# ELO Contract 1.07 with ELO 20

**February 2021**



[29.03.2021-09:46]

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# Welcome



**Please note**

Every effort has been made to ensure that this product is as accurate as possible. However, as we are continuously developing the ELO Business Solutions and produce multiple versions in parallel, the status of these programs changes very quickly. For this reason, there may be minor discrepancies between the descriptions and images in the manual and in the app. We ask for your understanding if this occurs.

# Conventions

The following conventions apply for this user 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**: This information should be noted to ensure the program runs without 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` in 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*. |

# Contents of the manual

The goal of this user guide is to explain all functions of Business Solution ELO Contract.

**Copyright** The first chapter contains general information about using the manual and an overview of the chapter content.

**Basics** The *Basics* chapter explains the basics of ELO Contract.

**Possible actions** The remaining chapters address possible actions using ELO Contract.

**Appendix** The *appendix* includes information on the website, a glossary as well as the Disclaimer of Liability.

# Target audience

This manual is addressed to Business Solution ELO Contract users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this manual may differ greatly from those in your client.

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

# Basics

**Overview**

ELO Business Solution Contract lets you take charge of incoming and outgoing contracts across their entire lifecycle.

Contract management already starts during contract initiation and includes the draft phase, approval, negotiation, contract maintenance, and termination. A template management system is available for easy contract document creation, allowing you to apply basic information automatically. Standard procedures for internal approval processes, concluding contracts, and contract termination are available as well.

A dashboard helps you to visualize contract phases.

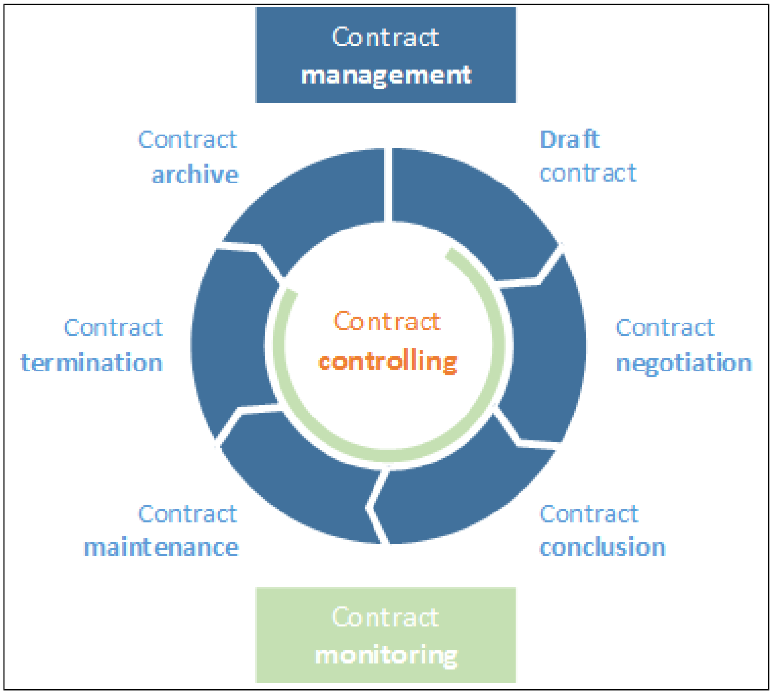


Fig. 1: Contract lifecycle

**General note**

ELO Contract works with the following clients:

- ELO Web Client
- ELO Java Client
- ELO Desktop Client

**Information**: In this manual, we use screenshots from the ELO Web Client.

**Requirements**

Your administrator must have configured ELO Contract for you.

# Program interface

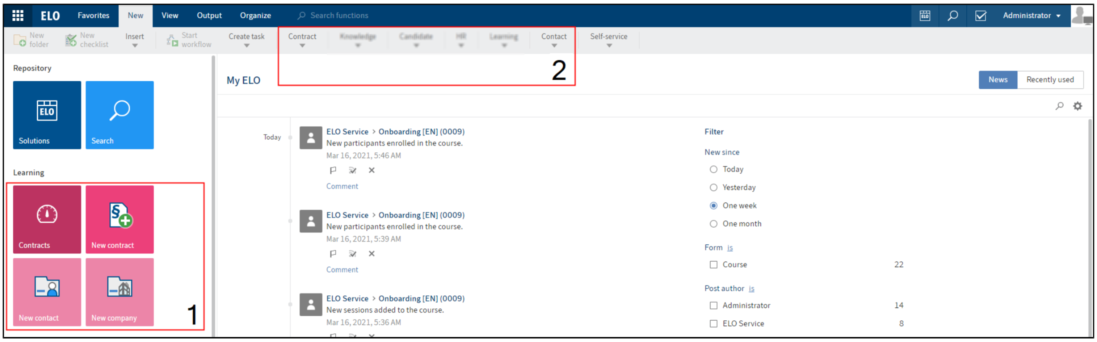


Fig. 2: Business Solution ELO Contract program interface

You will find ELO Contract functions in the following areas:

**1** *Contracts* and *New contract* tiles in the tile navigation area

You can access the contract monitoring dashboard by clicking the *Contracts* tile.

The *New contact* and *New company* tiles are used for contact management.

**2** *Contract* group on the *New* tab

This is where you can create new contracts and generate overviews of existing contracts.

The *Contact* tab is where you manage contacts.

See the *Contact management* chapter for more information.


Fig. 3: 'Contract' tab

**3** *Contract* tab

When you select an existing contract, the *Contract* tab opens.

You can access most contract management functions on this tab.

# Repository

The structure and appearance of the repository depend greatly on your specific configuration. The standard process is described here.

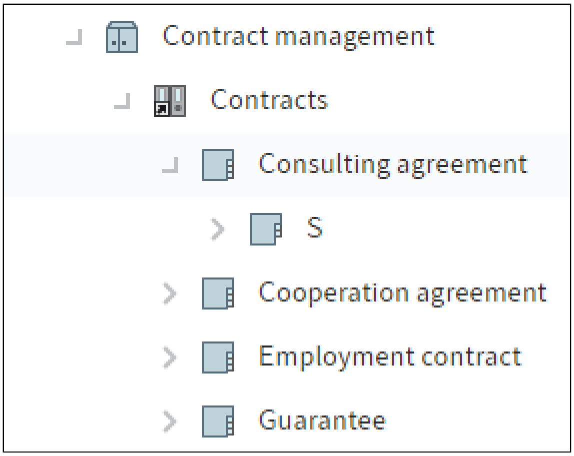


Fig. 4: Contract management in the repository

Contracts are filed to *// Contract management // Contracts // [Contract type]*.

You will also find references to contracts in dynamic folders. You can use these folders to search for specific contracts, such as by status.

**Contract types**

All contracts must be based on a contract type. Contract types automatically enter information when filing a contract.

If you don't have to select the contract type when creating a contract, this means that only one contract type has been configured, which is then selected automatically.

## Contracts

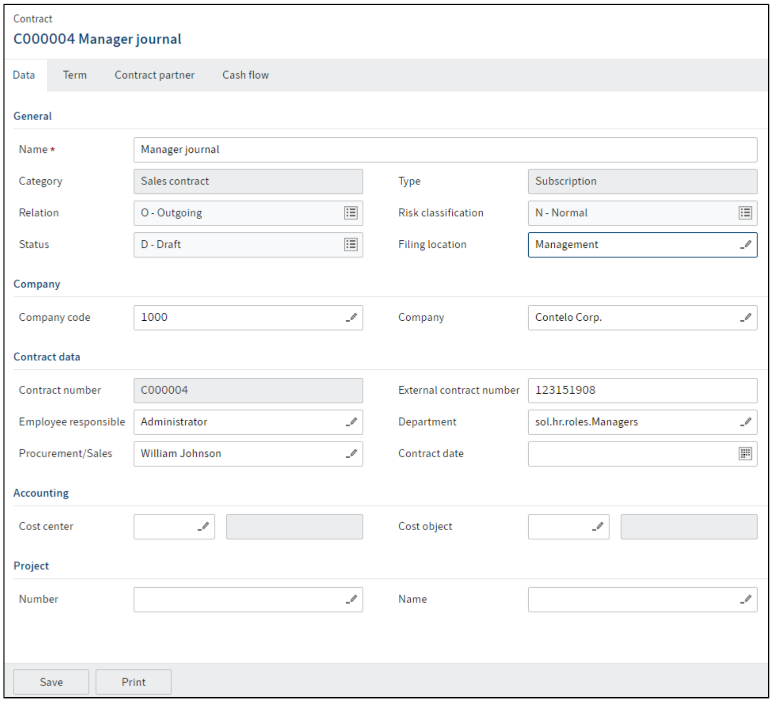


Fig. 5: Contract file form

Each contract file that is created contains a form.

This form contains the relevant information from the contract as well as its current status.

During the contract lifecycle, the form is edited or supplemented with information by the users involved in the process. The status changes automatically.

A contract can have the following statuses:

- D - Draft
- I - Approval initiated
- A - Approved
- N - In negotiation
- S - Concluded
- T - Terminated
- C - Canceled

Contracts can be created without a term, with a limited term, and with an unlimited term.

# Create contract

**Information**

You can create new contracts or existing ones in ELO.

When creating a contract, you can enter new contact data in the contact list as needed.

**Method**

1. On the *New* tab, click *Contract* > *New contract*.

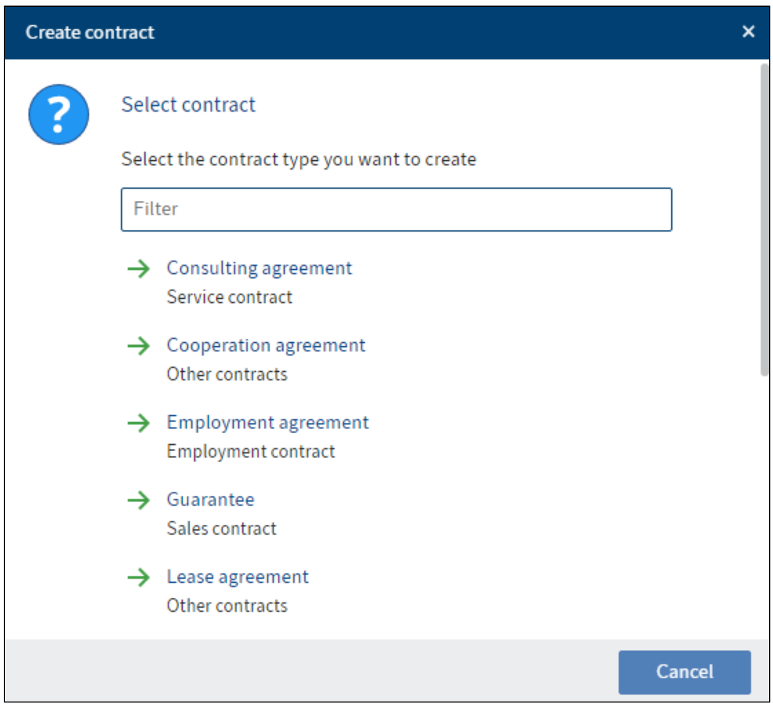


Fig. 6: 'Select contract' dialog box

**Optional**: If multiple contract types have been created, you first have to choose a contract type. By selecting a contract type, relevant information is automatically entered in the contract file.

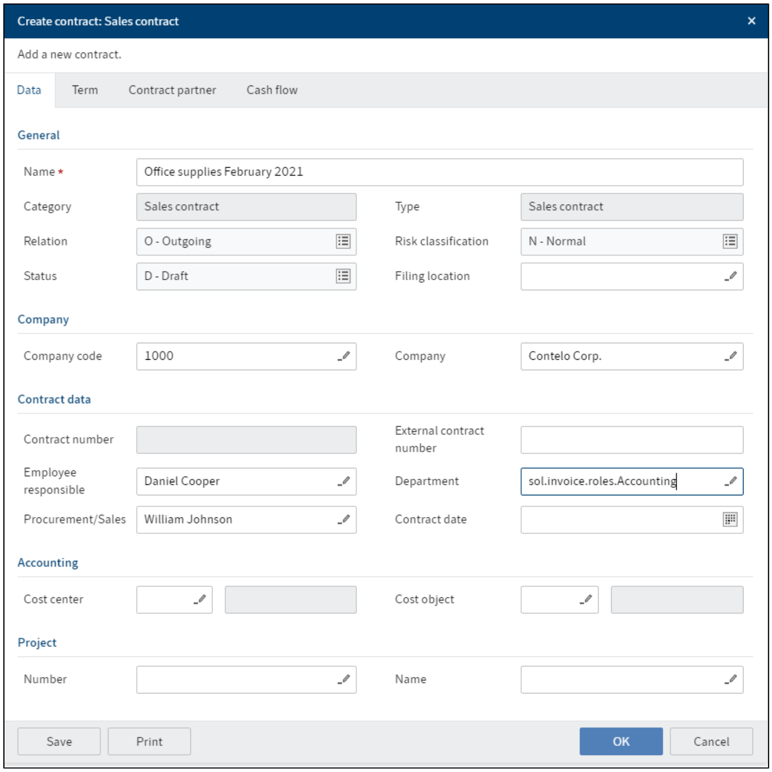


Fig. 7: 'Create contract' dialog box

2. Complete the fields in the *Create contract* dialog box as required.

You will find the input fields to create a contract on four tabs.

Depending on the contract type, master data may already be filled out. You will recognize such data by the gray background. You can change the entries in the *Relation*, *Risk classification*, and *Status* fields using the drop-down menus.

Mandatory fields are marked with a red asterisk. Combined mandatory fields are marked with a blue asterisk. One of the two fields must be completed.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

**Contract number**: The contract number is generated automatically as soon as you have created the contract.

**Create contact**: If this is a new contact you want to create, enable the *Create new contacts* option on the *Contract partner* tab.

**Result**

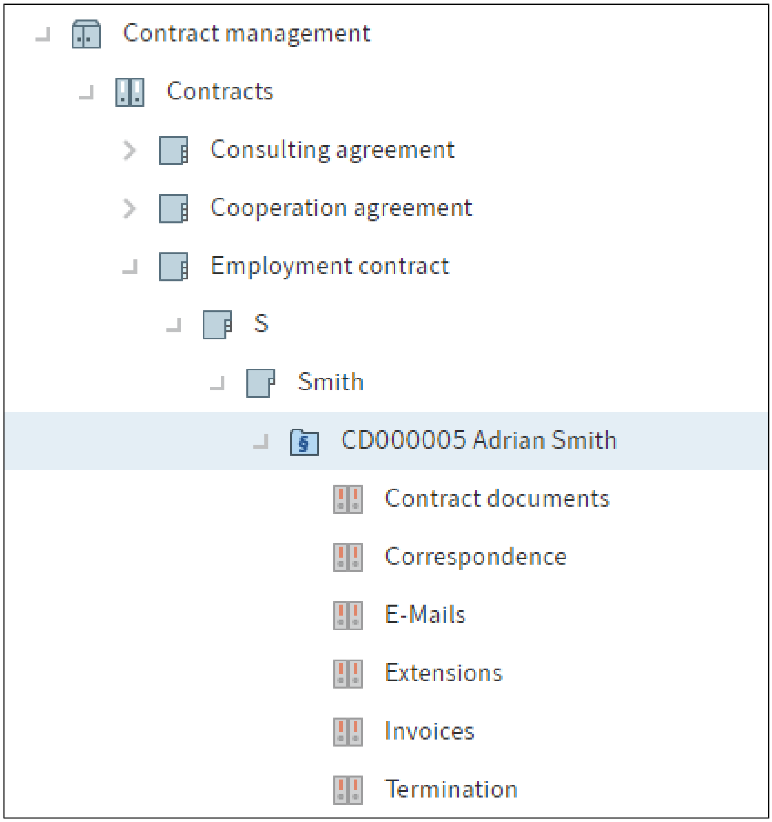


Fig. 8: New contract in the repository

A new contract is created with child folders.

**Outlook**

You can file record objects related to the contract in the corresponding child folders.

**Please note**: When filing documents related to a contract, make sure to use the *Contract document* metadata form. This is the only way to inherit information relevant for searches.

Depending on the status of the contract, you can perform actions described in the *Contract processes* chapter.

Using the functions described in the *Create related contract documents* chapter, you can automatically create documents with information from the contract.

If you have added a new contact, the new contact data will be available in a keyword list when creating new contracts.

# Contract processes

After creating a contract in ELO, you can map the following processes in ELO:

- Initiate approval
- Negotiate contract
- Conclude contract
- Cancel negotiation
- Initiate termination

These individual processes do not have to be performed as an overall process, meaning that less complex contracts can be completed without any steps.

# Initiate approval

**Information**

You would like to initiate the approval process for a contract. Approval can be initiated during any phase. During approval, all involved parties can make changes to the contract.

**Method**

1. Select the contract you want to initiate the approval process for.

2. On the *Contract* tab, click *Initiate approval*.

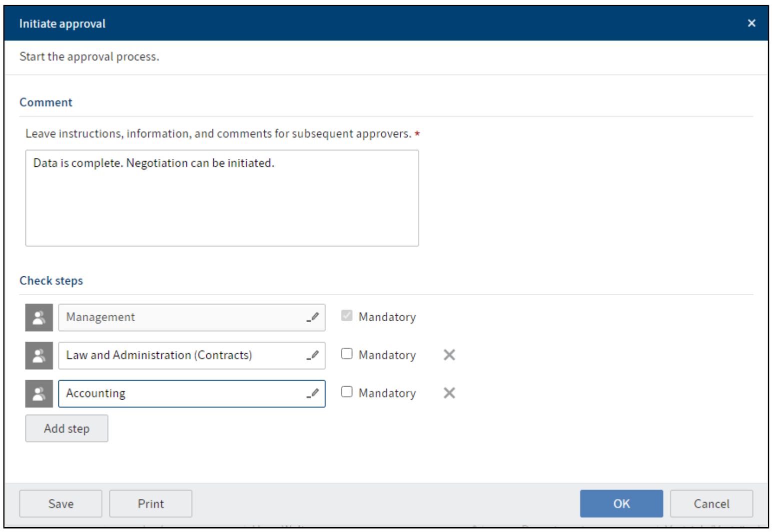


Fig. 9: 'Initiate approval' dialog box

3. In the *Initiate approval* dialog box, complete the fields as required.

**Check steps**: Enter the check steps. To prevent users from being able to skip a check step, check the box next to *Mandatory*. As a result, the subsequent check steps cannot be ignored.

**Result**

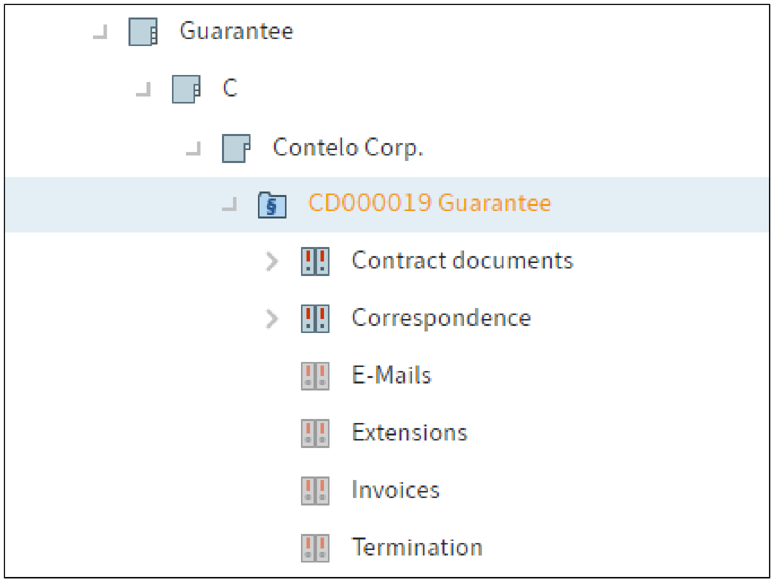


Fig. 10: Contract file in the repository

An approval workflow is started and is sent to the specified approver(s).

When the approval workflow is still pending, the contract has the status *I - Approval initiated*. After the approval workflow is completed, the contract has the status *A - Approved*. The contract file is shown in a yellow font.

# Approve

**Information**

If you have received a contract for approval, it will appear in your *Tasks* work area.

**Method**

1. In the *Tasks* work area, select the workflow with the contract you are supposed to approve.

2. Click *Accept workflow* to process the form.

3. Check the contract you are supposed to approve and enter a comment to the input field for the next editors.

**Optional**: Enter an additional check step as needed.

4. Click *Approve*.

**Result**

The workflow is forwarded to the next check step/the responsible department.

# Negotiate contract

| | |
|---|---|
| **Information** | You would like to initiate negotiations for a contract. |
| **Method** | 1. Select the contract you want to initiate the negotiation process for.<br>2. On the *Contract* tab, click *Negotiate contract*. |
| **Result** | The status of the contract changes to *N - In negotiation*.<br>An automatic feed post is created. |

# Conclude contract

**Information**

You want to conclude a contract. To search for active and inactive contracts, valid contracts have to be marked as concluded.

**Method**

1. Select the contract you want to conclude.

2. On the *Contract* tab, click *Conclude contract*.

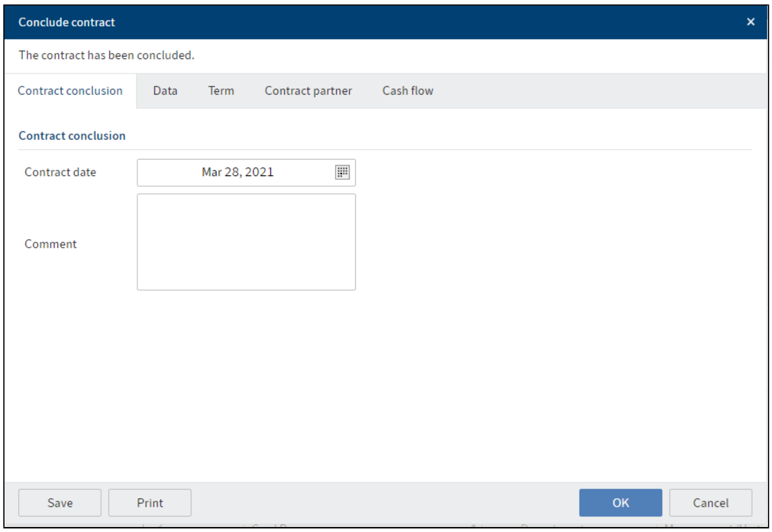


Fig. 11: 'Contract conclusion' dialog box

3. In the *Contract conclusion* dialog box, complete the fields on the *Contract conclusion* tab as required.

The fields on the *Data*, *Term*, *Contract partner*, and *Cash flow* tabs are already completed.

**Result**

Fig. 12: Contract file in the repository

The status of the contract changes to *S - Concluded*. The contract file is shown in a green font.

# Cancel negotiation

| | |
|---|---|
| **Information** | You would like to cancel negotiations for a contract. |
| **Method** | 1. Select the contract you want to cancel the negotiation process for. |
| | 2. On the *Contract* tab, click *Cancel negotiation*. |
| **Result** | The status of the contract changes to *C - Canceled*. |
| | An automatic feed post is created. |

# Initiate termination

**Information**

You want to terminate a contract. Once a contract is completed, it has to be terminated to signalize the end of the contract in ELO. Before concluding the contract, use the *Cancel negotiation* function.

**Method**

1. Select the contract you want to terminate.
2. On the *Contract* tab, click *Initiate termination*.

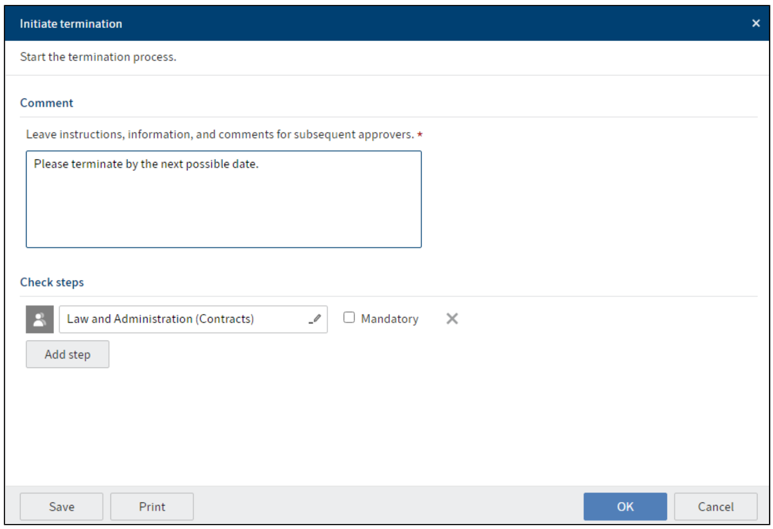


Fig. 13: 'Initiate termination' dialog box

3. In the *Initiate termination* dialog box, complete the fields as required.

**Check steps**: Enter the check steps. To prevent users from being able to skip a check step, check the box next to *Mandatory*. As a result, the subsequent check steps cannot be ignored.

**Result**

A termination workflow is started and is sent to the specified approver.

**Outlook**

During the termination process, the contract maintains its existing status. Once the contract is terminated, the contract status changes to *T - Terminated*.

# Terminate contract

**Information**

If you have received a contract for termination, it will appear in your *Tasks* work area.

**Method**

1. In the *Tasks* work area, select the workflow with the contract you are supposed to terminate.

**Optional**: Click *Accept workflow* to process the form.

2. Check the contract you are supposed to terminate and enter a comment to the input field.

**Optional**: Enter an additional check step as needed.

3. Click *Accept*.

**Result**

The status of the contract changes to *T - Terminated*.

A feed post is created with the comment you entered.

# Create related contract documents

You can automatically create documents related to contracts.

This chapter addresses the following functions:

- Create document
- Update document
- Create cover sheet
- Create label

# Create document

**Information**

You want to automatically create a document with the data from a contract. Use document templates for this. Document templates contain placeholders that are automatically replaced with the information from the contract.

**Condition**

At least one document template must be available.

**Method**

1. Select the folder for the contract you want to generate a document for.

2. On the *Contract* tab, click *Create document*.

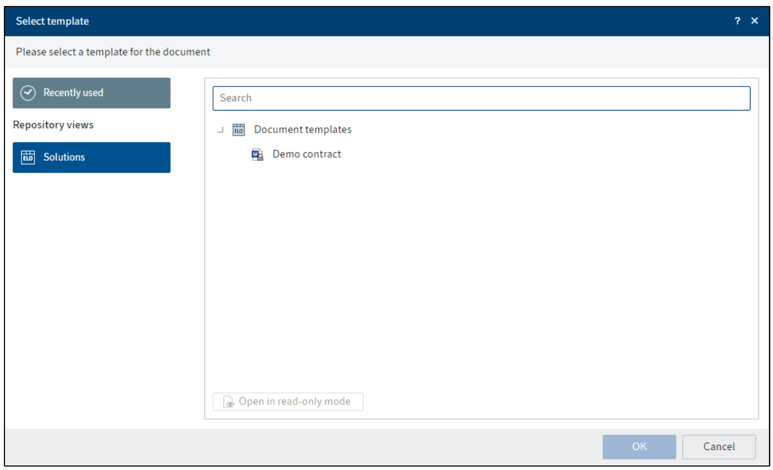


Fig. 14: 'Select template' dialog box

3. In the *Select template* dialog box, select a document template and confirm with *OK*.

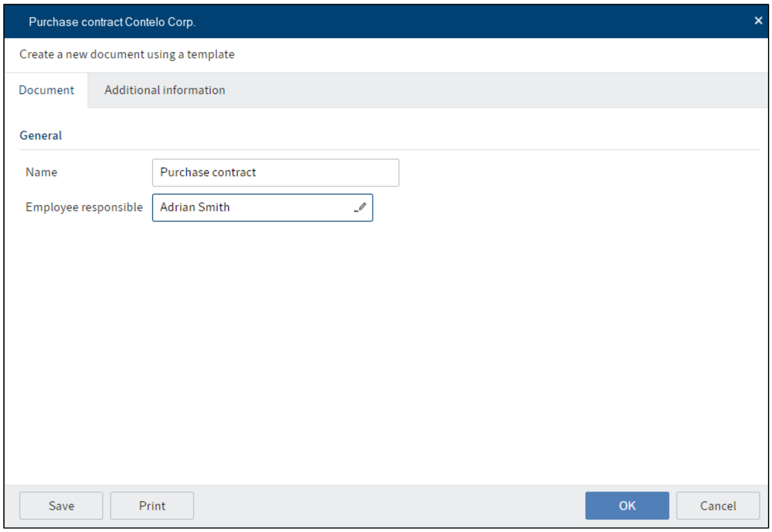


Fig. 15: 'Create new document' dialog box

4. In the *Create new document* dialog box, you can change the name of the document and the responsible user.

The fields on the *Additional information* tab contain the contract information and cannot be changed.

**Result**

The document is added to the selected folder and opened.

**Outlook**

You can edit the document and print it for use.

If any contract information changes, you can apply changes using the *Update document* function.

The *Update document* function has no effect on subsequent changes to the document. It only updates the information automatically transferred from the form.

# Update document

**Information**

For example, if contract data changes after a document has been generated using the *Create document* function, you can update the document. As a result, you do not have to create a new document or make manual changes to an existing one.

The *Update document* function has no effect on subsequent changes to the document. It only updates the information automatically transferred from the form.

**Method**

1. Select the document you want to update.
2. On the *Contract* tab, click *Update document*.

**Result**

Old information and blank spaces in the document are replaced with new information from the contract.

# Create cover sheet

**Information** Use this function to create a cover sheet for the selected contract.

**Method**

1. Select the contract you want to create a cover sheet for.
2. On the *Contract* tab, click *Create cover sheet*.

**Result**

**Contract**

C000005

**Manager journal**

| | |
|---|---|
| Contract partner | Contelo Corp.<br>Cooper, Daniel |
| Employee responsible | Adrian Smith |
| Contract type | Subscription |
| Contract conclusion | 22.03.2021 |
| Relation | I - Incoming |

Fig. 16: Cover sheet

The cover sheet is saved to the file.

**Outlook** The cover sheet contains information on the contract as well as a QR code. If you print the cover sheet and file it to a physical file, mobile end devices will take you straight to the digital file by scanning the QR code.

# Create label

**Information**

Use this function to create a label for the selected contract file.

**Method**

1. Select the contract you want to create a label for.
2. On the *Contract* tab, click *Create label*.

**Result**


Fig. 17: Label with QR code

The label is filed to the contract file.

**Outlook**

The label contains information on the contract as well as a QR code. If you print the label using a label printer and file it to a physical file, mobile end devices will take you straight to the digital file by scanning the QR code.

If you want to use the *Print document* function in the ELO Java Client, you will have to set the label printer as the default printer in Windows.

You can also select the label printer as the default printer for faxes in the ELO Java Client configuration and print using the *Fax document* function.

# Overviews

Reports and dashboards help give you an overview of your contracts.

# Reports

**Information**

You can create reports to analyze contracts. A report is filed to your repository as an Excel table. When you create a report, it is only visible to you.

Reports are based on templates. These templates filter the contracts based on specified criteria.

The following reports are available:

- **Contract report**: This report type creates a report with the values within the selected folder.
- **Cash flow**: This report type creates a report with the cash flows for all contracts.

**Method**

1. Select the folder you want to create a report for.

**Information**: The contracts do not have to be located directly below the selected folder. But the more child folders there are, the more time it will take to create the report.

2. On the *New* tab, click *Contract* > *Create contract report* or *Contract* > *Create cash flow*.

**Optional**: Select a report template. If only one report template has been created, it is selected automatically.

**Result: Contracts**

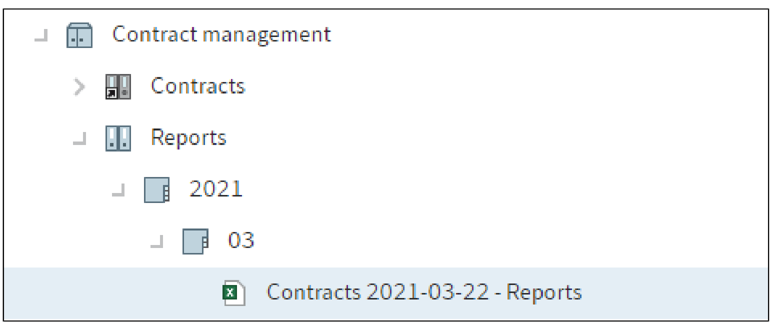


Fig. 18: Reports in the repository

The document with the contract overview opens and is created under *Reports* by default.

By default, the report contains the *Table1* and *Data* tabs.

Under *Table1*, you will find a visualization of the selected contracts. With a pivot table, you can customize the report and use it for calculations.

Under *Data*, you will find a list of selected contracts with the information preset in the report template.

**Result: cash flow**

The document with the contract overview opens and is created under *Reports* by default.

By default, the report contains the *Data* tab. You will find a list of the cash flows here.

# Dashboard

The dashboard provides an overview of all filed contracts.

You can reach the dashboard by clicking the *Contracts* tile in the *My ELO* area.

The dashboard remembers your settings. When you exit then open the dashboard again, it remembers and displays your most recent view.

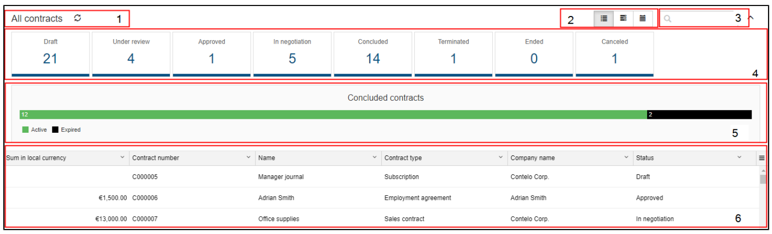


Fig. 19: Dashboard in the table view

The dashboard is divided into the following areas:

**1 Database**: In the dashboard header, use the drop-down menu (arrow icon) to select a database. A dashboard database is a list of contracts that is loaded for evaluation.

**Information**: If there is only one database, this database is selected permanently and no drop-down menu is available.

**2 Table/Timeline/Calendar**: You can choose between three dashboard views: *Table*, *Timeline*, and *Calendar*.

**3 Search**: In addition to text values, you can also search for deadlines and amounts. All data that you can select as column values in the table view serves as the basis.

**4 Status**: The dashboard header contains a button for each contract status. If a button is active, all contracts with the corresponding status are shown in the dashboard viewer pane.

**5 Concluded contracts**: If concluded contracts exist in the database, a bar appears with the statuses of the concluded contract. Entered contract deadlines serve as the basis.

**6 Viewer pane**: In the dashboard viewer pane, you will see a list of contracts. This list changes depending on the filter criteria applied.

**Table**

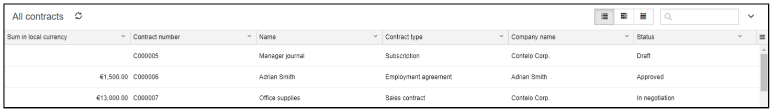

Fig. 20: Table view

Clicking an entry shows a preview of the entry. Double-clicking an entry brings you to the repository.

Customize the table view using the drop-down menus.

Fig. 21: Customizing the table view

The drop-down menus in the column headings contain the following functions:

- **Sort ascending**
- **Sort descending**
- **Remove sorting**: This option appears if you have sorted the column.

**Alternative**: You can sort the column by clicking the column heading. Clicking once sorts in ascending order. Clicking a second time sorts in descending order. Clicking a third time clears sorting.

- **Hide column**
- **Group**: The content of a column is joined into groups. The number of contracts in each group is shown in brackets. Click the plus icon before the group to expand it and view all contained contracts. The minus icon minimizes it again. Clicking the plus icon in the header expands all groups.

**Information**: You can combine multiple groups. You can specify a hierarchy with the order in which you select the columns.

- **Reset grouping**: This option appears if you have grouped items. Click *Reset grouping* to discard the group.
- **Agg: Total** (only for number fields and when another column is grouped): The total of the group is shown.
- **Agg: Minimum** (only for number fields and when another column is grouped): The lowest value of the group is shown.
- **Agg: Maximum** (only for number fields and when another column is grouped): The highest value of the group is shown.
- **Agg: Average** (only for number fields and when another column is grouped): The average of the group is shown.

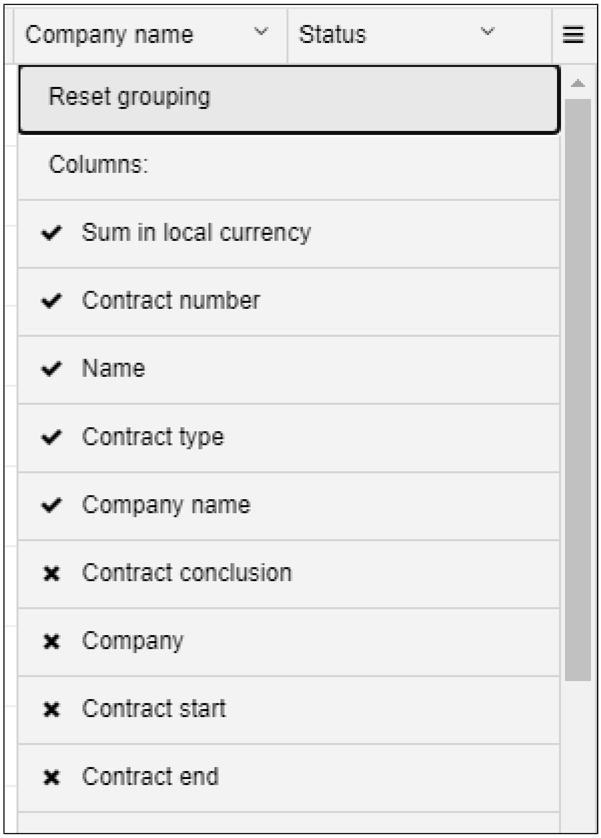


Fig. 22: Overview of all columns

**Menu**: You can show hidden columns.

**Timeline**

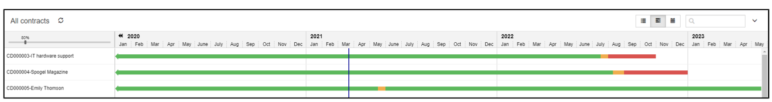

Fig. 23: Timeline view

The timeline view visualizes the duration of contracts with color bars.

If the beginning or end of the duration is outside of the time frame shown, this is indicated by an arrow at the beginning or end of the bar.

You can recognize the contract status by the color.

- **Green**: Active contract
- **Yellow**: Termination deadline coming up
- **Red**: Contract expiring
- **Green-expiring**: Contract with extension

The current day is marked with a vertical blue line.

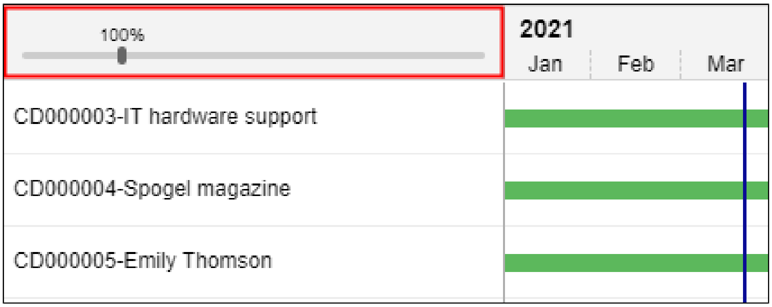


Fig. 24: Zoom

There is a zoom button at the top left of the dashboard viewer pane. Move it left or right to zoom in or out horizontally.

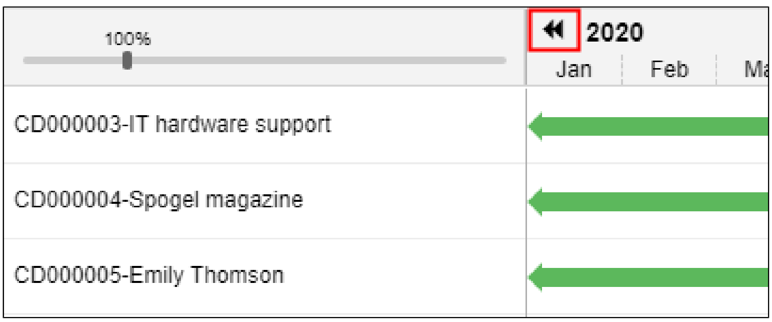


Fig. 25: Extending the time frame

By default, four years from the current year are shown. You can extend this time frame by clicking the double left arrow to the left or right of the timeline.

## Calendar

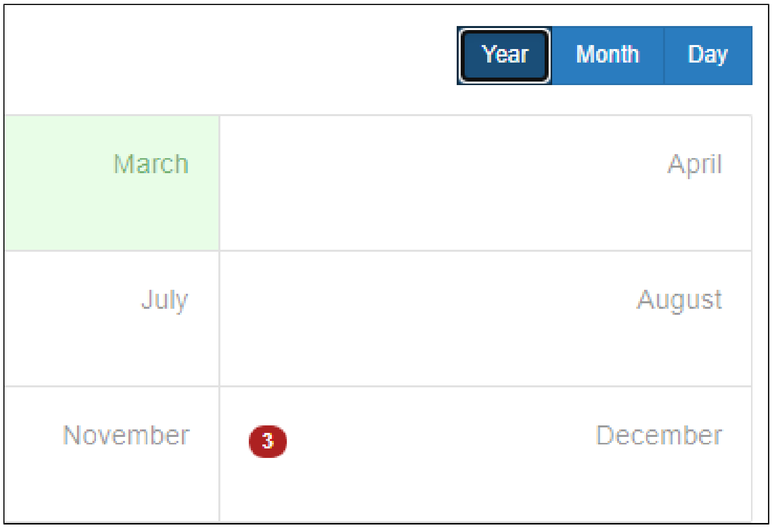


Fig. 26: 'Year', 'Month', and 'Day' buttons

The calendar offers three options: *Year*, *Month*, and *Day*.

Reminders, termination deadlines, and contract end dates are shown in all views.

**Information**: Only contracts with deadlines are shown in the calendar view.

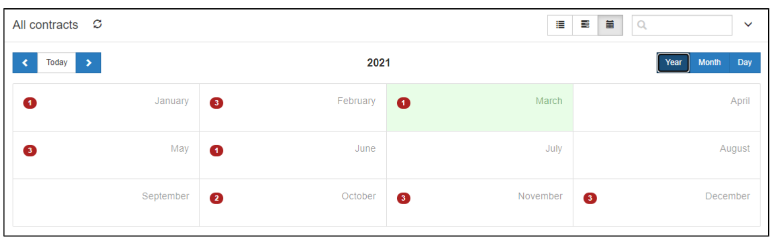


Fig. 27: Annual view

**Year**: The annual view shows the number of contract deadlines each month. For more detailed information on a month, click the month.


Fig. 28: Month view

**Month**: The month view shows the number of contract deadlines each day. For more detailed information on a day, click the day.

To preview a contract, click the contract.

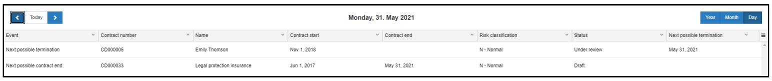


Fig. 29: Day view

**Day**: The day view lists the contracts for the selected day. It works in the same way as the table view.

# Contact management

You can save companies and contacts to speed up the process of creating new contracts. If you select a contact when creating a contract, the data stored for this contact is automatically entered in the correct fields.

When creating a contract, you can save the contact you have entered or use the following functions on the *Contacts* tab:

- New contact list
- New company
- New contact

**Create overview of contacts**

To get an overview of your contacts, use the *Create overview of contacts* function. The overview of contacts is filed as a PDF document at the selected position.

**Create contact label**

When you select a contact from your contact list, the *Contact* tab opens containing the *Create contact label* function.

This function creates a contact label that is stored in the contact's folder.

The label contains information on the contact as well as a QR code. If you print the label using a label printer and file it to a physical folder, mobile end devices will take you straight to the digital folder by scanning the QR code.

If you want to use the *Print document* function in the ELO Java Client, you will have to set the label printer as the default printer in Windows.

You can also select the label printer as the default printer for faxes in the ELO Java Client configuration and print using the *Fax document* function.

# Appendix

This chapter provides general information about ELO and information about this manual.

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# Website

The ELO Digital Office GmbH website contains additional information on our software. This information is helpful for users, administrators, and developers. Most parts of the website are accessible to everyone. You will require a logon for other areas.

Our website address is:

`http://www.elo.com`

# Disclaimer of Liability

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