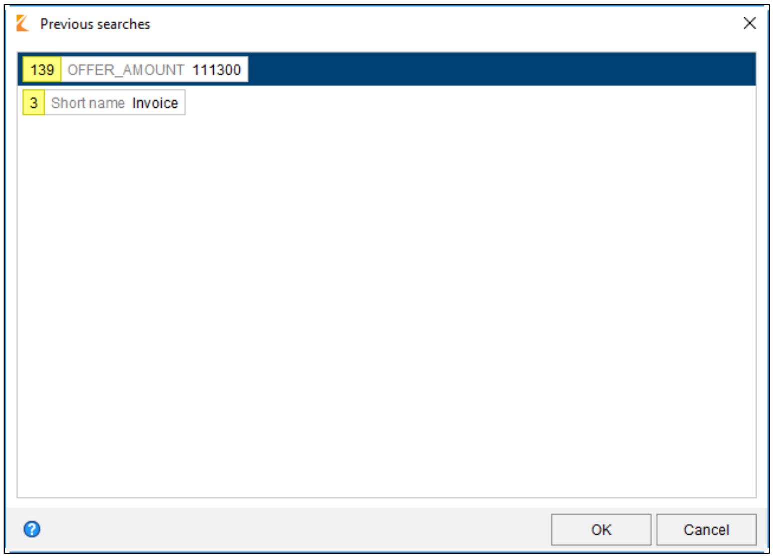


Fig. 157: 'Previous searches' dialog box

Select one of the listed entries and click *OK*. The terms will then be transferred to the search form.

AND/OR search in index fields

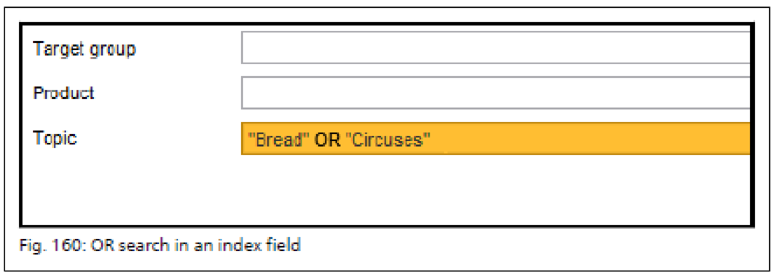


Fig. 158: OR search in an index field

In order to search index fields using AND/OR links, the search terms must be placed in quote marks. One of the operators (AND or OR) must be placed between the search terms.

Wildcard search

It is also possible to use the wildcard *, as is common in other Windows programs, in the search. This means you can use the * placeholder to search for sequences or character strings.

Information: You can use a question mark as a wildcard. However, you will then need to enter your search term in lower case letters. The question mark can only be used as a wildcard at the end of a word.

Search for sequences

There are several possibilities for this type of search, which will be explained with the following examples:

Let us assume you are looking for companies with "ow" in the name. Enter `*ow*`in the *Company* field of the search form. The search will return all documents containing the letters "ow" in the company name, e.g. **Ow**en, T**ow**nsend, etc. In other words, the search looks for the range between the two asterisks.

Search "beginning with" or "ending with"

If you omit either of the limits marked by the *, you will define a search as *beginning with* or *ending with*. This search option can be set as the default setting in the keywording forms. However, the option is not visible in the keywording form.

Let us assume you want to search for customers whose customer number starts with `15`. To do so, enter *15** to the search form in the `Customer number` field. ELO finds all documents in which the entry in the *Customer number* index field begins with `15`. If you enter **er* in the index field **Supplier**, all the documents that have **er** at the end of the entry in the *Supplier* index field will be found.

Information: You do not need to use the wildcard * in the *Short name, Date*, or *Extra text* fields. ELO displays all documents that contain the character string in the field in whatever form.

Universal search

ELO lets you perform a universal search for certain attributes. This applies to all index fields that use the same groups as well as index fields that have an identical component in the group name.

If you want to search multiple keywording forms, the group names of the index fields on different keywording forms have to be identical. Using the same group for multiple forms creates a horizontal relation between the index fields.

Identical group

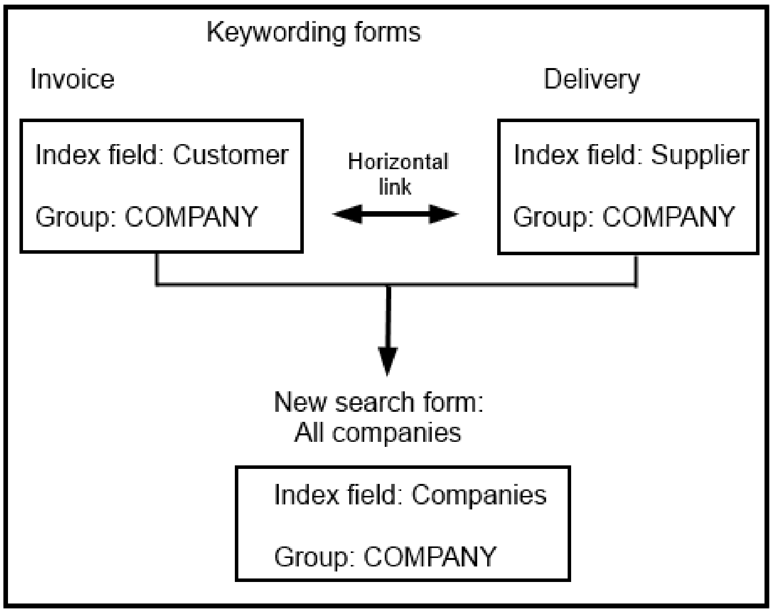


Fig. 159: 'Universal search' method

Example: All numbers

The universal search can also be used when multiple index fields do not use completely identical group names. However, all index fields in the group name must have an identical component at the beginning of the group name.

This is useful, for example, for a universal search for numbers. Please take the following into account:

Index fields for numbers must use a common characteristic (for example: *NO*):

- **Invoice number index field**: *NOINV* group
- **Customer number index field**: *NOCUST* group
- **Supplier number index field**: *NOSUPPL* group

The search form requires an index field (*All numbers*, for example) that uses *NO** as a group name.

If you use this search form via the *Search keywording* function, you can perform a universal search for all numbers.

For example, if you enter `2*` as a search term in the search form's index field, ELO finds all documents that contain a number in the keywording data that starts with *2*.

Additional functions

This section provides information on the additional search functions in ELO.

Recent search requests

ELO saves the ten most recent search requests.

Information: The search requests are saved when you close ELO.

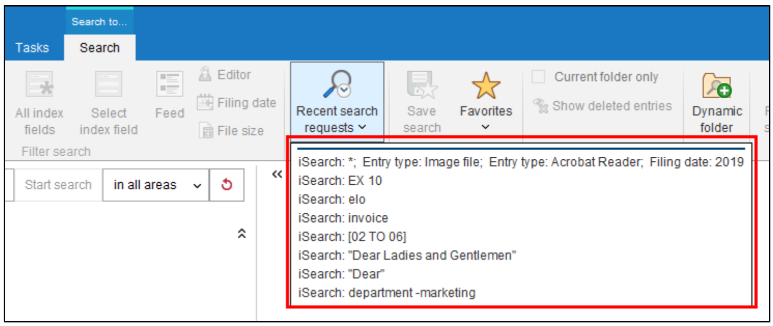


Fig. 160: 'Recent search requests' function

1. To retrieve a previous search request, click *Recent search requests* (*Ribbon* > *Search tab*).

A drop-down menu with the ten most recent search requests (ELO iSearch and keywording search) appears.

2. Click the desired search query.

The search request is performed again.

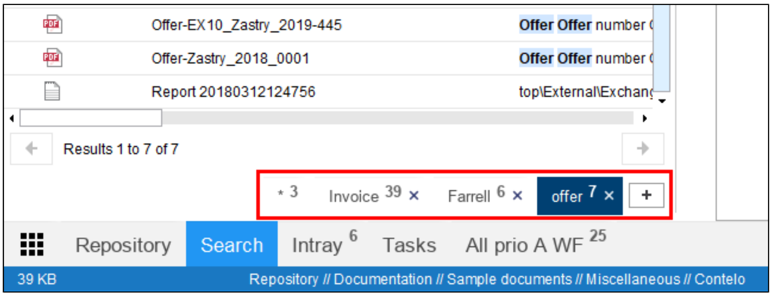


Fig. 161: Search views

Information: Search requests performed using the *Search keywording* button are also saved temporarily as a search view. These searches are deleted when you close ELO.

Favorites

You can also save searches as favorites in ELO.

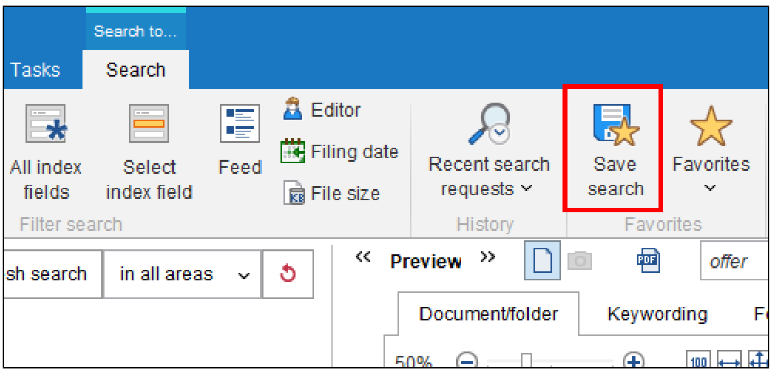


Fig. 162: 'Save search' button

1. To do so, click the *Save search* button (*Ribbon* > *Search tab*).

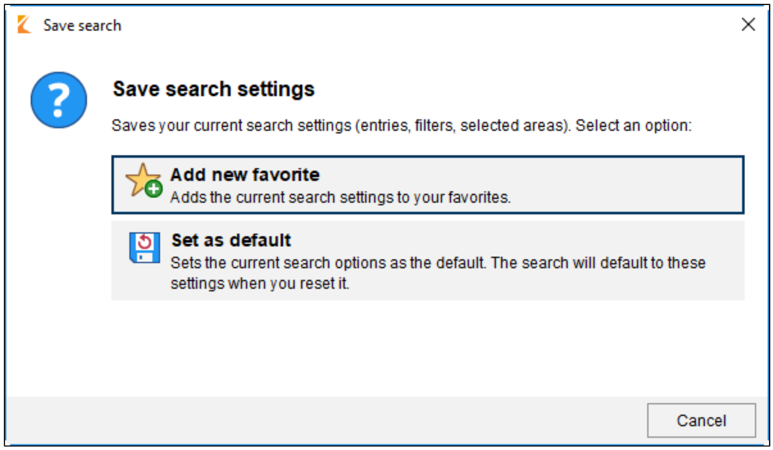


Fig. 163: 'Save search' dialog box

The *Save search* dialog box opens.

2. Click *Add new favorite*.

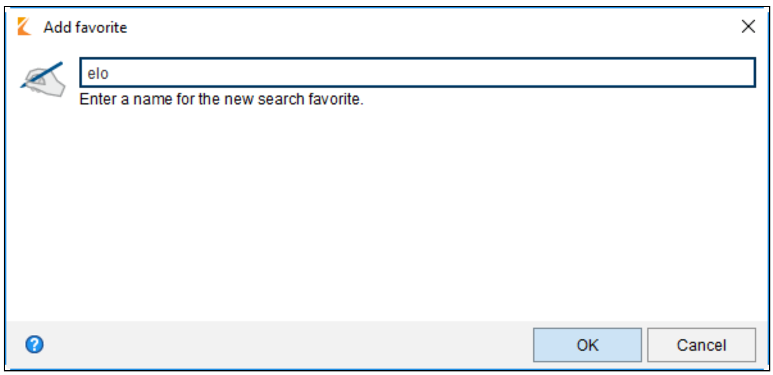


Fig. 164: 'Add favorite' dialog box

The *Add favorite* dialog box appears.

3. Enter a name in the text field.

4. Click *OK*.

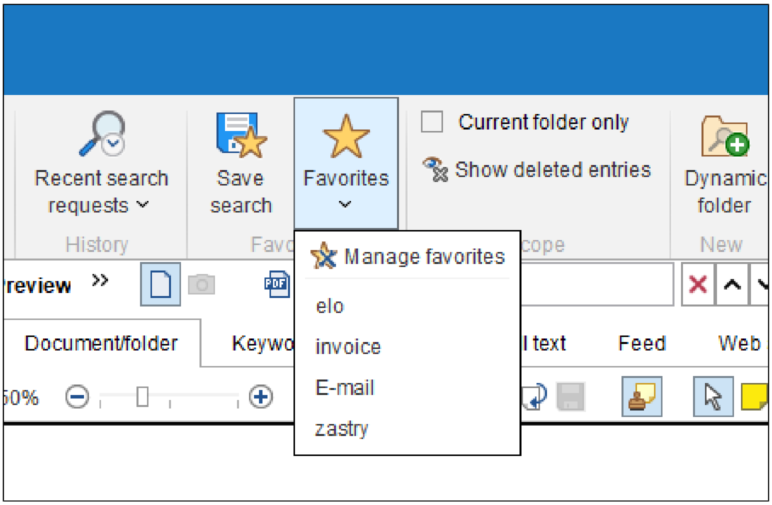


Fig. 165: New favorite

The new favorite now appears in the drop-down menu of the *Favorites* button.

Current folder only

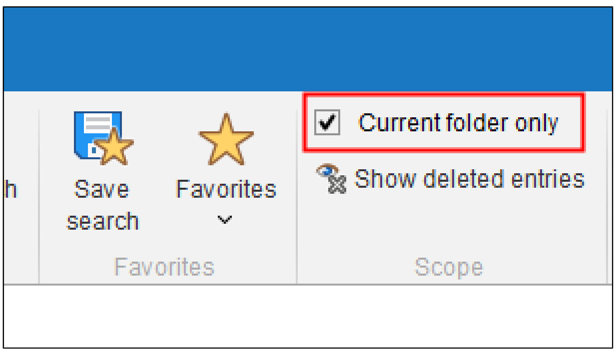


Fig. 166: 'Current folder only' option

The *Current folder only* option lets you restrict the search to the most recently selected folder in the *Repository* work area.

Please note: When the *Current folder only* option is enabled, the search can take a lot longer.

Show deleted entries

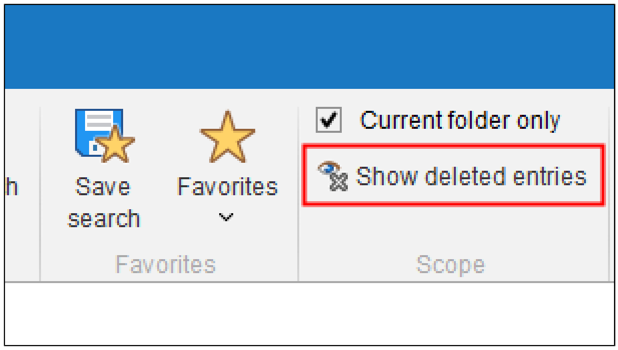


Fig. 167: 'Show deleted entries' option enabled

If the *Show deleted entries* option is enabled (highlighted yellow), then you will **ONLY** see deleted entries in the search results.

Fields searched

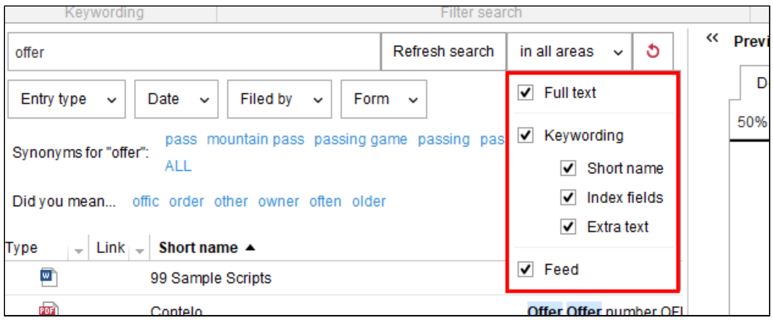


Fig. 168: 'Fields searched' drop-down menu

Information: The button is labeled *Fields searched* for historical reasons. The button name depends on the setting you have selected. The labels include *in all areas*, or *in full text*.

Click *Fields searched* to restrict the search to specific areas. The *Fields searched* button is located next to the *Start search* button and *Refresh search*.

You can choose from the following options:

- **Full text**: The *Full text* option restricts the search to the full text content.
- **Keywording**: The *Keywording* option allows you to enable or disable the following options at the same time: *Short name*, *Index fields* and *Extra text*.
- **Short name**: The *Short name* option restricts the search to the content of the short names.
- **Index fields**: The *Index fields* option restricts the search to the content of the index fields.
- **Extra text**: The *Extra text* option restricts the search to the content of the extra text.
- **Feed**: The *Feed* option restricts the search to the contents of the ELO feed. This includes version comments.

Enable or disable the various options by clicking the check boxes.

Dynamic folder

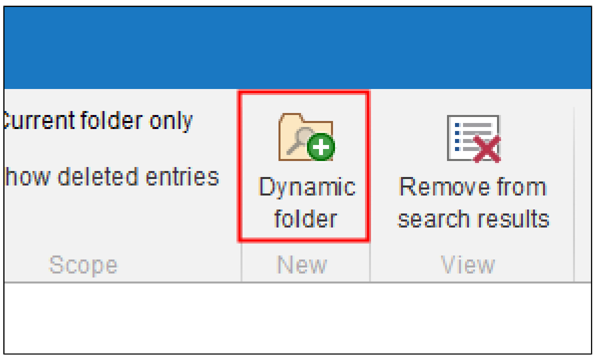


Fig. 169: 'Dynamic folder' button

You have the option to save search requests as a dynamic folder. Dynamic folders are automatically updated when entries that correspond to the search criteria are filed to the repository.

1. To save a search as a dynamic folder, click *Dynamic folder* (*Ribbon > Search*).

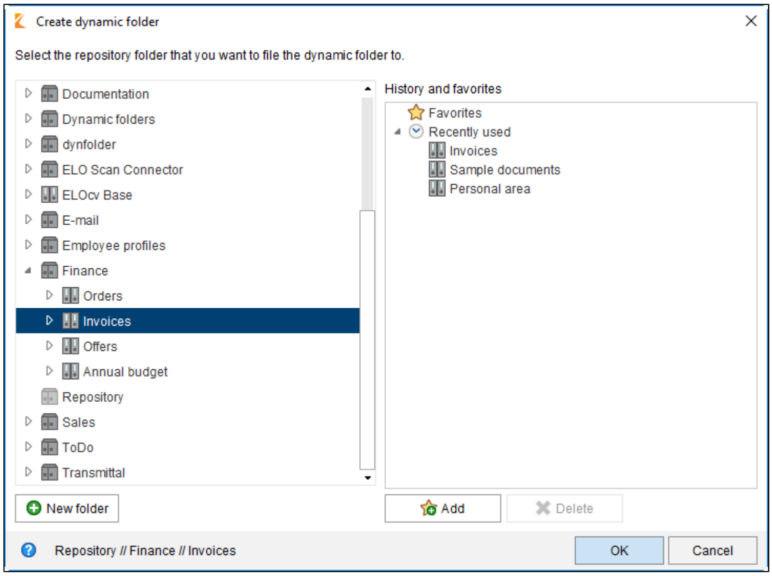


Fig. 170: 'Create dynamic folder' dialog box

The *Create dynamic folder* dialog box appears.

2. Select the folder where you would like to create the dynamic folder.

Optional: If you need to add child folders, you can do so using the *New folder* button.

3. Click *OK*.

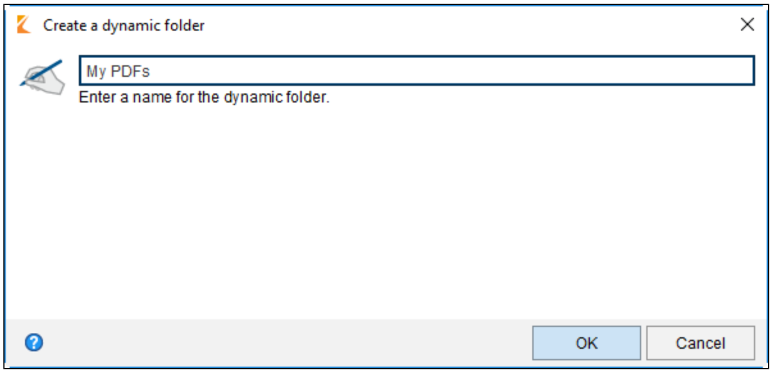


Fig. 171: 'Create a dynamic folder' dialog box

The *Create dynamic folder* dialog box appears.

4. Enter a name for the folder.

5. Click *OK*.

The dynamic folder is created.

Remove from search results

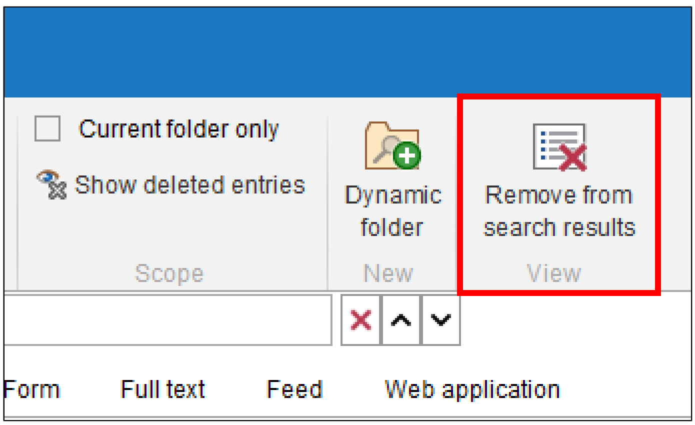


Fig. 172: 'Remove from search results' button

The *Remove from search results* function allows you to remove selected matches (supports multiple selection) from the search results list. This only deletes entries within the current search. The entries remain in the repository. If you perform the same search again, then all matches will be displayed.

Display search results

The search results are shown in multiple columns when the default settings are used. The column names correspond to the index fields of the keywording forms. The results can be filtered within the columns. By clicking the column headers, the results can be sorted alternatively in ascending or descending order.

Context menu

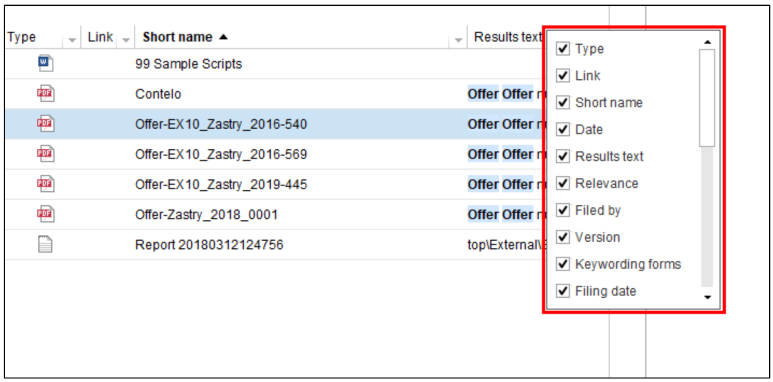


Fig. 173: Context menu for the search results

Right-click a column header to open a context menu. Now you can define the columns that will be displayed.

Numeric values

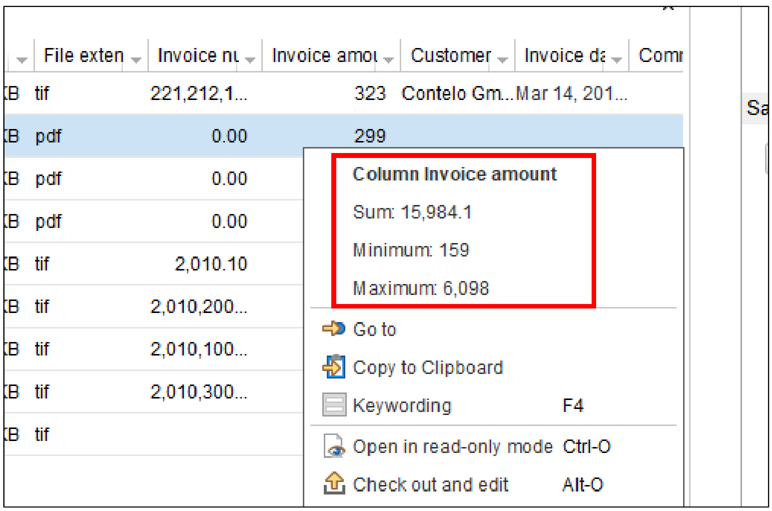


Fig. 174: Context menu for a column with numeric values

ELO provides the following additional information in the context menu for columns that only contains numeric values.

- **Sum**: Calculates the column sum.
- **Minimum**: Returns the lowest value in a column.
- **Maximum**: Returns the highest value in a column.

Filters

Filters can be placed in the columns of the search results.

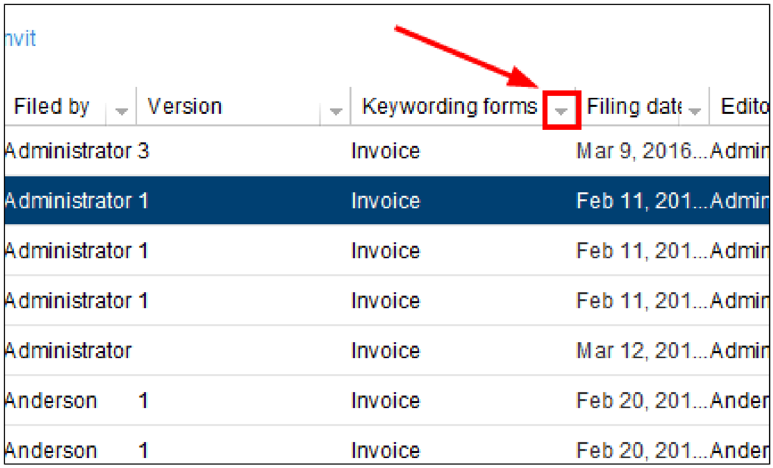


Fig. 175: Triangle icon

1. Click the triangle to the right of the corresponding column header.

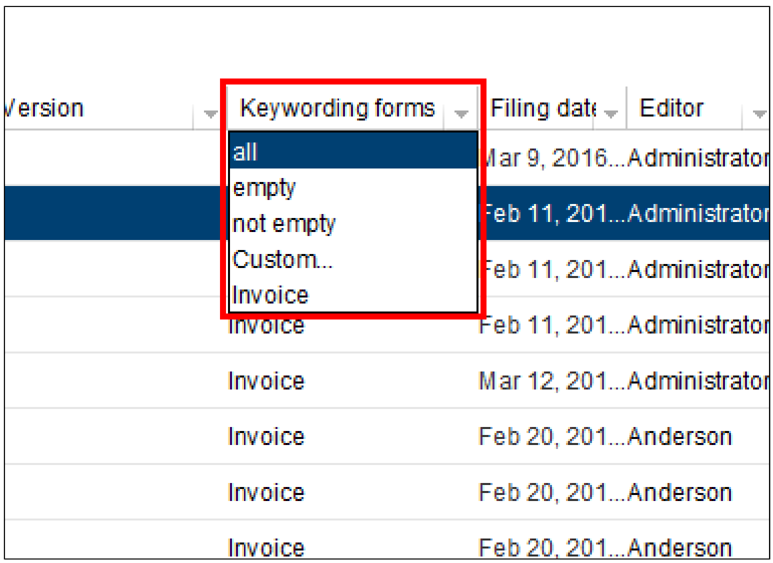


Fig. 176: Drop-down menu for filters

A drop-down menu appears with filter settings.

2. Click the desired filter setting.

The list is filtered.

Display

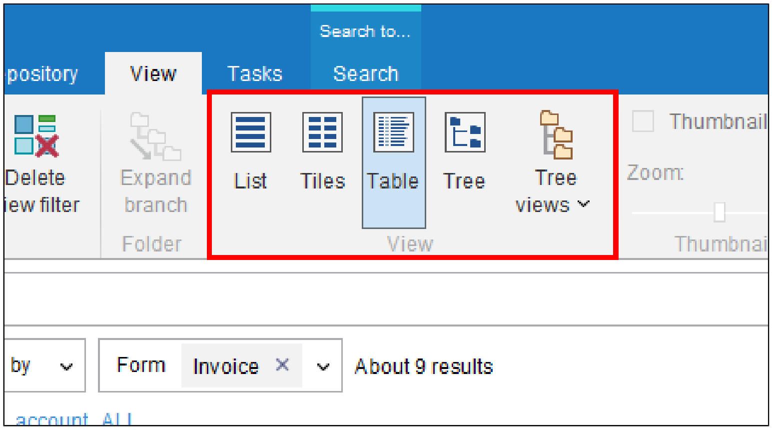


Fig. 177: 'View' tab; 'Display' group

Instead of displaying the results in a table view, you can also view them in a list view, tile view, or tree view. These settings are found on the *View* tab of the ribbon.

Search the contents of a document

ELO provides you with two options for searching the contents of a document for specific terms.

- The document preview
- The full text preview

Document preview

Use the *Search document* function to search the contents of raster graphics and PDF documents for a particular term. This function is available when the document is viewed in the document preview via the *Document/folder* preview element.

Information: This search method also works for e-mails if the *Browser preview* option for the corresponding file extensions is enabled in the *ELO > Configuration > Document preview > Preview configuration for various file types*).

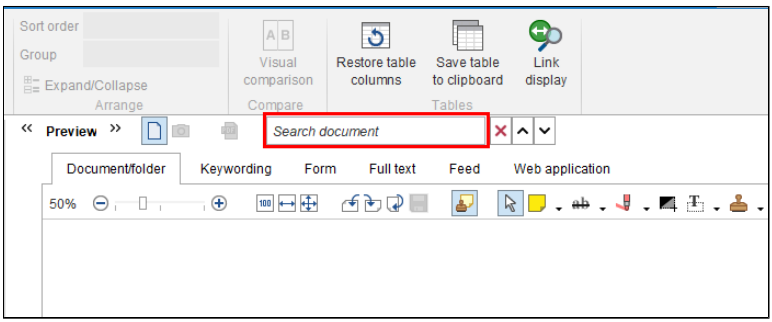


Fig. 178: Search document

The function is located on the preview bar.

Information: This option is only available for raster graphics documents (TIFF, JPG, etc.).

1. Select a document in which you want to search for a term.

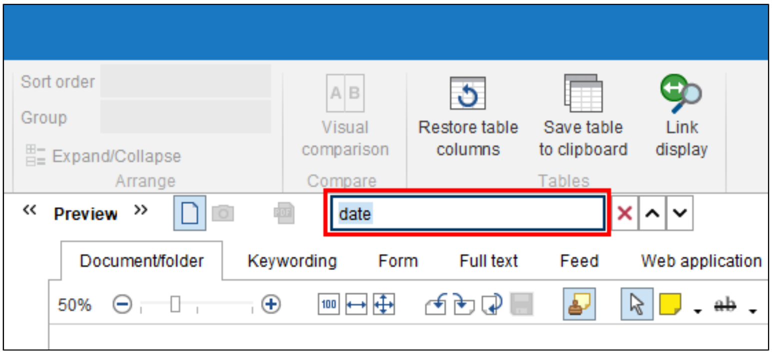


Fig. 179: Enter search term

2. Click the *Search document* field on the preview bar.

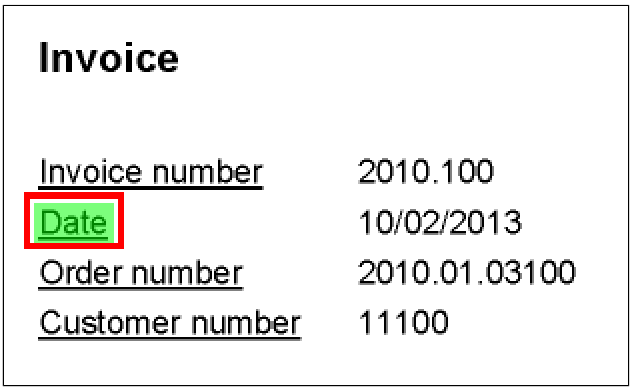


Fig. 180: Highlighted match

3. Enter a search term into the search field.

Information: If you find a document using ELO iSearch, then you can double-click the search term to import it to the *Search document* field.

ELO begins to search as soon as you start typing and highlights any matches in green.

If the document contains multiple matches, use the arrow icons next to the search field to skip through the matches. In this case, the currently selected match is highlighted in red.

Information: Click the X icon to the right of the search field to reset the search.

Full text preview

If full text contents exist for a document, you can search the contents using the full text preview.

There are two ways of doing this:

- In the repository
- In the search results

In the repository

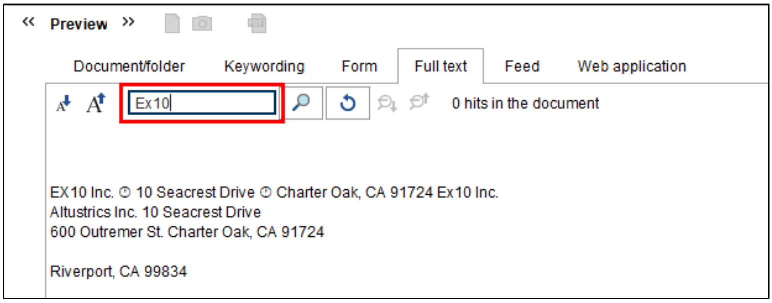


Fig. 181: Search field in the full text preview

If you have selected a document in the repository and enabled the *Full text* preview element, a search field appears that allows you to search through the full text content.

Start search: Click the *Start search* (magnifying glass icon) button to begin the search.

Reset search: Use the *Reset search* button (arrow icon) to delete the content of the search field.

Once you have performed a search, the following buttons appear:

Show next hit: The *Show next hit* button (magnifying glass icon with arrow pointing downwards) jumps to the next match.

Show previous hit: The *Show previous hit* button (magnifying glass icon with arrow pointing upwards) goes back to the previous match.

In the search results

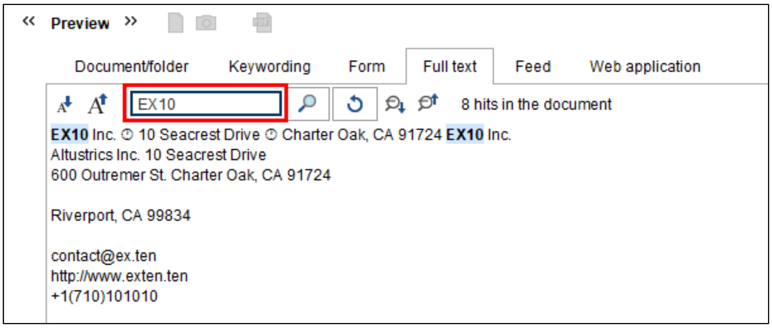


Fig. 182: Matches in full text

If you have selected a document in the search, the parts of the documents that match the search text are automatically marked in the full text preview. The search field is not displayed.

The *Show next hit* and *Show previous hit* functions work in the same way as described above.

ELO collaboration

ELO offers several features that support collaboration within your company.

This chapter contains information on the following topics:

- Feed
- My ELO

Feed

The feed is used to share information on an entry in the repository (document or folder) and record changes to the post.

The following message types are shown in the feed:

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

Creating a post

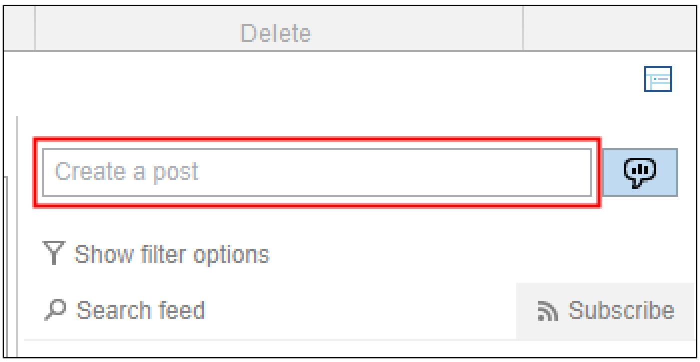


Fig. 183: 'Create a post' input field

Use the *Create a post* input field to create a feed post on an entry in the repository. Click *Create* to post the comment.

The text in posts, polls and comments can be formatted with the following syntax:

Bold: To format a part of the text in *bold* type, place an asterisk (*) at the beginning and end of the desired text section.

Example `I would like to emphasize this *again*.` will appear in the ELO feed as follows: "I would like to emphasize this **again**.".

Information: If you want the asterisk to appear as a character in the text, enter a backslash before the asterisk. The asterisk does not have a formatting function, but appears instead.

Poll

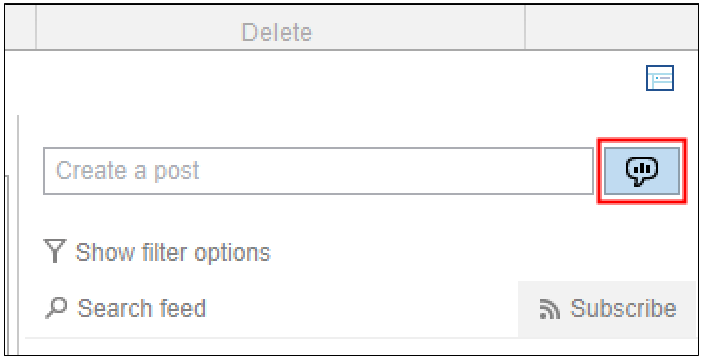


Fig. 184: 'Create poll' button

Clicking the *Create poll* button opens a new area in the ELO feed in which you can start a user poll.

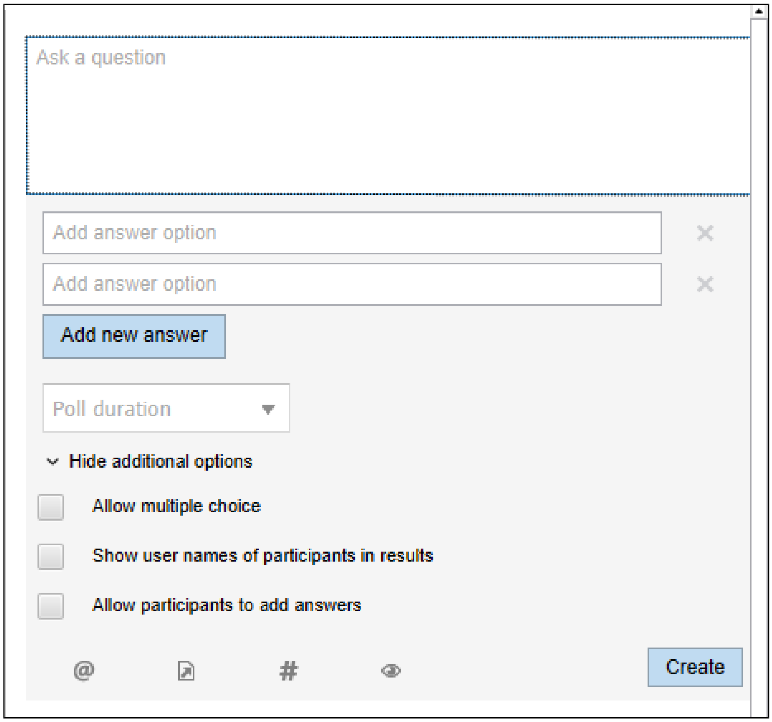


Fig. 185: Create poll

Enter the title or question of the poll in the first input field (with the placeholder text *Ask a question*). Enter the answer options to the next input fields (with the placeholder text *Add answer option*). To create an additional answer option, click the *Add new answer* button. You can select how long you want the poll to remain open in the *Poll duration* field.

Clicking *Show more settings* opens an area with additional settings. Here, you can you define whether you want to offer the user multiple options to select from, whether you want the user name of the participants to be visible in the poll result, and whether you want participants to be able to add further answer options.

Click *Create* to start the poll.

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

Mention

Fig. 186: 'Mention' button

Use the *Mention* button (@ icon) to address a feed post directly to another ELO user or an ELO group. You can select the user or the group in the *Mention* dialog box.

The users mentioned then see the corresponding feed post in the *My ELO* work area.

Alternatively: As soon as you type an @ character, ELO automatically recognizes that you want to insert a mention. The *Mention* dialog box appears.

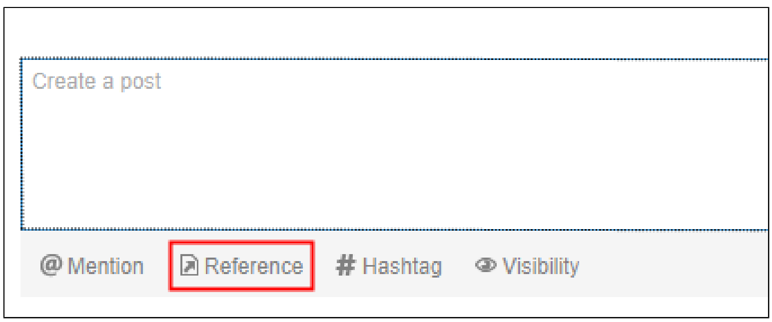


Fig. 187: 'Reference' button

Reference

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

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

Alternatively: As soon as you type a > character, ELO automatically recognizes that you want to insert a reference. The *Reference* dialog box appears.

Hashtag

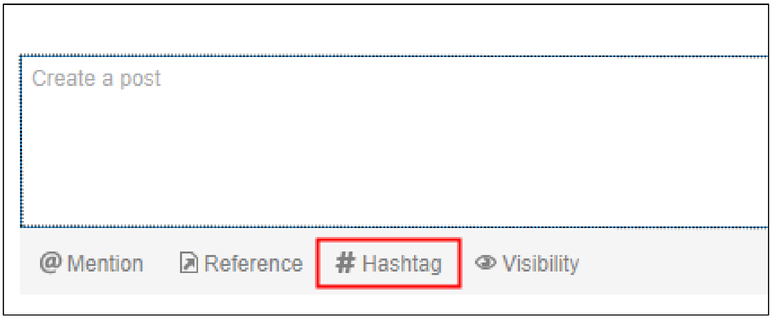


Fig. 188: 'Hashtag' button

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

Alternatively: As soon as you type a # character, ELO automatically recognizes that you want to insert a hashtag.

Subscribe to a hashtag

1. Click the respective hashtag to subscribe to it.

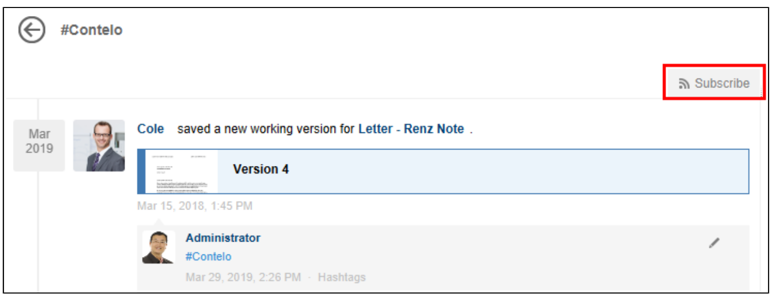


Fig. 189: 'Subscribe' button

The discussion page for the selected hashtag appears.

2. Click the *Subscribe* button.

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

Visibility

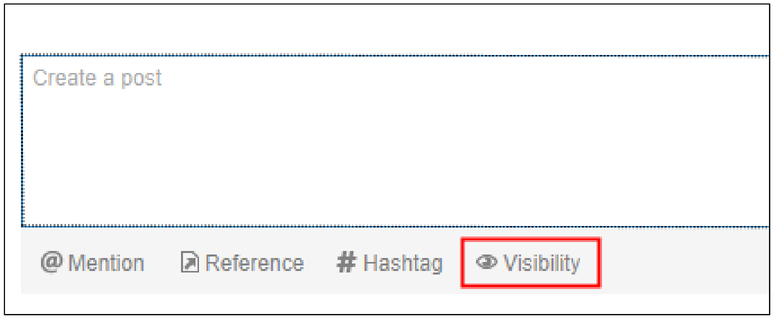


Fig. 190: 'Visibility' button

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

Show filter options

Fig. 191: 'Show filter options' button

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

Search feed

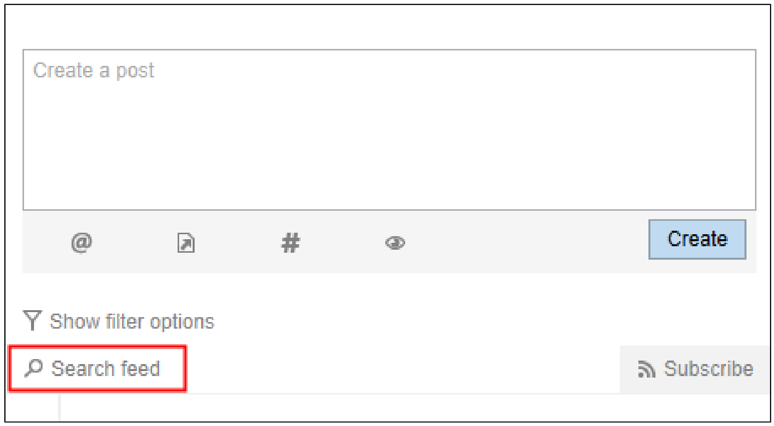


Fig. 192: 'Search feed' button

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

Subscribe to feed

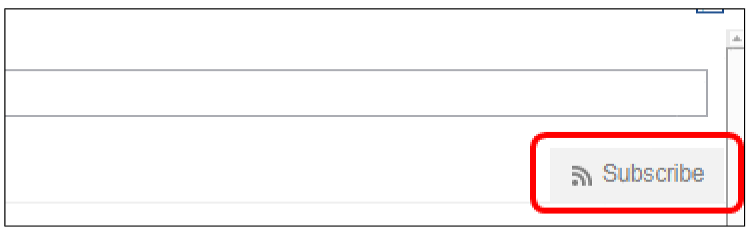


Fig. 193: 'Subscribe' button

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

Automatically subscribe to feed

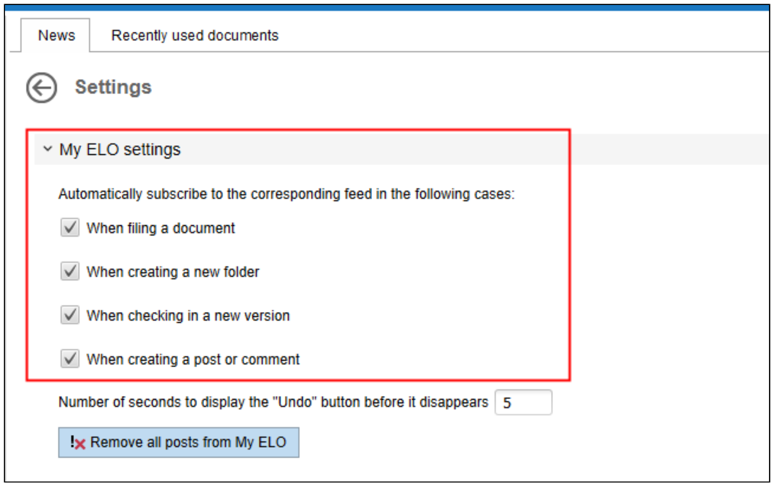


Fig. 194: Options for automatic subscriptions

ELO enables you to automatically subscribe to feeds. This applies to specific events that are triggered by a user:

- Filing a document
- Creating a folder
- Creating a new document version
- Creating a feed post or comment

You can enable the automatic feed subscription options in *My ELO > Settings > My ELO settings*.

Alternatively: You can also enable the automatic feed subscription option on the ribbon under *ELO > Configuration > Advanced settings > My ELO*.

Comment

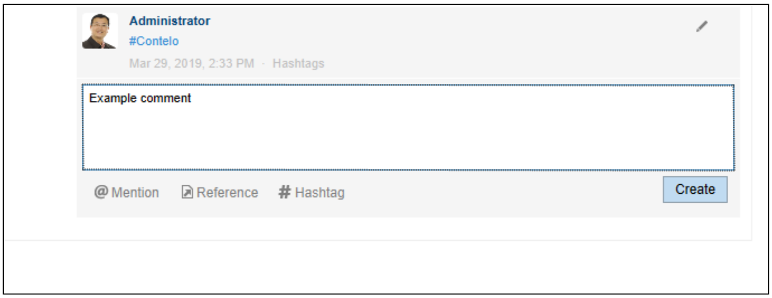


Fig. 195: Comment in a feed

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

Edit post

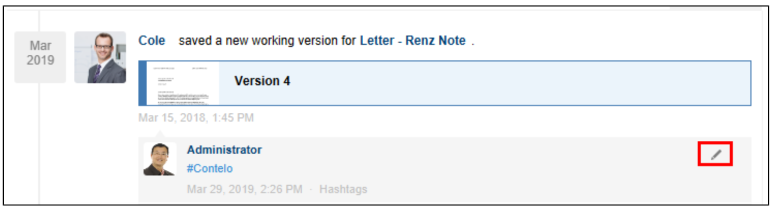


Fig. 196: 'Edit' button

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

My ELO

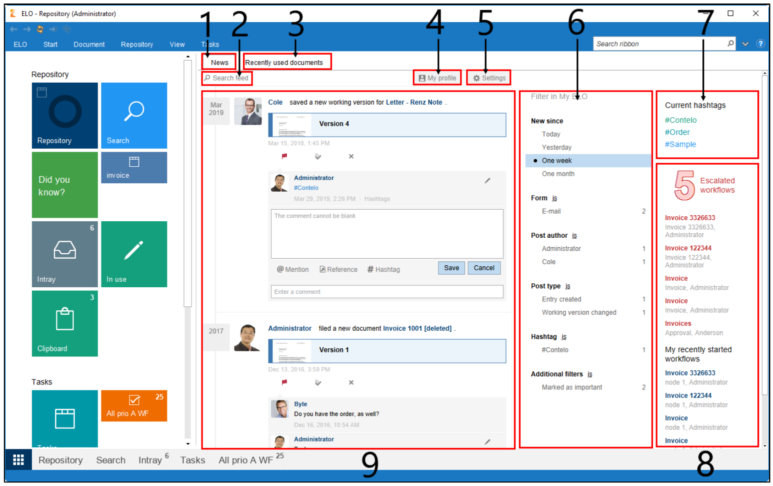


Fig. 197: The 'My ELO' work area

The *My ELO* work area is on the start page when you run ELO. From here, you can access the main areas of the ELO repository using tiles.

Information: Most functions in the *My ELO* work area relate to the feed function. You can find additional information about this function in the *Feed* section above.

The tile navigation area is explained in more detail in another part of this manual (*Program interface* chapter). This section only deals with *ELO collaboration* functions.

1 News: Feed posts from different entries are displayed in the *News* area. This applies to feeds such as those that a user has subscribed to or in which they are mentioned by another user. Escalated or recently started workflows that are relevant for the user are also shown in this work area.

Information: If no posts appear in the *My ELO* work area, check your filter settings. There may be no posts for the selected period (under *New since*).

2 Search feed: Click the *Search feed* button to open a search window. You can search the ELO feed using this search field.

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

4 My profile: Click *My profile* to open a dialog box that shows your profile. You can edit your profile in this dialog box.

To open the profile of another employee, click the employee's user name.

5 Settings: Click the *Settings* button to open the *Settings* page. On the *Settings* page, you will find the options for *My ELO settings*, *My subscribed hashtags*, and *My polls*.

6 Filter: You can filter posts in the ELO feed in the *Filter* area.

7 Hashtag cloud: Trending hashtags are grouped in the hashtag cloud. Clicking a hashtag opens the overview for the selected hashtag, where all posts marked with the hashtag are shown.

8 Workflows: In the *Workflows* area, you can see all workflows you are involved in. If any workflows you are involved in have been escalated, the number of escalated workflows and the corresponding workflows are highlighted in red.

Click the name of the workflow to jump to the respective workflow in the *Tasks* work area.

9 Feed: The *feed* contains current posts, polls, and comments.

Minimized window

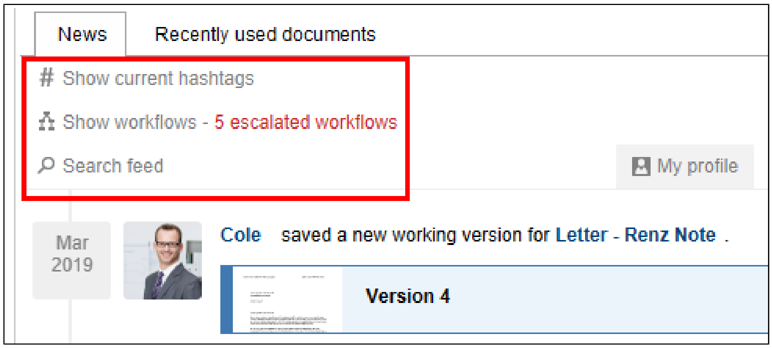


Fig. 198: Additional buttons with smaller program window size

If the preview pane in *My ELO* is not large enough to show workflow information, the *Show current hashtags*, *Show workflows*, and *Show filter options* buttons will appear. The elements are briefly described in the following. Refer to the following sections of this chapter for more information.

Show current hashtags: Clicking *Show current hashtags* shows the hashtag cloud (see above) with the most recent hashtags.

Show workflows: Click *Show workflows* to display workflow information above the subscribed feed.

Show filter options: Click *Show filter options* to display the filters for *My ELO* above the feed posts.

Mark as important

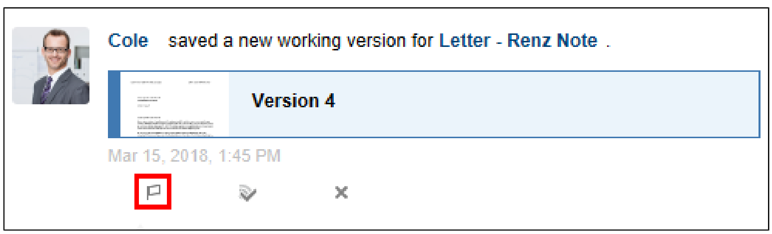


Fig. 199: 'Mark as important' button

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

Delete marker

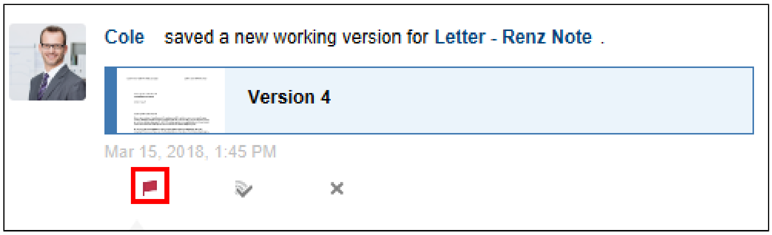


Fig. 200: 'Mark as important' button

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

Hide post

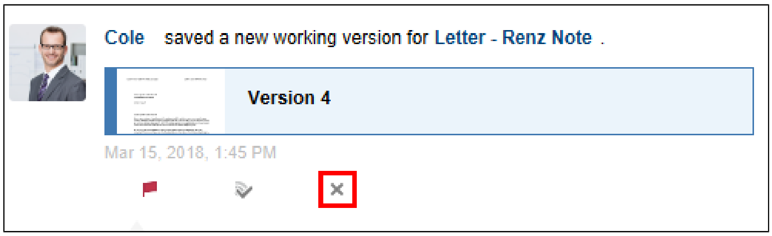


Fig. 201: 'Remove from My ELO' button

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

Information: The *Remove from My ELO* function does not delete a post from a feed.

Alternatively: To hide all posts in *My ELO*, use the *Remove all posts from My ELO* function. This function is in *My ELO* > *Settings* > *My ELO settings*.

Information: Posts marked as important are not removed.

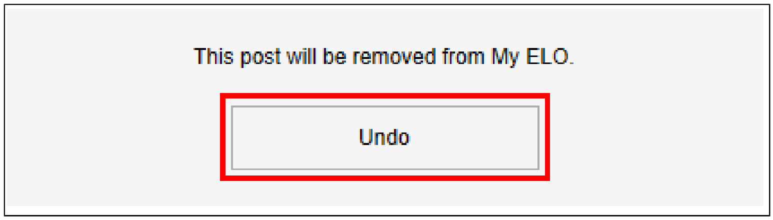


Fig. 202: 'Undo' button

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

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

Filter categories

The following filter categories are available in the *My ELO* work area and the ELO feed:

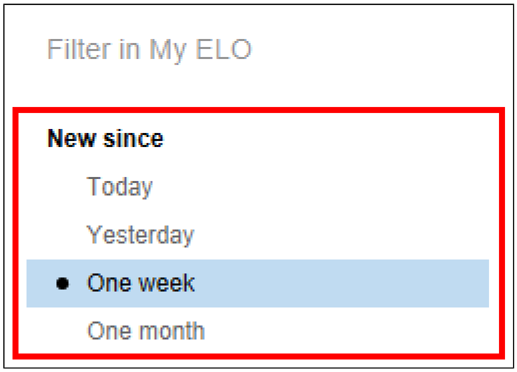


Fig. 203: 'New since' filter category

New since: The *New since* filter option lets you filter the *My ELO* work area by time periods.

Fig. 204: 'Form' filter category

Form: The *Form is* filter option lets you filter the *My ELO* work area by the keywording forms used for entries.

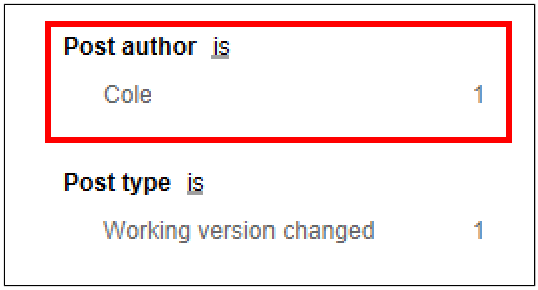


Fig. 205: 'Post author' filter category

Post author: The filters in the *Post author is* category let you filter the *My ELO* work area by the users that have created posts in feeds they have subscribed to.

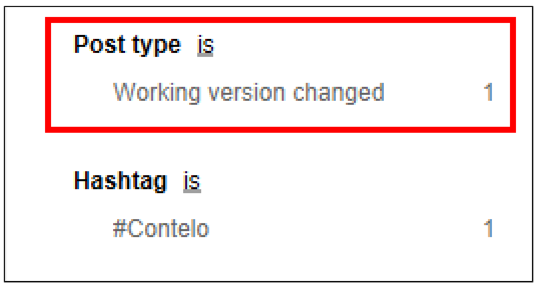


Fig. 206: 'Post type' filter category

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

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

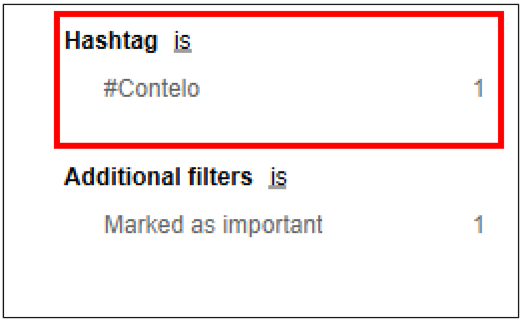


Fig. 207: 'Hashtag' filter category

Hashtag: The *Hashtag* filter option lets you filter the *My ELO* work area by hashtags.

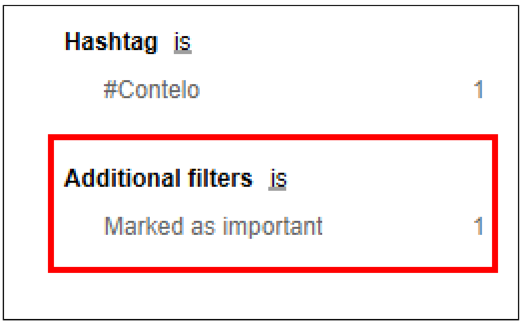


Fig. 208: 'Additional filters' filter category

Additional filters: The *Additional filters* option lets you filter the *My ELO* work area based on the settings that relate to the current user.

Use filters

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

Negate filters

In the default settings, all filters are applied in *is* mode. If a filter is applied in *is* mode, only posts that match the filter will be displayed.

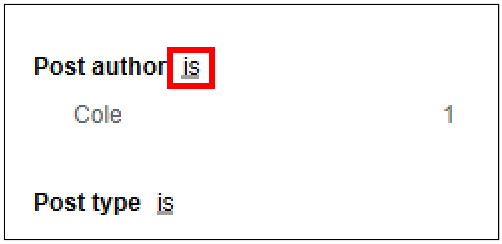


Fig. 209: Filter category in 'is' mode

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

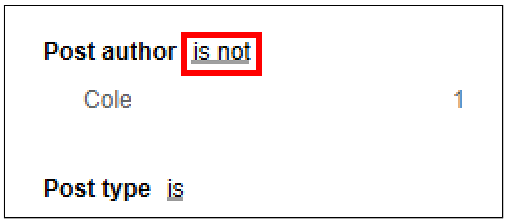


Fig. 210: Filter category in 'is not' mode

If a filter is applied in *is not* mode, you will see all posts that do not match the filter.

Reset filters

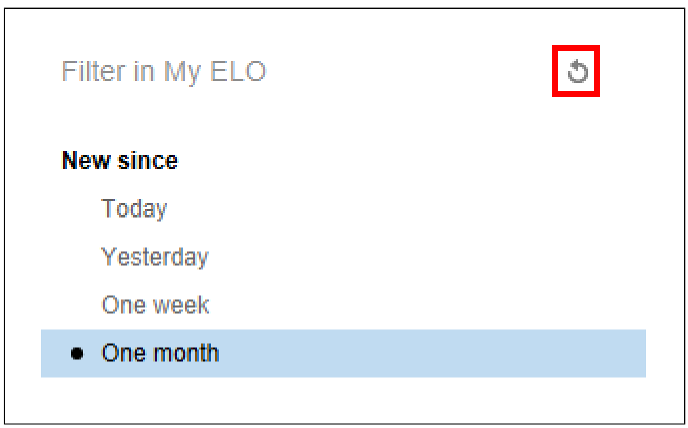


Fig. 211: 'Reset filters' button

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

Change profile image

Every ELO user and ELO user group has a profile for the ELO feed. You can upload an image of the user/group to this profile.

There are two ways to change the profile image of an ELO user/ELO group:

- In the Administration folder
- In the profile

In the Administration folder

The following describes the method using the Administration folder.

Information: You require the appropriate permissions for this method.

Filing location

The path of the filing location for profile images is as follows:

Administration//Users//<Folder with corresponding number range>// <User name>/<Group name>//data//elo.profile

Information: The profile image must have the short name *userimage*. Use PNG, JPG or GIF image files with a minimum of 280 x 280 pixels.

1. Open the folder for the respective user/group (see above).

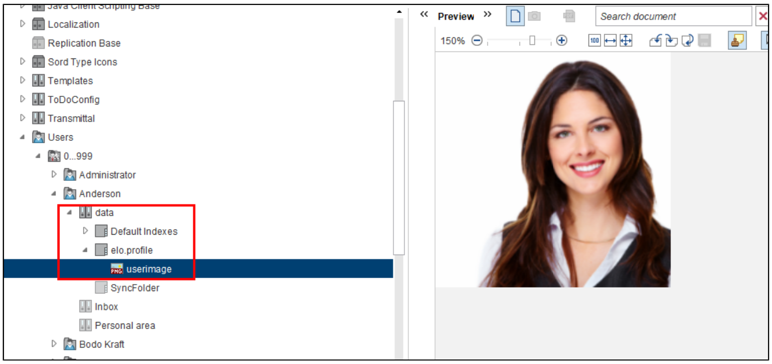


Fig. 212: Profile image in the 'elo.profile' folder

2. Save the image to the *elo.profile* folder of the respective user/ group.

3. Enter *userimage* as the *short name*.

4. Click *OK* to close the keywording.

The profile image is displayed in the feed.

In the profile

The user profile can be accessed via the feed or via the *My ELO* work area. You can access the group profile via the feed if the group has been mentioned. Users can change their own profile image in the respective dialog box. The following describes the method for users via the feed.

Information: Administrators with *Edit user data* permission can change images for other users.

1. Select an entry in the repository which you created a feed post for.

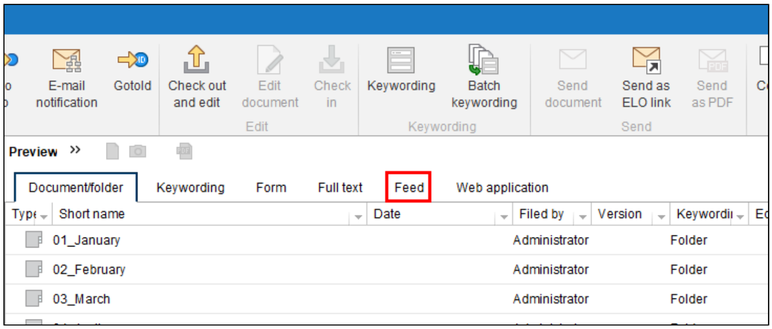


Fig. 213: 'Feed' preview element

Optional: If the feed is hidden, you can display it by clicking the **Feed** preview element in the viewer pane.

Information: The *Feed* preview element must be part of the selected preview profile.

2. Navigate to a feed post which you have created.

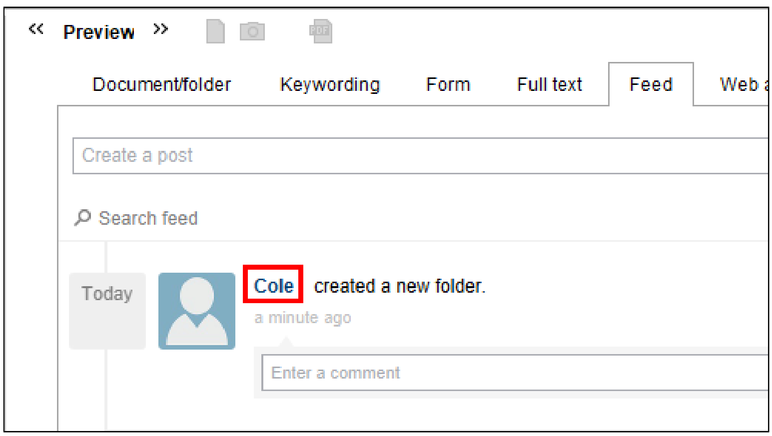


Fig. 214: Feed post; User name

3. Click your user name.

Alternatively: Click your profile image.

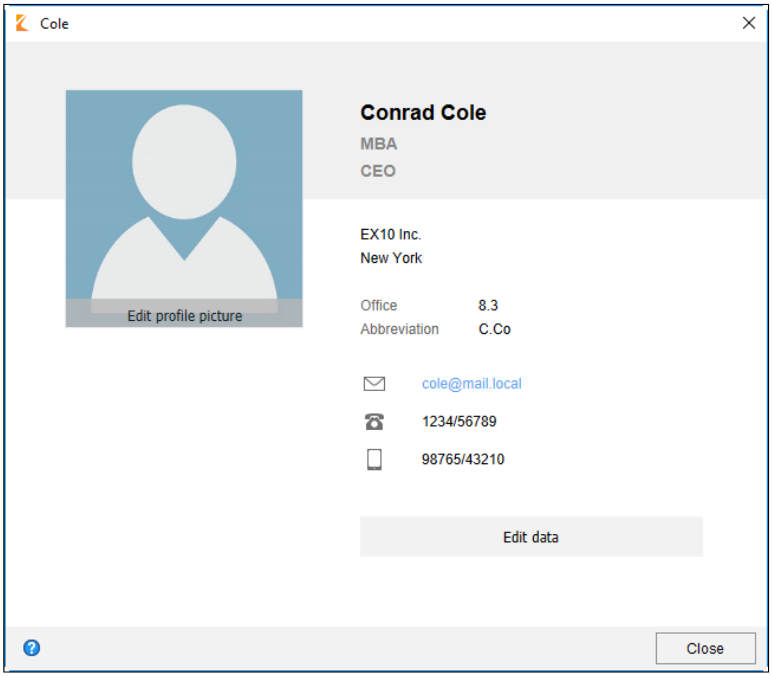


Fig. 215: User profile without profile image

The dialog box with your user profile appears.

4. Click *Edit profile image*.

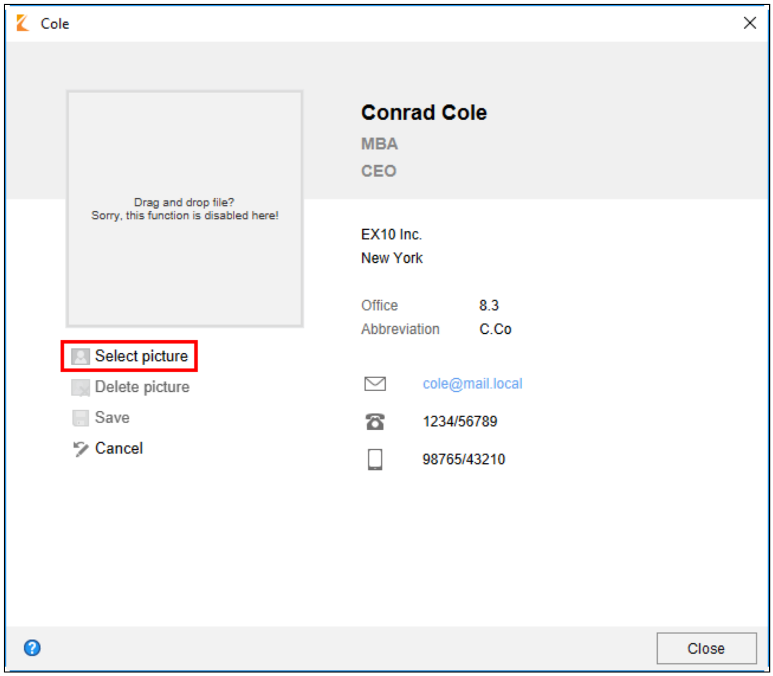


Fig. 216: Edit mode; 'Select photo' button

The dialog box switches to edit mode.

5. Click *Select photo*.

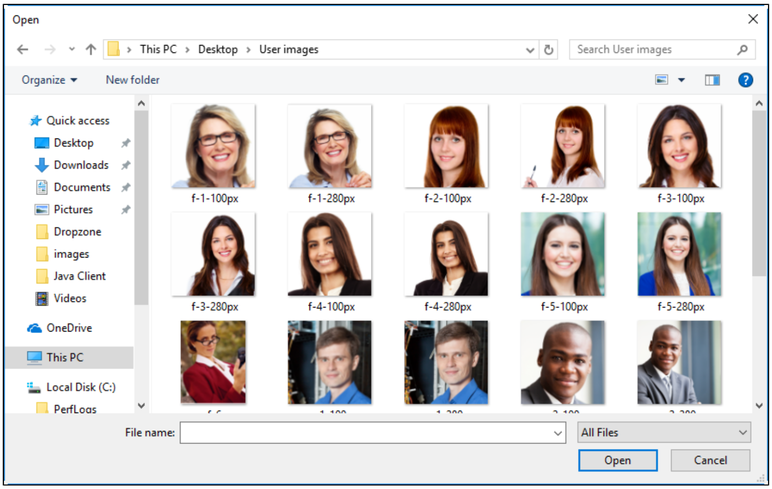


Fig. 217: Dialog box for selecting a file

A Microsoft Windows dialog box for selecting a file from the system appears.

Information: Use PNG, JPG or GIF image files with a minimum of 280 x 280 pixels.

6. Select the desired image file.
7. Click *Open*.

The file will be uploaded.

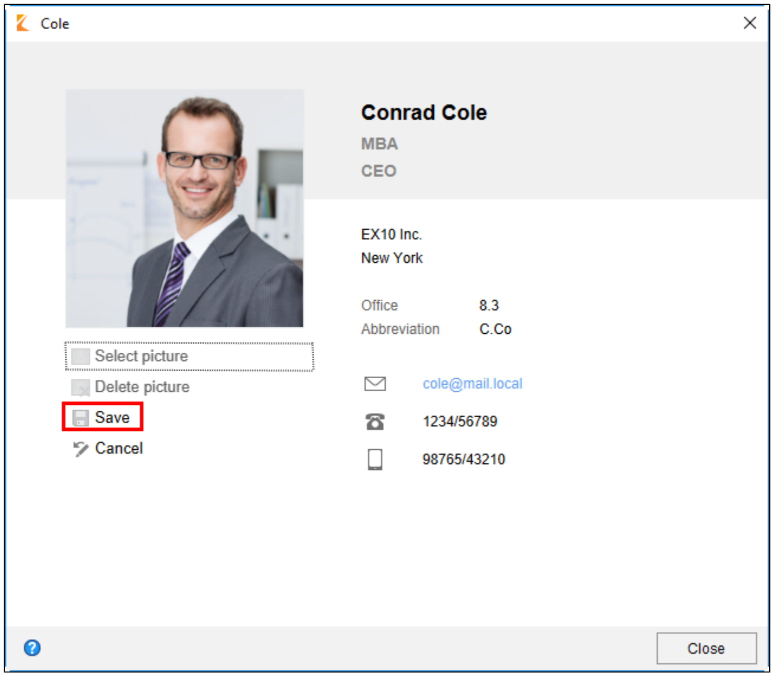


Fig. 218: 'Save' button

8. Click *Save*.

Edit mode now closes. The new profile image appears in the dialog box.

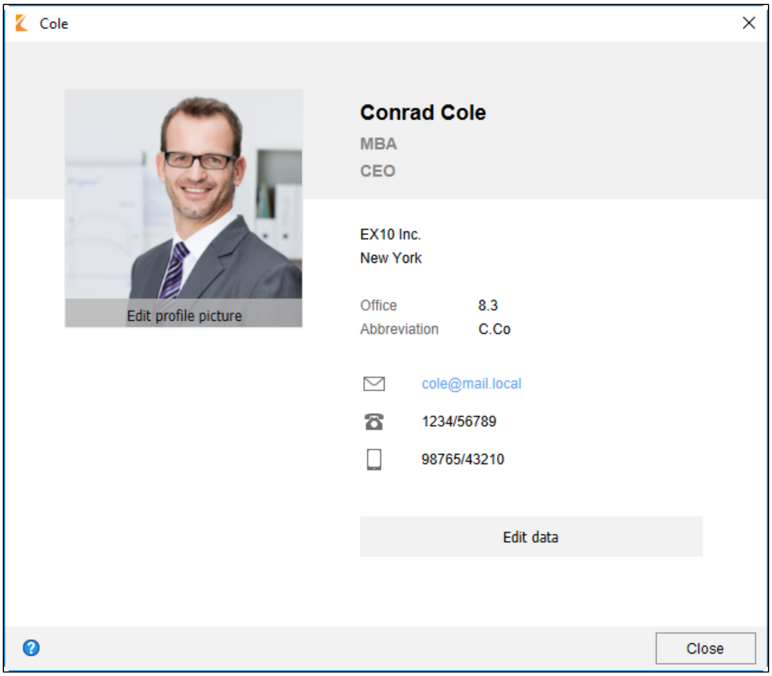


Fig. 219: 'Close' button

9. Click *Close*.

The dialog box closes. The new profile image has been saved.

Edit profile data

Every ELO user and ELO user group has their own profile. You can add data to this profile.

There are two ways to edit profile data:

- In the Administration folder
- In the profile

In the Administration folder

The following describes the method using the Administration folder.

Information: You require the appropriate permissions for this method.

Filing location

The profile data is saved in the keywording of the respective user/group folder. The path to the folder is as follows:

Administration//Users//<Folder with corresponding number range>//<User name>/<Group name>

Step by step

1. Select the folder for the respective user/group.

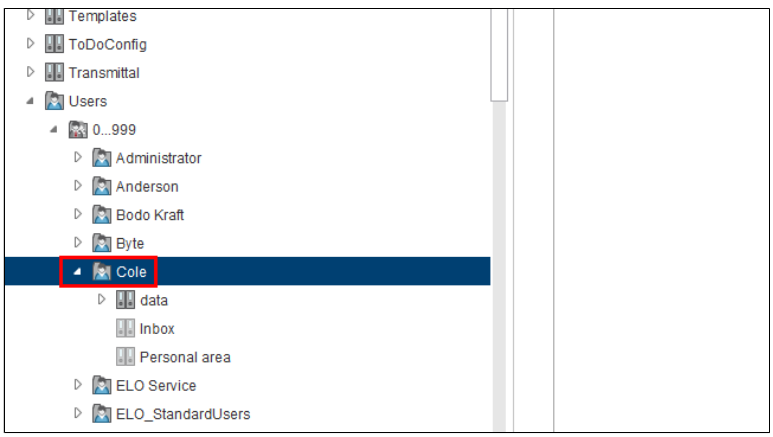


Fig. 220: User folder

2. Open the keywording.

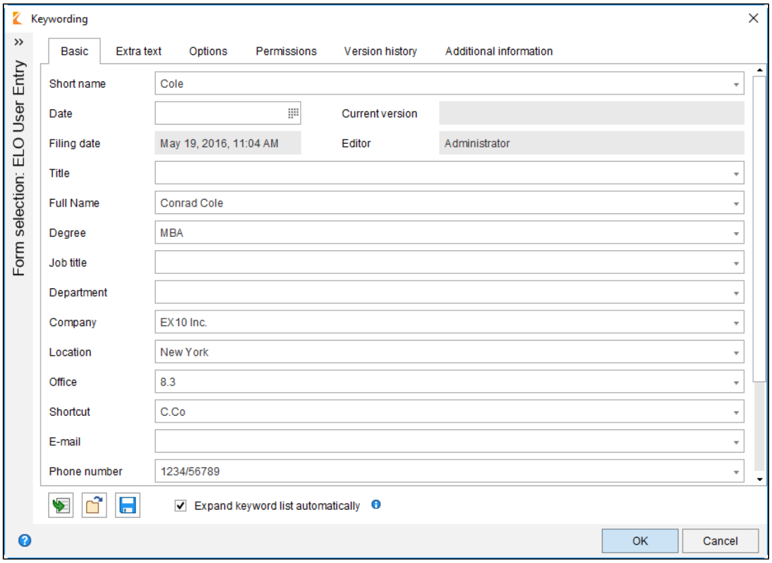


Fig. 221: Keywording for an ELO user folder

The *ELO user folder* keywording form must be selected.

3. Enter the respective information to the index fields.

4. Click *OK* to close the keywording.

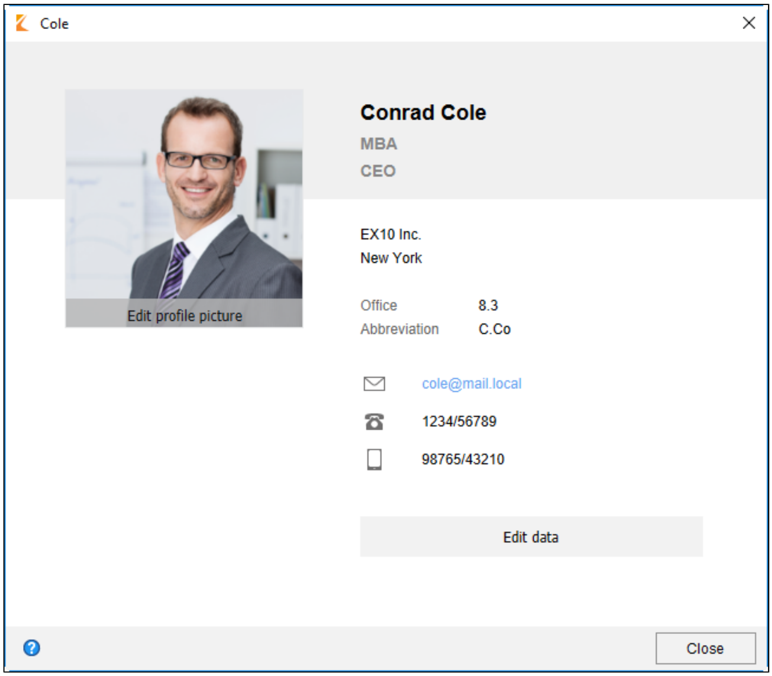


Fig. 222: Completed user profile

The information you entered is shown in the user/group profile.

In the profile

The user profile can be accessed via the feed or via the *My ELO* work area. You can access the group profile via the feed if the group has been mentioned. Users can change their own profile data in the respective dialog box. The following describes the method for users via the feed.

Information: Administrators with *Edit user data* permission can change data for other users.

Step by step

1. Select an entry in the repository which you created a feed post for.

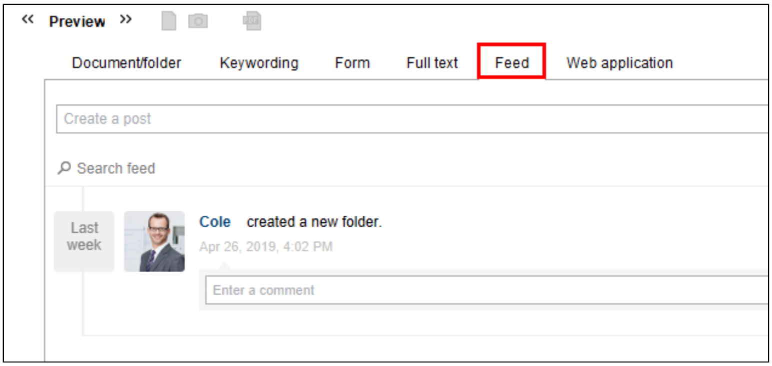


Fig. 223: 'Feed' preview element

Optional: If the feed is hidden, you can display it by clicking the **Feed** preview element in the viewer pane.

Information: The *Feed* preview element must be part of the selected preview profile.

2. Navigate to a feed post which you have created.

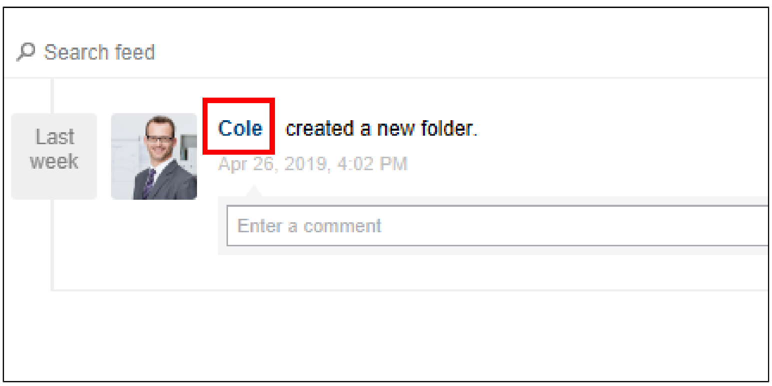


Fig. 224: Feed post; User name

3. Click your user name.

Alternatively: Click your profile image.

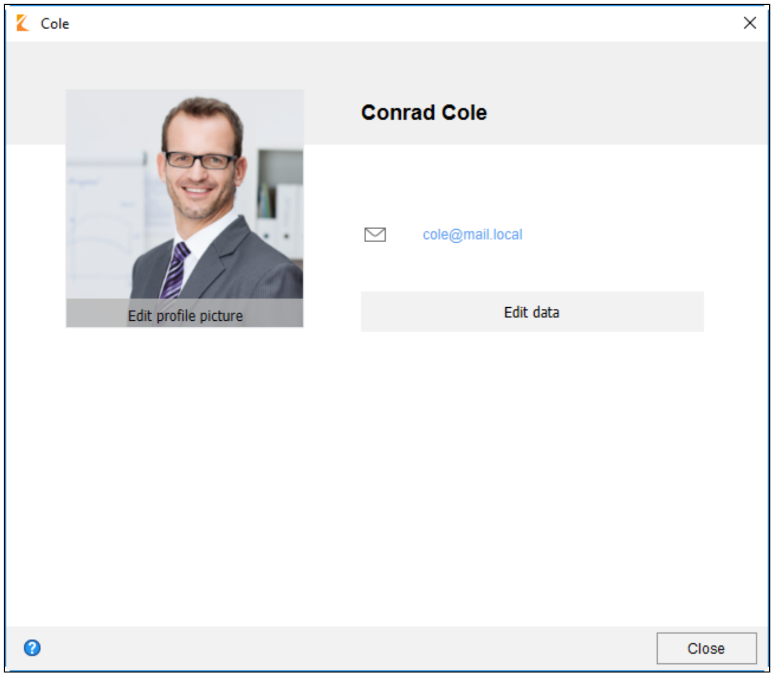


Fig. 225: User profile

The dialog box with your user profile appears.

4. Click *Edit data*.

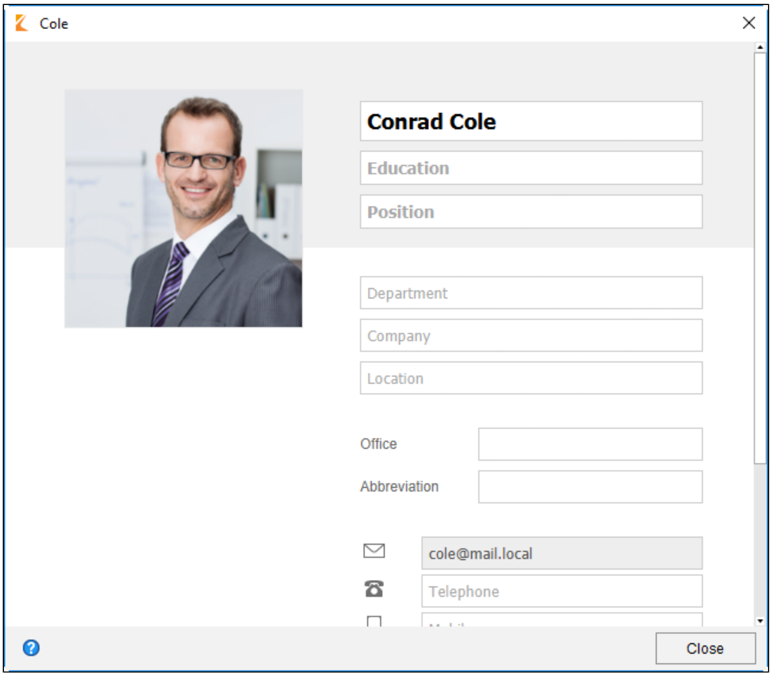


Fig. 226: Edit mode; 'Select photo' button

The dialog box switches to edit mode.

5. Enter the respective data to the index fields.

6. Scroll to the bottom of the dialog box.

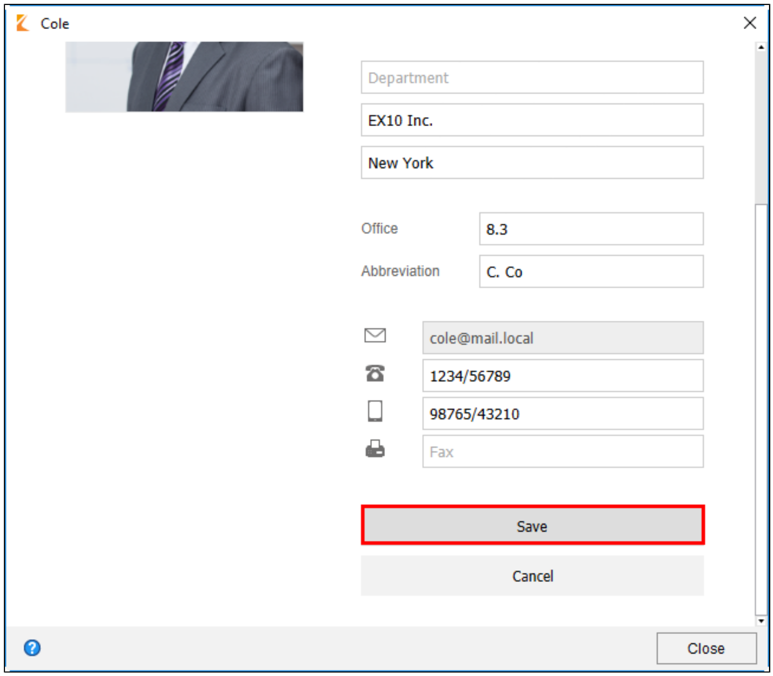


Fig. 227: 'Save' button

7. Click *Save*.

Result

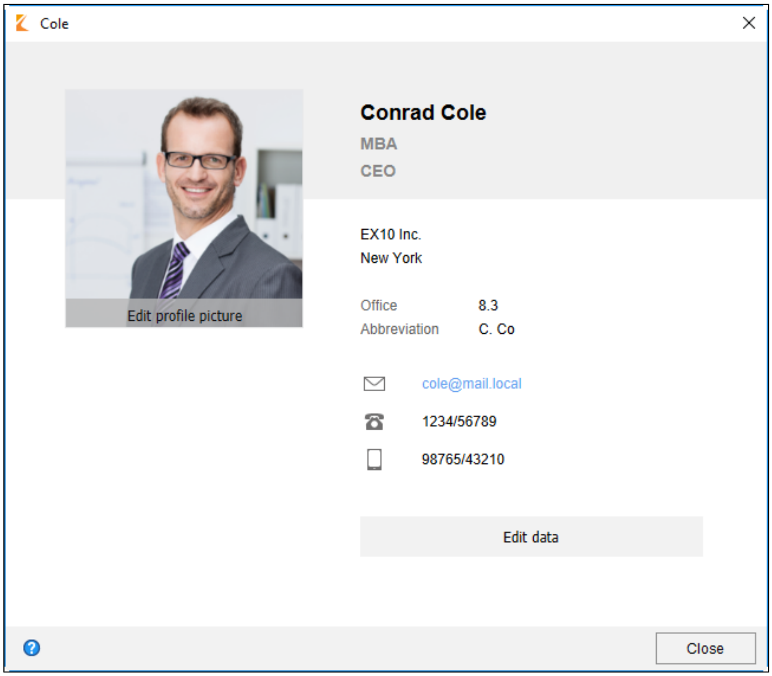


Fig. 228: Completed user profile

The information you entered is shown in the user's profile.

ELO Dropzone

This chapter includes a brief introduction to ELO Dropzone. You can find more information on the following topics in the separate ELO Dropzone user manual:

- Configuration
- Creating tiles
- Creating regular expressions
- Examples of use
- Administration

Brief introduction

Overview

ELO Dropzone makes it easier for you to file incoming documents to the ELO repository. Simply drag documents and files to a defined tile. ELO Dropzone keywords and files your documents according to your own rules. This provides the user with easy access to frequently used functions and enables them to file documents more easily to the ELO repository.

You can create filing, search, script, and template tiles. With a search tile, you can specifically set up the desired search terms via the index fields of a keywording form. It is also possible to define search tiles that you can activate using keyboard shortcuts. With a script tile, you can call a script event-controlled. With a template tile, you can create documents from templates.

Start

After installation, shortcuts to the ELO Dropzone and the ELO Java Client are placed on the desktop. Double-click the ELO Dropzone icon to open the ELO Dropzone. The ELO Java Client is started automatically in the process.

Program interface

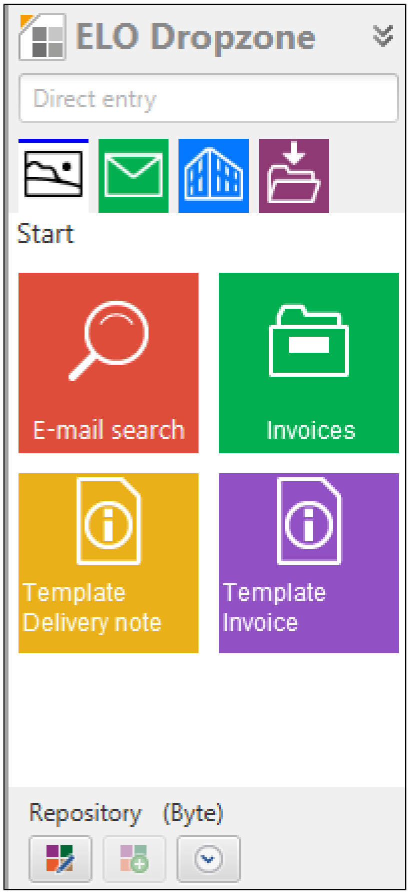


Fig. 229: ELO Dropzone program interface

When starting ELO Dropzone for the first time, only one group is available.

ELO MobileConnector

Overview

The ELO MobileConnector module allows you to synchronize data from a previously selected folder of your repository with an external file system or a mobile device or to create a copy. This means you can take all the documents you need to external appointments, and any changes are then synchronized back to ELO.

ELO MobileConnector checks whether synchronization folders from known cloud service providers are located on your computer. You are then asked if you want to use these folders as counterparts for folders in the ELO repository. However, you can also create your own synchronization folder pairs. This connection automatically synchronizes data from the ELO repository in both directions. In addition to synchronizing documents, it is also possible to display folder structures.

It is possible to access data in your provider's cloud and to edit it from any Internet-ready device. Once you log back on to the ELO Java Client, you have the option to transfer changes or new files into the repository.

Warning: As you can synchronize in both directions, this may cause documents to be deleted on the computer's file system.

Add folder

You can find the ELO MobileConnector in a separate group on the *Repository* ribbon tab. To select a folder in the ELO repository for synchronization, follow the steps below.

1. Select a folder in the repository.

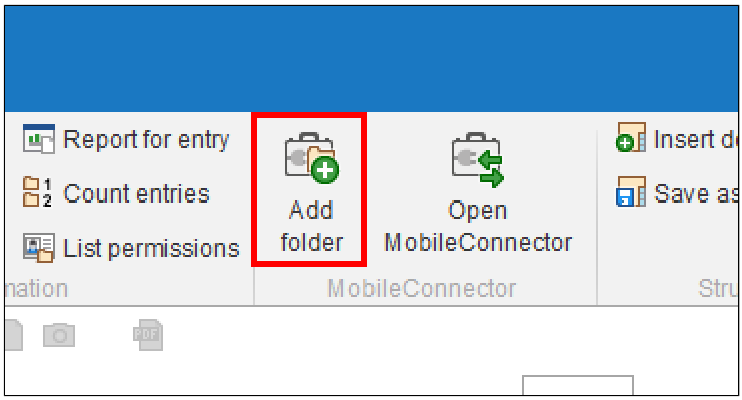


Fig. 230: 'Add folder' button

2. Click the *Add folder* button on the *Repository* ribbon tab.

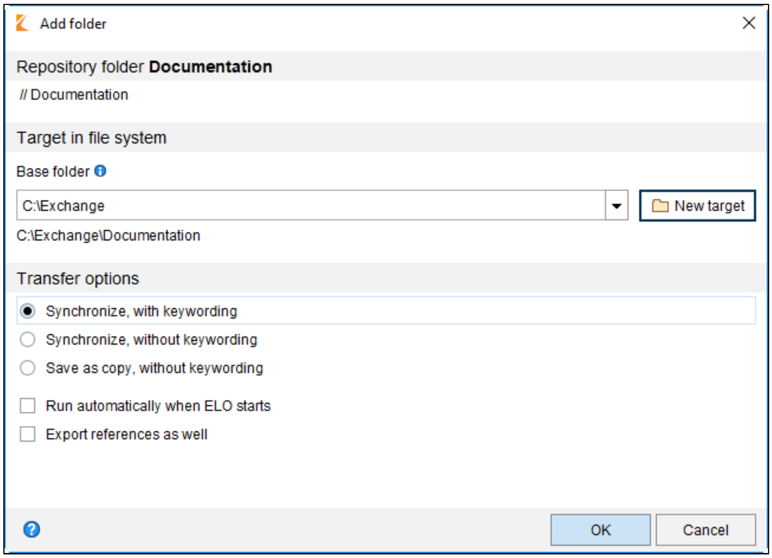


Fig. 231: 'Add folder' dialog box

In the *Add folder* dialog box, you will see a list of assignments between repository folders and folders on the file system.

Repository folder

In the *Repository folder* area, you see the folders selected in the ELO repository.

Target in file system

In the *Target in file system* area, you will see what folder has been selected as the target in the file system. You can select existing paths from the drop-down menu of the *Base directory* field. Click *New target* to assign a new folder.

Information: The module automatically searches for cloud folders from the following providers: Dropbox, Google Drive, Microsoft OneDrive, GMX MediaCenter, WEB.DE Online-Speicher, and SpiderOak Hive. If this kind of folder is detected on the computer's file system, ELO automatically enters the detected path in *Base directory*.

Transmission options

In the *Transmission options* area, you can adjust the synchronization settings. The following settings are available:

Synchronize, with keywording: The folders selected above are synchronized. An additional file is stored on the file system for each synchronized entry (folder or document). This additional file contains the keywording information for the synchronized entry in JSON format.

Synchronize, without keywording: The folders selected above are synchronized. Only the documents and child folders are compared, without keywording information. If you add a file to the folder in the file system, the file name must start with a plus icon (+) so that it is transferred to ELO during synchronization. The plus icon in the file name is automatically removed during synchronization.

Save as copy, without keywording: The *Save as copy* option saves an identical copy of the repository folder to the Windows file system, but without metadata (GUID, keywording information).

Run automatically when ELO starts: If you select the option *Run automatically when ELO starts*, the base directory and repository folder are synchronized every time ELO starts.

Please note: If you need to synchronize a large number of folders, this will delay all other processes when starting ELO. For this reason, this function is not recommended for very large directories that do not change very often. In such cases, it makes more sense to create multiple folder pairs and only set up automated synchronization for selected ones.

Export references as well: Enable the *Export references as well* option to also export references to the folder for synchronization.

Using ELO MobileConnector

The following describes how to use ELO MobileConnector once you have set up least one folder pair as described above.

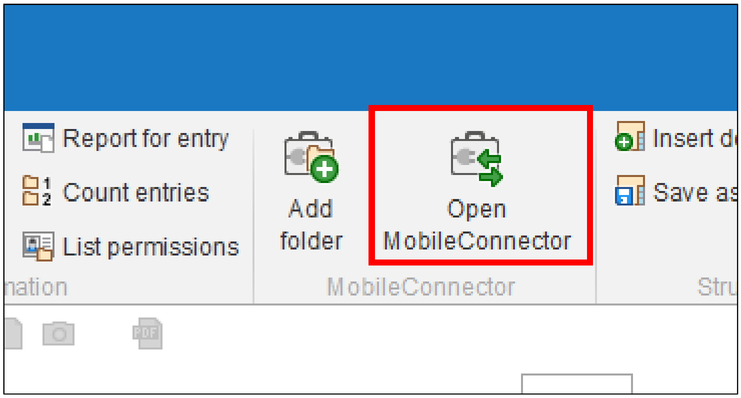


Fig. 232: 'Open MobileConnector' button

1. Click the *Open MobileConnector* button on the *Repository* ribbon tab.

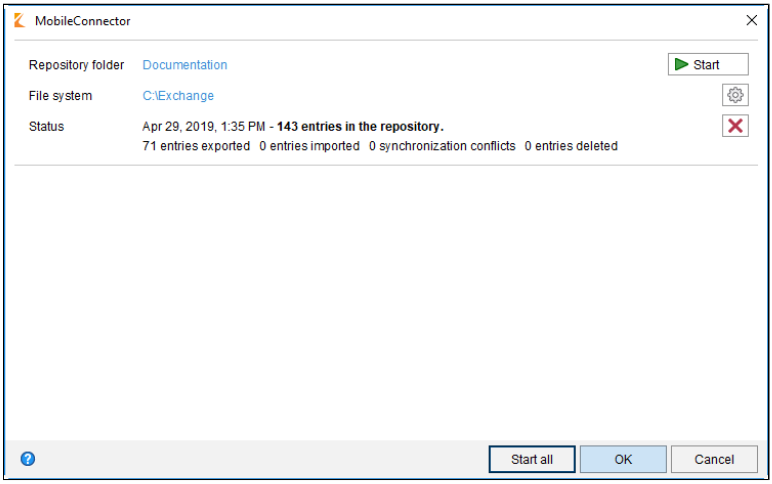


Fig. 233: 'MobileConnector' dialog box

The *MobileConnector* dialog box appears. You will see existing folder pairs and the status of the last synchronization.

The dialog box offers the following options:

Start (green triangle): Click this button to begin synchronization for the respective folder pair.

Please note: If you have enabled the option *Synchronize, without keywording* in the settings and add a file to the folder in the file system, the file name must start with a plus icon (+) so that it is transferred to ELO during synchronization. The plus icon in the file name is automatically removed during synchronization.

Settings (gearwheel icon): Click this button to open the *Add folder* dialog box. Here, you can change the settings for the respective folder pair. If the settings for a folder pair have been changed, an orange bar appears in front of the folder pair in the *MobileConnector* dialog box.

Delete (X icon): Click this button to remove the folder pair.

Information: Deleting a folder pair does not delete the folders themselves. This simply cancels the assignment.

Start all: Click this button to start synchronization for all available folder pairs.

Please note: If you delete and edit the JSON files, you will lose important data about the synchronization process.

Administration

This chapter contains information on the installation and the configuration of the ELO Java Client and is aimed at system administrators.

Windows

Requirements

The ELO Java Client requires OpenJDK 11 or newer in the 64-bit version.

If OpenJDK 11 is not installed on your computer, it will be installed during the ELO Java Client setup.

You need Windows administrator rights on the local computer to install the ELO Java Client.

Install from DVD

There are different ways to install the ELO Java Client. The following method describes how to install ELO from the ELO ECM Suite DVD.

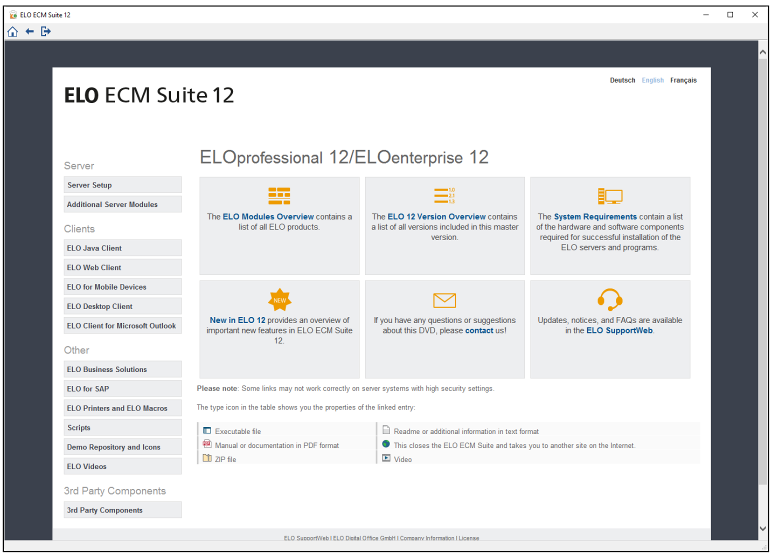


Fig. 234: Start page of the ELO ECM Suite DVD

1. Click *ELO Java Client* under *Clients* in the navigation menu on the left.

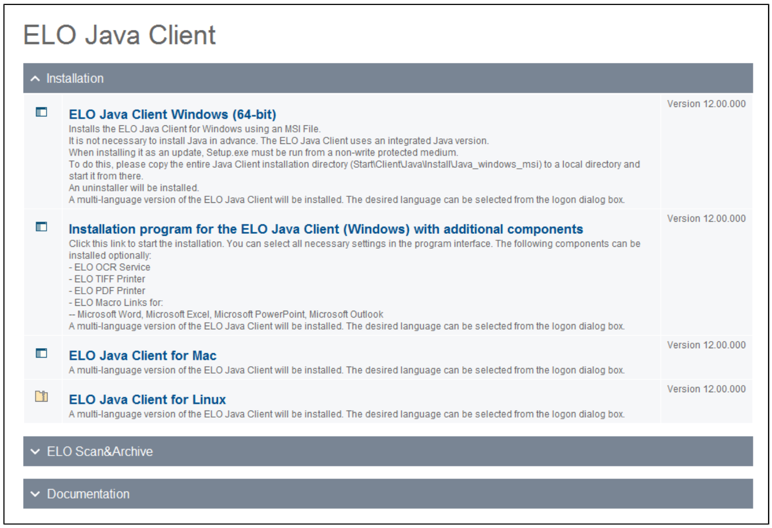


Fig. 235: 'ELO Java Client' page

The *ELO Java Client* page opens.

2. Click *ELO Java Client Windows (64-bit)*.

Optional: If the *Windows User Account Control* window appears, confirm with *Yes*.

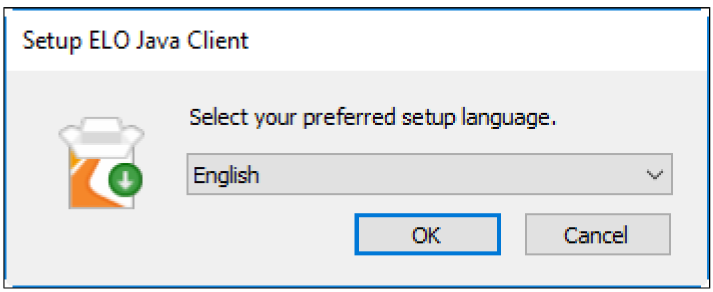


Fig. 236: Selecting the installation language

The *ELO Java Client Setup* dialog box appears.

3. Choose the language for the installation and click *OK* in the drop-down menu.

Information: The language selection only refers to the installation. The language for the ELO Java Client user interface is set in the logon dialog box.

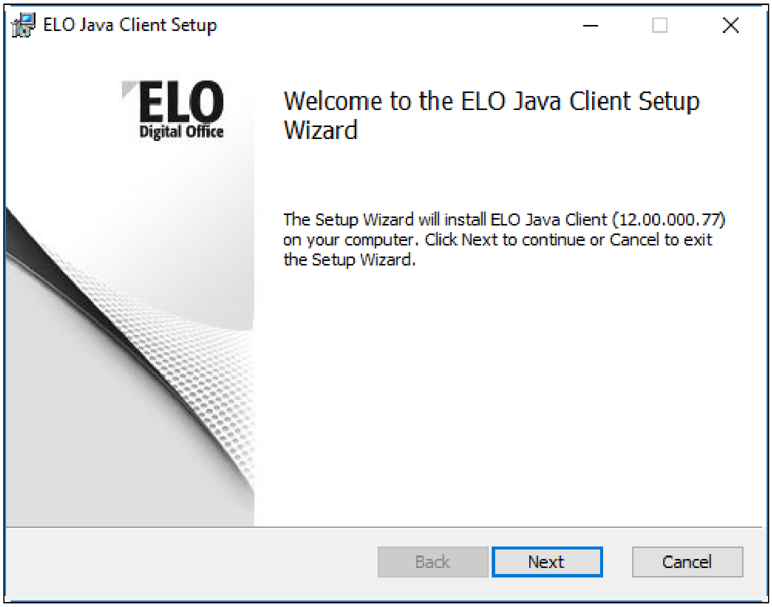


Fig. 237: 'ELO Java Client Setup' dialog box

The *ELO Java Client Setup* dialog box appears.

4. Click *Next*.

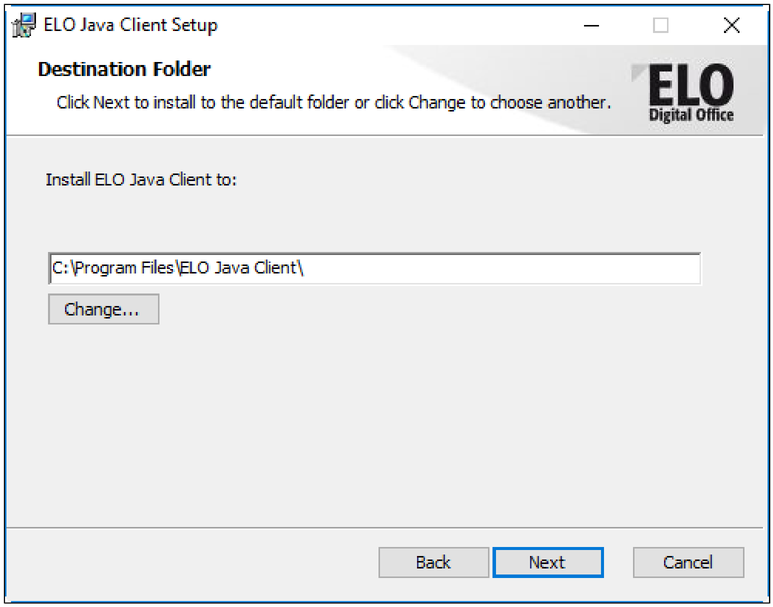


Fig. 238: Selecting a target directory

The *Destination folder* screen appears.

Alternatively: Click *Browse* to change the suggested target directory and choose a different installation directory.

5. Click *Next*.

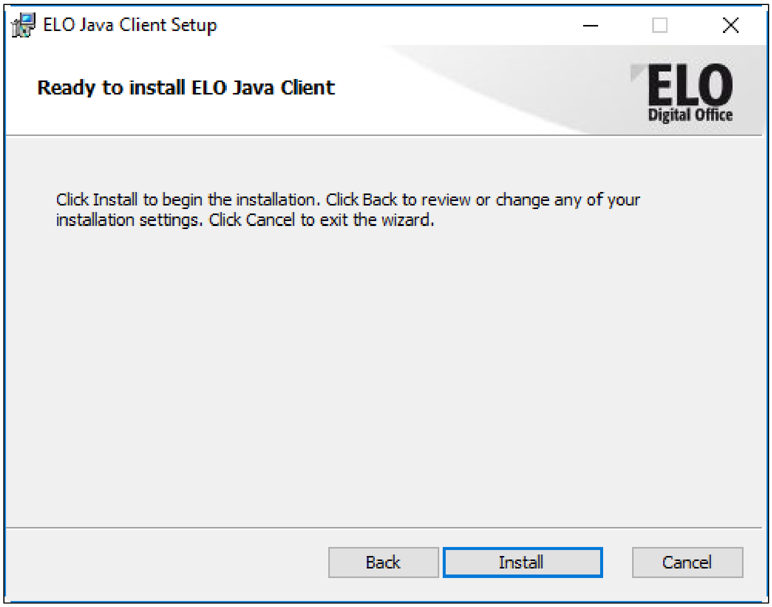


Fig. 239: Ready for installation

The *Ready to install ELO Java Client* screen opens.

6. Click *Install*.

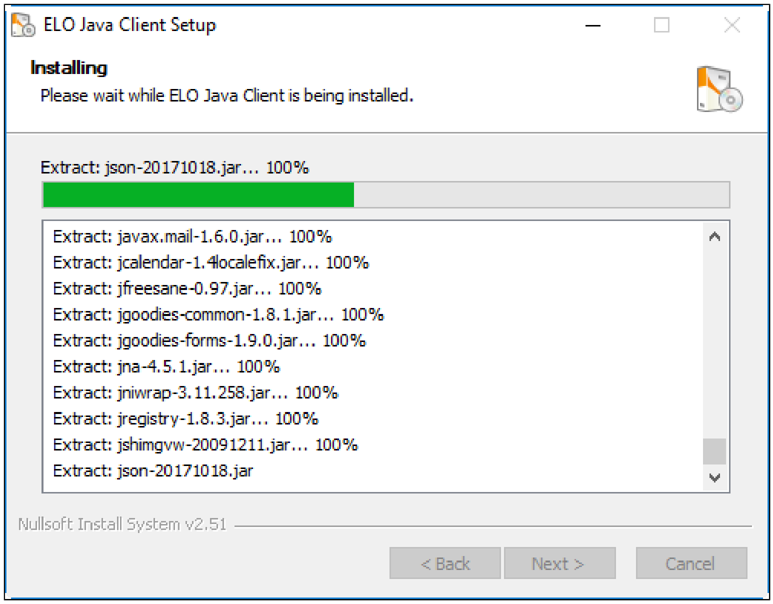


Fig. 240: Installation completed

The installation starts.

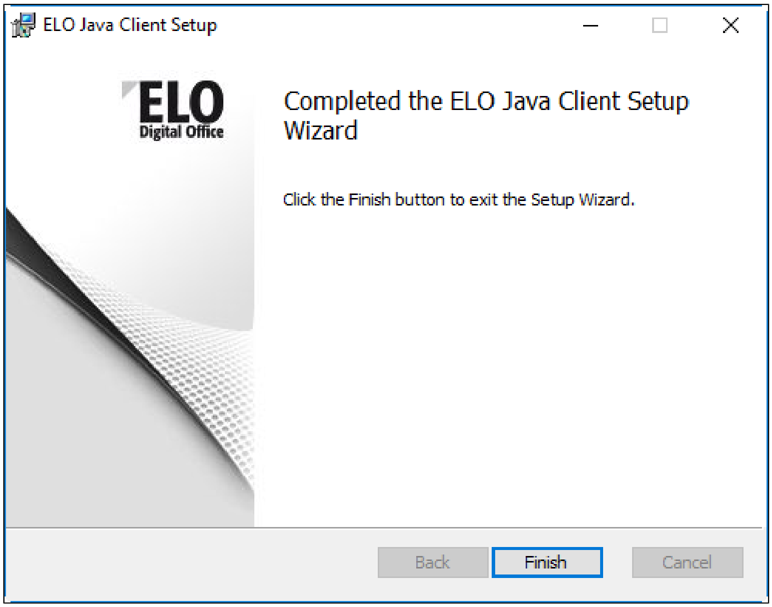


Fig. 241: Finishing the installation

A message appears when the installation is completed.

7. Click *Finish* to complete the installation.

The ELO Java Client is fully installed.

Indexserver configuration

The ELO Java Client needs to connect to an ELO Indexserver to access a repository. When you run the client for the first time, there is no ELO Indexserver connection registered and the *ELO Indexserver* dialog box appears.

Information: The *ELO Indexserver* dialog box is also displayed when you remove all existing ELO Indexserver connections, since at least one connection must be entered.

1. Start the client.

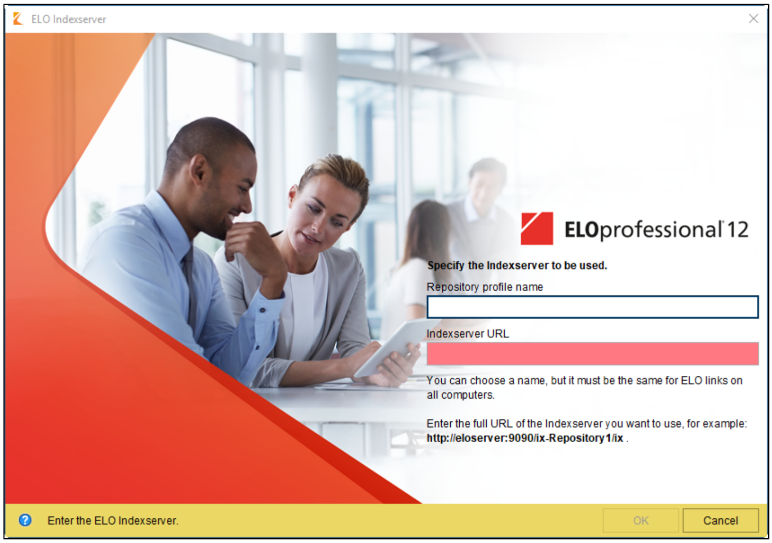


Fig. 242: 'ELO Indexserver' dialog box

The *ELO Indexserver* dialog box appears.

2. Enter the name of the repository to the *Repository profile name* input field.

The name of the server connection is the same as the profile for the repository. The name is displayed during logon in the form of a repository selection and is used as the name in ELO link files.

This is why you should enter the same name for all computers. The repository name is usually used for this.

3. Enter the ELO Indexserver URL.

Example

`http://[server name]:[port]/ix-[repository name]/ix`

Information: Determine the ELO Indexserver URL with the help of the ELO Application Server Manager. Open the ELO Application Server Manager in your browser. Select the Indexserver to be used from the list of applications. You will find the associated repository name on the left.

You can also use HTTPS if the server is configured accordingly.

If the URL you entered was found, the color of the *Indexserver URL* input field turns to green.

Go to the *Managing repository profiles* section to learn more on how to add additional repositories or to edit an existing connection.

Optional: Logging

The ELO Java Client logger is set up via the configuration. You can configure a special logger in the registry for a more detailed log output. In this case, the logger settings in the configuration of the ELO Java Client are inactive and are not used.

1. Start the Registry Editor by entering the word *regedit* in the Run line.

2. Open the following directory:

`HKEY_CURRENT_USER\Software\JavaSoft\Prefs\ELO Digital Office\eloenterprise`

3. Create the *logger* entry by selecting *New, String value* from the context menu.

4. Enter `logger` as the name for the new string.

5. Enter the path to the file with the logger configuration.

Information: A default *log4j.properties* file is located in the installation directory of the ELO Java Client.

Warning: The storage location for the log file is defined in the *log4j.properties* file located in the ELO Java Client directory.

6. If you already need a log output before setting up the logger, start the *EloClient.bat* batch file located in the ELO Java Client installation directory.

Automated installation

You can configure the ELO Java Client to install automatically. In this case, no user interaction is necessary and the installation can be performed on multiple computers at the same time. To do this, you need a *Setup.ini* file that contains the parameters for automated installation.

Define configuration

1. Create a file called *Setup.ini* that contains the following information:

Name	Value
archive1	<Indexserver URL>
name1	<Name>
installDir	<Path of the installation directory>
language	<Language tag>

Fig. 243: Setup.ini options

Example

```
archive1=http://elo:8080/ix-archive/ix
name1=Housearchive
installDir=C:\Program Files\ELOclient
```

Fig. 244: Setup.ini

The following values must be entered in the *Setup.ini*:

- **URL for the Indexserver**: Enter the Indexserver URL.
- **Name**: This corresponds to the profile for the repository and is displayed during logon in the form of a repository selection and is used as a name in ELO link files.
- **Installation directory path**: Enter the path for the filing location of the *ELOclient* directory.
- **Language code (optional)**: Use this setting to determine a language for the user interface.

Information: The user can select the language for the user interface in the logon dialog box. The default setting is always the language which was last used, which is stored in the registry. If the client is started for the first time, the system language is used. You can set a language with the *language* (language code) value in the *Setup.ini* file. This option makes sense if you are using single sign-on (SSO) since the user is not able to select the language.

The codes used are in accordance with ISO 8859-1.

Abbreviation	Language
cs	Česky
da	Dansk
de	Deutsch
en	English
fr	Français
hu	Magyar
pl	Polski
ro	Romana
sk	Slovensky
sr	Srpski

Fig. 245: Language codes

Additional repositories

You can set up additional repositories. For a second repository, enter the required information for *name 2* and *repository 2*, and for a third repository, the entries *name 3* and *repository 3*, etc.

Automatic installation

1. Store the *Setup.ini* file in the same directory as the *Setup.exe* file.
2. Start the automated installation with the option "/S:".

Example

```
Setup.exe /S
```

Information: The character S must be **capitalized**, otherwise the installation will not start.

MAC OS X

If you are installing the ELO Java Client on Mac OS X, you need to consider the following information.

Java Runtime Environment

The ELO Java Client for Mac OS X includes a Java Runtime Environment package. This means you don't need to install the Java Runtime Environment separately.

Installation

The installation files are provided as a disk image file (*DMG*). If you downloaded the installation package from the ELO SupportWeb, the DMG file comes in a ZIP file. If you have already copied the *InstallELOClient* DMG file to your Mac, continue reading from the *Start installation* section.

ZIP file

1. Download the latest version of the ZIP file for Mac OS X.
2. Unzip the ZIP file to your Mac.

The *InstallELOClient* DMG file is now available.

Start installation

You can now proceed with the installation.

1. Double-click to open the DMG file.

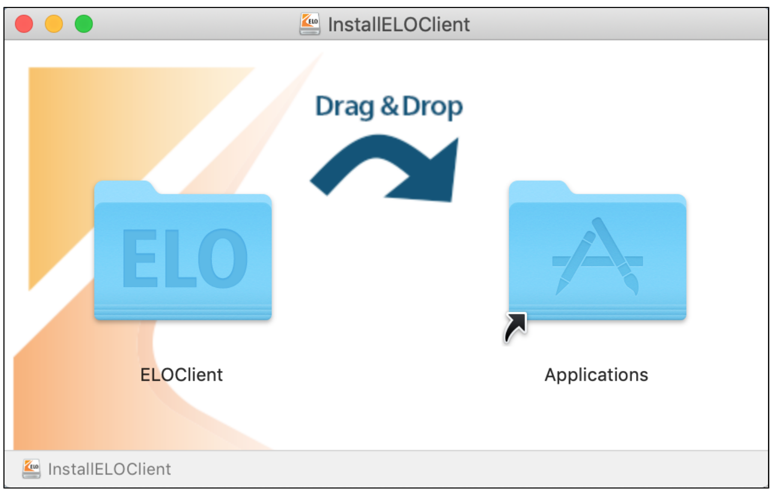


Fig. 246: 'InstallELOClient' finder window

The DMG file is executed. The *InstallELOClient* finder window appears.

2. Drag the *ELOClient* folder to the *Applications* folder.

Information: A confirmation dialog appears if there is an update. Click *Replace* to confirm that you want to overwrite existing files.

Installation starts. When installation is completed, the *ELOClient* folder is located in the *Program files* directory.

Start the ELO Java Client

1. Open the *ELOClient* folder.

2. Double-click *ELOClient.app* to start the ELO Java Client.

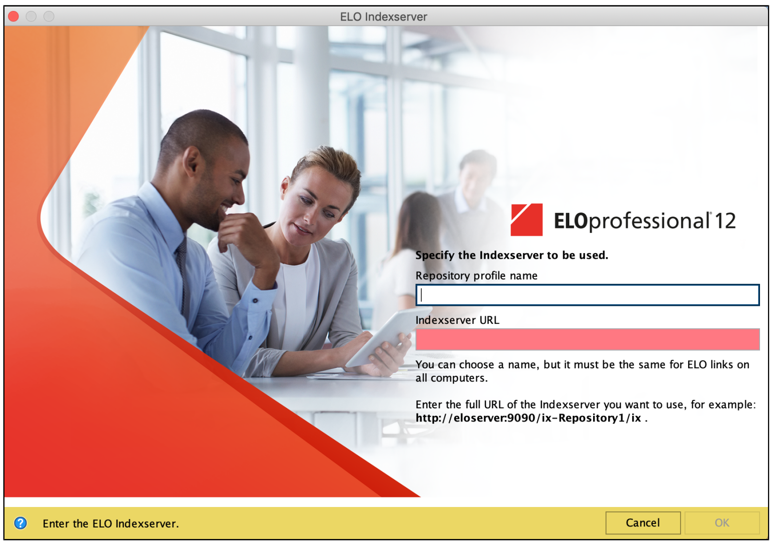


Fig. 247: Indexserver configuration

When you run the client for the first time, you will be asked to enter the ELO Indexserver URL. If you have already entered an ELO Indexserver, the logon dialog box appears immediately.

Enter Indexserver URL

The ELO Java Client requires an Indexserver connection to access a repository.

1. Enter the name of the repository profile and the URL of the ELO Indexserver.

Example `http://[server name]:[port]/ix-[repository name]/ix`

Information: Determine the ELO Indexserver URL with the help of the ELO Application Server Manager. Open the ELO Application Server Manager in your browser. Select the Indexserver to be used from the list of applications. You will find the associated repository name on the left.

You can also use HTTPS if the server is configured accordingly.

Logging

If you want to use parameters when you start the ELO Java Client, you can do this via the terminal.

1. Execute the following command to see which parameters you can use:

```
/Applications/ELOClient/ELOClient.app/Contents/MacOS/ELOClient -h
```

2. To run the ELO Java Client with the desired parameters, adjust the command as required.

Example

```
/Applications/ELOClient/ELOClient.app/Contents/MacOS/ELOClient -logging DEBUG
```

Linux

If you want to install the ELO Java Client on a Linux system, you need to consider the following information.

Install Java

If you are using Linux, there are two different methods for installing the Java components you require. Select one of the following methods.

- Install the latest version of Oracle JDK.

OR

- Install the latest versions of OpenJDK **and** OpenJFX.

Check Java installation

To check if Java already is installed, proceed as follows:

1. Start the terminal.
2. Enter the following command:

```
java -version
```

3. Check whether Java 1.8.x or newer is listed.

Install the ELO Client

The installation package for Linux comes in a compressed TAR file (*TAR.GZ* format).

1. Download the latest installation package for Linux.

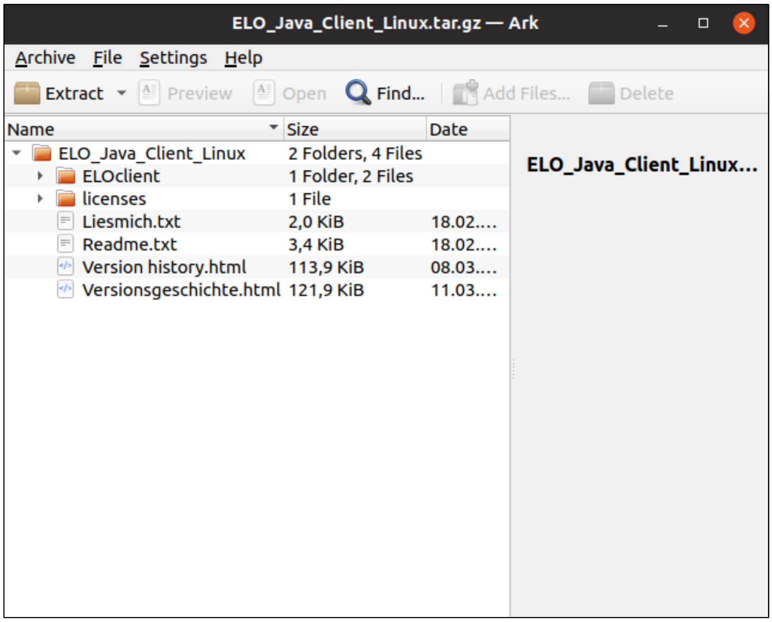


Fig. 248: Unzip installation package

2. Extract the directory to your Linux computer.

3. Copy the *ELOclient* folder to a directory on your Linux computer.

This is the installation directory of the ELO Java Client that the client is run from.

Start the ELO Java Client

In Linux, the ELO Java Client is started with the *ELOclient.sh* shell script.

1. Open the *ELOClient* folder.

2. Double-click to open the *ELOClient.sh* file.

Alternatively: Start the shell script with the following terminal command:

```
./ELOclient.sh
```

Indexserver configuration

Fig. 249: Configure ELO Indexserver

When you run the client for the first time, you will be asked to enter the ELO Indexserver URL. Later, the logon dialog box appears immediately.

The ELO Java Client needs to connect to an ELO Indexserver to access a repository.

Enter Indexserver URL

1. Enter the name of the repository profile and the URL of the ELO Indexserver.

Example

`http://[server name]:[port]/ix-[repository name]/ix`

Information: Determine the ELO Indexserver URL with the help of the ELO Application Server Manager. Open the ELO Application Server Manager in your browser. Select the ELO Indexserver to be used from the list of applications.

You can also use HTTPS if the server is configured accordingly.

Repository profile

The name of the server connection is the same as the profile for the repository. The name is displayed during logon in the form of a repository selection and is used as the name in ELO link files.

This is why the same name must be entered for all computers. The repository name is usually used for this.

Logging

If you want to use parameters when you start the ELO Java Client, you can do this via the terminal.

1. Execute the following command in the installation directory of the ELO Java Client to see which parameters you can use:

```
./ELOclient.sh -h
```

2. To run the ELO Java Client with the desired parameters, adjust the command as required.

Example

```
./ELOclient.sh -logging DEBUG
```

Single sign-on

SSO is a technology whereby a user logs on to the operating system once, then reuses the authentication data to skip entering their user name and password to other programs.

Due to security issues, single sign-on is **not** available to system administrators.

If single sign-on is not possible, the logon dialog box appears and you can log on with your user ID.

Requirements

The following requirements must be met before you can use single sign-on:

- The ELO Java Client must be installed
- A Windows user must be set up
- Assign administrator rights to Windows users

Choose from the following options to set up single sign-on:

- Registry entry in Windows
- SSO with Kerberos

Registry entry in Windows

1. Open the Registry Editor.

2. Open the following path:

`HKEY_CURRENT_USER\Software\JavaSoft\Prefs\ELO Digital Office\eloenterprise`

3. Set up a new `issinglesignon` entry with the value `true`.

4. Restart your computer.

SSO with Kerberos

Kerberos is an encryption procedure that has been established as the default protocol for single sign-on in Windows networks. With this method, the user signs on once with the Key Distribution Center (KDC). Authentification for other services takes place automatically without user interaction. Kerberos is used as a part of the Microsoft Active Directory services.

You need to configure the Access Manager and the ELO Java Client to set up single sign-on with Kerberos. Please refer to the documentation for more information.

Add new repository profile

You manage repositories in the *Repository profiles* dialog box. The following describes how you register a new repository.

Step by step

1. Start the client.

The logon dialog box appears.

2. Press the keyboard shortcut CTRL+P.

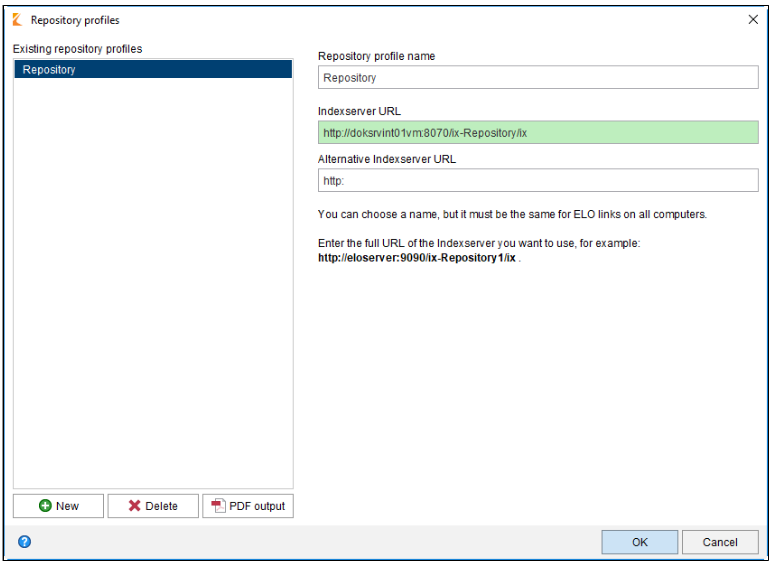


Fig. 250: 'Repository profiles' dialog box

The *Repository profiles* dialog box appears. The existing repository profiles are displayed.

3. Click *New*.

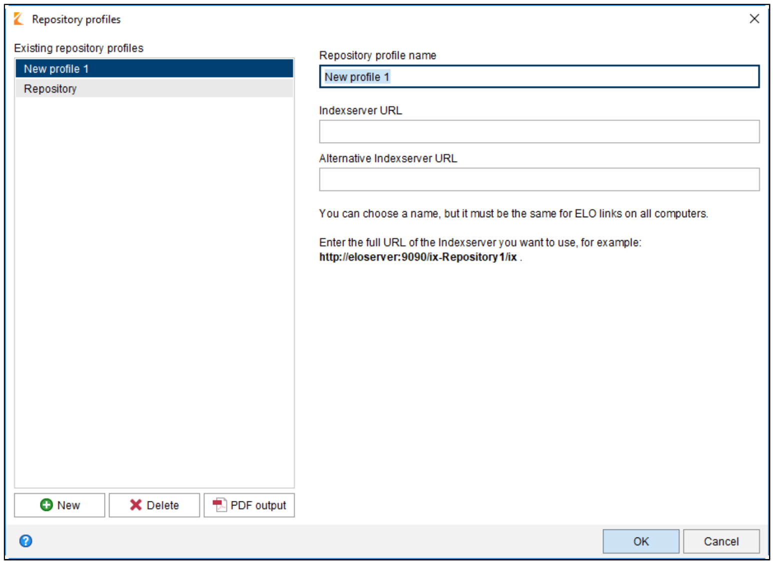


Fig. 251: Entering a new repository

4. Click the *Repository profile name* field and enter a name for the new repository profile.

5. Click the *Indexserver URL* input field and enter the Indexserver URL of the new repository.

Information: The ELO Indexserver URL of a repository can be determined via the ELO Application Server Manager.

If a connection to the Indexserver is established, the *Indexserver URL* field turns green.

Optional: Enter a second ELO Indexserver URL to the *Alternative Indexserver URL* field. ELO automatically connects to this URL if a connection cannot be established to the first URL.

6. Click *OK* to save the settings and to close the dialog box.

Result

You can select the newly registered repository via the *Repository* drop-down menu in the logon dialog box.

Information: The new repository is now also stored as an entry in the Windows Registry under `HKEY_CURRENT_USER\Software\Javasoft\Prefs\ELO Digital Office\eloenterprise`. The numbers at the end of the entries are incremented automatically. They correspond to the number of existing repositories.

Manage repository profiles

You manage your repository profiles via the *Repository profiles* dialog box. You are provided with an overview of all existing repository profiles including the name and Indexserver URL. In addition, you can set up new repository profiles, delete existing repository profiles, or display repository profiles as a PDF.

The *Repository profiles* dialog box can be called from two dialog boxes: the *ELO Indexserver* dialog box and the *ELO logon* dialog box.

The *ELO Indexserver* dialog box appears when you run the client for the first time after installation. Otherwise, the *ELO logon* dialog box appears when starting the client.

1. Use the *CTRL+P* keyboard shortcut to open the `Repository profiles` dialog box.

Please note: The corresponding dialog box must be in focus, since otherwise the keyboard shortcut will not apply to the ELO Java Client.

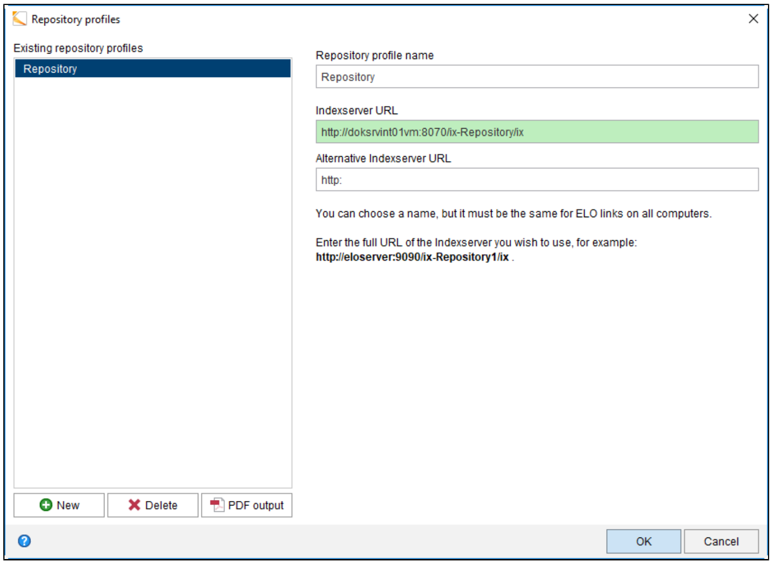


Fig. 252: 'Repository profiles' dialog box

The *Repository profiles* dialog box appears.

Profiles: Overview of the available profiles.

Repository profile name: Name of the new profile.

Indexserver URL: Specify the ELO Indexserver URL for establishing a connection between a repository and the client.

The ELO Indexserver URL will be checked once it has been entered. If a connection to the ELO Indexserver is established, the *Indexserver URL* field is green.

Alternatively: If the field is red, the URL you entered cannot establish a connection to the ELO Indexserver. Enter a valid ELO Indexserver URL.

Information: If the ELO Indexserver URL you entered contains an error, you cannot log onto the repository. An error message appears in the *ELO logon* dialog box ("Unable to connect to Indexserver").

Optional: Enter a second ELO Indexserver URL to the *Alternative Indexserver URL* field. ELO automatically connects to this URL if a connection cannot be established to the first URL.

New: Create a new profile via this button.

Delete: Use this button to delete a profile selected in the *Profiles* area.

PDF output: Use this button to print the profile settings as a PDF.

OK: Click the *OK* button to save the changes you made. The selected profile will be used next time you log on.

HTML templates for the keywording preview

The HTML templates are used for configuring the keywording information display of a document or folder.

The HTML templates can be defined for each keywording form. There is also a default template that is used if no keywording-specific template has been defined.

HTML Templates folder

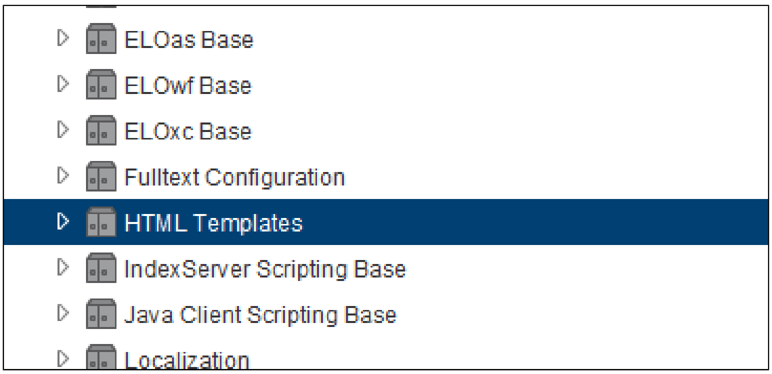


Fig. 253: 'HTML Templates' folder

Custom HTML templates must be stored in the ELO repository under *Administration* > *HTML Templates*.

HTML Templates file format

You must apply the following naming convention: `defaultH` or `defaultV`. The file extension is *htm*.

`mask{Nr.}{H|V}.htm`

The following applies:

- **{no.}**: Replace this placeholder with the keywording form ID.
- **{H|V}**: Replace this placeholder with `H` (= horizontal) **OR** `V` (= vertical).

Example `mask3H.htm`

Alternatively: To edit the default values for all keywording forms, store the *defaultH.htm* and *defaultV.htm* files in the ELO repository and modify them according to your requirements.

Variables

The following variables can be used in the HTML templates. They will be automatically evaluated by the ELO Java Client.

`<!--ELO_T_A-->`: Filing date

`<!--ELO_T_B-->`: Internal file attachment ID

`<!--ELO_T_D-->`: File date

`<!--ELO_T_E-->`: Owner

`<!--ELO_T_I-->`: Document ID

`<!--ELO_T_K-->`: Short name

`<!--ELO_T_M-->`: Name of the keywording form

`<!--ELO_T_O-->`: ELO object ID

`<!--ELO_T_T-->`: Document type ID

`<!--ELO_T_V-->`: Retention period

`<!--ELO_T_D-->`: File date

`<!--ELO_T_...-->`: Index field contents The (`...`) placeholder must be replaced with the number of the desired index field.

`<!--ELO_N_...-->`: Name of the index field The (`...`) placeholder must be replaced with the number of the desired index field.

Correct syntax

To ensure that the contents of variables are displayed correctly, every code block must start with the following variable:

`<!--ELO_B_...-->`: The (`...`) placeholder must be replaced with the number of the desired index field or the identifier for one of the variables specified above.

The code block must end with the following variable:

`<!--ELO_E_...-->`: The (`...`) placeholder must be replaced with the number of the desired index field or the identifier for one of the variables specified above.

Example: Owner

```
<!--ELO_B_E--><tr class="odd">
<th class="index"><!--ELO_N_E--></th>
<td class="index"><!--ELO_T_E-->
</tr><!--ELO_E_E-->
```

Example: Standard variables

```
<table cellspacing="0" cellpadding="3" width="100%">
<!--ELO_B_D--><tr class="oddeven">
<th class="index"><!--ELO_N_D--></th>
<td class="index"><!--ELO_T_D--></td>
</tr><!--ELO_E_D-->

<!--ELO_B_1--><tr class="oddeven">
<th class="index"><!--ELO_N_1--></th>
<td class="index"><!--ELO_T_1--></td>
</tr><!--ELO_E_1-->

<!--ELO_B_2--><tr class="oddeven">
<th class="index"><!--ELO_N_2--></th>
<td class="index"><!--ELO_T_2--></td>
</tr><!--ELO_E_2-->

<!--ELO_B_3--><tr class="oddeven">
<th class="index"><!--ELO_N_3--></th>
<td class="index"><!--ELO_T_3--></td>
</tr><!--ELO_E_3-->
```

Fig. 254: Variables in the HTML template for the keywording display

A number of additional variables and information are also available in the ELO Java Client.

```
<h1><!--ELO_T_K--></h1>

<!--ELO_B_CurrentVersionDate-->
<table cellspacing="0" cellpadding="0" border="0" style="padding-bottom:2px;">
<tr><th class="version"><!--ELO_N_CurrentVersionName--></th></tr>
<tr><td class="version"><!--ELO_T_CurrentVersionName--></td></tr>
<tr><th class="version"><!--ELO_N_CurrentVersionDate--></th></tr>
<tr><td class="version"><!--ELO_T_CurrentVersionDate--></td></tr>
<tr><th class="version"><!--ELO_N_CurrentVersionOwner--></th></tr>
<tr><td class="version"><!--ELO_T_CurrentVersionOwner--></td></tr>
<tr><th class="version"><!--ELO_N_CurrentVersionComment--></th></tr>
<tr><td class="version"><!--ELO_T_CurrentVersionComment--></td></tr>
</table>
<!--ELO_E_CurrentVersionDate-->

<!--ELO_B_ArchivingMode-->
<p style="padding-bottom:12px; font-size:<!--ELO_FONTSIZE_1-->pt; font-weight:bold;">
<!--ELO_E_ArchivingMode-->
```

Fig. 255: Additional variables of the direct keywording display

These are some examples of additional information that can be displayed:

`<!--ELO_N_CurrentVersionName-->`: Display name of the *Current version* field

`<!--ELO_T_CurrentVersionName-->`: Contents of the *Current version* field

`<!--ELO_N_CurrentVersionComment-->`: Display name of the *Comment* field

`<!--ELO_T_CurrentVersionComment-->`: Contents of the *Comment* field

`<!--ELO_N_CurrentVersionOwner-->`: Display name of the *Editor* field

`<!--ELO_T_CurrentVersionOwner-->`: Contents of the *Editor* field

`<!--ELO_N_CurrentVersionDate-->`: Display name of the *Version date* field

`<!--ELO_T_CurrentVersionDate-->`: Contents of the *Version date* field

`<!--ELO_T_ArchivingMode-->`: Document status (*Version control disabled*, *Version control enabled* or *Non-modifiable*)

Configure quick launch toolbar

The quick launch toolbar is located above the menu bar and above the *ELO* tab. Use the quick launch toolbar to call frequently used functions. You can adjust the quick launch toolbar to your individual needs. Select the desired functions in the *Configuration* dialog box.

Information: There are several functions that can only be called via the quick launch toolbar.

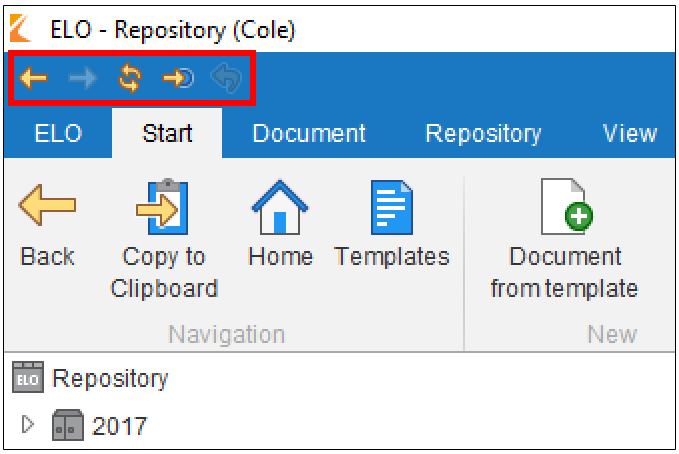


Fig. 256: Quick launch toolbar

Edit functions

1. Right-click to open the context menu on the quick launch toolbar.

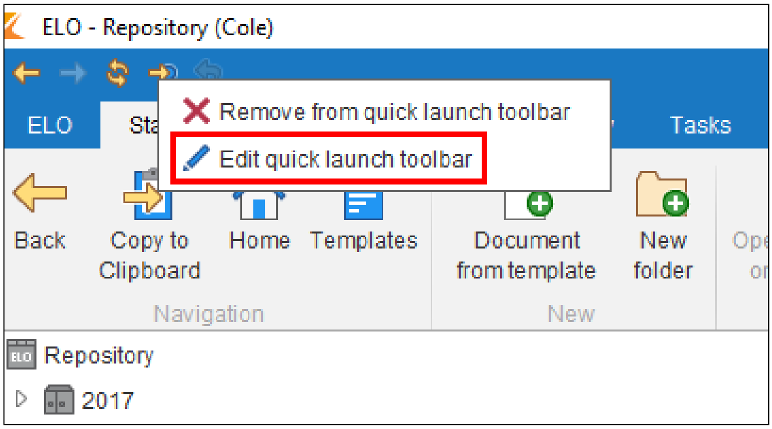


Fig. 257: 'Edit quick launch toolbar' menu item

2. Click the *Edit quick launch toolbar* menu item.

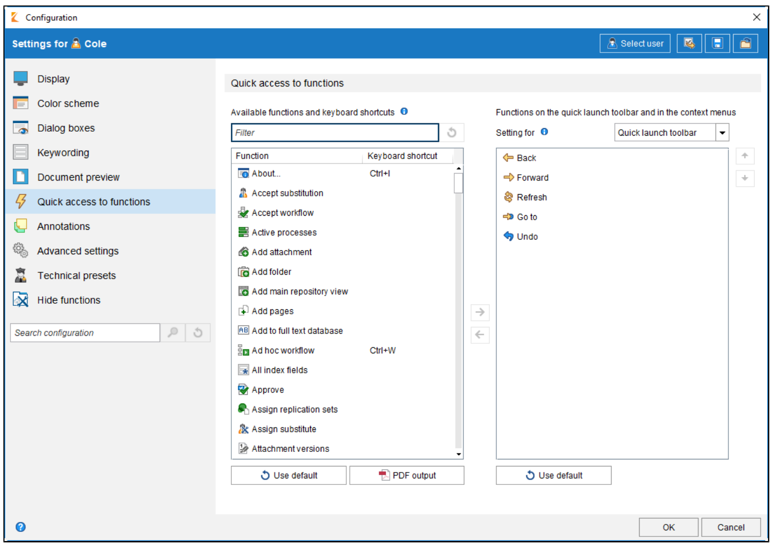


Fig. 258: 'Configuration' dialog box

The Configuration dialog box opens to the *Quick access to functions* area.

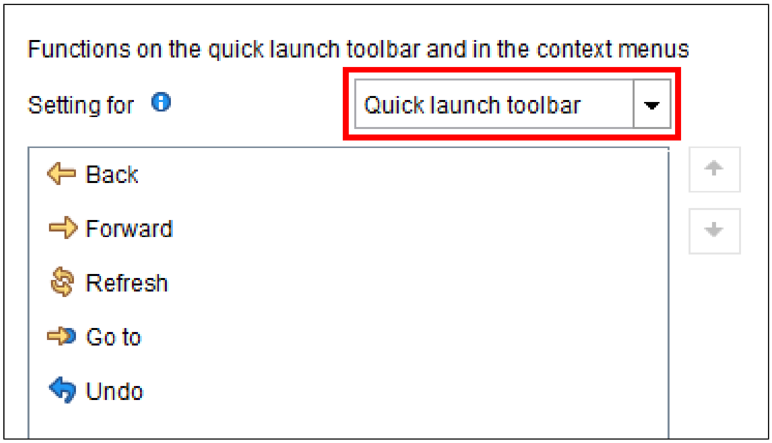


Fig. 259: Settings for the quick launch toolbar.

The settings for the quick launch toolbar are displayed.

5. To add a function to the quick launch toolbar, select the function in the left column and click *Add function* (arrow pointing right).

Information: You can change the order of functions in the quick launch toolbar with the help of the arrow buttons below the *Setting for* column.

Alternative 1: To remove a function from the quick launch toolbar, select the function in the right column and click *Remove function* (arrow pointing left).

Alternative 2: To reset the quick launch toolbar to the default functions, click *Use default*.

6. Click *OK* to save the changes.

Add functions

You can also use the mouse to add functions directly to the quick launch toolbar.

1. Right-click the function that you would like to add to the quick launch toolbar.

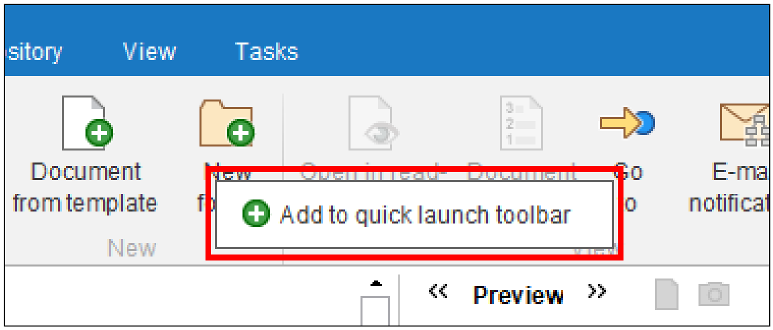


Fig. 260: Add to quick launch toolbar

A drop-down menu with the entry *Add to quick launch toolbar* appears.

2. Click the *Add to quick launch toolbar* entry to add the function to the quick launch toolbar.

Remove functions

You can also remove functions from the quick launch toolbar by clicking.

1. Right-click the function in the quick launch toolbar that you would like to remove.

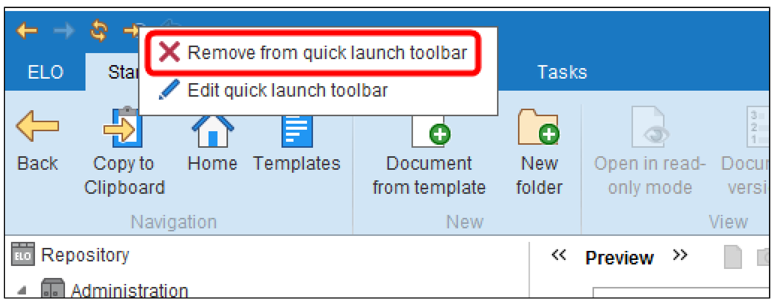


Fig. 261: Remove from quick launch toolbar

A drop-down menu with the entry *Remove from quick launch toolbar* appears.

2. Click the *Remove from quick launch toolbar* entry to remove the function from the quick launch toolbar.

Organize functions

You can add separator lines to get a better overview of the functions in the quick launch toolbar. You will find the *Separator line* function in the *Available functions and keyboard shortcuts* column on the *ribbon*> *ELO* > *Configuration* > *Quick access to functions*.

Configuration

Overview

Use the *Configuration* dialog box to centrally adjust the local user settings. You can define many personal settings yourself; your system administrator will perform all other settings.

If needed, ask your system administrator when certain settings need to be changed and this cannot be done via the *Configuration* dialog box.

Click the ELO button on the ribbon and select *Configuration* to open the *Configuration* dialog box.

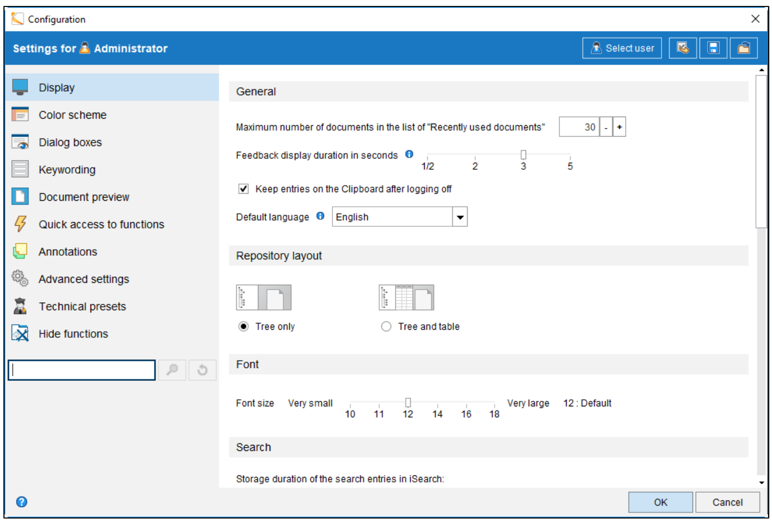


Fig. 262: 'Configuration' dialog box

Areas

The *Configuration* dialog box consists of the following areas:

- Display
- Color scheme
- Dialog boxes
- Keywording
- Document preview
- Quick access to functions
- Annotations
- Advanced settings
- Technical presets
- Disable functions

On the left side, you can see which areas you can make settings for. If you click the name of an area, a list with the settings of the area is opened and the current settings are displayed on the right-hand side. The current settings are displayed on the right-hand side of the dialog box.

To change a setting, select the setting in the list on the left-hand side and then change the setting in the display area on the right. Click *OK* to save the changes.

Levels concept in the configuration

There are different levels in the configuration:

- **User**: Settings that a user has made or that an administrator has made on a user's behalf.
- **Option group**: Settings that an administrator has made on behalf of an option group. Members of the option group are assigned these settings.
- **Global**: Settings that an administrator has made for all users (the *Everyone* group).
- **Default**: The default settings in the ELO Java Client.

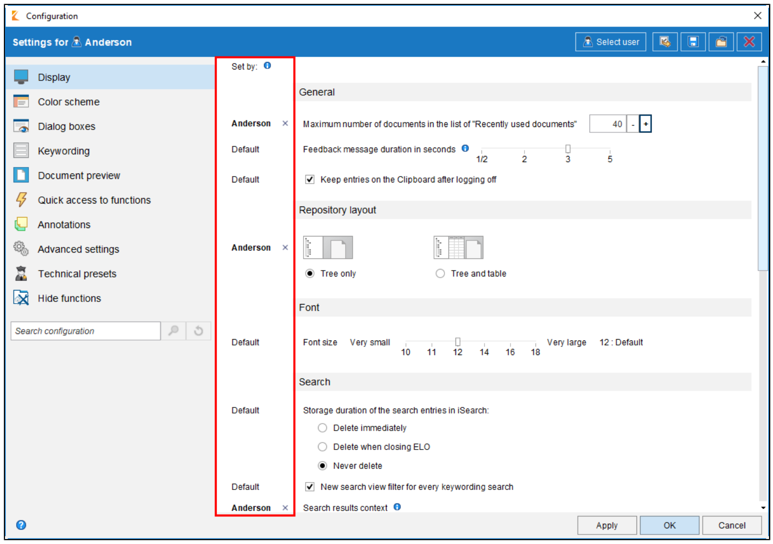


Fig. 263: 'Set by' column

In the *Set by* column, you can see the level at which settings have been made. This column appears when you make settings for another user or group.

If the settings are configured differently at two or more levels (conflicting settings), the following hierarchy applies:

1) **User**: The settings for all other levels can be overridden at the *User* level.

2) **Option group**: The settings for the levels *Global* and *Client default* can be overridden at the *Option group* level.

3) **Global**: The settings for the *Default* level can be overridden at the *Global* level.

4) **Default**: The *Default* level applies if no settings have been made at any of the other levels.

Override settings

The administrator can modify and override settings at all levels.

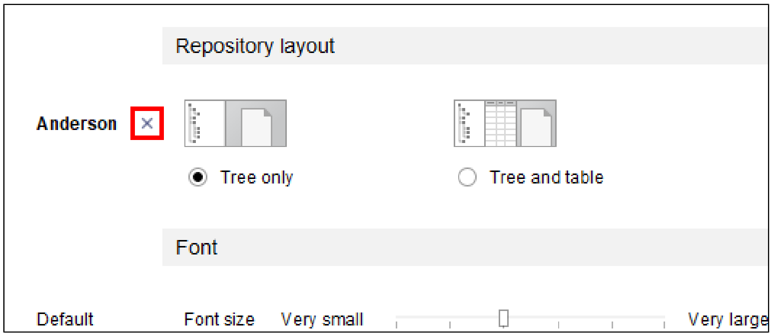


Fig. 264: Delete configuration

For example, to delete the settings for a user, click the X icon in the *Set by* column.

Information: The user can override these settings again.

Select user: Select a user or option group via the *Select user* button to assign the user/option group specific settings in the configuration.

General functions

Transfer settings to other users (arrow icon): Transfer the settings you made to one or multiple users or an option group.

Save the settings of the configuration as a file (disk icon): This option saves the settings of the configuration as a file.

Load existing settings for the configuration (folder icon): Load the settings from a configuration file.

Delete settings (X icon): Click here to delete all settings you made for an option group or other users. This restores the settings to their default values.

Search configuration

You can search all options in the *Configuration* dialog box.

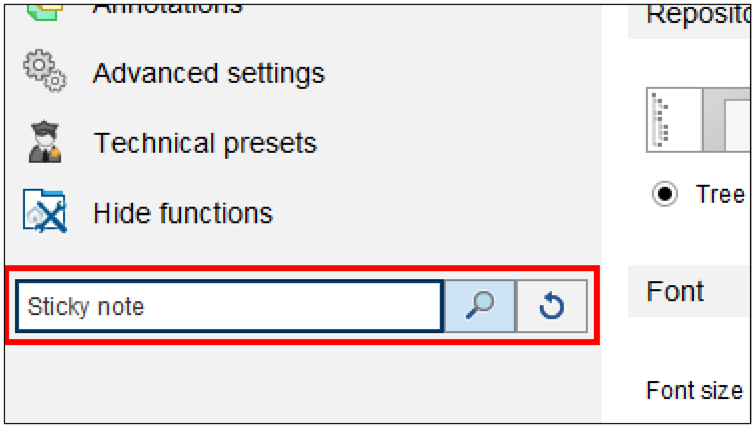


Fig. 265: 'Search configuration' field

1. Place the cursor in the *Search configuration* field.
2. Enter a search term, e.g. "Sticky note".
3. Click the *Start search* button (magnifying glass icon).

The corresponding settings are displayed on the right side of the dialog box.

Delete the search term with the *Reset search* button. The *Display* area appears.

Display

The settings for the following topics can be found in the *Configuration* dialog box in the *Display* area:

- General
- Repository layout
- Font
- Search
- Lists and tables
- Task list display options

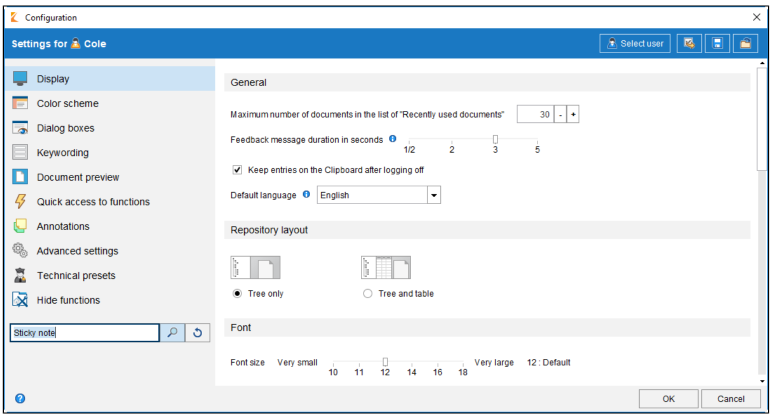


Fig. 266: 'Configuration - Display' dialog box

General

Maximum number of documents in the list of "Recently used documents": Use this option to define the maximum number of recently used documents that are shown. You will find the overview of recently used documents in the *My ELO* work area.

Feedback message duration in seconds: For actions without displaying a confirmation window, a notification is displayed in the top area of the program window. Use this option to set how long the notification is shown in seconds.

Keep entries on the Clipboard after logging off: This setting enables you to save the contents of the Clipboard when closing the program.

Default language: Change the language of the client in the drop-down menu.

Repository layout

There are two options for displaying the repository:

- **Tree only**: The repository tree and the document are displayed next to the buttons for the work areas.
- **Tree and table**: In addition to the tree view, a table is displayed between the tree and document in a table that shows the contents of the element selected in the tree.

Font

Font size: Define the font size for the ELO Java Client user interface in this area.

Information: The ELO Java Client restarts automatically when you change the font size.

Search

Storage duration of the search entries in the iSearch: Choose an option for the storage duration of the search results.

New search view filter for every keywording search: Select this option when you do not want to overwrite an existing view filter when starting a search. A separate search view filter is created for each new search.

Search results context: Choose whether to display the *Hits* column or the *Results text* column in the search result list. To improve search performance, select the *Disable* option.

Number of synonyms: Use the spin box to set the maximum number of synonyms to be displayed. To disable synonyms, select the value "0".

Maximum number of search results per page: Define in this area how many search results are displayed per page. The higher the number of search results per page, the longer the search takes. If the number of search results exceeds the defined number, you can access the other search results via the arrow buttons below the table with the search results.

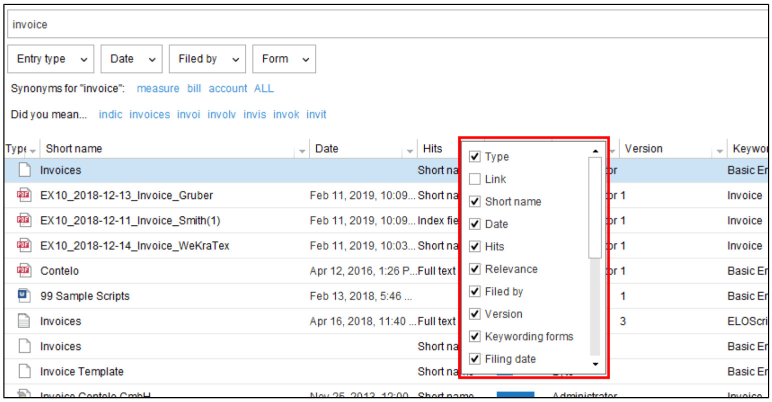


Fig. 267: Context menu in the search results table.

Number of index columns for the keywording in the tasks and search results tables: Search results and tasks are shown in the form of a table. The table columns correspond to the index fields from the keywording. In this area, you specify how many index fields from the keywording form you want to display.

Lists and tables

Version information in the repository tree: Select whether and what version information to show in the repository after the short name.

Show document date in the repository tree: If you enable the *Show document date in the repository tree* option, the document date is shown in front of the short name.

Show folder date in the repository tree: If you enable the *Show folder date in the repository tree* option, the folder date is shown in front of the short name.

Show contents of priority fields in the repository tree: If you enable the *Show contents of priority fields in the repository tree* option, the contents of the index fields marked as priority fields are displayed after the short name in the repository tree. The settings for priority fields are under *Index field with high priority* in the keywording form editing options.

Show version information in additional columns: Select this option to show additional information on the entries. This includes the editor of the last version, the version comment, the version date and the version size.

Number of priority fields in the table columns: Define the maximum number of columns with high priority that may be displayed in tree view. A column with high priority is used to display an index field of a keywording form. When editing the keywording form, you will find the settings for priority fields under *Index field with high priority*.

Information: Having a large number columns will mean it takes longer to load and display items in the repository.

Maximum size of thumbnails in pixels: Define the maximum size of the thumbnails in this area. Enter the length of the longest side in pixels. The size of the thumbnails can also be changed with the zoom function.

Task list display options

Refresh interval for the list in minutes: Specify how often you want the task list to be refreshed in *Refresh interval for the list in minutes*. If you do **not** want the task list to be refreshed automatically, enter "0".

Show tasks due in the following number of days: The task list in the *Tasks* work area contains an overview of all due tasks. Use this option to specify in how many days a task must be due for it to be displayed in the task list. For example, if you enter 10 days, all tasks that are due in the next 10 days will be displayed. Tasks that are only due in 20 days are not displayed.

Maximum number of tasks displayed: Determine in this area the maximum amount of tasks that are displayed in the task list of the *Tasks* work area.

Information: This setting only refers to the number of displayed tasks and *not* to the total number of tasks in the repository.

Color scheme

The settings for the following topics are located in the *Color scheme* area of the *Configuration* dialog box.

- Color scheme

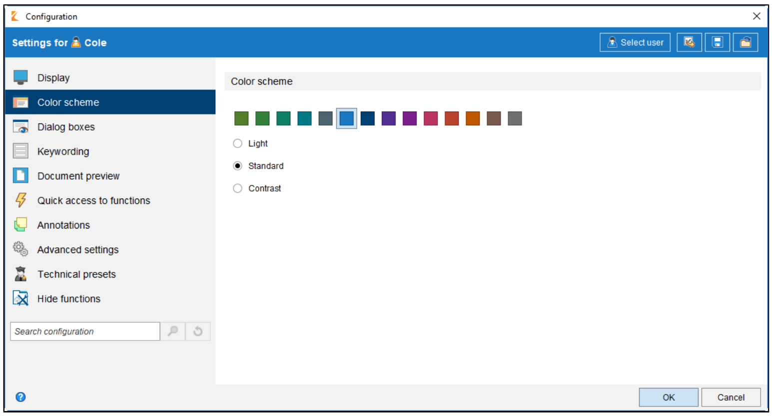


Fig. 268: 'Configuration - Color scheme' dialog box

The following settings are located in the *Color scheme* area of the *Configuration* dialog box.

Color scheme

Choose the color scheme for the ELO Java Client program interface in this area.

- **Light**: Lighter version of the main color with white borders
- **Standard**: Main color with gray borders
- **Contrast**: Darker version of the main color with contrasting borders in a lighter color

Information: The ELO Java Client restarts automatically when you change the color scheme.

Dialog boxes

The settings for the following topics are located in the *Dialog boxes* area of the *Configuration* dialog box.

- General
- Version comment
- Notes
- Annotations when sending as PDF
- Inherit permissions when moving entries
- Drag-and-drop
- Duplicate check
- Load new version
- Check in
- Delete reference
- Multiple entries as link
- Print separator page
- Deleting from the Clipboard
- Deletion from the search

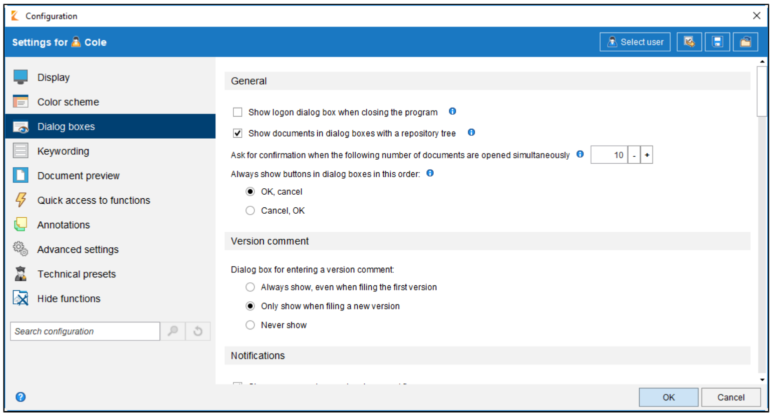


Fig. 269: 'Configuration - Dialog boxes' dialog box

General

Show logon dialog box when closing the program: When this option is selected, the logon dialog box is displayed when closing the program.

Show documents in dialog boxes with a repository tree: If this option is selected, the documents are displayed in a repository tree in a dialog box such as *File to repository*, *Move elements* or *Reference*.

Ask for confirmation when the following number of documents are opened simultaneously: When you open or edit many documents at the same time, there can be delays in the client. Use this option to specify how many documents you can open or edit at the same time.

Always show buttons in dialog boxes in this order: Use this option to define whether the *OK* button or the *Cancel* button always appears first in the dialog boxes.

Version comment

Dialog box for entering a version comment: Choose an option for the display of the version dialog box.

Notes

Show message when postponing a workflow: If you select this option, you will be notified that the postponed workflows will be hidden in the task list.

Display message if retention period was set: If you select this option, a notification window is displayed when closing the *Keywording* dialog box. The window only appears if you have entered a retention period on the *Options* tab. In this case, you will be notified that you cannot delete a document with a retention period before the deadline has expired.

Display message if keywording does not contain a personal identifier: If this option is enabled, a notification window is displayed when closing the *Keywording* dialog box if the fields *Personal identifier* and *Deletion period* are empty.

Show message when setting the document status to "Non-modifiable": Define whether you want to show a message when setting the *Non-modifiable* document status.

Show message when deleting files in the Intray: Documents in the Intray are not yet in the repository. When you delete documents in the Intray, the documents (and keywording) are removed and cannot be restored. Select this option to show a pop-up notification when deleting Intray documents. You will be asked to confirm the deletion process.

Show message when changing keywording forms in the keywording dialog box: if you select this option, a pop-up message is displayed when you switch forms in the *Keywording* dialog box. This only appears if an index field that you already edited does not exist in the new keywording form.

Show message when revoking your own read or write permissions: Define whether or not a message should appear when a user wishes to revoke their own read or write permissions.

Show message when overwriting existing keywording with serial keywording: Define whether a message should appear when overwriting existing keywording with serial keywording.

Message when searching for multiple terms in different areas of iSearch: Determine whether a message should appear when you perform a search with multiple terms across multiple areas (full text, keywording, and feed). When you perform a search with multiple terms, only results containing all the search terms are found.

Restart required message when activating/deactivating a substitution: Specify whether you want a message to be displayed when you activate or deactivate a substitution. Changes to substitutions do not take effect until you restart the client.

Annotations when sending as PDF

In this area, you specify how annotations placed on a document are handled when creating and sending a PDF file.

Please note: When you create a PDF, margin notes are **not** embedded. The embedded annotations can **no longer** be edited.

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to define what happens to annotations.
- **Do not embed annotations**: The annotations will not be embedded in the PDF.
- **Embed annotations in the PDF file**: The annotations will be embedded into the PDF during conversion.

Inherit permissions when moving entries

Behavior for differing permissions when moving documents: In this area, you specify what to do with permissions when moving an entry in the repository. Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to define what happens to permissions when moving entries.
- **Keep previous permissions unchanged**: The moved entries retain the existing permission settings.
- **Replace with the permissions of the target folder**: The moved entries inherit the permission settings of the target folder.
- **Replace permissions inherited from the previous folder, keep individual permissions**: The moved entries inherit the permission settings from the target folder. Any additional permission settings will be retained.

Drag-and-drop

Behavior when dragging and dropping within the repository: Here is where you specify the settings for moving documents in the repository via drag-and-drop.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Move**: Moves the selected entries without confirmation.
- **Reference**: Creates references without confirmation.

Behavior when dragging a file to a repository document: Here is where you specify the settings for adding an external document to the repository via drag-and-drop.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **File as a new version of the document in the repository**: This creates a new version of the document.
- **Add pages to the beginning**: The file is added to the front of the document you have dragged it to.
- **Add pages to the end**: The file is added to the end of the document you have dragged it to.
- **File as a new document to the repository**: The document is filed to the repository as a new document.
- **File as a new document with the same keywording**: The file is filed to the repository as a new document. The new document is keyworded with the same data as the file you drag it to.

Information: If you have selected the *File as a new version of the document in the repository* option, you **cannot** drag and drop onto a checked-out or deleted document.

Confirm via dialog box if you want to cancel keywording when filing multiple documents: If this option is enabled, a dialog box will appear if you cancel the keywording asking whether you want to file the documents with the default keywording. If the option is not enabled, the process is aborted without asking you for confirmation.

Duplicate check

Behavior when filing a duplicate: The client recognizes when filing documents whether the document already exists in the repository. This where you specify how duplicates should be handled.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Reference**: Automatically creates a reference.
- **File again**: The document is stored in duplicate.

Load new version

Behavior with an identical new document version: This option refers to the *Load new version* function > *Document* tab > *Extended* group.

This is used to define how the program behaves when an identical document is loaded as a new document version via the *Load new version* function.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Cancel loading the new version**: No new version is created.
- **File as new version anyway**: Creates a new version with identical content.

Check in

Behavior when checking in an unchanged document: This option refers to the *Check in* function, *Start* tab > *Edit* group.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Cancel editing and restore original version**: No new version is created.
- **File as new version anyway**: Creates a new version with identical content.

Delete reference

Behavior when deleting a reference: Use this option to specify whether you want a dialog box to appear before deleting a reference and what ELO should do if the dialog box is deactivated.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Delete reference only**: If this option is enabled, a dialog box will not appear. Only the reference will be deleted. The original document will not be deleted.
- **Delete original document and reference**: If this option is enabled, a dialog box will not appear. The reference and the original document will be deleted.

Multiple entries as link

Behavior when creating a link when multiple entries are selected: Use this setting to define the program behavior when multiple selected entries are sent as an ELO link.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Create one ELO link per entry**; Creates an ELO link for each entry sent.
- **Create one ELO link for all entries**: Creates just one ELO link for all entries sent.

Print separator pages

Behavior when printing a separator page: Define in this area which type of separator page will be printed.

Separator pages are needed, for example, for the *Join pages after separator pages* function. To print a separator page pattern, switch to the *Intray* work area. Open the *Scan profiles* dialog box and click the *Print separator page* button.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Print separator page with horizontal bar**: Prints separator pages with a horizontal bar.
- **Print separator page with vertical bar**: Prints separator pages with a vertical bar.

Deleting from the Clipboard

Behavior when deleting from the Clipboard: When you select this option, a notification window appears when deleting an entry from the Clipboard. The notification window explains the difference between the *Delete* and *Remove from Clipboard* functions.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Remove from Clipboard**: Entries deleted from the Clipboard are removed from the Clipboard but not from the repository.
- **Delete in the repository**: Entries deleted from the Clipboard are removed from the Clipboard **AND** the repository.

Deletion from the search

Behavior when deleting in the search: This option enables you to specify how the program behaves when you delete a document in the *Search* work area.

Choose from the following options:

- **Confirm via a dialog box**: A dialog box opens. Use the dialog box to determine what ELO should do in each case.
- **Remove from the search result**: The selected entries are removed from the search result but not from the repository.
- **Delete in the repository**: The selected entries are removed from the search result **AND** the repository.

Keywording

The settings for the following topics are located in the *Keywording* area of the *Configuration* dialog box.

- General
- Keywording display
- Default settings for keywording
- Keywording forms for various file types

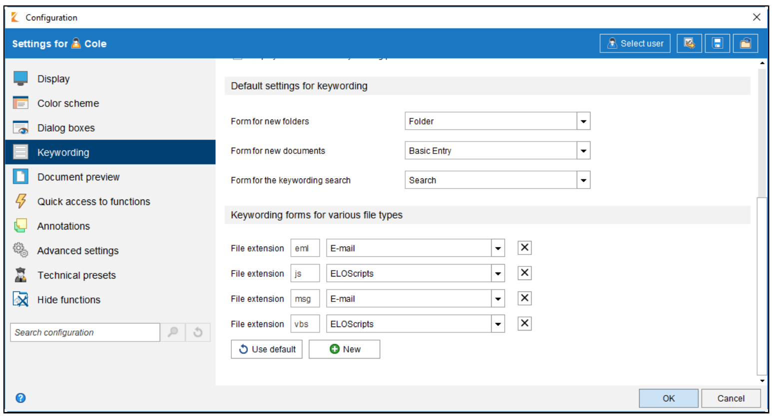


Fig. 270: 'Configuration - Keywording' dialog box

General

Use the default keyword list for index fields: Select this option to use a default keyword list (global) for index fields without a separate keyword list.

Sort keyword lists alphabetically: Select this option to sort keyword lists automatically.

Automatically activate keyword list filter: When this option is enabled, the keyword list is filtered automatically based on the characters that were entered.

Show keywording dialog box when filing non-keyworded entries: Select this option to open the *Keywording* dialog box when filing a new document. The dialog box only appears when the document has not yet been keyworded. If this option is cleared, the document is automatically filed with the default keywording form for new documents. The file name is used as the short name.

Keywording display

Show keywording in the preview with: The following options are available for the keywording preview:

- **Internal ELO display**: The keywording preview is displayed using the ELO software provided.
- **Browser display**: The keywording preview is displayed in an embedded browser window.

Display extra text in the keywording preview: Select this option to display the text entered in the *Keywording* dialog box on the *Extra text* tab in the keywording preview.

Default settings for keywording

Form for new folders: Specify which keywording form will be used for new folders.

Form for new documents: Specify which keywording form to use for new documents.

Form for the keywording search: Select the keywording form that is used by default for the keywording search in this area.

Keywording forms for various file types

In this area, you can link file extensions with keywording forms. The file extension is recognized when filing a document. The associated keywording form is set by default. When filing without keywording, the linked keywording form is used automatically.

By default, the *.js* and *.vbs* file extensions are linked with the *ELOScripts* keywording form and the *.eml* and *.msg* file extensions are linked with the *E-mail* keywording form.

Use default: Click the *Use default* button to restore the original settings in this area.

New: Click the *New* button to add a new row for linking the file type and keywording form. Enter a file extension and select a keywording form.

X: Click one of the buttons with an X icon to delete the corresponding row.

Document preview

The settings for the following topics are located in the *Document preview* area of the *Configuration* dialog box.

- General
- E-mail
- Preview configuration for various file types
- Preview plugins

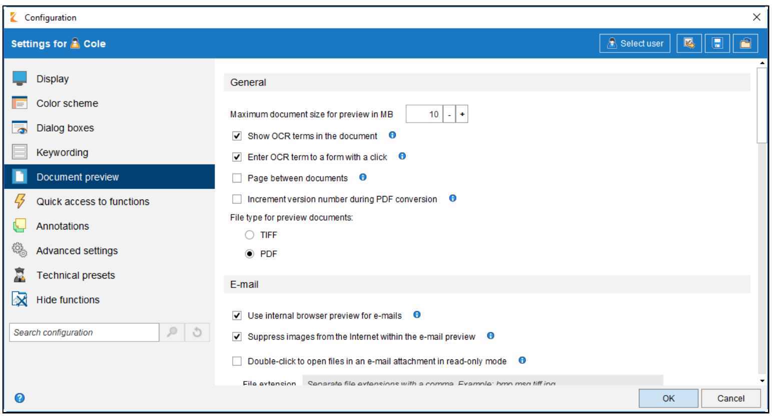


Fig. 271: 'Configuration - Document preview' dialog box

General

Maximum document size of the preview in MB: Determine the maximum megabyte (MB) size a document may have to be displayed in the preview. If a document exceeds the defined size, a notification will be displayed instead of the preview. The value 0 deactivates the preview completely.

Show OCR terms in the document: Select this option to highlight the words in the document recognized by the OCR. As soon as you point to a word, the word is highlighted. When the keywording is open, you can click a word to add it to the keywording.

Enter OCR term to a form with a mouse click: Transfer words recognized by the OCR to the currently open form with a click of the mouse.

Page through and between documents: Selecting the *Page through and between documents* option allows you to jump to the next document when you reach the end of the original document in the viewer pane.

File type for preview documents: This setting refers to the *Create document preview* function. Define whether preview documents will be displayed in TIFF or PDF format.

Please note: Depending on the selected format, the correct ELO printer (ELO TIFF Printer or ELO PDF Printer) must be installed.

E-mail

Use internal browser preview for e-mails: If this option is enabled, e-mails are displayed with the internal browser instead of the embedded Internet Explorer.

Suppress images from the Internet in the e-mail preview: If this option is selected, images in e-mails that are downloaded from the Internet will not be downloaded. The images cannot be displayed in this case. However, embedded images in e-mails will be displayed.

Double-click to open files in an e-mail attachment in read-only mode: In this field, you can enter the file extensions that you want to open by double-clicking. A dialog box for saving the e-mail attachment appears for all other file extensions.

Information: You can enter multiple file extensions. You need to separate the entries with periods.

Certificates for decrypting e-mails: This option allows you to set where ELO should import the certificates for decrypting e-mails from.

- **Use Windows certificate store**: If you are using ELO on a Microsoft Windows system, you can use the certificates supplied by Microsoft Windows.
- **Use certificate store from specified path**: If you are not using ELO on a Microsoft Windows system, or if you do not want to use the certificates supplied by Microsoft Windows for other reasons, you need to select this option. In addition, you must enter a location for the desired certificates in the *Path* field.

Preview configuration for various file types

In this area, you define which type of preview is used for which file extension. If no preview class is defined for a file extension, the browser will be used for the preview.

Use default: Click the *Use default* button to restore the original settings in this area.

New: Clicking the *New* button adds a new row for linking the file type and preview method. Enter a file extension and select a preview method.

Confirm: When displaying this file type, ELO will ask every time whether you want to open the file with the default viewer.

X: Click one of the buttons with an X icon to delete the corresponding row.

Choose from the following options for configuring the preview:

- **ActiveX plugin preview**: This preview type now supports viewer plugins from the ELO Windows Client.
- **Apple OS X preview**: Viewer for displaying files on the Mac OS X operating system.
- **Image preview**: Viewer for JPG, BMP, and TIFF that can be used to place annotations on documents
- **Browser preview**: Preview in the standard browser
- **DXL preview**: Viewer for documents from IBM Notes in .dxl format
- **EML e-mail preview**: Viewer for e-mails from IBM Notes in .eml format

- **Windows Media Player preview**: Preview for audio and video files based on JavaFX
- **Windows Picture and Fax Viewer (Windows XP)**: Alternative viewer for Windows XP
- **MSG e-mail preview**: Viewer for Microsoft Outlook e-mails in .msg format
- **Windows Media Player preview (Windows)**: Viewer in Windows for audio and video files
- **MS Office preview (Windows)**: Recommended viewer for Microsoft Office documents newer than 2003. Also suitable for Apache OpenOffice documents (ODT).
- **OpenOffice preview**: Viewer for Apache OpenOffice documents. Requires Apache OpenOffice and additional module to be installed.
- **PDF preview**: Viewer for PDF documents with which annotations can be placed on documents. As an alternative, use Internet Explorer with the Acrobat Reader plugin (the annotations on the document are not shown)
- **Text preview**: Viewer for text files; allows two font types, adjustable font size, and automatic line breaks.
- **Show preview document**: With this setting, preview documents created previously are shown instead of the original documents.
- **ZIP preview**: Viewer for ZIP archives, shows file content as a tree; files can be shown or filed via the context menu

Preview plugins

You can link file extensions with preview plugins in this area.

New: Clicking the *New* button adds a new row for linking the file type and preview plugin. Enter a file extension and the corresponding OLE object ID.

X: Click one of the buttons with an X icon to delete the corresponding row.

Quick access to functions

The settings for the following topics are located in the *Quick access to functions* area of the *Configuration* dialog box.

- Available functions and keyboard shortcuts
- Quick launch toolbar
- Repository context menu
- Tasks context menu
- In use context menu
- Clipboard context menu
- Intray context menu
- Search context menu

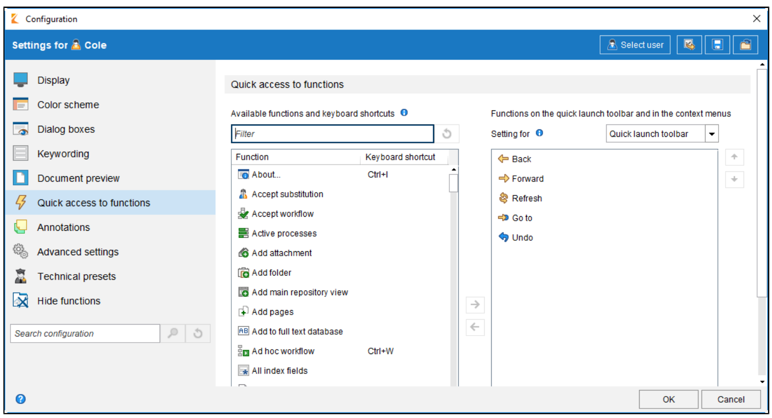


Fig. 272: 'Configuration - Quick access to functions' dialog box

Quick access to functions

Available functions and keyboard shortcuts: Select the function that you want to add to the quick launch toolbar or a context menu in the *Available functions and keyboard shortcuts* column. To add a function, select the function and click *Add function* (arrow icon pointing to the right).

Filter: Use the *Filter* field to filter the *Available functions and keyboard shortcuts* column. The column is refreshed as soon as you enter a character.

Reset filters: Click the *Reset filters* button to delete the current filter term from the *Filter* field. All functions are displayed.

Functions on the quick launch toolbar and in the context menus: The *Functions on the quick launch toolbar and in the context menus* column shows you which functions already exist on the quick launch toolbar or in the selected context menu.

Settings for: Use the *Settings for* drop-down menu to choose whether you want to edit the quick launch toolbar or one of the context menus.

The following items are available for selection:

- Quick launch toolbar
- Repository context menu
- Tasks context menu
- In use context menu
- Clipboard context menu
- Intray context menu
- Search context menu

Assign keyboard shortcuts to functions

You can assign keyboard shortcuts to functions in the *Available functions and keyboard shortcuts* column.

1. Select the function you want to assign a keyboard shortcut to.

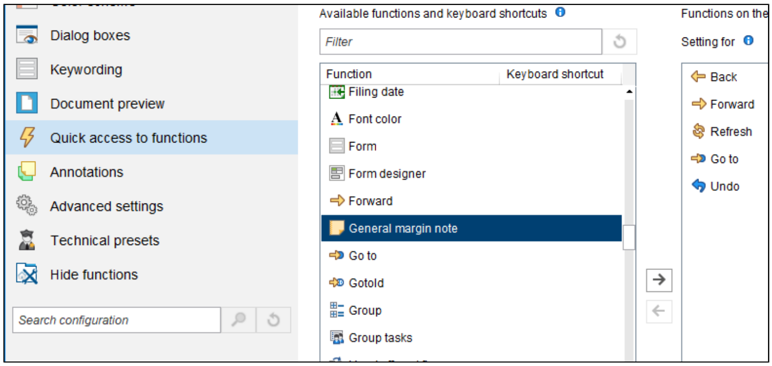


Fig. 273: Selected function

The function is now marked as selected.

2. Enter the desired keyboard shortcut, e.g. CTRL+M.

Please note: Some keyboard shortcuts are already assigned by the operating system or other programs. This applies in particular to the function keys F1 to F12. You can assign keyboard shortcuts to the function keys, but the commands will not be executed. Keyboard shortcuts at the operating system level are executed first.

Enter the keyboard shortcut in the field to the right of the function.

Delete keyboard shortcuts

1. Select the function with the keyboard shortcut you want to delete.

2. Press the BACKSPACE key.

The keyboard shortcut is deleted.

Reset keyboard shortcuts

You have the option to restore all keyboard shortcuts to default values.

1. Scroll down in the *Configuration* dialog box.

2. Click the *Use default* button below the *Available functions and keyboard shortcuts* column.

All keyboard shortcuts you assigned are removed.

Keyboard shortcuts as PDF file

You can save an overview of the keyboard shortcuts as a PDF file.

1. Scroll down in the *Configuration* dialog box.

2. Click the *PDF output* button.

The *PDF output* dialog box appears.

3. Select a storage location in the file system.

4. Click *Save*.

A PDF file with all keyboard shortcuts is saved to the selected storage location.

Add function

1. Use the *Settings for* drop-down menu to choose where you want to add a function.

2. Select the desired function in the *Available functions and keyboard shortcuts* column.

3. Click *Add function* (arrow icon pointing to the right).

Information: The *Separator line* function can be added as often as you like. The separator line is used to group functions and to set them apart from one another.

The function is displayed in the area on the right.

Change order

You can change the order of the entries in the quick launch toolbar and the context menus.

1. Use the *Settings for* drop-down menu to choose what you want to edit.

2. Select the desired function in the *Functions on the quick launch toolbar and in the context menus* column.

3. Click the *Move up* button (arrow pointing upwards) to move the selected function up.

Alternatively:Click the *Move down* button (arrow pointing downwards) to move the selected function down.

Remove function

1. Use the *Settings for* drop-down menu to choose what you want to edit.

2. Select the desired function in the *Functions on the quick launch toolbar and in the context menus* column.

3. Click *Remove function* (arrow icon pointing to the left).

Information: You can also add or remove functions by dragging them to the right or left or by double-clicking.

Reset functions

It is possible to reset the quick launch toolbar or the context menus to the default settings.

1. Scroll down in the *Configuration* dialog box.

2. Use the *Settings for* drop-down menu to choose what you want to edit.

3. Click *Use default* (below the *Functions on the quick start toolbar and in the context menus*).

All functions that you added are removed from the quick launch toolbar or the selected context menu.

Annotations

The settings for the following topics are located in the *Annotations* area of the *Configuration* dialog box.

- Sticky notes
- Marker width
- Horizontal marker
- Freehand marker
- Rectangle marker
- Strikethrough
- Redaction
- Text notes

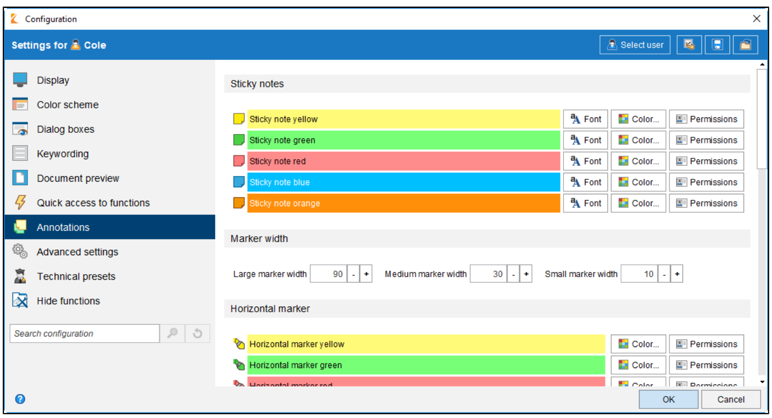


Fig. 274: 'Configuration - Annotations' dialog box

Sticky notes

A sticky note is a colored text field that is affixed directly to a document and that is used for recording information. Choose from five different colors for sticky notes – yellow, green, red, blue, orange are set by default. You can configure these colors individually.

You can adjust the following settings:

- Font
- Color
- Permissions

Marker width

The *Marker*, *Freehand marker*, and *Strikethrough* tools are made available in three different sizes (widths). You can define the widths of the markers via the *Large marker*, *Medium marker*, and *Small marker* fields.

Information: The values are about the same as the point size, depending on the font. For example, if you enter the value *12*, this corresponds approximately to the width of a line in 12-point *Arial* font.

Large marker: Here you can set the width of the large markers.

Horizontal marker

You can define five types for the *Horizontal marker* tool. Colors and permissions can be set for each type.

Color: The *Color* button opens the *Select color* dialog box. Use the dialog box to change the color of the respective marker.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to define the permission settings for the respective marker.

Freehand marker

You can define five types for the *Freehand marker* tool. Colors and permissions can be set for each type.

Color: The *Color* button opens the *Select color* dialog box. Use the dialog box to change the color of the respective marker.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to define the permission settings for the respective marker.

Rectangle marker

You can define five types for the *Rectangle marker* tool. Colors and permissions can be set for each type.

Color: The *Color* button opens the *Select color* dialog box. Use the dialog box to change the color of the respective marker.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to define the permission settings for the respective marker.

Strikethrough

You can change the settings of the *Strikethrough* tool.

Color: The *Color* button opens the *Select color* dialog box. Use the dialog box to change the background color of the *Strikethrough* tool.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to make the permissions settings for the *Strikethrough* tool.

Redaction configuration

The *Redaction* tool can be used to render texts unreadable.

Information: For the *redaction* function to be available for the user, certain settings must be made to the ELO database. You can find more detailed information about *redaction* in the documentation *ELO Redaction*.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to make the permission settings for redacting documents.

Text note configuration

You can define five types for the *Text note* tool. You can set the font, font size, font style, font color and permissions for each type.

Font: Click *Font* to open the *Font* dialog box. You can set the font, font size, font style, font color and permissions for each type of text note here.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to make the permission settings for each type of text note.

Advanced settings

The settings for the following topics are located in the *Advanced settings* area of the *Configuration* dialog box.

- General
- Settings for the Intray work area
- Intray folder in the file system
- Workflow
- My ELO
- Signature

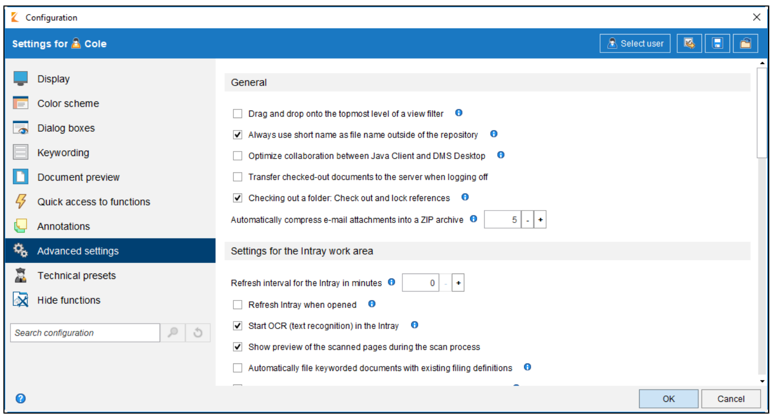


Fig. 275: 'Configuration - Advanced settings' dialog box

General

Drag and drop onto the topmost level of a view filter: If this setting is selected, the entry is added at the topmost repository level when filing via drag-and-drop to the button of a view filter. If the option is cleared, the entry is set at the place in the repository that is currently selected in the Repository work area.

Information: If a document is dragged to a view filter that only contains a branch of the repository, the document is filed at the topmost repository level of this branch.

Always use short name as file name outside of repository: Select this option to always use the short name of an entry as the file name. For example, the file is used when sending a document by e-mail. If this option is enabled, the *File name* field is ignored on the *Options* tab.

Optimize collaboration between Java Client and DMS Desktop: This option should only be selected when the ELO Java Client is used together with ELO DMS Desktop. Select this option to avoid excessive load times for Microsoft Office documents.

Transfer checked-out documents to the server when logging off: Select this option to save checked out documents to the server after the user logs off. If the user logs onto another workstation, they have access to documents that they have checked out.

Checking out a folder: Check out and lock references: This option refers to checking out folders. If there are references in a checked-out folder, these are also stored in the checkout directory. To lock the references and original files when checking out folders, select the option *Checking out a folder: Check out and lock references*.

Please note: If you check out a folder with all the references, you cannot check in the references separately. Instead, you need to check in the entire folder. In addition, you cannot check in the original documents that are linked to the references until you have checked in the entire folder.

Automatically compress e-mail attachments into a ZIP archive: Enter a maximum value here. If the number of e-mail attachments exceeds this limit, the e-mail attachments will be automatically compressed into a ZIP archive.

Settings for the Intray work area

Refresh interval for the Intray in minutes: Enter a number greater than zero to the *Refresh interval for the Intray in minutes* field if you want the *Intray* work area to automatically refresh at regular intervals. The value zero means that the Intray will not automatically refresh.

Refresh Intray when opened: Select this option to automatically refresh the *Intray* work area every time it is called. This also updates the monitored folders.

Start OCR (text recognition) in the Intray: Select this option to start with the text recognition as soon as a document is filed to the *Intray* work area. The text content of a document is available, for example when keywording.

Show preview of all scanned pages during the scan process: Select this option to display the preview of the scanned pages during the scan process.

Automatically file keyworded documents with existing filing definitions: Select this option to automatically file documents in the Intray if you have entered all keywording information and the documents have a valid filing definition. Filing takes place as soon as you close the *Keywording* dialog box by clicking *OK* or *Apply and next*. You do *not* need to run the **Automatic filing** function.

Information: You **cannot** create or edit keywording forms in the ELO Java Client. Contact your system administrator for questions on automatic filing and on the filing definition.

Automatically convert TIFF files to PDF when filing to the repository: TIFF files are automatically converted into PDF files during filing to the repository.

Create searchable PDFs: If this option is enabled, TIFF files are sent to OCR during automatic conversion to create searchable PDFs.

Join pages after separator pages: Specify which type of separator pages to use for the *Join pages after separator pages* function.

You can select from the following options:

- Separator page
- Blank page
- Delete separator page and blank pages

Save Intray on server when logging off: Select this option to save checked out documents to the *Intray* work area after the user logs off. If the user logs onto another workstation, they have access to their Intray documents.

Intray folder in the file system

Include child directories when importing into the Intray: Enable this option to include all child directories of the specified Intray directories when refreshing the *Intray* work area.

New: Click the *New* button to select a folder in the file system to use as the Intray folder.

Information: You can use the variables "%USERTEMP%" and "%APPDATA%" in the Intray folder.

Directory: The *Directory* field shows the path to the designated Intray folder.

X: Click the *Remove directory* buttons (X icon) to remove the corresponding link to a folder in the file system.

Workflow

Default duration for workflow postponement in days: You can defer a workflow for processing later on. Use this option to define the default settings in days for the *Postpone workflow* dialog box.

Start workflow in edit mode: Select this option to edit the selected workflow template when starting a new workflow. If this option is cleared, only one list of templates appears. In this case, you can open the workflow templates via the *Show template* button.

Show successor node users when passing workflows forward: The name of the successor node will be displayed in the *Pass workflow forward* dialog box in addition to the name of the user/group that is entered as the node editor.

Automatically refresh the "Workflow overview": Define here whether the list of workflows in the *Workflow overview* dialog box is always refreshed automatically.

Default name for new workflows: In this area, you define how new workflows will be named by default. The name can be changed when you start the workflow.

Choose from the following options:

- Name of workflow template
- Short name of the entry
- Name of workflow template + short name of the entry
- Short name of entry + name of workflow template

My ELO

This is where you define the settings for automatically subscribing to a feed.

Choose from the following options:

- When filing a document
- When creating a new folder
- When checking in a new version
- When creating a post or comment

Signature

Recognize signature files: In the *File extensions* field, specify which file extensions are to be recognized as signature files.

Information: You can enter multiple file extensions. You need to separate the entries with periods.

File signature files: Select this option to file signature files.

Include signature file when sending documents: Select this option to also send the associated signature file when sending a document.

Automatically save the signature verification log as an attachment: Select this option to store the verification logs of the documents as an attachment.

Signature check on display: Select this option to start the signature check while displaying a signed document.

Technical presets

The settings for the following topics are located in the *Technical presets* area of the *Configuration* dialog box.

- General
- Display and refresh
- Log file
- Date formats
- Number formats
- Show or hide work areas
- Folder for document templates
- OCR (text recognition)

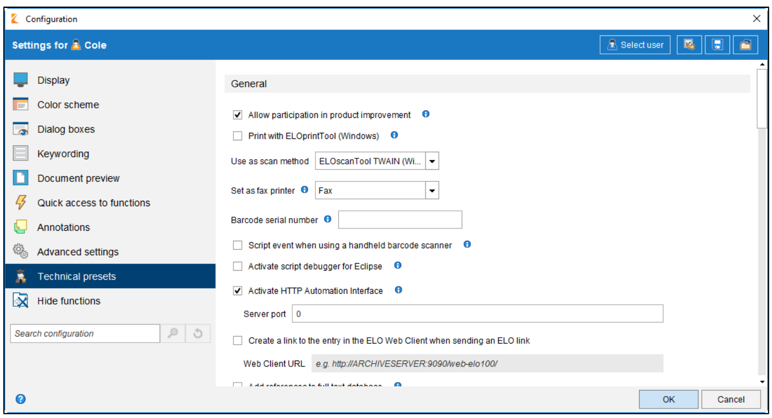


Fig. 276: 'Configuration - Technical presets' dialog box

General

Allow participation in product improvement: Select this option to participate in product improvement.

Print via ELOprintTool (Windows): Printing is performed via the *ELOprintTool*.

Use as scan method: Select which scan method to use.

Please note: The *ELOscanTool* can only be used under Microsoft Windows and requires a 32-bit TWAIN driver.

Set as fax printer: To send a document as a fax, the document must be sent to a fax printer that processes the digital data and sends it to the recipient. Use this setting to specify which fax printer to use.

Barcode serial number: Enter a valid barcode serial number here if you want to use the barcode function at your workstation.

Information: This setting is only available to administrators.

Please note: Barcode serial numbers are unique to each workstation and may not be used multiple times.

Script event when using a handheld barcode scanner: If the *Script event when using a handheld barcode scanner* is enabled, the ELO Java Client sends a corresponding script event as soon as a handheld barcode scanner is recognized.

Information: This setting is only available to administrators.

Activate script debugger for Eclipse: Select the *Activate script debugger for Eclipse* option to activate the script debugger for internal scripts. This will disable the internal script debugger (CTRL+ALT+D).

Activate HTTP Automation Interface: Selecting the *Activate HTTP Automation Interface* option allows you to call scripting functions starting with the prefix *http* via the HTTP Automation Interface. To do so, you need to enter the corresponding port number in the *Server port* field.

The syntax must follow this pattern:

```
http://<server>:<port>/scripts/<script name>/?p1=<parameter value1>&p2=<parameter value2>
```

Server port: To call script functions via the HTTP Automation Interface, you need to enter the corresponding port number in the *Port* field.

Create a link to the entry in the ELO Web Client when sending an ELO link: If this option is enabled, a web link to the entry is embedded in the e-mail when sending an ELO link. This web link can also be used as an ELO link in the ELO Web Client.

Web Client URL: For the additional web link when sending an ELO link (see above) to work, you need to enter the Web Client URL to the *Web Client URL* field.

Add references to full text database: If this option is enabled, references are included when adding to the full text database.

Display and refresh

Cache refresh interval in seconds: Use this option to set the refresh interval of the repository. Work areas and settings are updated at this interval.

Storage duration of thumbnails in the cache: The ELO Java Client stores the created thumbnails to a local cache. In this area, you specify when to delete the cache. Choose from the following options:

- Delete when closing ELO
- Delete after 30 days
- Never delete

Clear document cache on shutdown: If the *Clear document cache on shutdown* option is enabled, the temporary file folder will be emptied when you close the ELO Java Client.

Maximum number of documents in the *In use* **work area**: In this area, you specify how many documents can be checked out at the same time. This prevents too many external applications from being started since this could impact system performance. The default value is *20*.

Maximum number of pages in OCR preprocessing: Use the value in the *Maximum number of pages in the OCR preprocessing* field to specify the maximum number of pages per document to be processed during OCR preprocessing. The default value is *20*.

Start search immediately when clicking a search favorite: You can save and search favorites and use them multiple times via the *Favorites* function on the *Search tools/Search* tab. Select the *Start immediately when clicking a search favorite* option to immediately start the search when clicking a search favorite. If this option is disabled, the search favorite is added without starting the search.

Information: The sort order of the search results always applies to the currently selected page.

Log file

The log file contains the automatic protocol of all or certain processes of an application.

You can make the following settings for the log file:

Write log file: Select this option to write a log file.

Open log file: Open the log file for viewing.

Send log file: Add a log file as a txt file to an e-mail.

Log file path: Define the storage location for the log file.

Information level: Define how detailed you want the information in the log file to be (standard, script development, debug).

Information: You can only make changes to the log file if there is **no** logger entry in the registry.

Date formats

Possible date and time formats: Click this link to show the variables for the configuration of the date and time formats.

Preview: The *Preview* field shows what the date format would look like with the current settings.

Format for date and time entries: Determine the format for the date and time entries here. The format used is displayed as an example in the *Preview* field. The default setting is *Use standard Java date formats*.

Please note: If nothing is displayed in the *Preview* display field, the date entries will not be displayed in the client either.

	Date format: If you have selected the *User-defined* option, you can choose a predefined date format in the *Date format* field or generate your own date format from the variables displayed under *Date and time format options*. **Time**: If you have selected the *User defined* option, you can choose a predefined time format in the *Time* field or generate your own time format from the variables displayed under *Date and time format options*. **Date format that should also be accepted for entries in ELO**: If you have selected the *User defined* option, you can select or create an additional date format that is also valid in ELO in the *Date format that should also be accepted for entries in ELO* field. **Replace date in tables with "Yesterday", "Today", and "Tomorrow" as required**: Select this option to replace the date with *Yesterday*, *Today*, or *Tomorrow* as required. **First weekday in the calendar**: Use the drop-down menu to set the first day of the calendar week in ELO. The default value is *Monday*.
Number formats	**Separator for number entries**: Specify the separators used for numbers here. The default setting is *Use standard Java separators*. **Thousands separator**: If you have selected the *User-defined* option, you can enter a separator to mark numbers higher than one thousand in the *Thousands separator* field. **Decimal separator**: If you have selected the *User-defined* option, you can enter a separator for numbers with decimal places in the *Decimal separator* field.
Show or hide work areas	You can hide or show the *Intray*, *Clipboard*, *Tasks*, *In use* and *Search* work areas with this option.
Folder for document templates	**Path**: Define in which folder the document templates will be stored in the repository.
OCR (text recognition)	**OCR recognition**: Specify here whether you want to perform OCR in fast or detailed (but slower) mode. **Filter**: Use the *Filter* field to filter the *Available languages* column. The column is refreshed as soon as you enter a character. **Reset filters**: Click the *Reset filters* button to delete the current filter term from the *Filter* field. All available languages are displayed.

Available languages: From the list on the left, select the languages for text recognition that will be used to analyze the documents in the repository.

Information: The OCR service and languages are only available when an OCR instance has been installed.

Selected languages: In the *Selected languages* column, you can see which languages have been selected for text recognition.

Disable functions

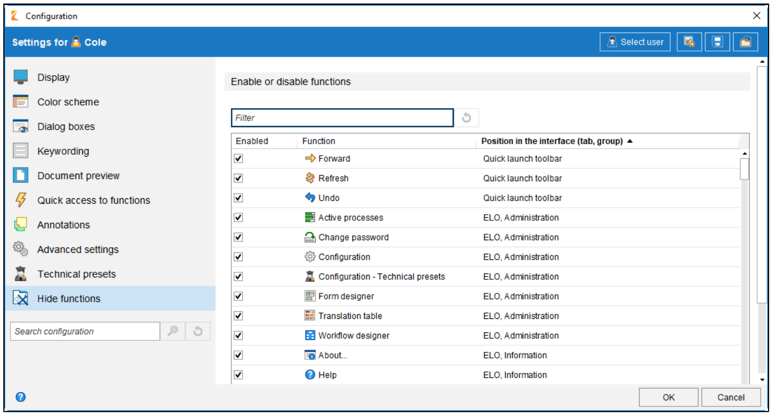


Fig. 277: 'Configuration' dialog box - 'Enable or disable functions'

Enable or disable functions

Enable or disable the functions in the list by clicking the corresponding check boxes. The function is available if the check box is selected. If the check box is cleared, the corresponding function is no longer displayed in the user interface.

Please note: Disabling/enabling functions does not remove any permissions associated with the function.

Filter: Use the *Filter* field to filter the list of functions. The column is refreshed as soon as you enter a character.

Reset filters: Click the *Reset filters* button to delete the current filter term from the *Filter* field. All functions are displayed.

PDF output: Create a PDF overview of the functions.

Enable all: All functions are enabled.

Enable none: All functions are disabled.

Information: Changes here automatically restart the ELO Java Client when you close the *Configuration* dialog box.

Search configuration

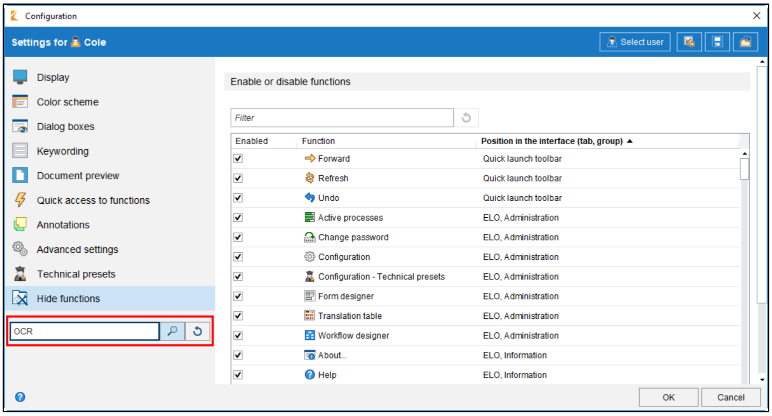


Fig. 278: 'Configuration' dialog box - Search

Search configuration

1. Click in the *Search configuration* field.
2. Enter a search term, e.g. "OCR".
3. Click the *Start search* button (magnifying glass icon).

The corresponding settings are displayed on the right side of the dialog box.

Delete the search term with the *Reset search* button. The *Display* area appears.

Appendix

This chapter provides general information about ELO and information about this manual.

- Website
- Glossary
- Disclaimer of Liability
- Index

Website

Visit the ELO Digital Office GmbH website to find additional information on our software. This information may be useful for users, administrators and developers. Most parts of the website are accessible to everyone. You will require a logon for other areas.

You can find our website on the Internet at:

`http://www.elo.com`

Glossary

The ELO glossary explains and defines important terms, expressions and keywords related to ELO.

Access right
See: Permissions.

Additional modules
Functional modules that are not included in the standard ELO package. They require separate installations and special knowledge of their respective topics.

Administrator
User with maximum rights who cannot be deleted. The administrator is created during ELO server installation. Only the administrator can create new repositories or expand the database after an update.

Administrator rights
This primarily refers to the *Main administrator* right in the user manager, which grants universal permissions within the ELO system. Users with administrator rights can create other users and assign rights to them, as well as manage existing users. Unlike the Administrator user, other users with administration rights can be deleted.

Annotations
See also: Sticky note and margin note.

Barcode
A barcode is a representation of data made up of a pattern of parallel lines and spaces. Barcodes are used to simultaneously code information which can be read by a machine.

Check out/in
To work on a document in the repository, it first needs to be checked out. It is opened in a corresponding application, e.g. a Word document opens in Microsoft Word, for example, where it can be edited. While the document is checked out, it is locked for other users. This is another way in which the system replicates paper-based document processes, just as checking the document back in is like putting a document back into a filing cabinet. However, unlike paper documents, previous versions are also saved and you can undo changes.

Data backup
An effective data backup concept prevents data loss on a large scale. It should be performed on a regular basis. The type and scope of the necessary measures are dependent upon each system.

Database — The database is the heart of the ELO system, its *management center*. This is where every detail about each folder and document is saved, from the keywording to the filing location. ELOprofessional and ELOenterprise use Microsoft SQL Server, Oracle, PostgreSQL or DB2 databases.

Document — Documents are all existing forms of information on paper (invoices, letters, drawings, photographs, etc.) as well as their electronic equivalent in the form of computer files.

Document management system (DMS) — Document management refers to all aspects of digital processing and management of documents. This includes digitizing documents with a scanner, editing existing documents with their respective applications (e.g. Microsoft Office documents), and filing data. Systems which are used for these tasks are known as document management systems, or just DMS for short.

Document viewer — This is a function integrated into ELO which allows documents to be (pre-)viewed.

Drag-and-drop — This refers to the action of selecting a document with the left mouse button, *dragging* it to a new location and *dropping* it there by releasing the left mouse button.

Duplicate — A duplicate is a document which exists more than once in ELO.

Duplicate check — The duplicate check determines whether a file already exists in the ELO repository. If so, the document can be filed anyway, filed as a reference or not filed at all.

DVD publication — Creates a read-only copy of a repository. This can also be viewed on PCs that ELO is not installed on. It is not possible to add documents to the read-only copy.

ELO Viewer — This is the name of the program *EloOVw.exe*. It allows documents to be displayed after DVD publication. It is started by double-clicking the icon. ELO does not need to be installed on a computer for the ELO Viewer to work.

ELOenterprise — The large-scale DMS solution for large companies. Java-based and flexible, with many additional modules (e.g. Replication), and with Microsoft SQL Server, Oracle, PostgreSQL, or DB2 databases as a basis.

ELOprofessional — This DMS solution is ideal for medium-sized companies and usually uses Microsoft SQL Server as its database.

Encryption key/encryption
Encryption keys are used to encrypt documents. Only those users who enter the correct password for the encryption key (assigned to a document) can open the respective document. If entered correctly, the password is requested only once during an ELO session. If you close the software and open it again later, ELO will prompt you for your password again. Encryption keys are assigned when a document is filed. In the file system, encrypted documents will no longer be readable without ELO.

Entry
This is the general term for folders or documents in ELO. An entry can refer to one or the other.

File system
This refers to the organization system for files on the computer's storage medium, such as the folder structure on the computer's "C:" drive.

Filing
Filing refers to the process of assigning attributes to documents which enable them to be found again later (see *Search*) and then saving them into the repository. The system corresponds to the traditional method of filing physical documents. The filed documents make up a part of the repository and database.

Filing cabinet
This looks like a filing cabinet and is used in precisely the same way. An ELO filing cabinet is a graphical element with a separate name that works analogously to a real filing cabinet. It serves as a container for filing folders and documents.

Full text database
In a full text database, all terms are saved that occur in a document. This makes it possible to search for words that occur within a document, but not within its name. For example, within the document `News from 2016-04-01` you can search for words like `Chicago` or `Train`.

Full text search
The full text search searches for the entered term in the full text database of a document. For this to work, the document must have been added to the full text database. The full text search does work with all document types.

Index/Index field
Part of keywording. It allows specific information (such as the invoice number of a bill) to be entered to a predefined field in the keywording form's definition. It can be searched for later.

Interface
See OLE Interface.

Keys
Keys are a way of assigning rights to specifically limit access to folders and documents. Only users who have the necessary keys can open the locked entries. The permissions are verified without any user interaction.

Keywording
Keywording consists of naming a file as well as entering any additionally required information in other index fields, or on the extra text, options, or version history tabs of the keywording form.

Keywording form
A document's keywording form contains typical information for the document, such as the file name and other characteristics. For example, a keywording form for e-mail typically includes fields for sender and recipient, whereas one for invoices might include fields for the invoice number, amount due, payment date, etc.

Margin note
A margin note is a special kind of annotation. It is attached to the edge of the document on the split bar between the tree view and the preview of the document. This means the user can see it at all times while viewing the document, regardless of the page on the document it refers to (unlike sticky notes). It is therefore recommended for annotations that should be noticed immediately.

OLE interface
This is a collection of commands and command structures which allow processes to be automated using scripts, or for connections to be created between ELO and other programs. This interface requires programming knowledge.

Permissions
Permissions allow you to restrict access to an entry in ELO. This means ELO users only see the entries the ELO administrator has given them access to. There are user-based permissions as well as entry-based permissions.

Preview
The *Preview* of a document filed in ELO. The preview is displayed on the right-hand pane of the program window as soon as a document is selected on the left. Information: It is not possible to preview all document types.

Reminder
Reminders help you to keep on top of your tasks so that you know when you need to check or forward a document, e.g. to approve a supplier's invoice in time to take advantage of an early-pay discount. In ELO, that means that the document appears in the *Tasks* work area and can be edited there.

Replication Replication refers to the comparison of data between multiple repositories with equal rights through the use of replication sets. This enables users to work with the same data at multiple company locations simultaneously and subsequently synchronize any changes made between them. The newest version of each document, according to Universal Time Code (UTC), becomes the current version in all synchronized ELO systems within the respective replication set. Any other versions created parallel to the newest one will be placed in the version history.

Replication sets Replication sets represent an identifier – all elements in a replication set are synchronized between locations and repositories that possess this replication set identifier. The creation and management of replication sets requires various additional ELO modules as well as advanced knowledge of ELO.

Repository Figuratively, the ELO repository represents a room in a building. The filing cabinets are in this virtual room. Whereas ELOoffice allows a maximum of five cabinets, ELOprofessional and ELOenterprise do not have this restriction.

Repository synchronization This method of comparing distributed repositories is related to replication and is primarily used with mobile repositories. Unlike replication, however, the mobile component on the central server is dependent on the master data. You can find more details on this feature in the manual on replication.

Rights assignment/management Rights management refers to assigning and managing access to documents and folders. In other words: Which users are able to view or edit a document? In addition, both user-based (*user manager*) and entry-based permissions (e.g. when only the owners of a specific key are allowed to see a folder) are used.

Scan profiles With ELO scan profiles, you can use default settings to scan without having to use the manufacturer's proprietary software. If you use multiple profiles, you can switch between the different settings used without having to repeat entries, such as switching from one-sided (simplex) black and white at 200 dpi resolution, to double-sided (duplex) color at 300 dpi.

Scripting Scripting enables users to automate functions with commands. Programming knowledge is a requirement to effectively use scripting.

Search Searching is a primary function of a DMS system in addition to storing documents. There are various types of searches in ELO. These include iSearch, full text search, direct search, and searching through all documents with the same keywording form.

Short name The *Name* of the file in ELO. This is defined in the keywording form.

Signature, digital/electronic Digital signatures on documents are a legitimate form of handwritten signature. Signed documents can be filed to ELO.

Stamp Stamps in ELO correspond to physical rubber stamps. They exist in various formats for sticky notes and margin notes.

Sticky note A sticky note corresponds to yellow Post-it® notes that are applied to paper documents. In ELO, there are both general (yellow) sticky notes and personal (green) sticky notes - the first will be seen by everyone who views the document. The personal sticky note, on the other hand, is only visible to its creator.

System directory The system directory in ELOoffice contains the repository data as well as the file *syslog.esp*.

TWAIN Name of a standardized interface protocol used by most scanner systems. The use of ELO scan profiles requires scanner drivers which support TWAIN.

User This is a person authorized to log onto and work with ELO. Users and user rights are generally created by the *Administrator*.

User authentication User authentication consists of a user name and a unique password for each ELO user. Only a correct combination of these two entries permits a user to log on to ELO.

User manager This refers to the assignment and management of the rights a user will have within the ELO system. This the responsibility of the *Administrator* or another user or users with administrator rights.

UTC UTC stands for Universal Time Code, which is a unified, coordinated time system for the entire world. It refers to atomic clocks, like that of the United States Naval Observatory in Flagstaff, Arizona. Another name for this term is Coordinated Universal Time.

Version control

By default, ELO works with versions, which means that when a document is checked out, edited, and then checked in again, the original document remains available. It will not be overwritten. In this way, one can access various versions of a document if needed (see *Version history*).

Version history

This area of the keywording indicates what was changed by which user at what time in the keywording - thus, for example, the creation of a new version, the addition of a new file attachment, etc.

Version history

The document versions record the previously created versions of a document. These can be viewed whenever needed or even be made the current working version. This is particularly important when using replication, broker synchronization (BrokerSync), and repository synchronization (ArcSync).

Workflow

A workflow consists of a series of processing steps for a document. These are each completed by respective users before being forwarded to the next step. Each workflow includes a start and end point. Workflows must be defined by an administrator. Here is a basic workflow example: an invoice is received at step 1 of the workflow, is checked at step 2, and then, depending upon the result of step 2, is forwarded to accounts at step 3 for payment or to a user at step 4 if there any questions that need to be resolved. A clearly defined workflow is a tried-and-tested method for automating frequently recurring processes.

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ELO Digital Office GmbH, Tübinger Strasse 43, 70178 Stuttgart, Germany; info@elo.com, www.elo.com
ELO Digital Office AT GmbH, Leonfeldner Strasse 2-4, 4040 Linz, Austria; info@elo.at, www.elo.at
ELO Digital Office CH AG, Industriestrasse 50b, CH-8304 Wallisellen, Switzerland; info@elo.ch, www.elo.ch

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Index