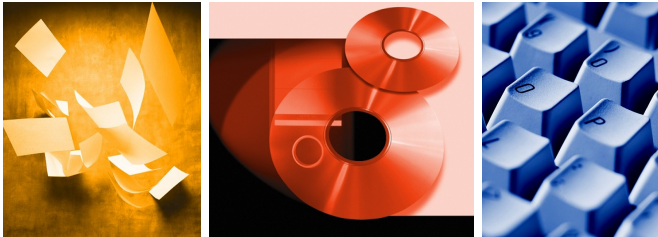


# **ELO***professional*

Document Management and Archiving Software



## **CLIENT**

**August 2005**

**ELO Digital Office GmbH**

**<http://www.elo-digital.de>**

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# Preliminary note

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## copyright notices

### Note on the printed version of this manual:

You can find more extensive **online help** either on the installation CD, or after installing **ELO**, in the program menu:

*Start, Programs, ELOprofessional CLIENT manual.*

### Copyright

ELO Digital Office GmbH is the copyright holder for this program. The product may only be copied and used in accordance with the License Agreements.

It is illegal to wholly or partly copy, reproduce or transmit **ELOprofessional** as a full version.

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### Trademarks

**ELO professionalis** a registered trademark of ELO Digital Office GmbH.

MS Windows, MS Word, MS Outlook and MS Excel are registered trademarks of Microsoft Corporation. All other product names are protected by copyright and are registered trademarks or brand names of their respective owners

We have made every effort to supply product documentation that is as accurate as possible. However, as we are continuously developing **ELO***professional* and producing several parallel versions, the program status is subject to change without notice. Minor errors may therefore occur in the contents of this manual under certain circumstances.

We apologize for any inconvenience.

ELO Digital Office GmbH

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# Welcome

Welcome to the 21st century – with **ELO***professional*, the best electronic document management and archiving system for the office of the future.

Experts estimate that the volume of information to be processed will increase by 25 percent every year and will continue to increase in the next few years.

## Growing mass of information

These enormous data volumes can only be processed with sophisticated communication and information technology in the office. However: the use of these new technologies will also increase the volume of stored information. That's why, in the future, efficient filing and retrieval of documents and written material will become increasingly important.

Above all, it is the interface to this digitized information that is increasingly significant. ELO Digital Office has prepared for these changes in the way we work with information in the office – for example, with this very document management and archiving software, **ELO***professional*, which will assist you in your daily office work.

## Archiving out of the very top drawer.

Whether you are copying, forwarding, retrieving or simply archiving documents: with **ELO** you can do all this instantly and effortlessly, because **ELO** is a data management and archiving program of the highest class. That means impenetrable mountains of files and row upon row of filing cabinets are now largely a thing of the past

But **ELO** is more than just a visual representation of the existing filing cabinets on your computer. The major advantage of an electronic document management and archiving system is that the information is structured and stored in the best possible way.

## Save time

A wealth of features ensure you can retrieve your archived documents quickly and securely. And you gain something rather important - time. Because over a year, the two minutes you spend searching every day add up to a full day's work. **ELO** puts an end to all that. You now have instant access to every archived document.

Of course, the term *document* is not limited to paper documents alone. It also includes images, speech, video clips etc. All of these *types of information* can be easily managed in **ELO***professional* in a standardized way.

## Optimal data security

**ELO***professional* also enhances document protection using, for example, access rights, copy protection and version control.

## State-of-the-art technology

Thanks to its MS Outlook integration, you can file incoming e-mails directly in **ELO***professional* and with the optional additional modules **BARCODE**, **COLD**, **NOTES**, **INTERNET** and **FULLTEXT** you can optimize the efficiency of the program to an even greater degree.

**ELO** *professional*, therefore, can give you the essential support you need to deal with the growing mass of information now and in the future. Because of the time, money, space and energy you will save, you'll soon find you can't live without the benefits of our document management and archiving system.

**ELO***professional* brings the dream of a paperless office a great deal closer.

ELO Digital Office GmbH



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# Conventions

The manual contains numerous notes, instructions and suggestions for program dialog boxes, menu items and tips. The following conventions are followed in this documentation. Text is shown as follows:

## Italics

The names of menus, options, dialog boxes, folders, references to chapters, paths and file extensions are printed *italics*.

Example: Click on the menu item *Options* and select the *Mail* index card.

## Upper case

Key combinations are printed in UPPER CASE. A plus sign (+) between the key descriptions means they should be pressed simultaneously.

Example: CTRL + C

## Bold

Hyperlinks – such as **www.elo-digital.com** –, **chapter headings** in running text – such as **references to the manual** – are highlighted in **bold** type.

## Underline

Parts of words, letters and other points to be emphasized can be underlined where necessary.

## Courier Bold

**Text to be entered in ELO is shown in Courier Bold font.**

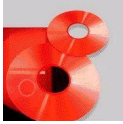
Example: **[reg=] L4 (2,1)**

## Courier

Program code, program outputs and scripts are shown in Courier font.

Example:

```
Set Elo=CreateObject("ELO.professional")
```



# Chapter 1

---

## First steps

This section provides you with an overview of **ELO***professional*. You will find out how to start the program and get to know the most important areas of it. Finally, we will show you the best way to navigate through your electronic data management and archiving system. It covers the following topics:

- Getting started
- Notes on using the manual
- Starting **ELO** *professional*
- The **ELO***professional* work area
- Navigation through the archive

---

# Getting started

**ELO** *professional* organizes your documents in a way that is clear and easy to use and corresponds to the way you're used to working in the office. But some people may not take to electronic document management as naturally as others.

There can be many reasons for this, but it's usually because of ingrained methods of working and predetermined organizational mechanisms. In the course of a day's work it is also hard to find the time to dedicate to a new tool or to integrate it fully into existing working methods.

The fact that using **ELO***professional* means that your documents and written material are no longer physically held in your hands, but are stored on your PC will make many people ask:

- Are my documents secure?
- What happens if the PC crashes?

## **Don't fear the unknown!**

You will soon put these uncertainties behind you once you see the benefits of electronic archiving with **ELO***professional*. Now, failsafe hard disk systems and the many back up options (tape drive, CD, MOD, DVD etc.) mean optimal data security.

## **Start by taking one step at a time.**

To overcome initial uncertainties, take our advice when using **ELO***professional*: Take one step at a time. Plan how you want your entire filing structure to look, begin by filing only small sections of your current archive.

First of all, archive those documents that you access most frequently and that you can initially archive independently of the entire process (e.g. instructions, guidelines or tabular notes that assist your work). Doing this will mean you can get started very quickly. Then you can start to add other areas (e.g. transaction files, project documents, personal PC documents, faxes received, order transactions etc.) into **ELO***professional*.

## **Take your time**

Generally speaking, there is plenty of scope for optimizing workflows in everyday work. Once these improvements have been implemented correctly they have a positive outcome on the effectiveness and efficiency of workflows. But in the daily routine you are often unable to devote a lot of time to optimization efforts.

However, in this case, we at ELO Digital Office recommend that you take the time you need. Because you will save all the time you invest initially many times over later on.

---

# Starting **ELO***professional*

You start **ELO** *professional* in the same familiar way you start all Windows programs. Proceed as follows: it is easier and quicker to put a shortcut to **ELO** on the desktop. You can find more on how to do this in the Windows user manual.

## Starting **ELO**

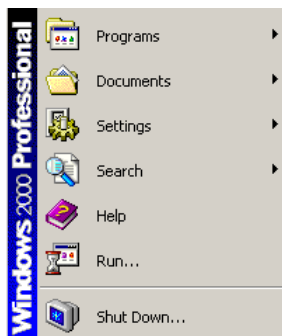
Or start **ELO***professional* from the taskbar:

1. On the taskbar, click on *Start*.

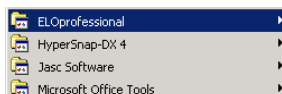


The Windows 2000, Windows 2003 or Windows XP program menu appears at the bottom-left of your screen.

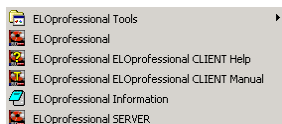
2. Point to *Programs*. Another window opens, containing all the programs installed on your computer.



3. Point to the **ELO***professional* program group. This opens the **ELO***professional* program group folder.



4. Now click on **ELO***professional*. That starts **ELO***professional*, the document management and archiving system.



## The ELO login dialog



Fig. Login dialog

First you will see the **ELO login dialog**. Enter your name and the password that you received from your system administrator. In the *Archive* field the correct archive will normally have been entered automatically. If not, click on the arrow next to the form field and select the archive in which you want to work

## Create archive - ask your administrator

For the purposes of the tutorial, please select the archive `ELO_demo` or `Archive1`. Selecting this archive means the examples and screenshots will correspond to what you see on the screen. If your archive is not available, or you require another, please contact your system administrator. For security reasons, usually only the system administrator can create or modify archives.

Now click on *OK* or confirm your settings by pressing the Enter key.

The Electronic Leitz Organizer opens with the selected archive.

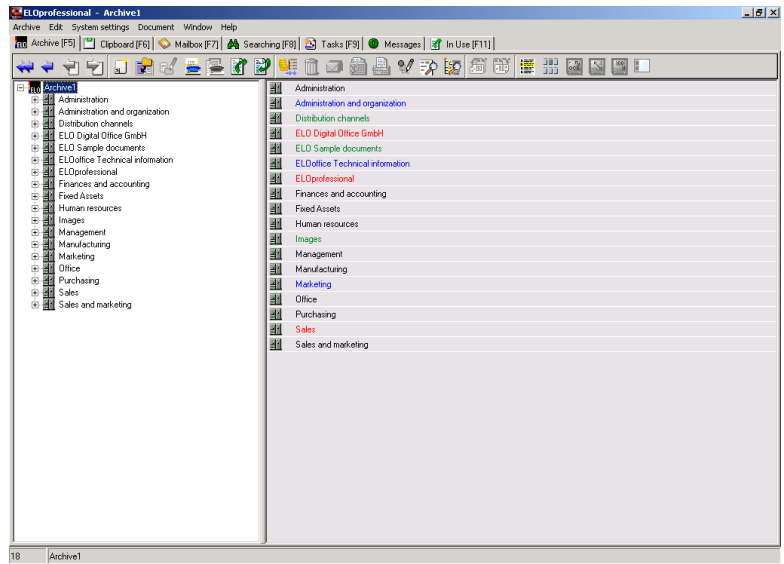


Fig. Standard screen for ELO archive view

---

# The **ELO***professional* work area

After the program has started you will see the **ELO** work area. **ELO** looks and feels like a standard Windows program.

Experienced *Windows users* will probably find much that is familiar on the next few pages. If you are an experienced Windows user, you can skip the next few pages.

If not, you should: Get to know the **ELO** interface. Otherwise, you will not be able to follow the further instructions in the manual.

You should also read the definitions carefully and compare them with the screenshots pictured and described below.

## The **ELO** start window

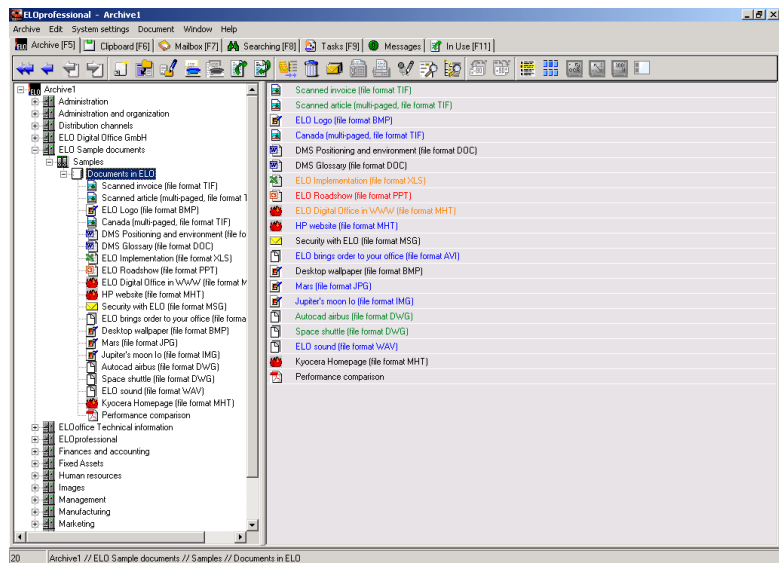


Fig. Main screen - Folders with documents - Documents



## The title bar



As with all Windows applications, the program name can be found to the left of the title bar. On the extreme right you can see three buttons. They do the following:



A single click on the dash icon minimizes the window. The program itself remains open. You can tell this because the program icon remains on the taskbar. A single click on this reopens the window.



Click on the icon with two windows to reduce the size of the window. The icon then changes to a single window. Clicking the icon maximizes the window again.

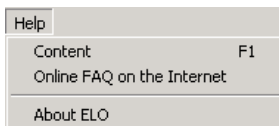
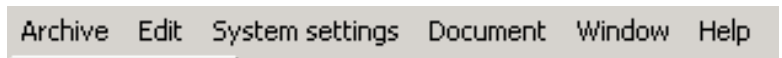


This icon is at the bottom right of every **ELO** window. You can resize the window freely by clicking and dragging with the mouse. This icon is only visible if the window is not already *maximized*.



Clicking on the *Close* icon closes the program.

## The menu bar



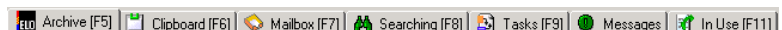
The menu bar contains the commands for **ELO**. That is why this line is often referred to as the "command bar". You can see six command menus: *Archive*, *Edit*, *System settings*, *Document*, *Window* and *Help*.

Each group contains further commands. They are revealed in drop-down menus when you click on a command group in the menu bar. You can select the command you want from the drop-down menu by clicking on it with the mouse.



Clicking on *Help* in the menu bar opens this drop-down menu. You can select the relevant menu item from the list.

## The index cards



The index cards are below the menu bar: *Archive*, *Clipboard*, *Mailbox*, *Searching*, *Tasks*, *Messages* and *In Use*. Your screen will look different depending on which index card is *in front* (as in a card index). In this example, the *Archive* index card is in front, or active. Behind each index card there is a separate work space.

You switch back and forth between the index cards by clicking on the tab corresponding to the card, or by entering the relevant keyboard shortcut. The shortcut is on the index tab in square brackets after the name, for example [F5] to switch to the Archive work area.

The chapter on *index cards* contains more information about the individual work spaces behind the index cards. But to start with, a short overview should be enough to give you at least an idea of the separate ELO areas.



There is a shortcut after many of the commands. These are key combinations that initiate the corresponding command. You can, for example, delete a selected archive entry using the key combination Shift+Del (Pressing the Shift and Delete keys simultaneously).

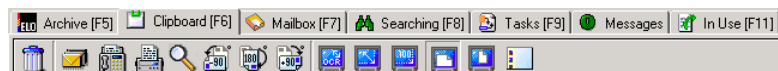
## Archive index card [F5]



You will probably use the *Archive* index card most frequently. Here, you can customize your archive environment according to your requirements and preferences. For example, you can create filing cabinets, folders and indexes in the archive (and remove them).

Furthermore, you can view and print documents, prepare them for follow-up, keyword them or send them to the mailbox.

## Clipboard index card [F6]



The *clipboard* index card shows you the contents of your *clipboard*. The *Clipboard* allows you to move or copy individual sections of your archive. You can temporarily copy filing cabinets, folders, levels, documents and indexes to the clipboard so that you can then move or copy them to another folder, for example.

## Mailbox index card [F7]



Every **ELO** user has their own personal mailbox. It receives all incoming documents, such as faxes received over ISDN, documents sent by a network scanner etc. But you can also add to the mailbox documents already on your PC and forward them to a colleague's mailbox.

## Searching index card [F8]



The *Searching* index card allows you to retrieve a document quickly. You can begin searching for a document from any level of the archive, because the search view has its own work space.

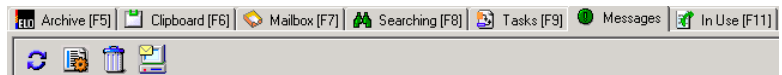
## Tasks index card [F9]



The *Tasks* and *Task reminder* areas show you important appointments where you need a specific document and outstanding tasks.

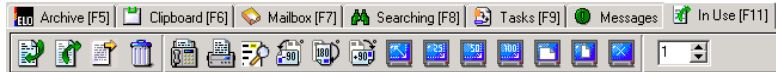
But you can also put a document, such as a customer enquiry, into a task reminder for the relevant colleague. He/she then sees all the documents with deadline and priority displayed in Task reminder on screen.

## Searching index card [F10]



The *Messages* area creates transparency within the ELO Client. In other words, this area shows you what is currently happening in **ELO**. Depending on the functions you have activated, you will either receive a notification when a workflow starts or when somebody puts something for you in Task reminder. And, of course, you can also send short messages (50 characters) to other **ELO** users.

## In Use index card [F11]



The *In Use* area shows you an overview of the documents that are currently in use and checked out.

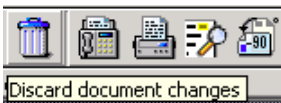
## The toolbar



The toolbar changes depending on which index card is active. Single-clicking on an icon launches the corresponding command, and is quicker than having to use the menu bar.



For example, selecting an entry with the mouse then clicking on the trash can symbol when in the *Archive* index card deletes that entry.



07/01/2005 Canada (multi-paged, file format TIF)  
You can scan and compile multi-paged documents in ELO.  
Date=07/01/2005  
Filing date=07/01/2005

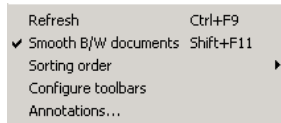
You can see what an icon does in the QuickInfo field that opens when you point to an icon with the mouse (without clicking).

A more detailed QuickInfo field is available in Archive view for all ELO objects (cabinet, folder, index and document). This extra ELO QuickInfo field displays the text in the input fields of your index form. This allows you, for example, to instantly see the filing date or the keywords entered. You can choose whether to display this detailed QuickInfo field:



Click on the *Display QuickInfo* icon.

## Configure the toolbars



You can configure which icons are displayed on the toolbar. This option is particularly useful if you only have a small monitor available or if you do not require certain icons (features).

The *Configure toolbars* command is in the *Window* menu. This opens a selection dialog box containing all the functions and corresponding icons available in the **ELO** index cards (Archive, Clipboard, Mailbox, Searching, Tasks and In Use).

## The work area

The corresponding **ELO***professional* work area is shown below the toolbar. Just like the toolbar, it also changes its appearance depending on the active index card. When you start the program, the *Archive* index card is in front by default.

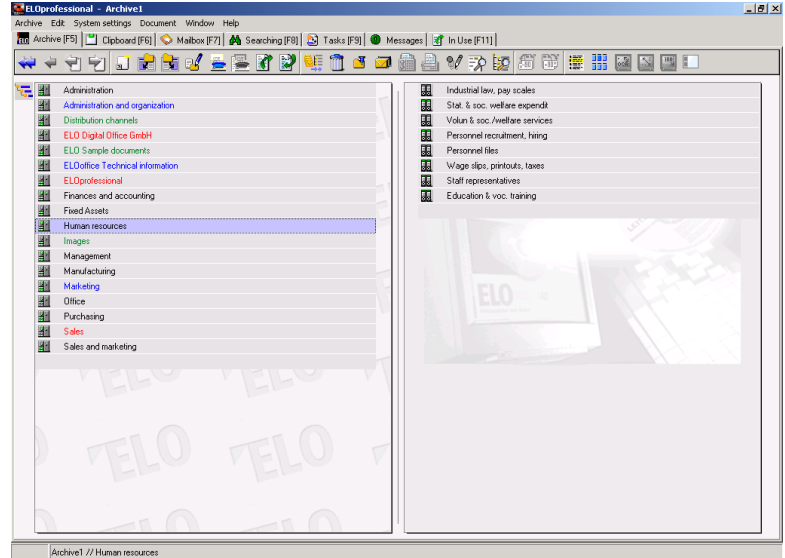


Fig. Main screen elements: Menu toolbar - Index cards - Toolbar - Filing cabinets with content

The **ELO***professional* archive level looks like an open Leitz folder. And the program is almost as easy to use – with one big difference: **ELO***professional* offers you almost unlimited possibilities, because **ELO***professional* is the archiving and document management system for the 21st century.



"Learning by doing"; it makes sense to explore the program using our manual. So do all the tutorials on the PC as you read. Feel free to experiment, because any practice filing cabinets, folders or documents you create can be quickly deleted. Also make sure you read the manual thoroughly. You will keep coming across features and options that will make your day-to-day work easier.

## The status bar

Archive1 // ELO Sample documents // Samples // Documents in ELO // Scanned article (multi-paged, file format TIF)

The status bar is displayed along the bottom of the **ELO** screen. The status bar displays additional information, e.g. the current archive level (filing cabinet, folder etc.). This means that if you have opened a document, the status bar will show you the precise filing location for the open document.

In the status bar pictured above, you can see the following information for an open sample document called "Contract of sale":

- Filing cabinet: Fixed Assets
- Folder: Property
- Index: Apartment
- Document: Contract of sale

The status bar display also changes. When in the Mailbox, for example, it displays the number of pages in a document. But in search mode, it once again shows you the precise location of the file found.

## The context menu

The context menu is a very efficient way of executing commands. Different context menus open depending on where you right-click in the **ELO** work area (folder, index, document etc.). They contain different commands that you can select with the left mouse button.

---

# Navigation through the archive

When you start the program, the *Archive* index card is in front by default. In this view, the work area resembles an open Leitz folder.



The following screenshots show scaled down parts of the **ELO** work area. An archive with *three* levels has been selected.

**Please note:** Archives in ELO do not have a fixed number of levels. They can have up to 24 levels.

The archive entries are always on the left side, i.e. the name or description of the filing cabinet, folder, index or document. Using the icons, you can see whether it is a filing cabinet, folder etc.

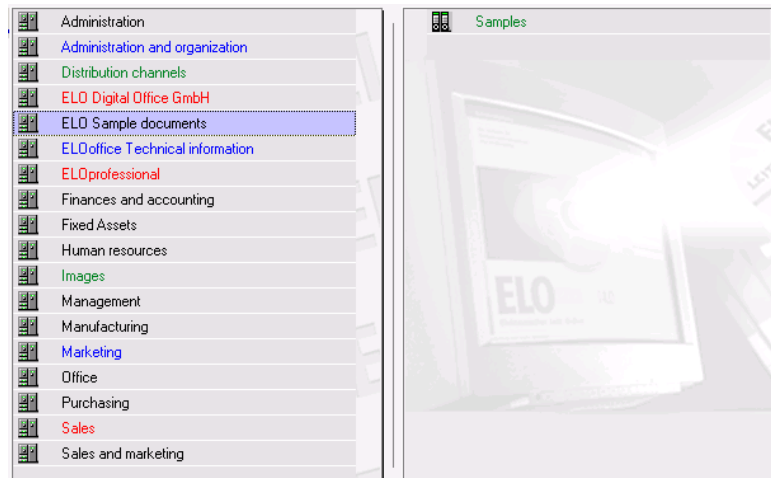


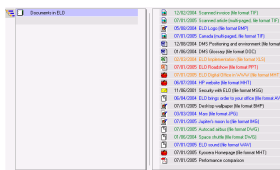
Fig. Folders and indexes



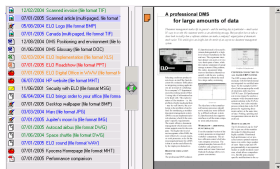
The right-hand side of the **ELO** work area always displays the content of the archive entry selected on the left-hand side. This means that if you select a filing cabinet on the left, you can see what it contains – the folders – on the right. You are at the filing cabinet level. To see the contents of a folder, you have to leave the filing cabinet level. Single-click on the folder whose contents you want to view/edit.



The folders are now on the left side and the index selected in the folder is now displayed on the right. This means that you have changed from the filing cabinet level to the folder level.



If you select an index on the right, the indexes move to the left side. The documents contained within the selected index are now shown on the right. You have changed archive level once again. You are now at index level.



If you click on a document, the list of documents is displayed on the left. On the right, you can see whichever document is selected in the left pane. Now, for example, you can edit, copy, send or print the document.

## An example



If the *Archive* index card is in front, you can already see the filing cabinets contained in the archive.

When you click on a filing cabinet, all the folders it contains appear in the right-hand pane.



Click on a folder. This moves you to the folder level. That means that the folders are on the left, while the right pane shows the individual indexes in the selected folder.



It's that easy: If you click on a document, you will change levels once again.

The index is now on the left and the documents held in the selected register are shown in the right pane.



If you click on a document, you will change levels once again. The documents are now shown on the left. On the right, you can see the (selected) archived document.

## The Concatenate icon



You can stop **ELO***professional* from changing levels. This is useful if you want to dragging and dropping a document into another index, for example.

You can concatenate the levels with a single click on the Lock levels icon.

Now, for example, you can right-click on a document entry and drag it to another index.

To copy an object, hold down the CTRL key at the same time. This will create an additional reference (shortcut, logical copy) to the object in **ELO**. (This also works with indexes, folders etc.)

Refer to the chapter **The archive** for more information on the archive.

## Navigating using icons and the keyboard

To change levels quickly, use either the two arrow icons or the keyboard.



Clicking on the *Back* icon takes you up a level (back), e.g. from document to index level or from folder level to the filing cabinet.



Clicking on the *arrow* icon takes you back to the filing cabinet level in one go.

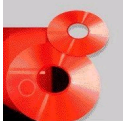


You can also navigate quickly through the archive using keyboard shortcuts: the ENTER key takes you down a level, ESC takes you up a level and the arrow keys allow you to select a single document in **ELO**.



Remember: the context menu is a very efficient way of executing commands. Different context menus open depending on where you right-click in the **ELO** work area (folder, document etc.). They contain different commands that you can select with the left mouse button.

Use the many *shortcuts* too. You can find more information in the **Annex**.



# Chapter 2

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## Basics

This chapter will give you an intensive *crash course*. You will rapidly become acquainted with the most important features and capabilities of **ELO***professional*. You will find out how to start the program and how to create filing cabinets, folders, levels and indexes. And you will also soon see how you can store a wide variety of documents in your electronic archive.

The information in this quick-start guide has been kept as brief as possible, so you are not bombarded with unnecessary information right at the start. But it does show you what can be done. And this knowledge is important for you to get the best out of **ELO***professional*. Quick start focuses on the following points:

- Starting the program
- Creating a new filing cabinet
- Creating a folder
- Creating an index
- Archiving documents
- Filing documents using macros
- Importing images and graphics
- Filing documents from the Mailbox
- Working with documents in the archive
- Viewing with Internet Explorer
- Creating documents in ELO
- Document templates and the Internet

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## Starting ELO<sub>professional</sub>



Start **ELO<sub>professional</sub>**: On the taskbar, click on *Start, Programsetc.* as already described.

Enter your details in the login dialog. Select the archive *Archive1* and confirm by clicking **OK**.



Fig. ELO login dialog

**ELO<sub>professional</sub>** starts up.



It may be that that particular archive - *Archiv1* - is not on your PC. If that is the case, contact your system administrator, for them to set up a sample archive called *Archive1*.

After the program starts you will see an open Leitz folder. The *Archive* index card is in front, so it is active (if not, press the [F5] key).

On the left side, you will see the filing cabinets contained in the archive. When you click on a filing cabinet, all the folders it contains appear in the right-hand pane.

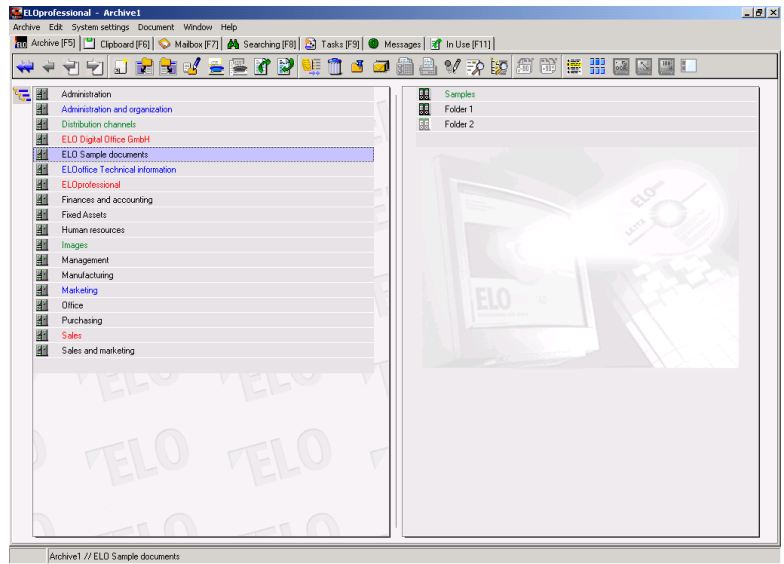


Fig. ELO interface - 'Archive' work area

In this work area, you can perform all further actions in the archive.





2. Select the index form *Structure element* and enter the name of your new filing cabinet in *Name*, e.g. *First steps*.

3. In *Date* you can enter the *creation date*. This is easy with the convenient calendar function. The *filing date* of the document in **ELO** will appear later in the *Filing date* field.

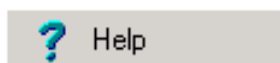
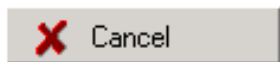
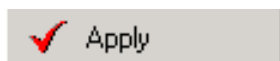
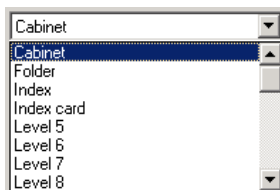
4. Click on the index card *Memos* to enter additional information about this structure element. The memo text is shown in the QuickInfo field and is also used for keywording. You can perform a search for this specific text later if required.

5. Click on the *Options* index card. Here, for example, you can change the color scheme or assign a key to the structure element. It is then only viewable by employees who have also been supplied with this key. You can set the sort order in your archive and also select an owner. Then only the owner or a user with the same user rights can make changes. If no owner is entered, the administrator is the owner.

## Object type

From a drop-down list you can select the icon to assign to the particular level.

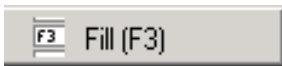
Select the search form you require. You can configure icon types for the individual levels in *System settings*, *Options*, *Display*, *Archive level settings* button, *Levels* index card.



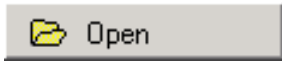
The *Apply* button applies your changes to existing filing cabinets without closing the input window.

*Cancel* ends your entry without creating a folder.

Clicking on *Help* launches the online help which can provide further information if required.



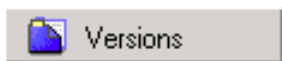
Click on the *Fill* button to copy the entries from the last keywording dialog to the active keywording form.



The *Open* button lets you load a keyword file (\*.ESW) into the current document keywording. Keywording information for an ELO object is saved in ESW files.



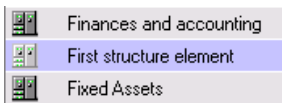
Using the *Save* button you can save the current keywording to a keyword file (\*.ESW). The keywords can then be loaded into the keywording for another document.



With the *Versions* button you can display the single versions of an ELO object - provided they are version-controlled.



6. Now click on *OK*. The input window closes and your new filling cabinet is ready in the archive.



If you want to make changes to a structure element or document in the archive, just double-click on the filing cabinet. Alternatively, right-click on it and select *Edit keywording* from the context menu.



Filing cabinets, levels, folders and indexes that are empty are grayed out. That lets you see immediately whether an object contains other ELO objects, without having to open it first.



**NB:** References to an object are also grayed out (see: *Logical copy*).

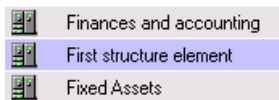
# Creating a document or structure element

You can create a structure element at every level, just as described above. The toolbar gives you four icons to create ELO objects on every level.



Select one of the icons if you want to create an object in the archive:

- Insert document on the left side
- Insert structure element on the left side
- Insert structure element on the right side
- Entry, edit



1. Select the test cabinet you just created *First structure element*. (But you can also use another and delete the folder again later.)

2. Click on the icon *Create structure element on the right side*. The window *Edit level 2 [New entry]* appears.

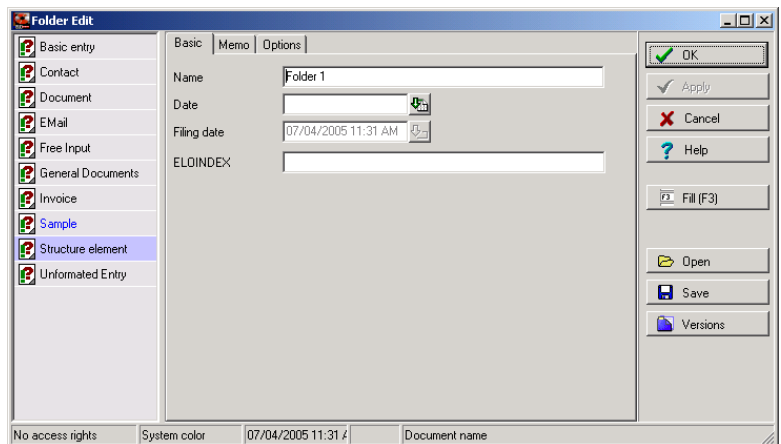


Fig. Creating a folder

3. Select the index form *Structure element* and enter the name of your new folder in *Name*.



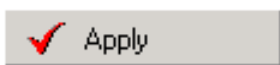
Remember, the process for creating ELO objects, i.e. structure elements and documents, is largely identical. Nevertheless, we will show you again just how to create a folder. You can skip this section if appropriate.



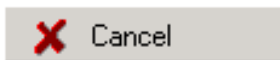
4. In *Date* you can enter the filing date. This is easy with the convenient calendar function. Click on the *Calendar* icon. The actual filing date will appear later in the *Filing date* field.

5. Click on the index card *Memos* to enter additional information about this file. The memo text is shown in the QuickInfo field and is also used for keywording. You can perform a search for this specific text later if required.

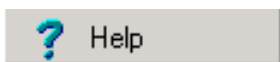
6. Click on the *Options* index card. Here, for example, you can change the color scheme or assign a *key* to your folder. It can then only be viewed by employees who have also been supplied with this key. You can set the sort order for the folders in your archive and also select an owner. Then only the owner or a user with the same user rights can make changes. If no owner is entered, the administrator is the owner.



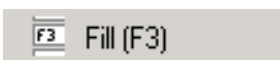
The *Apply* button applies your changes to existing folders without closing the input window.



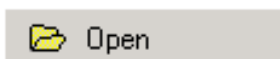
*Cancel* ends your entry without creating a folder.



Clicking on *Help* launches the online help which can provide further information if required.



Click on the *Fill* button to copy the entries from the last keywording dialog to the active keywording form.



The *Open* button lets you load a keyword file (\*.ESW) into the current document keywording. Keywording information for an ELO object is saved in ESW files.



You save the keyword file here.



With the *Versions* button you can display the single versions of an ELO object - provided they are version-controlled.



7. Now click on *OK*. The input window closes and your new folder is to the right of your selected filing cabinet.

Archive1 // First structure element // Folder 1

Fig. Statusleiste

The status bar (below) now displays the following information: the open archive, the filing cabinet you are currently working in and which folder is selected.



If you need to change anything, it is quick and easy.



Click twice on your folder. Or you can right-click on it. This opens the context menu, where you then select *Edit keywording*.

# Creating an index



Remember: You can insert an index on any level. From the context menu, select *General*, *Insert default index*.

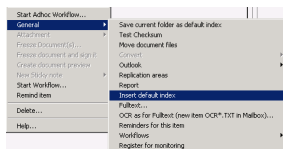
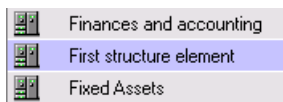
If you want to archive your first document, you should first insert an index in your folder. There are two ways to do this:

- Select a default index, or
- create your own index.



Remember: Documents can be filed on **all levels**. You should, however, think about exactly how you wish to structure your archive and where which documents should be filed before filing your documents.

## Selecting a default index

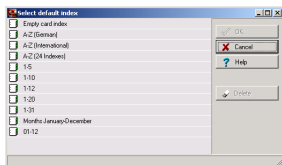


**ELO professional** comes with several default indexes. Using these you can, for example, insert a monthly index or an alphabetical index in your folder.

1. Click on the filing cabinet containing the folder where you want to create in a new index. In our example it is the cabinet *First steps*.

2. Select the folder by clicking the mouse, e.g. *First folder* where you want to insert a default index. Your folder then moves to the left side.

3. Select *General* from the context menu then select *Insert default index* in the submenu that appears. Indexes cannot be inserted via the toolbar.



The *Select default index* dialog appears.

4. Select the default index, for example *A ... Z German*, and confirm by clicking *OK*.

5. Your default index is visible immediately on the right side. That means it is available in your folder.



**ELO** *professional* comes with several default indexes pre-installed. But you can also define indexes of your own, that you use frequently, as default indexes. More about that later.

## Creating a new index

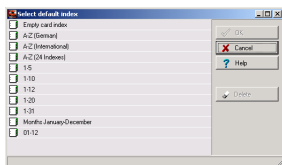


You can also create your own indexes for your folders and define them as default indexes in **ELO***professional*.

1. Create a folder or a structure element (e.g. *First folder*), where you want to create your own index.

2. Select *General* from the context menu then select *Insert default index* in the submenu that appears. The *Select default index* dialog appears.

3. Select *Empty card index* and click on *OK*. The *Edit level 3* window appears.



Remember: The names of the levels, e.g. *Level 1*, can be changed and may vary from archive to archive. You change the names of the levels in the *System settings* menu, *Options*, *Display index card*, *Archive level settings* button, *Levels* index card. The level names can be changed from there.

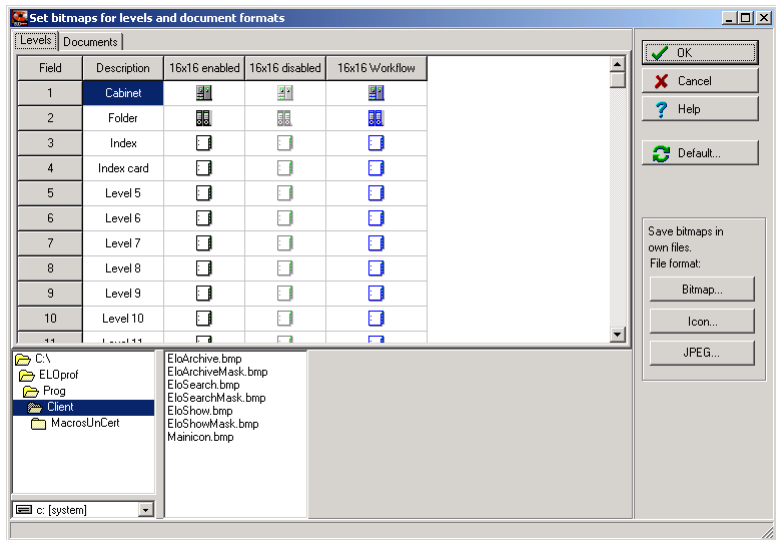


Fig. Changing the level names

4. Enter the name of your new index (e.g. *Index 1*) in *Name*. The first five letters or characters of the index name are used as the index tab description.

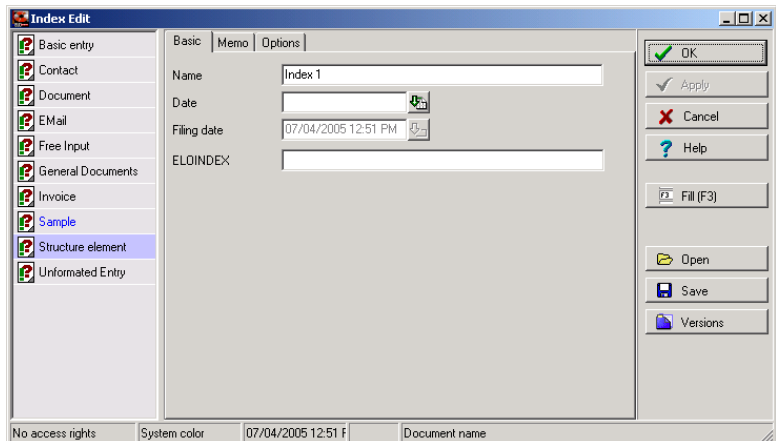


Fig. Enter short name in keywording form



5. In *Date* you can enter the creation date. You can also select the date using the *Calendar* button. The filing date appears in the *filing date* field after the ELO object has been completed.

6. You can enter target definitions in the *ELOINDEX* field in the *Structure element* index form. In this way, documents can be filed directly in this index. You can find further information under keywords *Document filing*, *Index setup* and *Index setup with target definition*.

7. Now click on *OK*. The input window closes and your new index *Index 1* is on the left side in the *Archive* functional area.



## Adding more indexes to the default indexes

### Adding a user-defined index

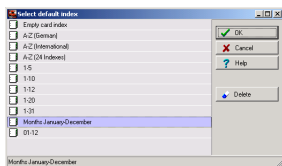
Additional indexes (user-defined and default) can be added to a folder that already contains a (default) index.

Select *General* in the context menu and then *Insert default index* in the submenu that appears. The *Edit level 3* input window appears.

Complete the index form as described and click on *OK*.

### Adding a default index

Select *General* and the command *Insert default index* in the context menu. The dialog box appears. Select an index.

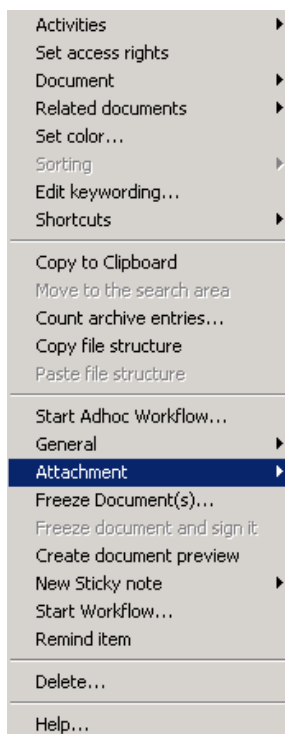


Select a default index and click on *OK*.

## Defining a user-defined index as a default index

A folder containing an index you created, or a default index you have modified, can be defined as a new default index. To do this, select *General* and *Save current folder as default index* from the context menu. Enter a name and click on *OK*. The complete index is now available in *Select default index*.

## Changes? No problem!



If you want to change something, there are three possible methods. Choose the one that's easiest for you.

a) Double-click on the index entry you want to change.

b) Select the index entry and then click on the icon *Edit existing entry*.

c) Right-click on the index entry. This opens the context menu. Select *Edit keywording*.

The input window with the keywording information reappears.

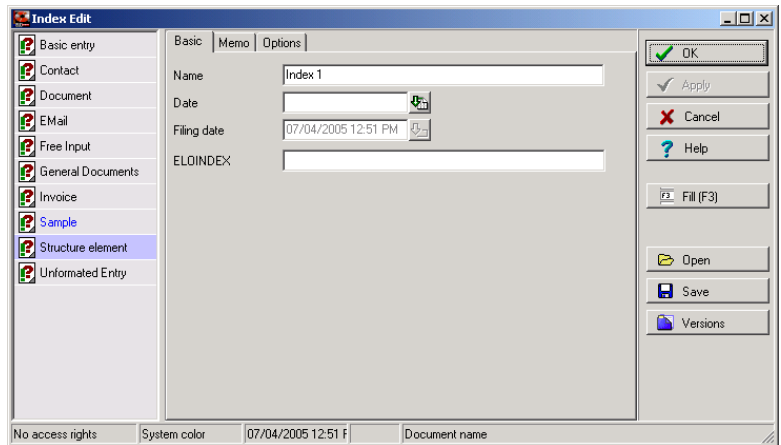


Fig. Editing the short name

Modify your entries and confirm by clicking on **OK** or using the **ENTER** key.



Changes to filing cabinets, folders, levels, indexes and documents are only possible on the relevant level, i.e. if the folder, index etc. to be changed is on the left side.

---

# Archiving documents

Documents already on your PC (e.g. graphics or text files) can be quickly archived in **ELO**, e.g. by dragging and dropping. These documents are filed in the Mailbox or directly in the relevant index of a folder in your archive.

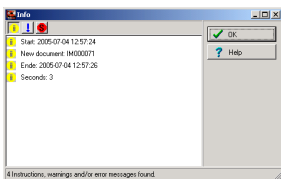
## Filing using Windows Explorer

1. Open **ELO** (open an index to place files in it directly) and Windows Explorer.
2. In Explorer, select the files you wish to file.
3. Drag the files (by holding down the left mouse button) from Explorer into the **ELO** window. (Drag and drop).



If you want to file them directly in an index, drag them into the open index. In this case, the *Edit document* window opens to allow you to keyword the document. Select *Invoice* as an index form, for example, and click on *OK*.

**Please note:** You can also file entire directories from Windows Explorer in **ELO**.



4. When filing to the mailbox, the info display window appears and provides detailed information:



**Notes:** These are merely for information purposes and describe what is currently happening (e.g. which document is being copied to the mailbox).



**Warnings:** These messages alert you to processes that could have unintended consequences, for example because they cannot be undone.



*Error messages:* These are displayed if a process cannot be carried out because of an error. They allow you to correct errors faster.



In System settings, you can customize the info display if, for example, you only want error messages to be displayed, not notes and warnings. Click on *System settings, Options, Display* index card.

5. Click *OK* to close the info display.



6. Switch to the **ELO** Mailbox (or from the archive to your index). In **ELO**, click on the *Mailbox* index card. The name of the document you just copied to the mailbox is shown on the left side, the content of the (selected) document is displayed on the right.



You can also file several documents in the mailbox or in an index at the same time by dragging and dropping. Select the files with the Shift or Ctrl key and drag them into ELO all at once. Copies are no problem either. You can simply copy the document to ELO several times. ELO automatically renames every copy, so that they are all retained.

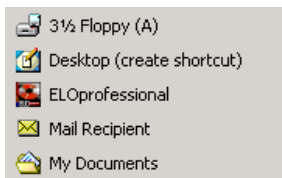
## Send to

Another method of filing documents is to use the *Send to* feature in Windows Explorer.

1. In Explorer, right-click on the document that you want to file in **ELO**.

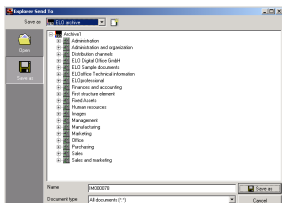
2. Point to *Send to* and click on **ELOprofessional** in the sub-menu.

3. If **ELO** is not already open, it will be started in the background and the document will be filed in the mailbox after a confirmation dialog.





If several users are registered in **ELO** the document is sent to the mailbox of the last person to use **ELO**.

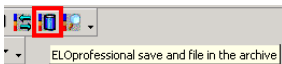


4. If **ELO** is already running, an input window opens, where you can specify the filing location. In the tree view, choose the folder, index or level where you want to file the document. In the following keywording dialog box you enter the keywording information.

5. Give the document a name (or OK the confirmation dialog) and click **OK**.

## Filing directly using macros

If you are working in an application, e.g. MS Word, you can file your documents directly in ELO using a macro.



1. Start **ELOprofessional**.

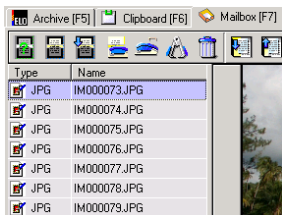
2. In the application, click on the ELO icon *ELOprofessional Save and Archive* in the toolbar of the Office application.

3. The input window *Edit document* opens and you can choose an index form and keyword the document.

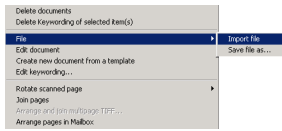
4. When you are in the index level, you can file the document in the appropriate index or, alternatively, in the mailbox.

## Importing files

A further way to add documents and files to the mailbox is available in the mailbox context menu.



1. Call up the context menu in the mailbox by right-clicking in the file view pane. Click on *File* in the context menu to open the submenu.



2. Select *Insert file*. That opens an *Open file* dialog box. Locate and select the file in the usual way. Then click on Open. The file is copied into your mailbox. It doesn't matter whether it is a text, graphics or video file.

---


# Document types

In **ELO** every document - and also every structure element - is assigned a specific *Document type*. This document type is independent of the index form with which the document was archived.

The allocation of document types is intended to allow you to see at a glance what type of document it is in the archive. The identifying icons used in **ELO** can be individually customized. Otherwise, **ELO** assigns the document type automatically in each case depending on the file extension of the document being filed and archived.

## Icons for document types

When filing documents, the document type is recognized automatically from the file extension. To set a particular icon to be used with each document format, these have to be allocated to file types in system settings.

 Archive level settings

In *System settings*, *Options*, and on the *Display* index card, select the *Archive level settings* button and make the necessary changes in the *Set bitmaps for levels and documents* dialog. Icons you want to assign must be saved in BMP format (16x16).



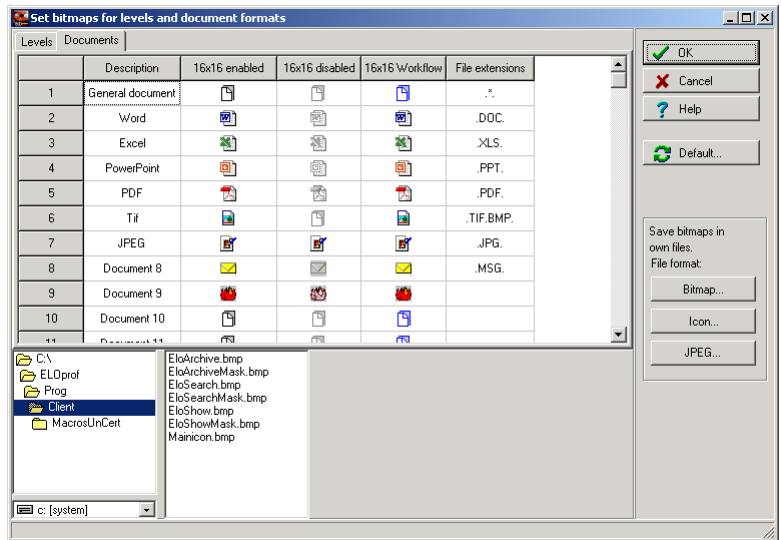


Fig. Assigning icons for document types

Settings for documents can also be carried out for structure elements. Switch to the *Levels* index card.

## Assigning document types

For every archived document, you can choose from 32 different document types. You can choose to differentiate by content (*Invoice*, *Delivery note*, etc.) or format (*DOC - Word file*, *XLS - Excel file*). The document can be assigned automatically when filing using the file extension. In the dialog box *Set bitmaps for levels and documents* the relevant extensions can be assigned in the column *File extensions*.

An icon can be individually assigned to any ELO object. You can alter these settings in the keywording dialog box on the *Options* index card. Allocate the current ELO object to the relevant object type by choosing e.g. *Word* from the drop-down list *Object type*.

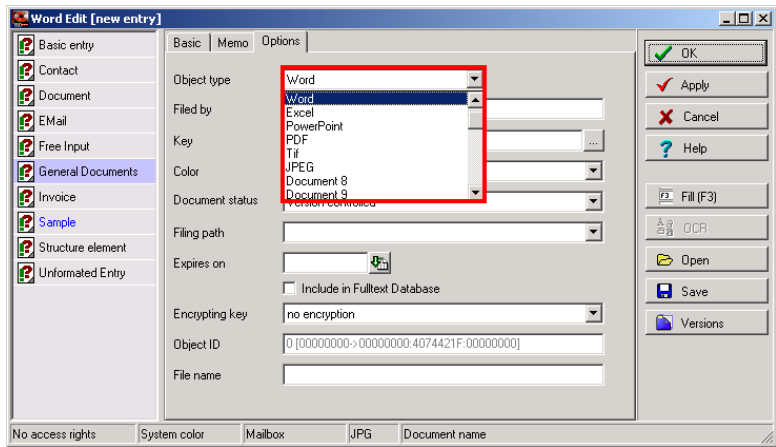


Fig. Assigning document types for icon displays



In the archive, the document is displayed with a Word icon.



To automatically display the document type in the list view in the ELO archive the file extension of the document is evaluated (Keywording dialog box, Index card *Options*, *File name*).

---

# Filing documents using macros

## Installing macros

Macros allow files to be transferred from the application to **ELO** for optimum integration between MS Office applications and ELO.

## Function of macros

Macros are installed automatically with a fresh ELO install. Via an earlier query, **ELO** creates a link to your application programs that work together with **ELO**. If you do not create a link to your applications when you install ELO, you can install the macros afterwards should the need arise.



**Please note:** If you install a new version of the macros, you should delete the installation files and existing icons before proceeding to install the new macro.

## Automatic installation

To install ELO simply follow the installation steps. The extract from the ELO installation instructions concerning the automatic installation of macros is repeated below.

## Creating a link to applications

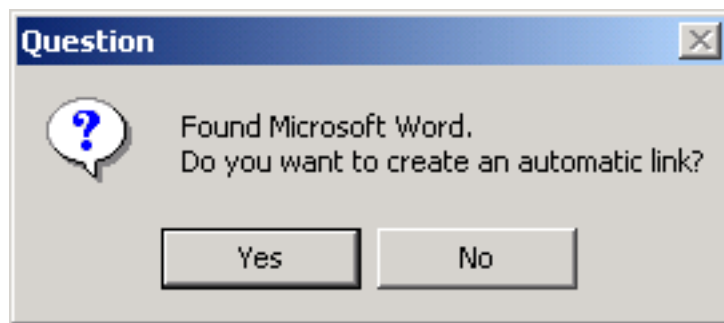


Fig. Installing macros for MS Word

1. **ELO** will now create a link to your applications (e.g. word processing programs). From here on, the installation procedure will vary depending on the programs installed on your system.



**Please note:** Depending on the version of the program installed, the installation screens for linking macros may vary considerably. But the procedure generally still corresponds to the examples shown below. Follow the on-screen installation instructions. Our example created a link to MS Word.

2. Confirm by clicking on **Yes**.

If you do not want to create a link to your application, click **No**. A dialog appears to explain that you can create a link later.

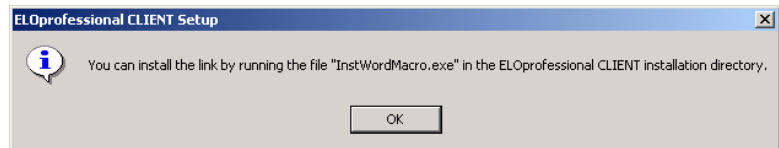


Fig. Confirmation dialog

## Setting the macro security level

You should make a note of this information. Otherwise, you will have to restart the setup program for ELO to accept the link.

Macros are used to transfer Word documents. For this to be possible, Macro Security in Word must be set to *Medium*. You can find this option in Word under *Tools, Macro, Security*.

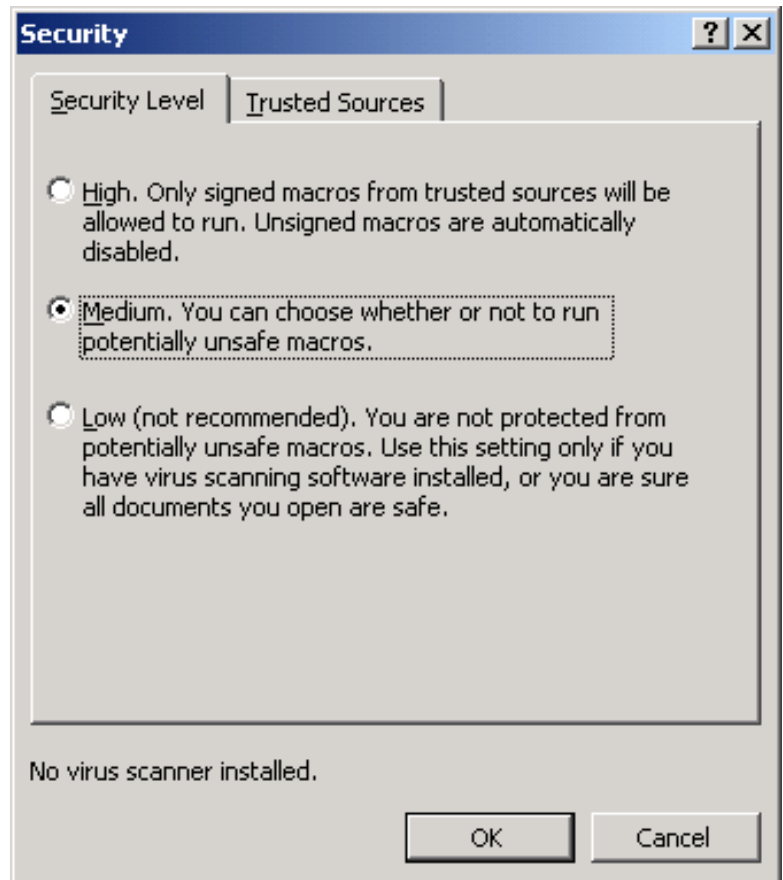


Fig. Setting the security level

## Activating macros

## Installing macros and icons

## Link to MS Word installed.

3. After you have set the macro security level, click on *OK*.
4. The macros from **ELO** are safe. If Word requests confirmation, click on *Activate macros*.
5. Confirm with *OK* so the macros and ELO icon can be installed in Word.
6. The link to MS Word is installed. Click on *OK* to continue the ELO installation if a dialog box asks you to do so. Otherwise, **ELO** will install the macros automatically.



Additional applications may be linked to ELO, depending on the programs already installed on your system. The procedure is almost identical. Here is some further information.

### Creating a link to MS Excel

1. **ELO** asks you if you would like to create a link to other Office programs.

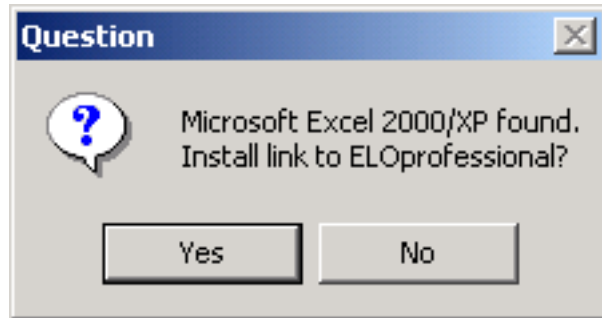


Fig. Installing macros for MS Excel

2. Confirm with **Yes**.

3. Another dialog box appears. Confirm with **Yes**. **ELO** automatically closes the Office application and the link is installed.

### Macro installation finished

Depending on the number of programs **ELO** finds installed on your PC, the relevant links are installed automatically. Confirm each process and query with **OK**.

### PowerPoint link

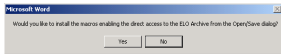
During installation, click **Yes** when **ELO** asks if you want to install a link to Powerpoint. The macros for Powerpoint integration are installed automatically.

### Installing macros at a later date

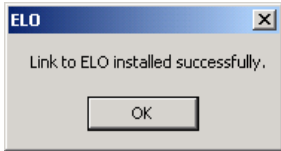
If you did not install macros during **ELO** installation, you can also do this at a later date. **ELO** includes four macros for MS Office. This is explained step by step below.

#### **Word**

Retrieve the *InstWordMacro.exe* file from the Client directory.



The ELOWordInst.dot template is called and a dialog box appears.

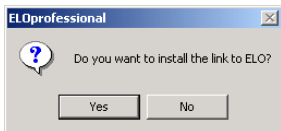


Click on **OK**. The ELO macros are installed.

## Excel

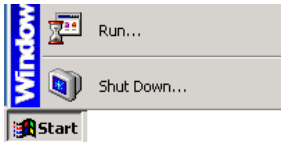
Open the file “ELOExvellInst.xls” in Excel or Explorer.

MS Excel opens and a dialog box appears. Click on the *Activate macros* button.

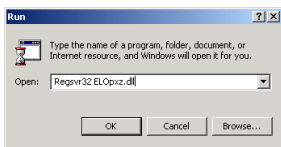


Another dialog box appears. Click on **OK**.

Lastly, ELO asks if you would like to install the macros. Click on **OK**. The ELO macros are installed.



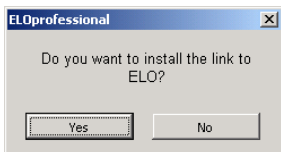
You can now register the file ELOpxy.dll via: *Start, Run, Regsvr32 ELOpxy.dll*.



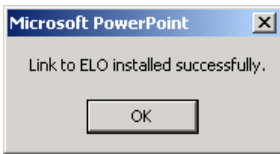
Click on **OK**. Then a message should appear confirming the operation was completed successfully. In the dialog box that appears, click **OK**. ELO macros are now fully functional.

## PowerPoint

Open the file ELOPowerpointInst.ppa in PowerPoint



Another dialog box appears. Click on **OK**.

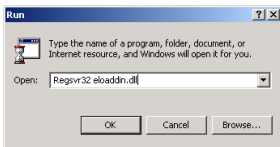
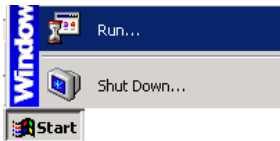


Another dialog box appears. Click on **OK**. The ELO macros are installed.

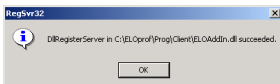
## Outlook 2000

In Windows under *Start*, *Run*, enter: `regsvr32 "<Clientdirectory>\eloaddin.dll"`.

<Clientdirectory> is the directory that also contains the ELO32.exe file.



A message should appear confirming the operation was completed successfully:



If registration is unsuccessful despite the message confirming success (the ELO button bar is not created or the buttons continue not to function), call the `InstEloAddIn.exe` program (on the installation CD). Start the program and click on the *Install* button. Settings for ELO file archiving (*System settings*, *Options*, *Mailbox*) are transferred into ELO. Please enter the correct values here. A 0 in an index field means that there is no input in the index form.

## Explorer plug-in Send to

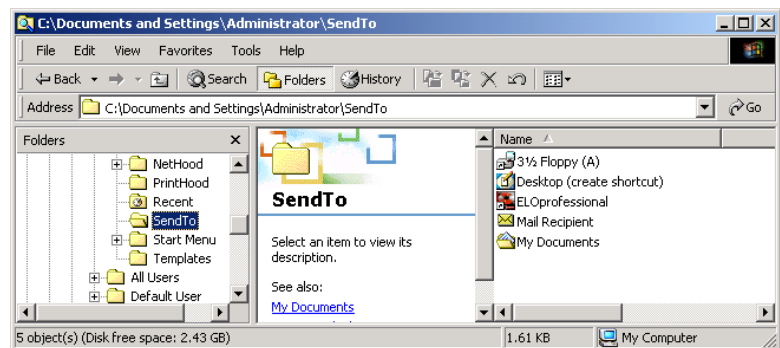


Fig. Set up Explorer enhancement 'Send to'



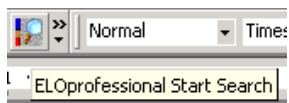
## Creating a shortcut

To install, create a shortcut in the “Sendto” folder. In Windows 98 this can be found in the Windows directory, in Windows NT in <Windows directory>\Profiles\<Windows User name>, and later in Documents and Settings\<Windows User name>.



Please ensure that this directory is user-specific so the ELO link cannot be used by other Windows users. To do this, simply copy the shortcut into the corresponding user directory. Set the target (or location of the object) to `Explorer2ELO.exe`. Enter your name as `ELOoffice` or `ELOprofessional`.

## How the buttons work



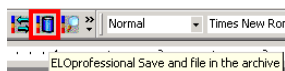
Using ELO macros you can start ELO, file and search for documents from within, for example, MS Word.

All the buttons allow you to start **ELO** from the respective Office program.

The first button on the left allows you to file a document either in the mailbox or directly in an **ELO** archive.



The center button opens the ELO search form *Search entries*.



The first button from the right-hand side allows you to start **ELO**.

## OpenOffice integration

There is also a package of macros for OpenOffice which allows support and integration with ELO.

Exactly as with MS Office applications, the macros are integrated into the toolbar.



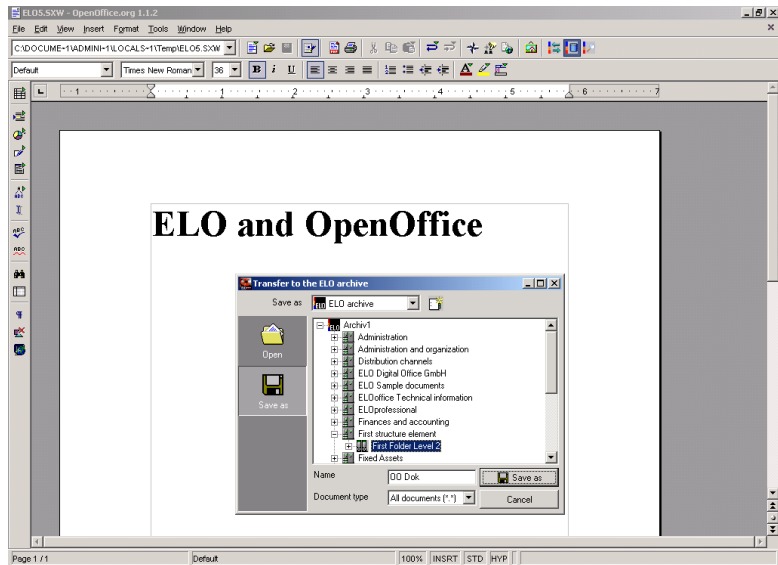


Fig. OpenOffice and ELOprofessional

## Installation

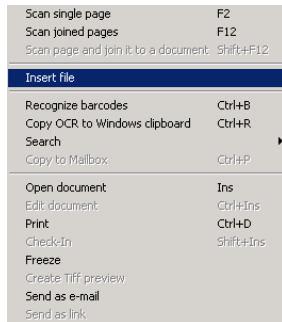
To install the OpenOffice macros, download the current version of the macro from the ELO website and follow the installation instructions in the accompanying information. Then the functions shown in the figure above will be available.

---

# Importing images and graphics

Digitized pictures or graphics can be placed in the mailbox in the same way as all other documents on your PC or on CD-ROM by dragging and dropping from Windows Explorer. But for images and graphics with the file extensions *bmp*, *tif* and *jpg*, **ELO** also offers another method: you can file them using the menu option *Import document*.

The advantage of this method is that you no longer have to call up Windows Explorer from the Start menu. The starting point is the Mailbox.



1. Switch to the *Mailbox* area. On the taskbar, click on *Document*. In the open drop-down menu, select *Insert file*.

2. An Open File dialog box appears.

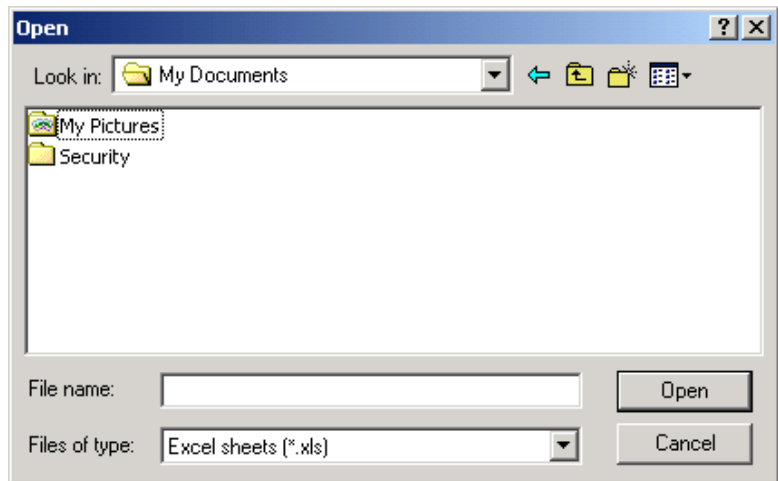


Fig. Opening a file for graphics import

3. Locate and select the file in the usual way. Then click on *Open*.

The window closes and the selected file has been placed in your Mailbox.

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# Scanning documents

There are several different methods of getting your documents into **ELO***professional*. But the *Mailbox* is the main repository and work area. It is your *organizational control center*. You can find detailed information about the Mailbox in the chapter of the same name.

Documents only available in paper form, e.g. invoices or delivery notes, are scanned in. There are three ways of doing this:

- Scanning individual pages that are each stored as an individual file. So you create one file per page. But you can, if you wish, join the different files in the mailbox into one file.
- You can scan and join multipage documents. That means that after the scanning procedure in **ELO**, the individual pages are joined into one document. (Using Split pages in the Mailbox, you can split these documents into individual documents again.) This feature is available to you in the Mailbox and in the archive (index level).
- You can scan and join several pages that you attach to an archived document. This scanner feature is only available in the archive (on the index level).

## Scanning pages individually

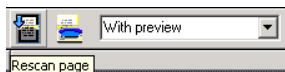


Select the scanner if necessary (see chapter **System settings**). Then switch to the Mailbox, because the *Scan pages* feature is only available in the Mailbox.

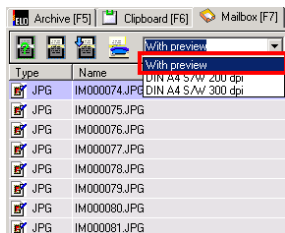
But you can also go directly to the Mailbox and select a scanner from there. Click on the *Select scanner* icon.



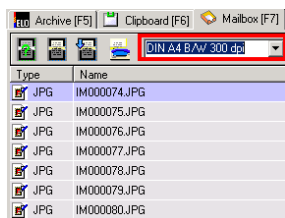
Once the correct scanner is selected, click on the *Scan pages* icon or use the *Document* menu then *Scan page [F2]*.



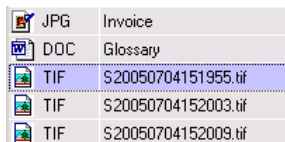
By clicking on the *Rescan page* icon you can repeat scanning of the TIFF files and rescan the page selected in the Mailbox.



If you have selected the option *With preview* in the *System settings*, *Select scanner profile* menu, the scanner software will appear. Use in the usual way. If you have any queries, use the manual that came with your scanner or contact your system administrator.



But if you use a default setting (Scanner profile, see *System settings*, under *Select scanner profile*), the scanner module will not be launched. The scanning process begins immediately using your settings.




The scanned document is then put in your Mailbox as a single page. This means that if you scan in a multipage document, each page will appear separately in the mailbox. This has many advantages - you can rearrange the pages in your document or join different documents into a new one. The screenshot on the left shows you the contents of a Mailbox.




The individual entries in list view are the following:



This is an MS Word document. You can recognize it by its file type of DOC. It is already keyworded, i.e. indexed with information in an index form (the document icon for Word documents is displayed) and ready to be filed.

	JPG	Invoice
	TIF	U_04164743_0000001.TIF

The file extensions JPG and TIF show you that you are dealing with graphics files. Neither has been keyworded as yet. The document *A0060000.JPG* was dragged and dropped into **ELO** from Windows Explorer, not scanned. You can tell this because the graphics format JPG has been retained and it has been assigned the document icon for graphics files.

	TIF	U_04164743_0000001.TIF
	TIF	U_04164743_0000002.TIF
	TIF	U_04164743_0000003.TIF

You can see four scanned documents on the left. None of the documents has yet been keyworded. You can tell this from the document icons for scanned documents. The numbered file names show you that they are four single pages. **ELO** automatically numbers the documents. You can set the numbering preferences in *System settings, Options, Mailbox, index card Scan file names*.

## Scanning duplex documents

Let us assume you are scanning 4 duplex pages with a feed scanner. First scan pages 1, 3, 5 and 7 (front sides). Then turn the pile over and scan the reverse sides, i.e. pages 8, 6, 4 and 2. Then select the individual pages in the Mailbox (10001 to 10008) and choose arrange duplex pages from the context menu. **ELO** sorts the scanned pages into the correct order (10001, 10008, 10002, 10007, 10003, 10006, 10004, 10005). The Join pages command lets you join the four pages back into one document.



**ELO** also supports duplex scanners, so you can set these devices to scan only the front sides or the front and back sides for each scan profile. You can find more information on this in the chapter **System settings** under **Scanner**.

## Scanning and joining pages

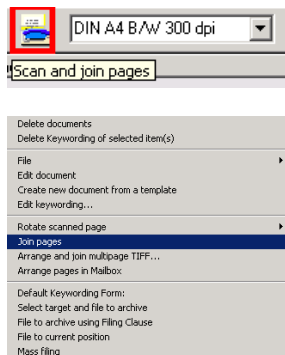
If you are using a feed scanner (with ADF), you can scan several pages in a row using the icon *Scan and join pages*. As soon as you finish the scanning process, **ELO** joins the pages into a single document.



If it is a single, multipage document, you should scan the pages in the correct order. That will save you having to arrange the pages in the Mailbox later.

## Scanning a multipage document

## Scanning several multipage documents



Say you want to file five documents of three pages each as efficiently as possible. Arrange the pile as follows:

Put a blank sheet of paper on top as a separator page, then the first three-page document (with pages in the right order). Then add another blank separator page, then the next three-page document and so on.

1. Scan all the pages using *Scan and join pages*. Select the document in the Mailbox that you want to move.
2. Now right-click to open the context menu and select *Join after separator pages*.

3. ELO will now automatically separate the individual documents using the blank separator pages scanned with the documents.



## ELO separator page

Using a blank page as a separator is particularly liable to cause errors because, for example, a page containing little text may be wrongly identified as a separator page. It will then be ignored and a new document created. Using this method, it is also impossible to scan blank pages, because they are recognized as separator pages and ignored.



**Please note:** You can define and determine the types of separator pages ELO should use.



So **ELO** has an additional separator page function, and a special ELO separator page to replace the blank sheet. Before you can use the separator page feature, you have to create a scanner profile and activate the option (*System settings, Options, Scanner profile*).

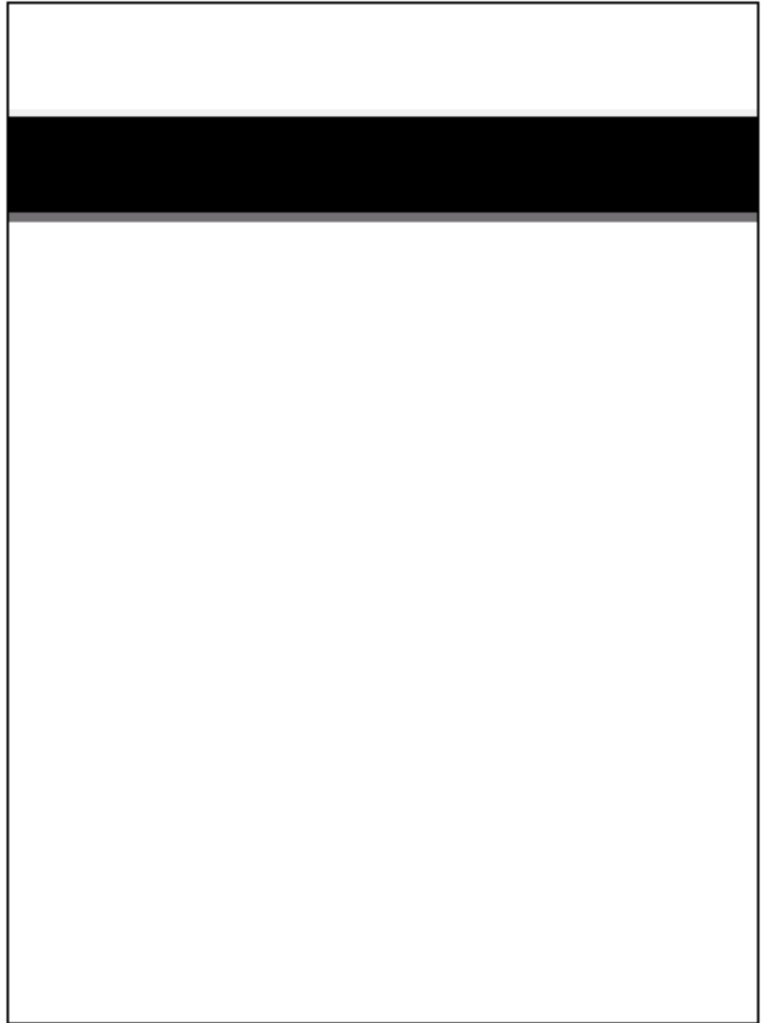


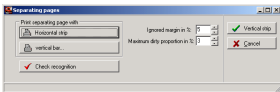
Fig. Separator pages for scanning documents

Once the separator page feature has been activated in *Scanner profile*, when pages are being scanned and joined, **ELO** checks every page to see if it is a separator page. If it is positively identified as such, a new document is created from the next scanned page, otherwise the page is joined to the current document.

The advantage is that now, you don't have to do any post-processing after the scanning process - the individual documents are ready and waiting in the mailbox.



You can print for yourself as many ELO separator pages as you need. There is a special command available for this under *System settings, Options, Scanner profile*.



In the *System settings* menu, select *Options*, the *Scanner profile* index card and click on the *Separator pages* button, then on *Print separator page with horizontal strip* or *vertical bar*.



But be sure to check the button *Check recognition*, to ensure your scanner will recognize a printed ELO separator page.

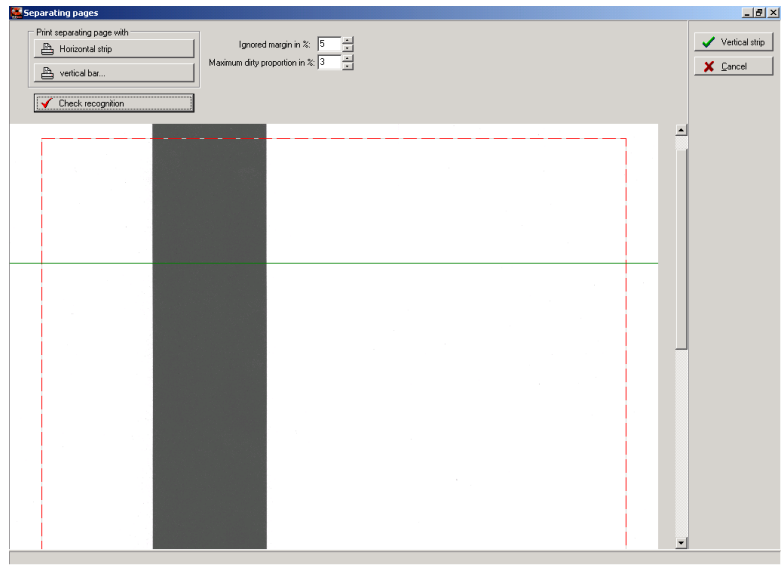
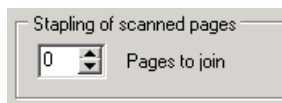


Fig. Separator pages - configuring settings

Via this dialog box you can recognize separator pages and modify the settings for the separator pages. With the *Ignored margin* option you can choose to ignore the margin, which often causes problems, during the scanning process when using separator pages. Accordingly, ELO does not analyze the margins of the scanned pages in the recognition of separator pages.

## Specifying the number of pages



## Adding a page to an active archive document

In Scanner profiles you can also determine whether and when to create a new document.

**ELO** always starts a new document after the requisite number of pages. This is the best scanner profile to scan documents with an equal number of pages.

This scanner feature is only available in the archive (on the index level).



This feature lets you scan individual pages and attach them to an active archive document. To do so, select the document in the archive (TIFF files only) and then click on the icon. This option is also available in the *Archive* view.



This function creates very large volumes of data if using version-controlled documents. So try to use it only with archive documents without version control where possible. This feature is naturally not available for read-only documents.

---

# Filing documents from the Mailbox

From the Mailbox, there are several ways to file documents in the archive.

## File to current position in the archive



JPG	IM000087.JPG
JPG	Invoice
DOC	Invoice
TIF	U_04164743_00000001.TIF
TIF	U_04164743_00000002.TIF
TIF	U_04164743_00000003.TIF

Delete documents
Delete Keywording of selected item(s)
File
Edit document
Create new document from a template
Edit keywording...
Rotate scanned page
Join pages
Arrange and join multipage TIFF...
Arrange pages in Mailbox
Default Keywording Form:
Select target and file to archive
File to archive using Filing Clause
File to current position
Mass filing
Attach to the selected document in the archive
Add to list
File as a new version to the selected document in the archive
Recognize barcodes
Copy to other user's Mailbox
Move to other user's Mailbox
Inspect substitutes' Mailboxes
Help...

File the document to the current position in the archive.

1. Click on the *Archive* index card (shortcut: [F5]).

2. Switch to the index level. Select a filing cabinet, then click on the folder and then on the index you want (e.g. *Index 1*). The index entry is now on the left, you are at the index level.

3. Switch to the Mailbox and select the file to be archived.

4. Drag the document to the *Archive* index card tab. Or right-click on the selected file. This opens the context menu. Select *File to current position*. Because the file is not yet keyworded, the *Edit document* window opens in both cases.

5. Select the *General document* index form.



**Documents and structure elements:** The *Structure element* index form is a default index form that you can use for all **ELO** objects - except documents. For certain types of document, e.g. *Invoices*, you (or the system administrator) can create and use your own index forms. You can find more information on this in the chapter *System settings*.

6. If necessary, enter a new name for the document in the *Short name* field or accept the defaults. The document date is already entered in the *Date* field. But you can also enter a different date (directly or using the calendar), e.g. the date of receipt. **ELO** automatically enters the current date in the *Filing date* field later.

You can enter an additional keyword in the *Memo* index card if required. The information you enter in the *Short name* and, where applicable, in the *Memo* field(s) mean a document can be individually keyworded (indexed).

Using these keywords, precise retrieval is possible using the search feature in **ELO**.

7. Click on *OK*.

The *First document* file is filed in *Index 1* and deleted from the Mailbox.



Press *[F5]* to return to the *Archive* index card. One click on the document that has just been transferred from the mailbox displays its contents on the right-hand page of the folder.

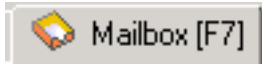


In this way, when you are at index level in the archive, you can also file documents directly from Explorer by dragging and dropping them in an index, without going via the Mailbox.

## Opening another ELO window

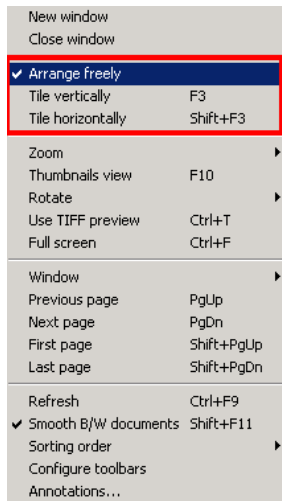
Dragging and dropping documents from the Mailbox via a second **ELO** window directly into the index.

**ELO** allows you to open a second **ELO** window. This means that you can move your documents by dragging and dropping them.



1. Switch to the *Mailbox* area. If there are no documents in the Mailbox, add one from Windows Explorer or copy your sample document from *Index 1* back to the Mailbox. You can also scan new documents into the Mailbox using the *Scan pages* function and use them for the further tutorials.

2. Click on the *Window* menu. In the drop-down menu, choose how to open the second window.



a) *New window* opens the second window with the setting *Arrange freely* (as you can see from the *small tick*). To change the view, open the menu again and select, for example, *Tile horizontally*.

b) Click on *Tile vertically* to open the second window right next to the first.

3. Select *Tile vertically*.

The two **ELO** windows are now side-by-side. In the left window you can see the open Mailbox, in the right window you are at the archive level.

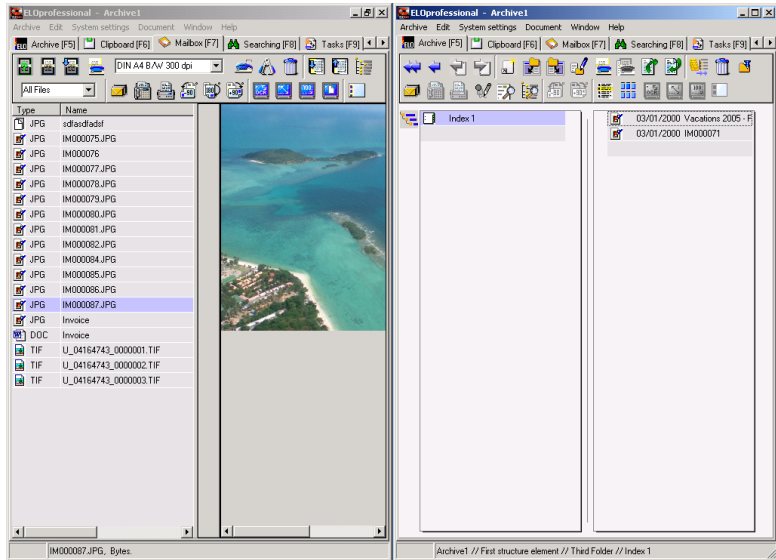


Fig. View: Tile vertically



4. Switch to the right-hand **ELO** window. Open the filing cabinet, folder and index. Our sample index *Index 1* is on the right.

This layout is ideal for filing several documents from the second **ELO** window in different indexes within a folder because all the indexes are displayed.

5. Now click on your document in the Mailbox (i.e. in the left **ELO** window) and hold down the mouse button. Drag the document into the corresponding index in the right **ELO** window - in our example *Index 1*. Now release the mouse button.

## Important information

If you used a new document that is neither archived or keyworded for this process, the *Edit document* dialog opens again. Now file the document using the index form as described. Remember you always have to keyword a document using an index form. This ensures that no document enters the archive without being keyworded so that it cannot be found again.



If, on the other hand, you have used a document that has already been archived using a completed document form (e.g. the document copied back into the mailbox), the document is filed immediately. Only the *Info dialog* appears. Once you click on *OK* the document is archived.

## File to archive using filing clause

File the document automatically by the target definition in the index form.

The third method for filing a document from the mailbox in an index is *File to archive using filing clause*. First, however, you must set up target definitions for the index forms and specific conditions for the target index. From the index form, *ELO* recognizes where to archive the file.

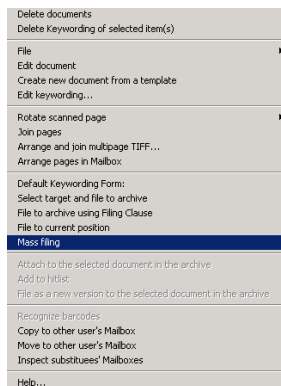
But these preliminary steps - defining target and conditions for the target index - require more profound knowledge of *ELO*. (You can find more information on this in the chapter **System settings** under the heading **Index forms**.)

## Mass filing

File several documents at once.

The *Mass filing* function simplifies the process when archiving several documents.

Say you have a whole folder full of old files (e.g. old invoices) that you do not really want to keyword individually. The *Mass filing* feature allows you to file all the documents at once using one index form and the same keywords.



1. Scan all documents using the *Scan pages* feature in your mailbox.

2. In the archive, open the folder and index where you want to archive the scanned files. If there is no suitable index available, create one.
3. Switch back to the Mailbox and select all the documents that you want to file in one go with the same keywords.
4. Right-click to open the context menu and select the command *Mass filing*.
5. The *Select document form* dialog box opens.



If you wish, you can bypass the *Select document form* dialog box to speed up the process. To do so, right-click to open the Mailbox context menu. Click on *Default Keywording Form*. The *Select document form* window appears. Select the index form you wish to appear automatically as the default template in future. (To undo this later or to create another index form, select *Select document form* then either *No data* or another index form.)

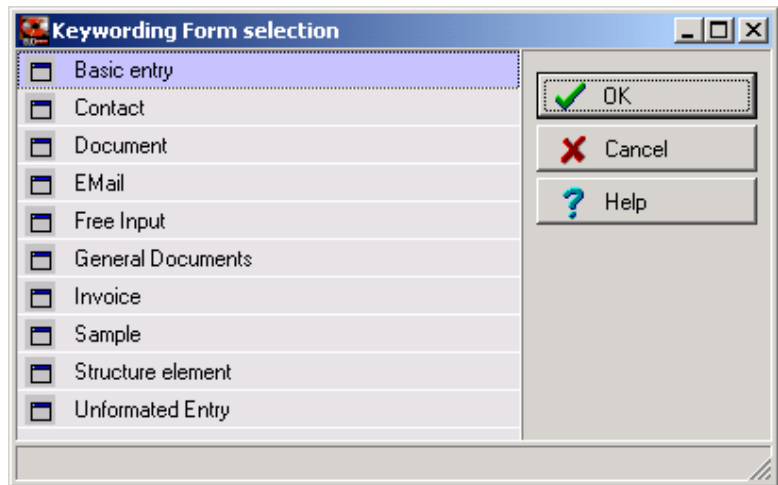
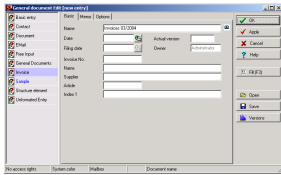


Fig. Selecting a keywording form

6. Select an index form, e.g. *General document*.



7. The Keywording dialog opens. The selected index form is already active. In Name, enter a name e.g. *Old files*, and memo text if required.



8. Click on OK. **ELO** now files all the selected files with the name you entered (*Old files* in our example) in the open index.

If necessary, you can view the individual documents later at any time and keyword them individually if necessary.



If you enter the parameter **##** in the *Name* field, you also have the option of appending an automatic counter. For example, if you enter **Old files ##** under *Name*, the files will be archived in the index as Old files 1, Old files 2 etc.

You can also enter a parameter as a prefix, e.g. **#5#**. So if you enter **Old files #5#**, the document names in the index will begin with Old files 5, Old files 6 etc.

Of course you can also automate the archiving further using *Mass filing* by creating a specific index form that already contains the target index.

You can find more detailed information about **index forms** in the chapter **System settings**.

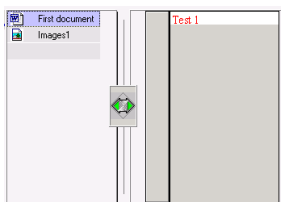


The best way to keyword documents and use the options in the *Options* index card, for example encrypting or sending documents, is explained in the chapter **The archive**.

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# Working with documents in the archive

## The document data context menu



Archived documents can be opened at any time and edited, sorted and printed as necessary.

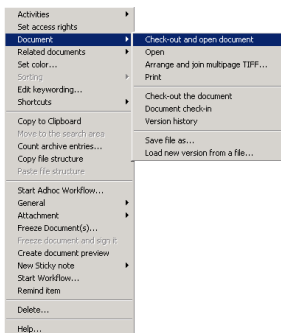
2. Click on the document you want to open, edit or print. It will be visible in the right half of the screen.

For OLE documents (e.g. MS Word text), **ELO** only displays the first page of a document in the document view. You must open the document to view the other pages.

3. To view or edit the document, *right-click* on the document entry (left side). A context menu appears.

1. Open the filing location of the document in the *Archive* area.

4. Choose *Document* from the context menu. A submenu opens that includes the following commands:



- Check out and open document
- Open
- Arrange and join multipage TIFF...
- Print
- Check out the document
- Document check-in
- Version history
- Save file as
- Load new version from a file

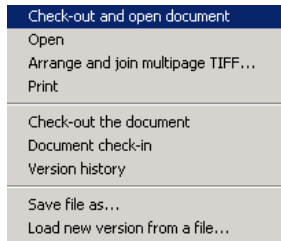
Depending on the menu entry you choose, you can now, for example, edit or view the document. We will take you through the options below.

## Editing documents

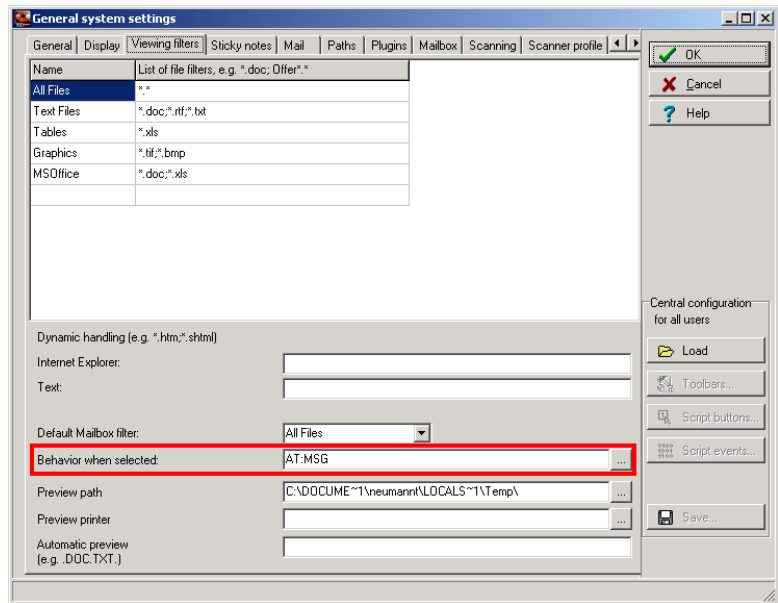
It is easy to open and edit archived documents.

1. Right-click on the document entry.

2. In the context menu, select *Document* then *Check-out and open document*.

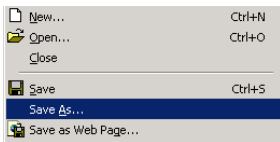


You can configure how **ELO** behaves when you select a document entry - for example, you can open a document immediately by clicking on the document entry, without opening the context menu. You can change the settings in *System settings*, *Options*, *Viewing filters* index card, *Behavior when selected* option.



**Please note:** You can change this behavior when clicking on an ELO object at any time in *System settings, Options, Viewing filters* index card, *Behavior when selected* option.

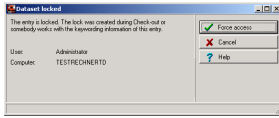
This opens the program that was used to create the document. For image or graphics files, an in-built **ELO** viewer opens. An internal **ELO** number is displayed in the program's title bar (e.g. MS Word).



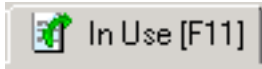
Now edit the program as usual in your application. After you have made the changes, save them in the application using *File, save* or by clicking on the disk icon. Then close the program to return to **ELO**.



The edited document is now marked with an arrow icon as checked-out in the archive view. The document is now locked in the archive.



If you attempt to edit the document, an error message appears.



Documents marked in the archive as checked out are grouped together in the *In Use* area.

Type	Name
TIF	[Canada (multi-paged, file format TIF)]
DOC	DMS Positioning and environment (file format Doc)
DOC	Glossary (file format Doc)

The *In Use* area gives you an overview of all the documents in the archive that have been checked out.

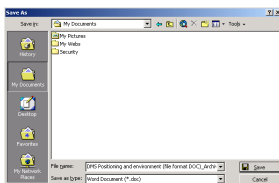


To check documents in again, you can use either the *Document check-in* option from the context menu, or the *Document check-in* button on the toolbar. If necessary, a dialog box is displayed, where you can enter a version number and comments. Then the document is returned to the archive area and is no longer marked as checked out.



Documents are checked out for editing. You should only check a document back in to the archive when you have made all your changes. If necessary, assign your comments and a unique version number to the document. Remember that the document will be locked for other users during editing.

Image and graphics documents are edited in the programs with which they are associated. In Windows, graphics formats are associated with Wang Imaging by default. Using this program, you can add annotations to the document (stamp, color etc.). These *Annotations* are only printed if the function *Print annotations* is selected in the system settings (*Options, General* index card).



You can also save the document you opened to edit with a different name. But this new document is then outside **ELO**. To do so, enter the name and file path (drive and folder) of the new document in the *File, Save as* menu of your application.

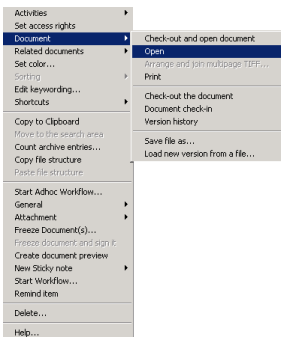


If the same document is opened by another user while you are editing it, he/she receives a message that the document is currently being edited by another user and cannot be modified or saved.

## Viewing documents

If you just want to view a document, without changing it, proceed as follows:

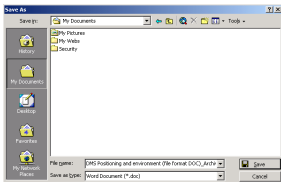
1. Right-click on the document entry to open the context menu.



2. Select *Document*, then *Open*. You can open the document read-only more quickly by double-clicking on the sticky note bar (see information on *Sticky notes*) or clicking on the *Open document* button. This opens the program that was used to create the document. In the program title bar (e.g. in MS Word), the internal **ELO** number is displayed, followed by *Read-Only*. The contents of the document can be viewed, but not changed.



You can also open a document directly by single-clicking - you can set how ELO responds to a single click, for the document entry and document icon respectively. So it is possible to assign two different responses, e.g. *Open document* when clicking on the icon and *Edit keywording* when clicking on the text.



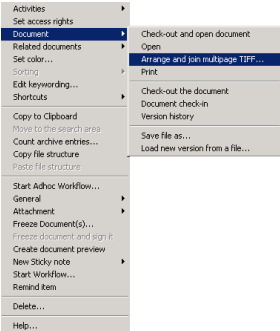
Once opened, the document can be edited and saved outside **ELO**. To do so, select the name and save location for the document in your application in the *File*, *Save as* menu. After you have saved the document, close the application again. This automatically returns you to **ELO**.



In the *Window* menu you will find the command *Smooth B/W documents*. You can turn on this feature by clicking (ticking), or using the keyboard shortcut Shift+[F11]. This smooths the grayscale display of scanned black and white documents.



# Arranging and joining multipage TIFF



TIFF documents can be rotated using this option. You can use this feature to rearrange the pages of multipage TIFF documents and to remove individual pages. To do so, right-click on the document. In the context menu, select *Document* then *Arrange and join multipage TIFF*.

The *Change page order* window appears.

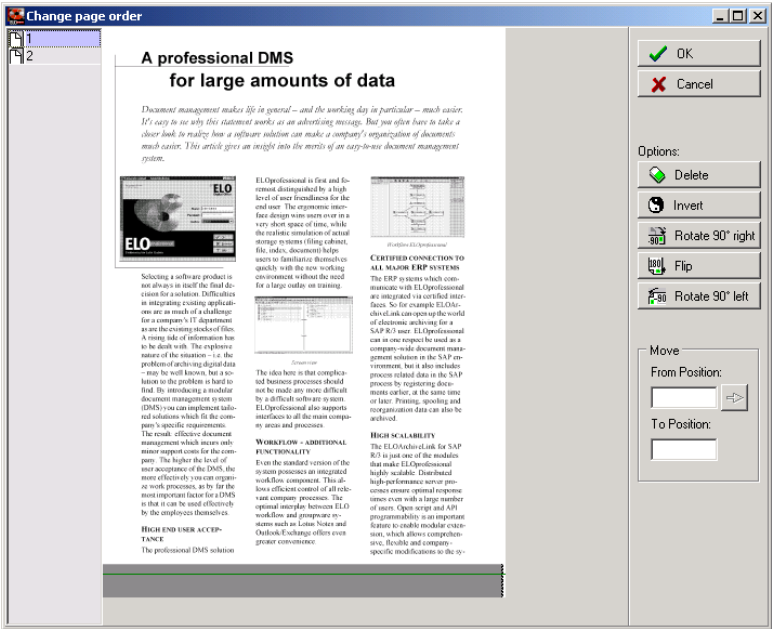
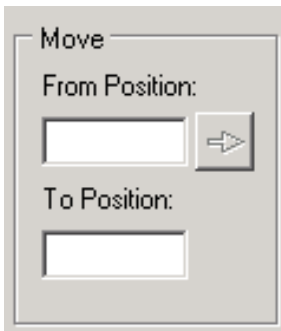


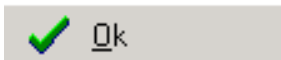
Fig. Arranging multipage TIFF documents



1. First select (or search for) the page you want to move from the list. The page is displayed so you can check you are moving the correct page.



2. In the *Move* field under *From Position* enter the page you want to move according to the list entry. In the *To Position* field, enter the new page number to which you want to move the page.



3. Click on the green arrow next to *From Position*. The new order is displayed in the list field.

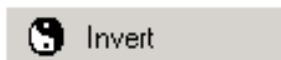
4. Click *OK* when you have finished sorting.



You can also sort using drag and drop: just click on the page in the list, hold down the mouse button and drag to the new location.



To delete a page, select it in the list and then click on *Delete*.



Sometimes, individual pages of a scanned document are displayed incorrectly (inverted). All white areas are displayed as black and black areas as white. This is usually caused by a problem with the scanner's Twain driver. Using the *Invert* feature, you can correct the pages retroactively.

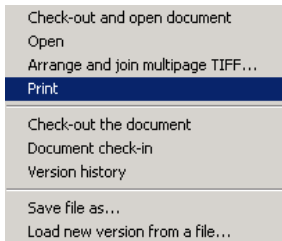
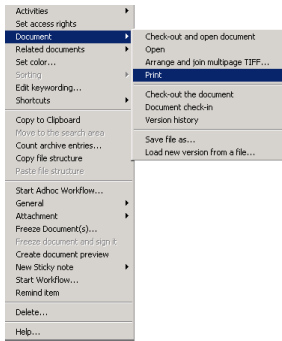


Whether and how you can access a document depends mainly on two things:

1. Your access rights. Your system administrator can assign you a key and grant you access rights.

2. The document status, i.e. the version control set in each case.

## Printing documents



All documents archived in **ELO** can be easily be printed out.

Right-click on the document entry for the document you want to print.. In the context menu, select *Document* then *Print*. Select your printer or enter your print settings and start printing.

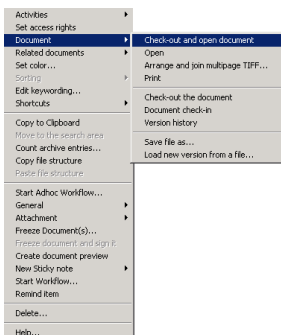
Alternatively, you can select a document entry then select *Print* from the *Document* menu. Print it from there as usual.

## Checking documents in and out

**ELO professional** creates a copy of the original document when any changes are made. (More information about this in **Version history**). Say you are working on a document over several days. To avoid a copy being made of every version of your document, you can *check out* the document. It is then simultaneously locked for all users. That means no-one can open the document inadvertently in the meantime, unless he/she has access to locked documents (e.g. the administrator).

### Check out and open document

Right-click on the document you want to check out.



The context menu opens. Point to *Document* and click on *Check-out and open document*.

Using the *Check-out and open document* command in the context menu, the document is checked out and opened following a warning.

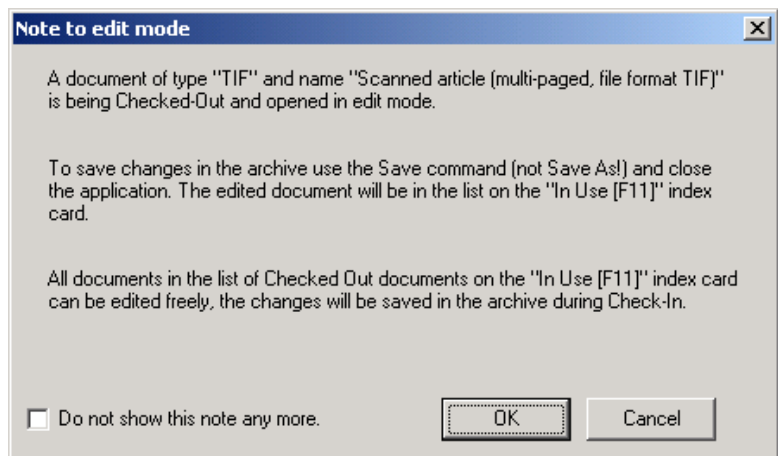
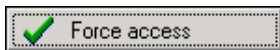
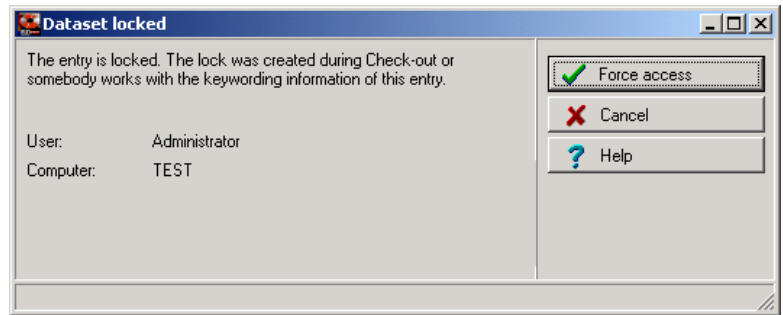


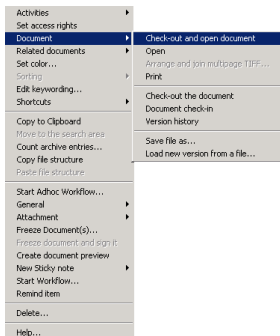
Fig. Confirmation dialog when opening the document for editing

The document is now locked. While it is still displayed in the archive, should anybody try to open the document, they will receive the message *Dataset locked*.



As system administrator you can open the document using the *Force access* button, but this is intended for emergencies only, for example, because you urgently need to access the document.

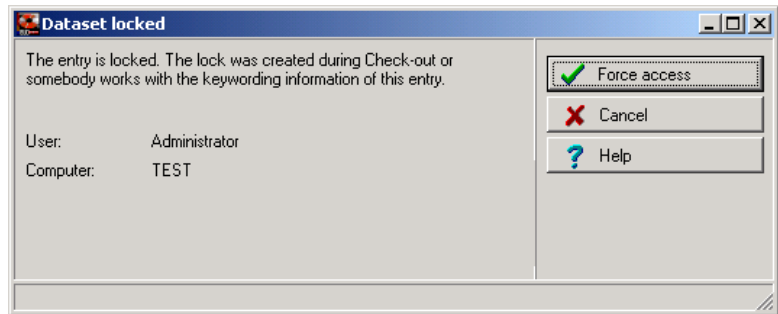
## Editing a checked out document



1. To edit a checked out document that you do not have in your own *In Use* area, right-click to open the context menu in the archive.

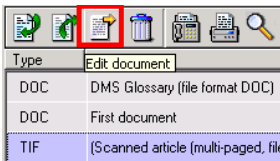
The click on the entry *Document, Check-out and open document*.

2. You will receive an error message informing you that the document is locked.



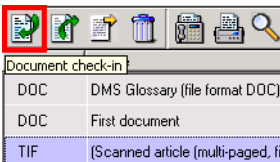
Either the document is in the *In Use* area, and was checked out by you and already transferred to the In Use area or the document is currently being used by another user and you cannot access it. In this case you only have one way of accessing and opening locked documents, if you have the appropriate user rights.

3. Switch to the *In Use* area. There, you can see an overview of the documents you have checked out.



All of your checked out documents are displayed. Select the document you want to open and then click on *Edit*.

The document opens and you can edit and save it, without the changes being visible in the archive. The reason for this is that checked-out documents are kept as copies in a special check-out directory. All changes are made to this copy. Save the document in the application. It appears in the *In Use* area again.



Or click on the *Document check in* icon.

If you want to purge the list in the In Use area, click on the *Delete* button to delete the selected document from the check-out directory. The original file is not affected.

## Document check-in



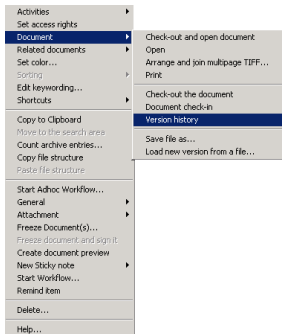
Open the *Document check in* window as described above (using the context menu or icon).

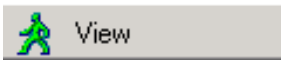
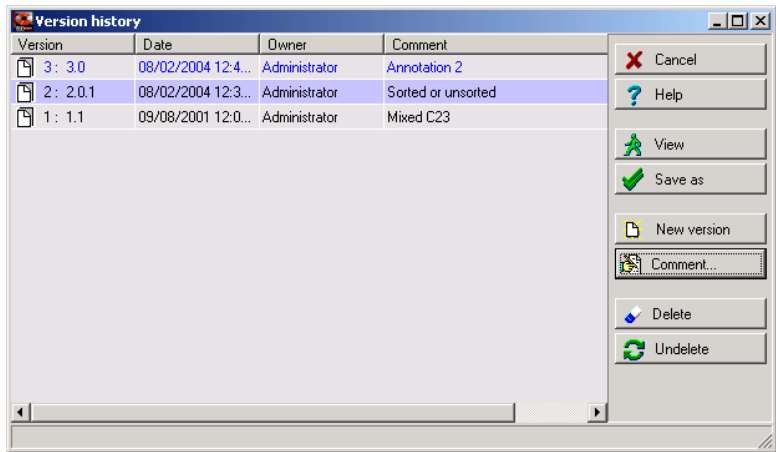
Select the document and then click on *Check-in*. The copy of the document is now moved back from the check-out directory to the ELO archive. If necessary, enter the required information in version comments, if it is a version-controlled document.

## Version history

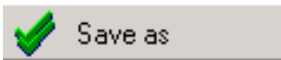
Because it is generally important in a company to know what changes have been made to a document and by which employee, **ELO** includes the *Version history* feature. That means you have a record of the different versions of a document, so you can track changes. This feature is very important for many requirements (ISO 9000, contracts etc.)

To view the version history of a document, right-click on the document entry. In the context menu, select *Document* then *Version history*.





The version history contains every version of a document. To view a version, select it and then click on the *View* button.



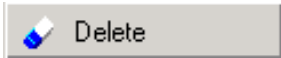
To save a version of the document outside **ELO**, i.e. on the hard drive in a particular directory or on a diskette, click on *Save as*.



Clicking on the *New version* button, you can make the selected version the current version.



Using this button, you can edit the version comment of the document versions.



You can delete individual versions using this button. For this you need rights to *Delete versions*.



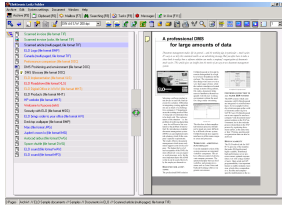
By clicking on this button you can remove the deletion marker on the selected versions. Make sure that you activate the *View* option in *Delete/restore entries* in the *Archive* menu. Otherwise, deleted versions will not be shown in version management.



You will find further information on this under **Version control** in the chapter **The archive**.



## Sending documents

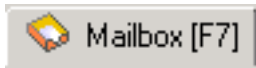


**ELO** lets you send documents directly to colleagues over the network. This means that you save time and energy (no need for paper copies). You start from the Mailbox. You must first put the document in the Mailbox.

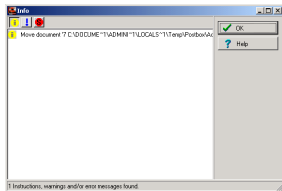
1. Select within the archive the document that you want to send to a colleague. The document entry is on the left, you can view the document on the right.

2. Click on the document entry and hold down the mouse button.

3. Drag the document to the tab of the *Mailbox* area. Release the button (drag and drop).



The info display appears and confirms that you want to transfer the selected document to the mailbox.



4. Click *OK* to close the info display. A copy of the document is now in the mailbox.

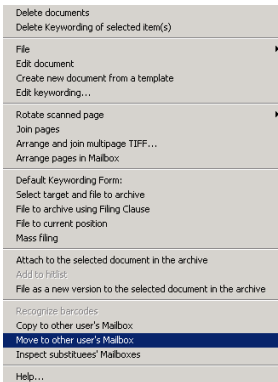


The info display only appears if the *Notes, warnings and error messages* option is checked in the *System settings, Options, Display* index card.

Alternatively, you can open the Mailbox in a second ELO window. Click on *Window, Tile vertically* in the menu bar. Then drag and drop the document into the second ELO window, i.e. straight from the ELO *Archive* level to the ELO *Mailbox*.



5. Now switch to the Mailbox and select the document again there.



6. Right-click to open the context menu.

7. Select the command *Move to other user's mailbox* from the context menu. The *Select user* dialog box opens.

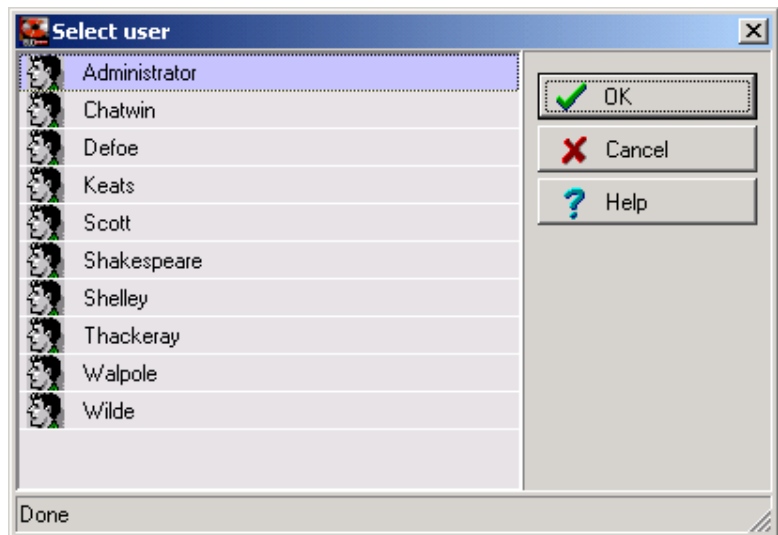
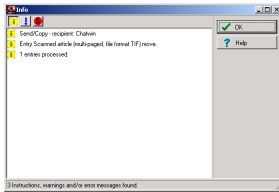


Fig. Selecting a user

This window displays all the users (ELO users) to whom you can send documents.



8. Choose the user you want to send your document to and click *OK* to confirm. Using the info display that appears, you can check once again whether the document was sent to the correct mailbox. Confirm again with *OK*. The document is now in the mailbox of the user you selected.



There are different ways to send documents to other mailboxes. To find out more, you should also read the sections on **Sending pages** and **Moving to other user's mailbox** in the chapter **The Mailbox**.

## Deleting documents

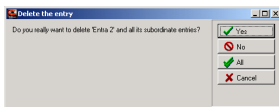


It is simple to delete documents in **ELO**. The same is of course also true for levels, indexes, folders and cabinets.

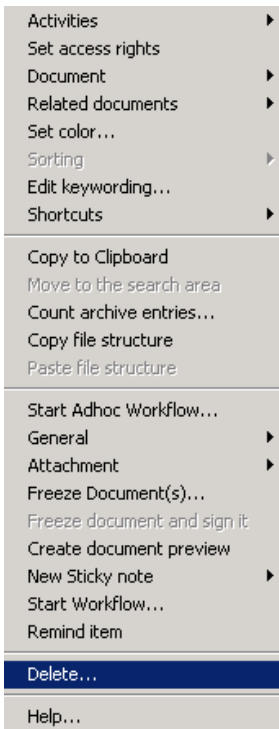


1. In **ELO**, select the object to be deleted, e.g. a document or folder entry.

2. Click on the *Delete* icon.



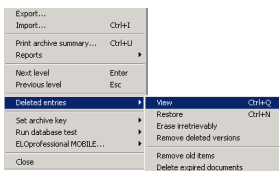
3. A confirmation dialog will then appear. Confirm the dialog box by clicking on *OK*.

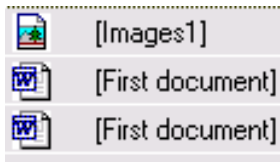


Alternatively, you can right-click on the object entry and click *Delete* in the context menu. The confirmation dialog also appears before the object is deleted. This gives you a last chance to confirm that you wish to proceed with the deletion.

When an object is deleted, all subordinate entries are also deleted. So if you delete a folder, for example, all the indexes and documents it contains are also deleted. This process does not delete the ELO object from the archive, but makes it no longer visible to the user and marks it with an internal *deletion marker*.

Via the menu entries *Archive*, *Delete/restore entries*, *View* you can make the deletion marker on entries visible again.





Deleted ELO objects are displayed, but are denoted by square brackets. The *Restore* option allows you to remove the deletion marker.

For this reason, please read about *Deletion* in the chapter **The archive** under *Deleted entries*. There, you will learn more about how to view and restore deleted documents, or delete them from the archive.

### Deleting individual pages

Individual pages of a scanned document can also be deleted. Right-click on the document. In the context menu, select *Document* then *Arrange and join multipage TIFF*. The *Change page order* window appears.

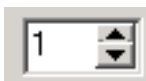
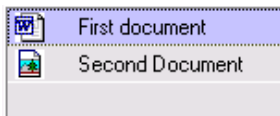


Select the page you want to delete in the list and click on *Delete*.

The screenshot shows *page 2* of a 4-page document being deleted.

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# Viewing with Internet Explorer

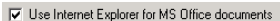
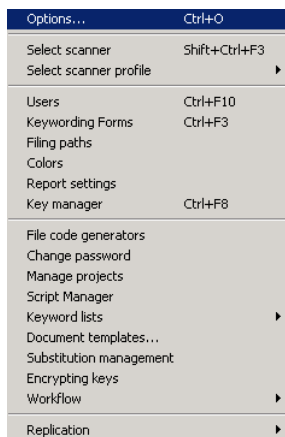


**ELO** displays all the archived documents in an index as document entries. When you click on an entry, you will see the document on the right-hand side.

For scanned documents, you can view every page of the scanned document using the *Page number* dialog box.

For Office documents, such as a multipage Word document, this is not enabled by default. Headers and footers are not displayed either. You first have to open the corresponding application to see the headers, footers and all pages.

But things are simpler if you have Internet Explorer installed: in the menu bar, click on *System settings*, then *Options*. From the *General system settings* window, select the *View index card*.



On this index card, activate the *Use Internet Explorer for Office documents* function. Now the headers and footers are displayed and you can scroll through all the pages in your document. The display size in **ELO** depends on the zoom setting in the relevant application. PDF files are always displayed using Internet Explorer.



**Please note:** If you do not wish to view PDF files using Internet Explorer, you must install a plugin for the PDF file extension via the ELO plugin interface. This can be entered under *System settings, Options, Plugin* index card.



Furthermore, the view options (e.g. normal view, outline view, etc.) and horizontal scroll bar are also directly available. That means, for example, that you can rapidly look through the individual slides in a PowerPoint presentation.



The *Use Internet Explorer for Office documents* option should not be activated if the documents contain **Fields**, otherwise Internet Explorer checks every field and asks whether to update it. This may cause unintentional changes to the original document.

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# Creating documents in ELO

**ELO** gives you the option of creating documents, e.g. an MS Word or MS Excel file directly in the mailbox or the archive.



In ELO you can define personal and global document templates using access rights. Only the administrator can create general document templates that are available to all users. If you require global templates, contact your ELO administrator. You can create private (user-defined) templates yourself and file them in the corresponding template folder in **ELO**. You will find the filing folder for templates under *System settings, Options, View* index card. The folder for templates is located here.

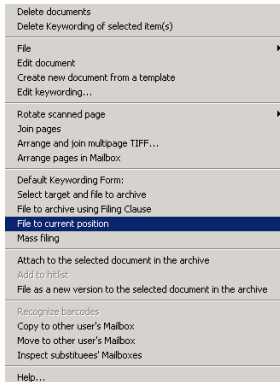
You create the private document templates yourself and they are only available to you. Consult your administrator if necessary.

## Creating private document templates

1. First create and design a template (file) in your application (e.g. in MS Word) that you would like to use as a document template. This could be a letterhead or invoice form.
2. Give the document a concise name (letterhead, offer, reminder etc.) and save it.
3. Start **ELO***professional* if it is not already running.
4. Now put the template (file) you created with your application program into your **ELO***professional* mailbox, e.g. by dragging and dropping from Windows Explorer.
5. Switch to the archive in the folder or index in which the private templates are filed.



6. The switch to the Mailbox and right-click on the appropriate document entry - the file which is to be the template - in order to open the context menu.



6. Point to *File to current position* in the context menu or create the document template via the *Select target and save to archive* option. The document template will then be in the *Templates/user-defined* folder, for example.

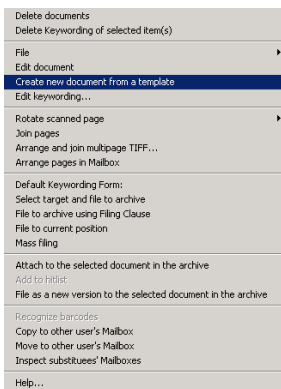
7. Your document template is now available in the *Mailbox* area in the context menu under *Create new document from a template*.



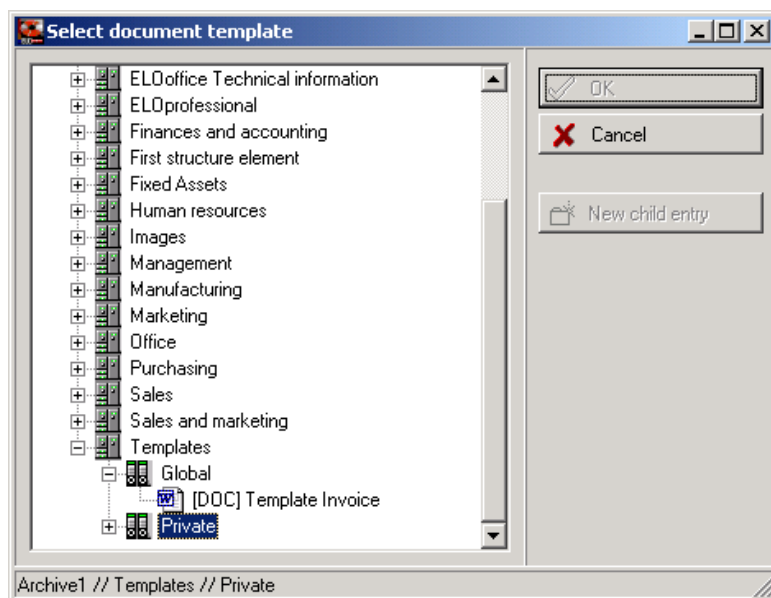
In this way, you can quickly turn any document into a template in the mailbox. You can edit these templates retroactively, assign a key to them or delete them. You can find these features under *System settings*, *Document templates*.

## Using document templates in the mailbox

1. Go to the **ELO** Mailbox. Right-click in the left mailbox pane, where the mailbox entries are displayed. The context menu opens.



2. Point to *Create new document from a template*. **ELO** opens a dialog box showing the templates available.



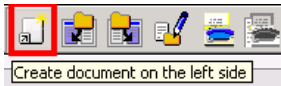
3. Select a template, e.g. *Invoice*. **ELO** opens the template in the relevant application, where you then create the document.

4. Then click *Save* in your application. Your new document is now filed in the mailbox. You can now keyword the document, give it the correct name and archive it.



If you create additional documents from the same template before keywording, these are simply numbered consecutively. This means that no document is overwritten; all are retained.

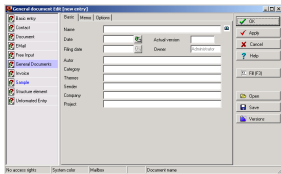
## Using document templates in the archive



You start from the index level, or any other level in the archive, so that e.g. *Index 1* is on the left side.

1. Left-click on the icon *Create a document on the left side*.

The window *Edit level [New entry]* appears.



2. Select a index form, e.g. *General document*.

3. Complete the fields. You are already familiar with the procedure and setup options from creating filing cabinets, folders and indexes. Under *Name*, enter the name of the new document, e.g. **First document**.



Index forms help you to file your documents in a standardized way with particular settings, such as keys or colors. You can, for example, create specific index forms for invoices. You can find more on this topic and the individual setup options in the *Options* index card in the chapters **The archive** and **System settings**. For our quick intro, you don't need to be familiar with these.

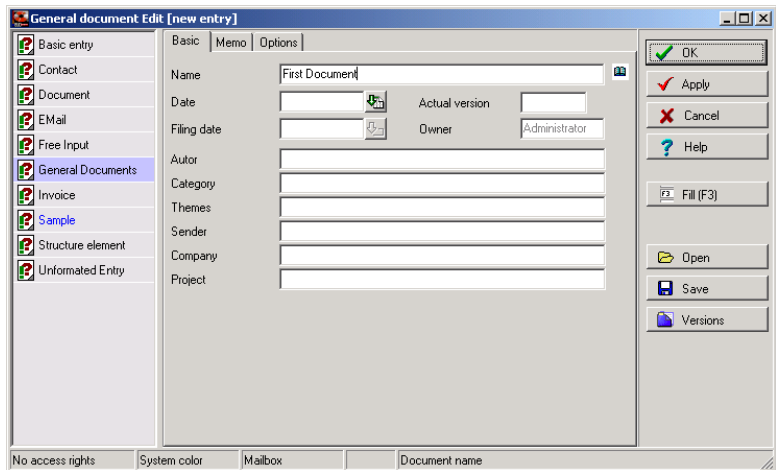


Fig. Selecting an index form and entering the name

4. Click on **OK**. The input window closes.

5. The *Select document template* window appears.

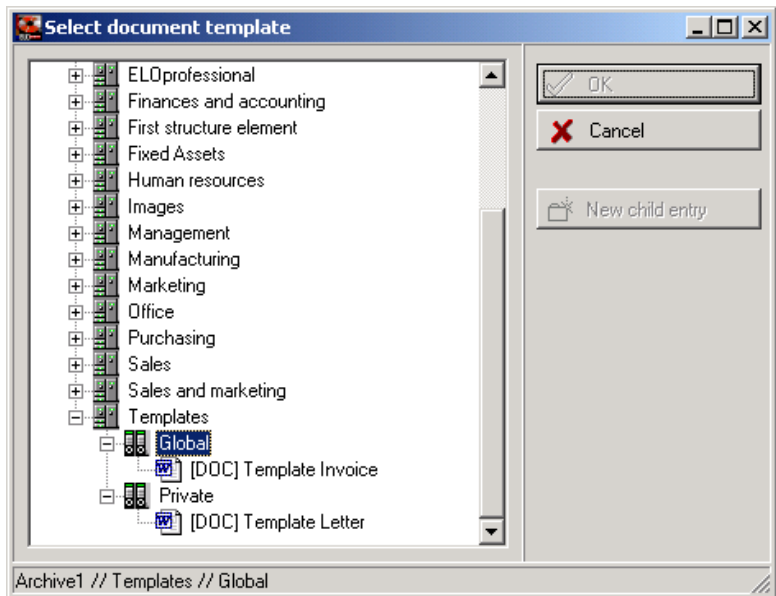
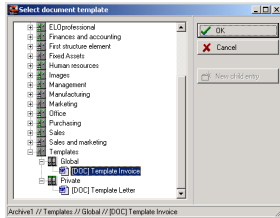


Fig. Selecting a document template

This window displays all the document templates that you can use to file a document.



6. Select *Sticky note*. The MS Word application opens. Type some text, e.g. *This is a test*. Then click on *File, Save* then close MS Word.



Choose *Save as* if you want to save the document outside of **ELO** on another medium, such as a disk.

Your *First Document*, with the document entry on the left side, is now visible. On the right side of the folder, you can see the text you entered (content of the object). The document is marked as checked out and is currently still in the *In Use* area. If necessary, check the document in when you have finished editing it. In the middle of the screen you can see a split bar to change the screen view.

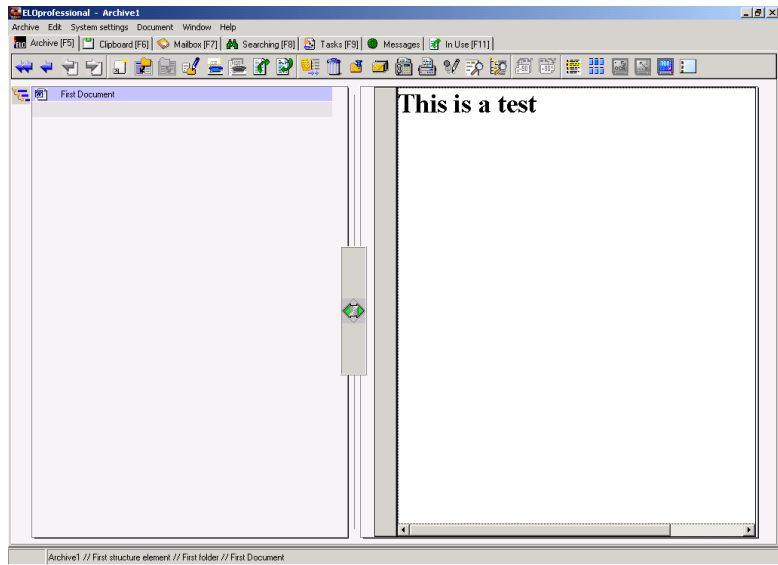


Fig. Work area with split bar

## Editing document templates

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

Document templates can be modified, locked and deleted like every document in **ELO**.

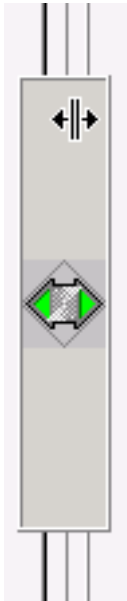
In the *System settings* menu, click on *Document templates*. The *Edit document templates* window appears.

The *Archive* area is activated and ELO switches to the folder containing the document templates. You can set this folder via *System settings*, *Options*, *View index card*, *Document templates* option, *Start path*.

Key or all the templates concerning *access rights* will be defined in **ELO** by issuing access rights. Read the corresponding section if necessary.

## Split bar

The bar in the center of the *open Leitz folder* (see above) is a split bar. It lets you adjust the view, or the aspect ratio, of your *open folder* or ELO object.



If move the mouse over it, the cursor changes to a *move icon*. You can click and drag the split bar to left and right. This function is very useful if, for example, you want to view large documents or images on the right hand side of the folder.



The split bar feature is available almost everywhere in **ELO**.

The gray bar to the right of the split bar is the *sticky note bar*. Right-clicking on the sticky note bar opens a context menu containing further functions - for example, creating and editing the sticky notes.





# Chapter 3

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## The Archive

At the start of this chapter, we will take you through the commands in the *Archive* menu and the *Archive* context menu. We will then show you how to sort your *Archive*, to lock documents and much more.

This chapter also contains information on several features that will assist you in your day-to-day work and make organizing your electronic archive easier

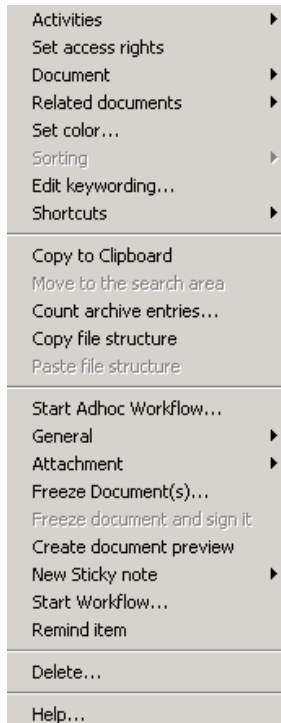
This section contains information about the following features:

- Overview of the commands in the context menu
- The commands in the Archive menu
- The commands in the context menu
- The Archive toolbar
- Encrypting documents
- List view and tree view
- Chaos filing
- Fulltext
- Linking to Outlook
- Playing video clips
- Version control
- Affixing sticky notes

- Attachments
- ELO printer
- Scanning into the archive
- Signing documents
- Displaying QuickInfo
- Configuring toolbars

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# Overview of the commands in the context menu



Right-clicking in the archive area opens the context menu containing all the features you can use in the archive. The features contained in the context menu refer to the object selected in the archive, e.g. to a selected filing cabinet or document. Some of these features can only be used with structure elements (filing cabinet, level, folder and index), others only with documents. Below, we will first provide an overview of the items in the context menu. Then, all the menu items will be explained.



Some of the commands can also be initiated using the icons in the toolbar or menu items. Please bear in mind the entries and shortcuts in the index.

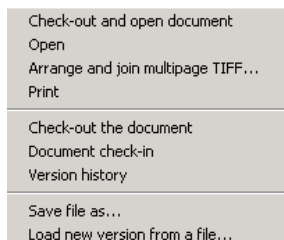
## Activities

This menu item allows you to display the activities associated with a document. Activities are a list giving an overview of the processes affecting a single ELO object.

## Setting rights

Using access control lists, you can clearly define access rights and the visibility of ELO objects within an archive. Each object now has its own access control list that determines unique object rights. Entries in the access control lists against particular ELO objects (e.g. documents or folders) enable access protection that can be customized down to the level of individual users. Identifying and authenticating users using the enhanced access protection rights down to individual groups/users allows you to specifically restrict access to ELO objects, such as documents or folders. You can now make a distinction between whether a group and its members, for example, have read or write permissions for a specified object, e.g. a document.

## Editing a document



This context menu heading allows you to perform all editing-related functions.

Using the functions in this context menu group you can edit and open documents. When editing, ELO checks the document out of the archive. If you open it, it is opened in read-only mode. Documents that have been checked out must be checked in again after editing. You can find more information about checking in documents in the chapter **The In Use area**.

As well as the option of sorting joined TIFF documents (scanned documents), this context menu group contains all the version history options for documents. To use version history, your documents must have been filed as version-controlled. For these documents, single versions may be made up of a wide variety of files, by adding these files from your file system (via Explorer) as a new version. Documents can of course also be saved as a physical copy in the file system.

<b>Related documents</b>	The Related documents context menu group includes functions for creating links to other documents and for creating a list of all the documents linked to a particular document. Using this feature, documents can be linked to others within an archive. Links connect related documents in different areas of the archive so that the user can access them quickly.
<b>Set color</b>	Using this command you can use the colors defined by ELO previously set in Color as the text colour for visual displays. All archive entries (document entries and structure elements) can be distinguished using colors. You can use these colors as an additional source of visual information. Colors allow you to distinguish parts of your archive - e.g. to create an invoice folder in red and an inventory folder in green. Or you can designate another color purely for certain document types - e.g. text files in blue and video files in yellow.
<b>Sorting</b>	<b>ELO</b> shows the content of a filing cabinet, folder or index in the archive as a list. You can set the how items are arranged in this list using the sort function in the <i>Sort</i> context menu heading.
<b>Editing keywording</b>	All objects (filing cabinets, folders, indexes and documents) in ELO are keyworded when they are created or filed. In other words, you entered a name and possibly some memo text. You also set options - different options for each element. You can change, add to or modify all these entries and settings using the <i>Edit keywording</i> command.
<b>Shortcuts</b>	In <b>ELO</b> <i>professional</i> you can create logical copies (shortcuts) of an ELO object (cabinets, indexes, folders and documents). That means that single documents or even, for example, whole folders or cabinets may appear many times in the archive. There is only one physical copy of these objects in the archive, but you can create multiple logical shortcuts to them. Under the <i>Shortcuts</i> menu heading you can see all the existing shortcuts for a selected object.

### **Copying to clipboard**

The clipboard is a sort of temporary holding area. You can copy any object to the clipboard - from an individual document to a filing cabinet and all its contents. You can also use the clipboard to reinsert objects in other locations in an archive. That allows you to move objects to the new location or to make logical copies of them (shortcuts). Refer to the chapter **The Clipboard** for more information on the clipboard.

### **Move to the search area**

Here you can move structure elements to the *Search* area. Multiple selection of ELO objects is possible here so that the same actions can be carried out in ELO with a group of objects.

### **Count archive entries**

The *Count archive entries* calculates the number of documents in a folder, for example, and how much disk space they require, including version history. You can also determine the size and number of attachments including the attachment's version history.

### **Copy file structure**

This function copies a complete filing structure to the ELO clipboard. From there, the copied file structure can be applied throughout the archive. This is very useful if, for example, you have to create the same folders and indexes in another filing cabinet for accounting purposes every year. As well as a file structure, you can also copy a selected document. Note that when the copy is pasted back, a physical copy of the document is created. You should try to avoid this, because it creates unnecessary duplicate data in the archive. If you wish to create a copy of a document, you should only use the *Shortcuts* function. We only recommend using the *Copy file structure* command if you really do require a duplicate copy of a document.

### **Paste file structure**

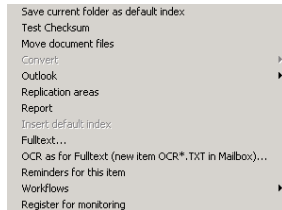
If you have copied a file structure (a filing cabinet, folder or index) to the clipboard, switch to the location in the archive where you want to insert the copy. Then click on *Paste file structure* in the context menu to paste the file structure or document that you previously copied to the ELO clipboard.

## Start Adhoc workflow

The Adhoc workflow is better suited for simple sequential or parallel business processes, e.g. to quickly and easily share certain documents among several employees. You can enter all your settings (e.g. selecting the employees or workflow type) in one, convenient dialog box.

## General

The *General* context menu group contains the following functions.



**Use current folder as default index:** This feature allows you to set an index in the selected folder as a default index. Once you have entered a name, you can use it as a default index. You can find more information in the chapter *Insert default index*.

## Example

Say you have a folder with a user-defined index or a default index you have modified yourself by adding some indexes. This function allows you to define the entire index as a *Default index*. It is then available from the *Insert default index* command.

## Test checksum

In **ELO** Access Manager, the system administrator can turn on an option to calculate a checksum. From then on, all new documents are checked and the checksum saved. Using the *Test checksum* command, you can call up the checksum report, which displays a line with the checksum for every version of a document. At the same time, the document is checked again. If the checksum is correct, the line is black. If no checksum was calculated when the document was saved (for example, if you filed it before turning on this option), the line is dark red. If the document has been modified, the line is bright red. So you can see at a glance whether the current document or one of the previous versions has been modified.

## Move document files

Using this function, you can easily move files, file versions, file attachments and/or versions of file attachments and referenced documents (shortcuts) out of ELO onto another medium. For example, the documents may no longer need to be readily accessible in the archive. The filing structure is retained. Select the ELO object from which you want to move the files. Point to *General* in the context menu, then click on Move document files. The *Move documents* window appears.

## Convert

Files imported from previous versions of ELO without being converted have the extension *.elo*. In that format, they cannot be indexed for fulltext. The **Convert** feature converts these files into TIFF files (*.tif*), so that their content can be transferred into the Fulltext database.

## Outlook

This command lets you link a selected index to MS Outlook, transfer the index content to Outlook and synchronize it. Further information on this can be found in **Linking to Outlook**.

## Replication groups

Assign replication groups (max. 2048) for the selective replication of ELO objects. (The **ELO***professional* Replication add-in module is required to use replication groups). You can assign any ELO objects (such as a filing cabinet) to several replication groups. The Replication module evaluates the replication groups and replicates accordingly.

## Report

Shows the archive report for the selected object. Report displays the report data for the selected object in a window. The latest date is at the top. Normally, the details for a single day are displayed, but you can also narrow the search to include particular entries or users. You can do this by clicking on the *Options* button. Refer to the *Reports* section in the *System settings* chapter.

## Default index, inserting

Inserts an index record into the selected folder from the default index dialog box. This function is only available at the folder and index levels. Using this command, you can insert an additional default index into the selected or open folder while holding down the Ctrl key in both cases.



## Fulltext

Transfers the contents of the selected document into the fulltext database. But this function is only available if the optional **ELO***professional* Fulltext module is installed.

You will find further information on this topic in this chapter in the section on **Fulltext**.

## Reminders for this item

Click on this to see any task reminders for the selected document.

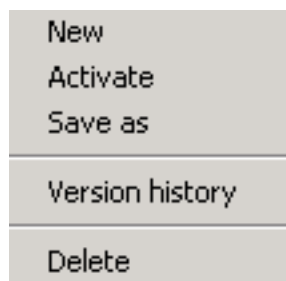
## Workflow

Use this feature to check whether the selected document is or was part of a workflow and, if so, which one.

Information on the topic *Workflow* can be found in the chapter **Workflow**.

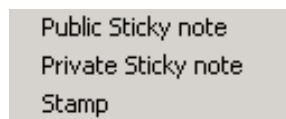
## Attachment

You can attach graphics, sound and video files to any document archived in **ELO** using the *Attachment* function. That means that you can attach almost any file to a document filed in **ELO**, including standard text files or executable programs (.exe files). You can also see the *history* (changes) of a file attachment via the *Version history*.



You can find more information about attaching files in this chapter in the section headed **Attachments**.

## New sticky note



A submenu opens when you point to *New sticky note*.

Select one of the three note types. Write the new note and affix it to your document.

More detailed information on *Sticky notes* can be found in this chapter in the section **Affix sticky note**.

## Start standard workflow

Own active workflows...  
All active Workflows...  
All finished Workflows...

## Creating a task reminder

**ELO professional** includes workflow management. This allows you to send documents on a predefined route between employees. The documents appear in the tasks area for the relevant employee.

The *Start standard workflow* menu item opens the *Start workflow* window. Select an existing workflow and start it by clicking *OK*.

**ELO** can automatically make documents available to you or a colleague at certain times. For that to happen, you just have to set a task reminder date for the document. When the task is due, the document reappears on your screen - because every time you start **ELO** it checks in task reminder to see if something is pending.

Refer to the chapter **Task reminders** for more information on reminders.

## Deleting

You can delete any object in ELO (filing cabinets, folders, indexes and documents).

1. **Right-click** on the object entry you want to delete then **left-click** on *Delete* in the context menu. The confirmation dialog appears.

2. Confirm by clicking on *Yes*. If you are not certain you want to proceed or you have selected the wrong document, click *No*.

The *Delete* command does not delete objects physically from the archive, just the shortcut to them. So you can also restore objects. You can read more about this under **Deleted entries**.

## Help

The *Help* command calls up online help. It offers quick access to information, hints and tips about **ELO professional**. Help opens automatically at the relevant place - in this case right at the *Archive context menu*.

---

# The commands in the Archive menu

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	▶
Next level	Enter
Previous level	Esc
Deleted entries	▶
Set archive key	▶
Run database test	▶
ELOprofessional MOBILE...	▶
Close	

Clicking on the menu bar in **ELO***professional* opens a drop-down menu containing all the commands in the *Archive* menu. Here, you can export sections of the archive, display reports or delete old documents.

What follows is just an overview - the commands are described in detail elsewhere in the manual.

## Import

Starts the import wizard. This is used to import a section of an archive that has already been exported (e.g. a folder or a single document) back into your **ELO***professional* archive. You can find further information about this in the chapter **Archive** under **Import wizard**.

## Export

This starts the export wizard which allows you to copy individual objects from an archive (e.g. a folder or document) to another medium, such as a disk or CD-ROM. You can find further information about this in the chapter **Archive** under **Export wizard**.

## Print archive summary

This command lets you create and print various summaries of the archive. This lets you display the archive setup (archive structure) and the contents of individual filing cabinets and folders clearly. You can find further information about this in the chapter **Archive** under **Print archive summary**.

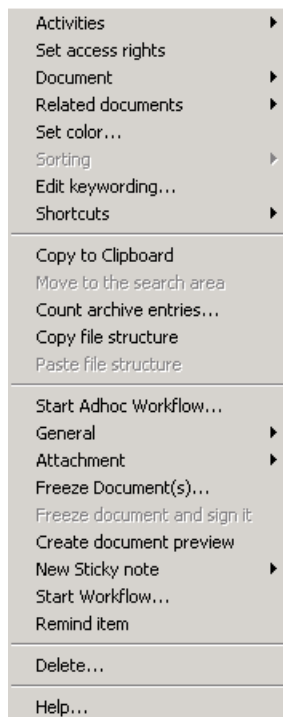
<b>Reports</b>	Security is a vital aspect of an electronic archive. For that reason, archive processes must be logged. Here, you can display logs of actions or system diagnostics. This makes fault-finding much easier. You can find further information about this in the chapter <b>Archive</b> under <b>Reports</b> .
<b>Next level</b>	Use this function to switch from folder to filing cabinet level, for example (Shortcut: Enter key).
<b>Previous level</b>	Use this function to switch from folder to filing cabinet level, for example (Shortcut: Esc key).
<b>Deleting/restoring entries</b>	Here, you can restore or irretrievably delete objects deleted in the archive. Further information can be found in the section on <i>Deleted entries</i> .
<b>Set archive key</b>	The Archive menu opens the <i>Select key</i> window to lock an archive. It can then only be viewed by employees who have the relevant key. The topic of the <i>Key</i> is dealt with in my detail in the chapter <b>System settings, Key administration</b> behandelt.
<b>Run database test</b>	Using this function you can run a database test. This option is primarily reserved for administrators.
<b>ELOprofessional MOBILE</b>	If you have installed <b>ELOprofessional</b> MOBILE, you can start the appropriate actions from this menu.
<b>Close</b>	Clicking on <i>Close</i> closes the <b>ELOprofessional</b> program.



You can also perform many **ELOprofessional** functions using shortcuts. You can speed up and simplify many tasks by using the key combinations shown in the drop-down menus.

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## The commands in the context menu



You open the context menu for the *Archive* index card by right-clicking on an object entry. The context menu is available for all filing cabinets, folders, indexes and documents. Commands that are available are shown in black type; inactive commands are grayed out.

The benefit of using the context menu is that it provides quick access to certain commonly used commands. The context menu in the *Archive* index card contains the following commands:

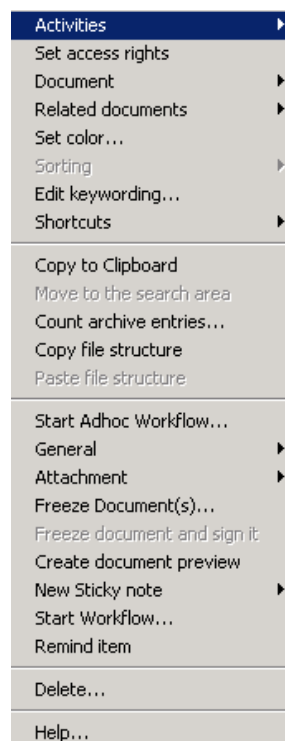
- Activities
- Set access rights
- Documents (e.g. edit and open)
- Related documents
- Set color
- Sorting (i.e. alphabetical, filing date, manual)
- Edit keywording
- Shortcuts
- Copy to clipboard
- Move to the search area
- Count archive entries
- Copy file structure
- Paste file structure
- Start Adhoc workflow
- General (e.g. insert default index and report)
- Attachments
- Freeze document
- Freeze document and sign it
- Create document preview
- New sticky note
- Start default workflow
- Create task reminder
- Delete and help



Some of the commands are also available via the icons in the toolbar, with shortcuts or by using the drop-down menus from the toolbar.

## Activities

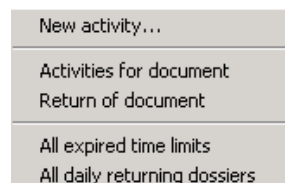
Like task reminders, the new *Activities* function lets you assign due dates and job instructions to documents, forwarding these to colleagues or to have ELO remind you about a document that needs your attention.



Activities can be assigned to documents or structure elements by clicking on *Activities* in the context menu in archive view and creating a new activity.

### New activity

The following options are available under the *Activities* submenu:



The *Edit activities* window opens. Here, you can select a project and assign an activity to a document.

Fig. Editing activities

Activities differ from task reminders in that they are always linked to a project. An administrator has to create the project. The advantage of this is that there are different types of activity available, because the activity form offers more index fields for keywording than a task reminder and it can be specifically adapted to each project.

## Activities for document

Displays a list with the activities available for each document.

Completed activities are not deleted. Instead, they are also displayed in the list so that you can always check when and by whom an activity was edited.



Name	Version	Owner	Sending	Send mode	Enh. Retn.	Return
Scanned articl...	2.0	Administrator	07/05/2005	FTP	07/08/2005	
Scanned articl...	Administrator	Administrator	07/06/2005			
Scanned articl...	Administrator	Administrator	07/06/2005		05/07/2005	29/07/2005

Fig. Displaying activities for a document

## Return of document

New activity...
Activities for document
Return of document
All expired time limits
All daily returning dossiers

The date is shown on which an activity is to be performed.

**All expired time limits:** Deadlines that have already passed are displayed here.

## All daily returning dossiers

Here you can see which activities are due today.

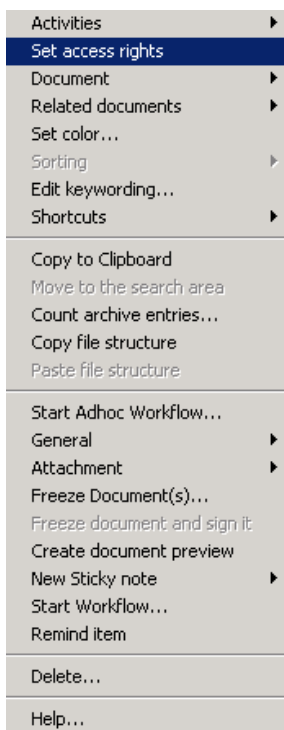
Another difference compared to task reminders is the auto-complete feature. The system administrator can set up the activities form so that frequently used information can be selected from a list of keywords.

New activity...
Activities for document
Return of document
All expired time limits
All daily returning dossiers

**All daily returning dossiers:** In task view, all documents are shown for which there are activities still to be completed.

## Set access rights

Access rights are assigned to an ELO object. Among the rights that can be assigned are *Keys*, *User rights* and *Group rights*.




Keys help to protect objects from unauthorized access. This means that if you assign a key to a filing cabinet, a folder, index or document, the object is only viewable by those that also have the key. It is also possible to assign different keys to a filing cabinet and its contents. So you can, for example, assign completely different keys to a folder, an index or a document. The system administrator decides whether you can assign access rights, and which ones.

There are two ways of assigning a key to an object:



a) Double **left**-click on the object entry on the left side, e.g. a document. The *Edit document* window appears. Click on the *Options* index card.

Basic	Memo	Options
Object type	Word	
Filed by	Administrator	
Key	Administrator	
Color	System color	
Document status	Version controlled	
Filing path	BASIS	
Expires on	<input type="text"/> 	
	<input type="checkbox"/> Include in Fulltext Database	
Encrypting key	no encryption	
Object ID	756 [000002F3->000002F4:0000004B:00000000]	
File name	Word.doc	

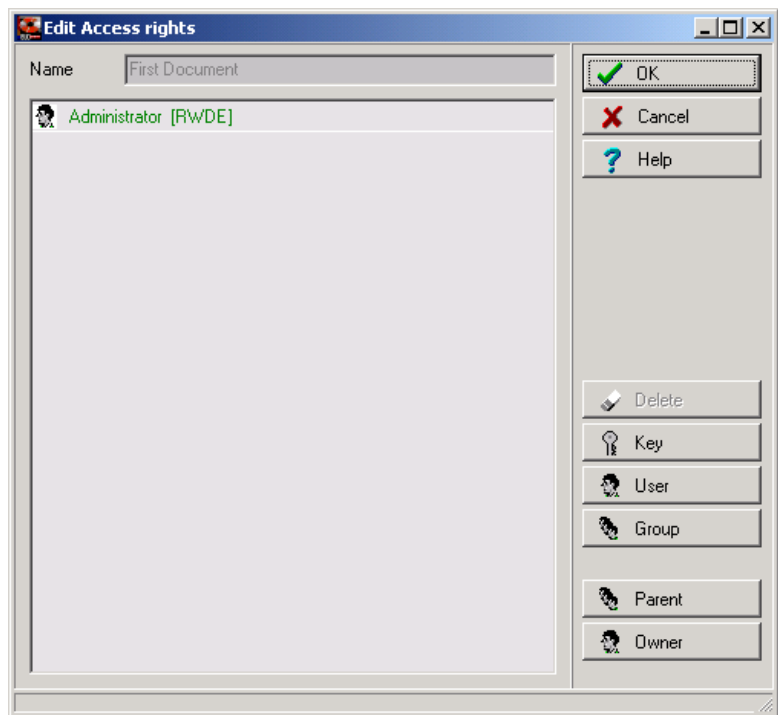
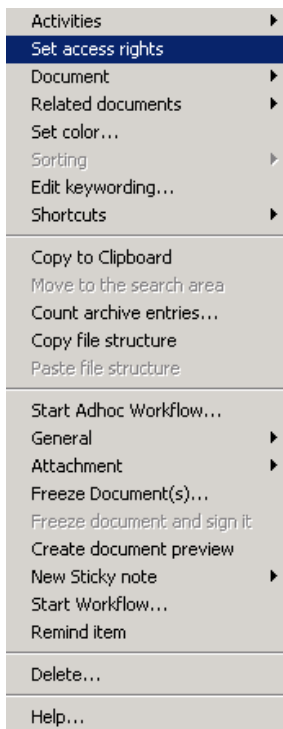
In the *Key* field, select the key you want to use to lock the document.



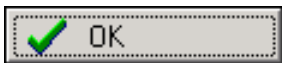
Which keys are displayed, and hence available for selection, and how many, is set by the system administrator in *System settings*. You can find more information on this in the chapter **System settings**.



b) **Right-click** on the object entry to which you want to assign a key. The context menu opens. Click on *Set access rights*. The *Edit object rights* window appears.



Here also, it is the system administrator who determines which keys are displayed, and how many, in *System settings, Key Manager*.



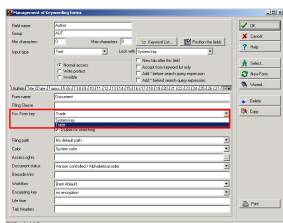
Select one of the available keys and confirm by clicking on **OK**.



The document entry, and therefore the document, is completely hidden from ELO users without the assigned key.

## Form keys

This procedure also applies to other objects you want to lock. You can also assign a form key to your document forms (index forms). Then, every document that is keyworded using that index form is assigned that key.



Do to this, call up the index form (*System settings, Keywording forms, Select*). In the *Keywording form* key field, select the key.



The changes to the index form only take effect from the next time you log in to **ELO***professional*.

Notwithstanding the setting in the index form, you can, if required, assign a different key to a document either:

- during keywording in the index form of the document on the *Options* index field in the *Key* field or
- as described in a) and b).



To change an assigned key, use one of the methods above and enter a new key. This will delete the previously assigned key.

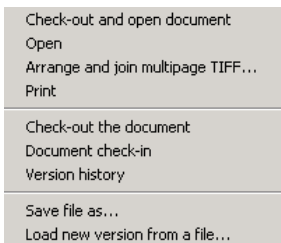
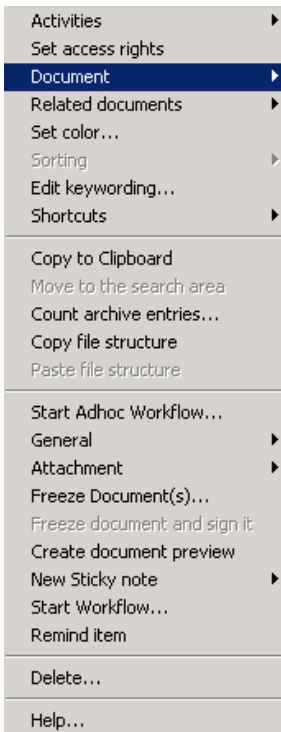
## Important information

The system administrator assigns certain keys to each ELO user. A user can only see the objects for which he/she possesses a key.

Furthermore, the system administrator also sets user rights. The options available to you in **ELO***professional* depend on these rights. So it is the system administrator who decides whether you can, for example, read documents or use keys.

## Documents

Archived documents can be opened at any time and edited, sorted and printed as necessary.



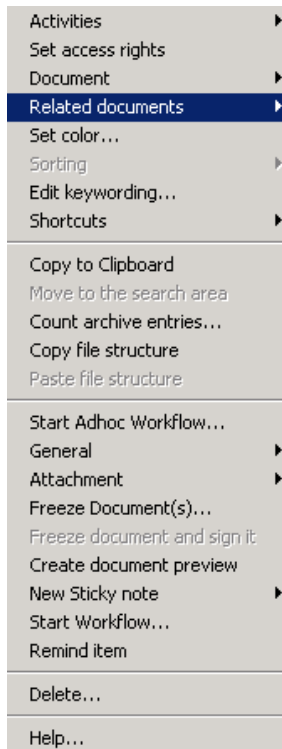
For that purpose, the *Document* context menu contains the following commands:

- Check out and open document
- Open
- Arrange and join multipage TIFF
- Print
- Check out the document
- Document check-in
- Version history
- Save file as
- Load new version from a file

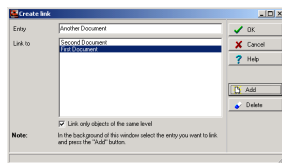
More detailed information on these commands in the context menu and on the topic *Check-out document* and *Check-out and open document* can be found in the chapter **Working with documents in the archive**. *Version history* will be discussed later in this chapter in the section on **Version control**.

## Related documents

Using the *Related documents* option, you can link different documents together.



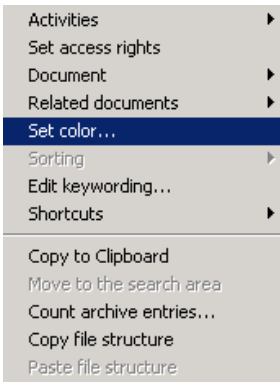
You do not have to take filing hierarchies or other dependencies into account. ELO objects and documents can be linked together freely.



Activate the *Related documents*, *Create link* option in the context menu of a document which is to be linked with another document or ELO object. Add the document you want to link to in the dialog box by opening the document in the archive area and clicking on the *Add* button in the still active *Create link* dialog.

## Select color

All archive entries can be color-coded. Colors allow you to distinguish parts of your archive - e.g. to create an invoice folder in red and an inventory folder in green. Or you can designate another color purely for certain document types - e.g. text files in blue and video files in yellow.



It is a simple process: Set the color either when creating a new document or later, for existing documents.

## Assigning a color to new objects

For objects you are creating, proceed as described below: Let's create a new level as an example. You set the colors in the same way for all other ELO objects. The steps are somewhat different for documents.



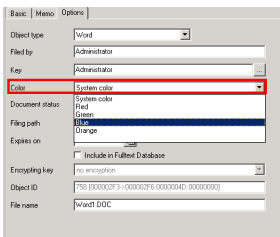
1. Click on the icon *Create structure element on the left side*. The *Cabinet Edit [New entry]* window appears. Select an index from the list field - in our example the *Structure element* index form - and keyword the level entry via the index cards *Basic* and *Memo*.



2. Click on the *Options* index card. The color you set is displayed in the *Color* field. Click the arrow to open the drop-down box. Select a color.



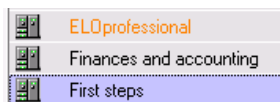
**Please note:** you can set the colors and how many are available in the menu *System settings, Colors*. You can find more information on this in the chapter **System settings** under the heading **Color**.



3. Confirm with *OK*.



## Assigning a color to existing objects



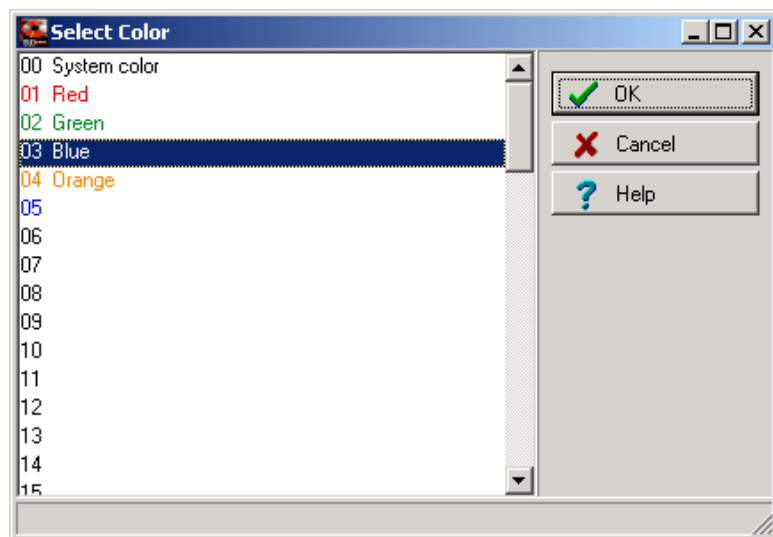
Your new structure element (cabinet, level) is displayed in the selected color.

For existing objects (objects that are keyworded and archived in ELO), there are two ways to assign a color to the object entry.

a) Double **left-click** on the object entry on the left side, e.g. on your filing cabinet called *First steps*. The *Edit cabinet* window opens. Click on the *Options* index card. In the *Color* field, select a color.

b) **Right-click** on the object entry to which you want to assign a color. The context menu opens. Click on *Select color*.

The *Select color* dialog appears.



Select a color and confirm by clicking *OK*.



The same is true for the *Select color* dialog: which colors are displayed, and hence available for selection, and how many, can be set in the menu *System settings, Color*. You can find more information on this in the chapter **System settings** under the heading **Color**.

## Assigning a color to a document

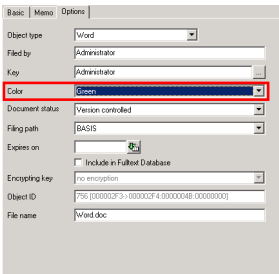


To highlight document entries in a color, there are three options. For existing documents, the process is as described under a) and b) above; the third alternative, c), is only applicable to new documents you file.

a) Double-click on the document entry for the document to which you want to assign a color, e.g. on your document *First document*.



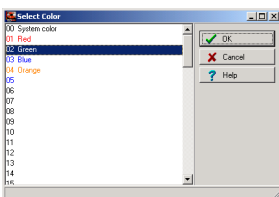
The document entry must be on the left side of the screen.



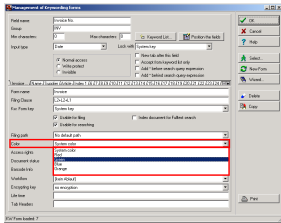
The *Cabinet Edit* window (the index form assigned to the document) is opened. Click on the *Options* index card and select the color in the *Color* field.



**Please note:** In the tree view, the color of the ELO object is only shown on the right-hand side of the screen in the *Archive* area.



b) **Right-click** on the document entry to which you want to assign a color. The context menu opens. Click on *Select color*. The *Select color* dialog appears. Select a color and confirm by clicking *OK*.

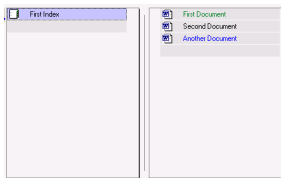


c) You can also highlight a type of document, e.g. **Invoices** in a color. To do this, call up the corresponding index form (*System settings, Keywording forms, Select*) and select the desired color for the ELO object in the *Color* field. This is now the default setting. That means that any document filed using that index form is given the preset color. Nevertheless, you can still assign a color to documents individually, either

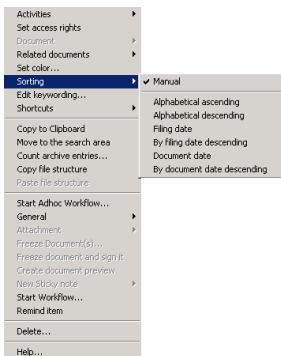
- when keywording the document, by selecting another color under the *Options* index card, *Color*, or
- as described in a) and b).

## Sorting

**ELO** shows the content of a filing cabinet, folder or index as a list. You can set how items are arranged in this list using the *Sorting* command.



1. **Right-click** on the object with the contents you want to sort. To sort a folder in a filing cabinet, for example, click on the corresponding filing cabinet entry, on the left. (On the right, you can see the content of the cabinet you want to sort: the folders). The context menu opens.



2. Point to *Sorting* in the context menu. A submenu opens with the different sorting options. Select the option you require:

- **Manual:** With this setting, you can order entries by dragging and dropping. This is particularly useful for indexes you have created.
- **Alphabetic ascending:** A-Z.
- **Alphabetic descending:** Z-A.
- **Filing date:** The entries are sorted by filing date. The creation date is used as the filing date. The entry with the most recent filing date is at the bottom.
- **By filing date descending:** The entries are sorted by filing date in reverse order. The latest date is at the top.

- **Document date:** applies only to documents. The documents are sorted by document date. The date entered in *Date* when keywording is used as the document date. The latest date is at the bottom.
- **By document date descending:** only applies for documents. The entries are sorted by document date in reverse order. The most recent document is at the top.



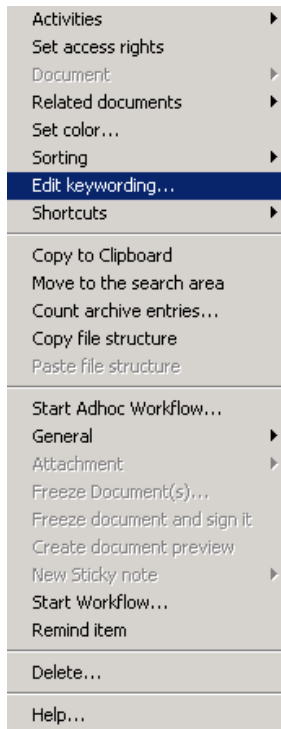
The sort order can be set for all ELO objects (structure elements).

## Edit keywording

All objects (filing cabinets, levels, folders, indexes and documents) in ELO are keyworded when they are created or filed. In other words, you entered a name and possibly some memo text. You also set options - different options for each element. You can change, add to or modify all these entries and settings using the *Edit keywording* command.



1. Right-click on the element to be changed, e.g. on a folder. The context menu opens.



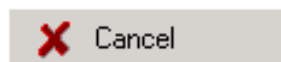
2. Select *Edit keywording*. The entry form associated with the object opens (e.g. *Edit folder*).

3. Make changes to the *Basic*, *Memo* and *Options* index cards.

You can find more information about the options in the *Options* index form in the following information about the **Select color** and **Set key** context menus as well as in the section on **Document paths** in **System settings**.



4. Confirm the changes with *OK*.



5. If, on the other hand, you want to discard the changes, click on *Cancel*.

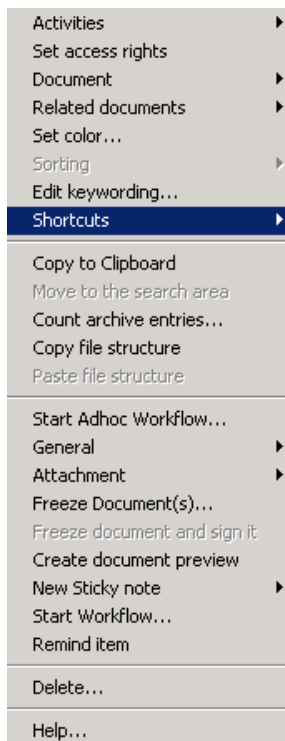


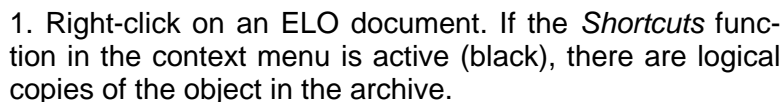
You can also change document keywording using the context menu. This does not affect the index form assigned to the document. To assign a new index form to the document, simply select another form from the list in the *Edit document* input window and keyword the document again if required.

## Shortcuts

In **ELO***professional* you can create logical copies (shortcuts) of an ELO object (cabinets, indexes, levels, folders and documents). You can find more information about this subject in the section **Logical copies**.

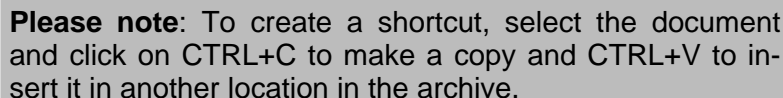
That means that a document, whole folder structures or cabinets can be displayed or archived in the archive many times. There is only ever one physical copy of the document in the archive, all other entries are only logical shortcuts to the real document. Until now, it had been difficult, or at least labor-intensive, to retain a global view in a large archive with many copies. But now, the *Shortcuts* function gives you an overview of all the logical copies of a document or ELO object in an archive.



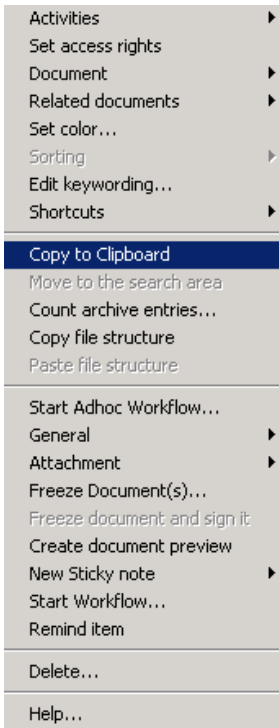


3. If you select one of the entries available in the list, **ELO** immediately switches to the selected entry in the archive. The original document is always displayed at the top of the list.

You will see an overview of all the copies (shortcuts). Clicking on a shortcut takes you straight to it, if, for example, you want to delete it.



The clipboard is a sort of temporary holding area. Every ELO object, from a single document to an entire filing cabinet can be copied to the clipboard and pasted back to another location in your archive.

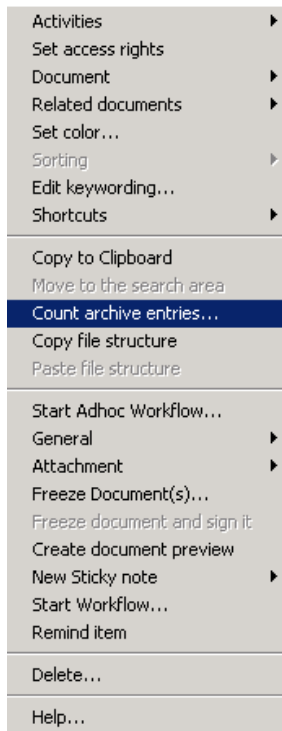


That allows you to move objects to the new location or to make logical copies of them (shortcuts). Refer to the chapter **The Clipboard** for more information on the clipboard.

## Count archive entries

This function calculates the number of documents in a folder, for example, and how much disk space they require.





Select the relevant ELO object (filing cabinet, folder, level or index) and click on *Count archive entries* in the context menu.

The *Count archive entries* dialog box opens. Your selected ELO object is displayed under *Selection*.

Now define which archive entries to count. You can include the **documents from the version history, with attachments** and **attachments from the version history**.

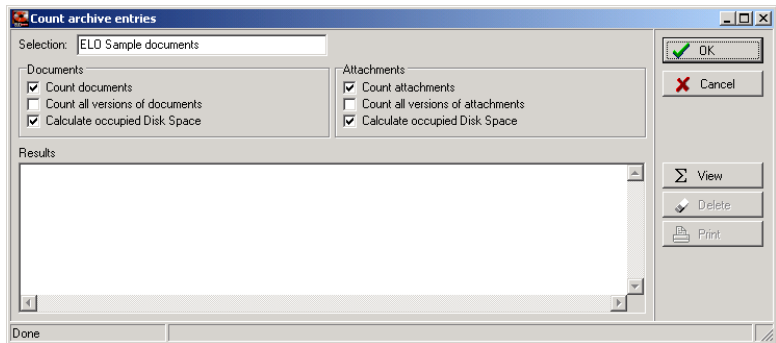


Fig. Count archive entries



Counting is always from the selected object *downwards*. If a cabinet is selected, all documents in all folders are counted. If you select a folder, only the documents it contains are counted.



After you have made your selection, click on *Count*. The result of the process is shown in the *Results* window.



Using the *Delete* and *Print* buttons, you can delete or print the results.

## Move to the search area

Select a structure element that you wish to move to the search area in order to carry out more activities - with the documents - in the archive after selecting multiple documents, e.g. checking out several documents at the same time.

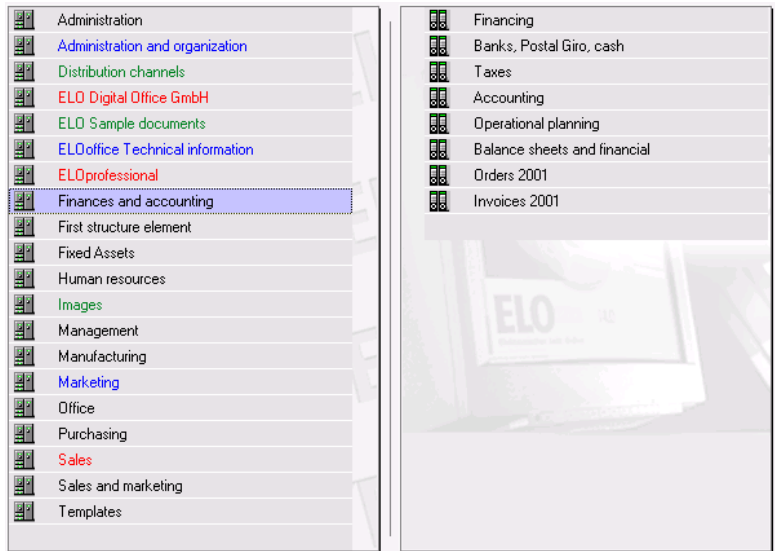
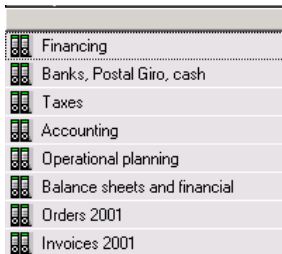


Fig. Moving a cabinet to the search view

The content of the cabinet *Manufacturing* is moved to the search area.



### Tree view

You can select multiple entries by holding down the CTRL key while clicking on the respective entries with the left mouse button in the list view. You can then perform actions on all the selected entries simultaneously. You can, for example, delete several entries in one easy step. To do this, click on the Delete icon in the toolbar. ELO will ask you what to do next. There are three possibilities:

In the *Archive* area, multiple selection of ELO objects is possible in the tree view. Then you can perform actions on the selected objects at the same time.

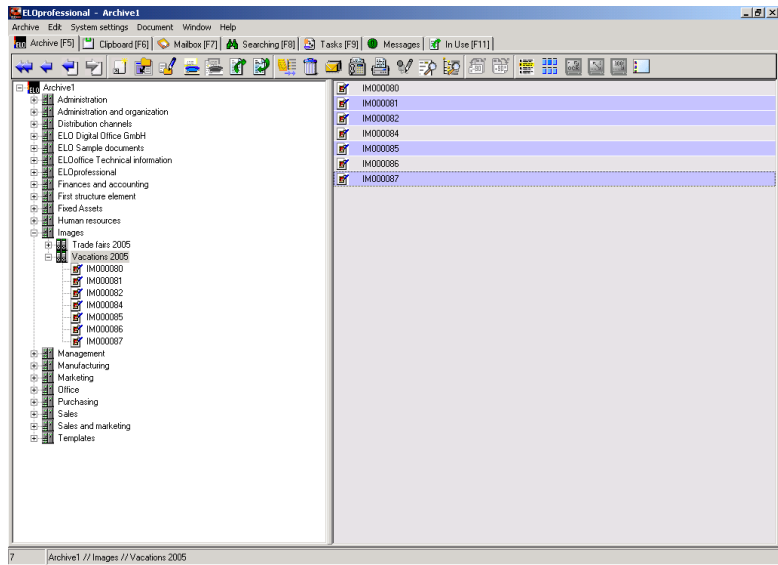
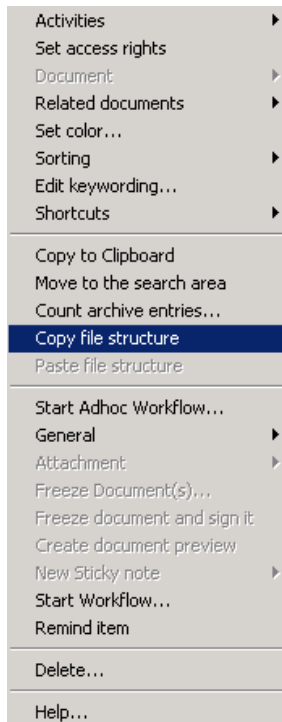


Fig. Multiple selection in tree view

## Copy file structure

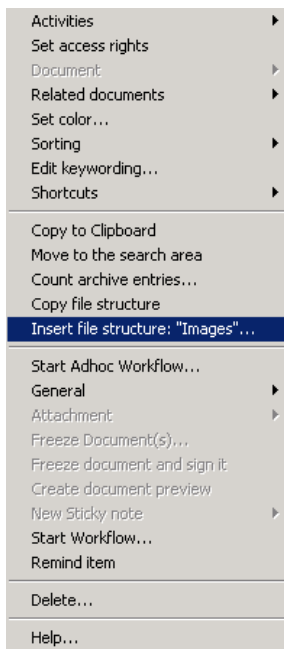
This function copies a complete filing structure to the clipboard. From there, the copied filing structure can be applied throughout the archive. This is very useful if, for example, you have to create the same folders and indexes for accounting purposes every year.



Select the filing cabinet or folder, the structure of which you want to copy and click on *Copy file structure*.

## Paste file structure

If you have copied a file structure (a filing cabinet, folder or index), switch to the location in the archive where you want to insert the copy.



In the context menu, click on *Paste file structure*. The window of the same name opens.

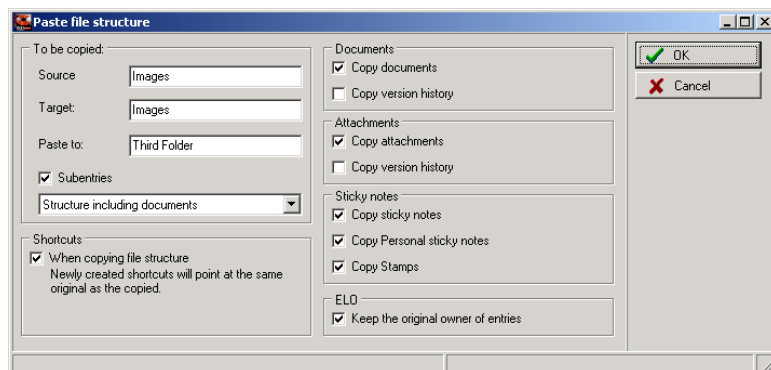


Fig. Pasting a file structure in the archive

Here you can specify how the file structure is reinserted.

Source:

Target:

Paste to:

☒ Subentries

In the *To be copied* area, the copied file structure (in our example, a folder) is shown in the *Source* field and the location in which it is to be pasted is shown in the *Target* field. It is important to enter how many levels of the structure you want to copy. To do this, check *Subentries* and from the drop-down list, choose whether the structure should be pasted with or without the documents. The screenshot shows **Structure including documents**. That means that the entire folder with all the indexes and documents will be pasted.

☒ Subentries

If, on the other hand, you only want to paste the folder and indexes (without documents), then select **Structure without documents**. In doing so, you deactivate the additional options in the *Documents*, *Attachments*, *Sticky notes* and *ELO* areas.

Shortcuts

☒ When copying file structure  
Newly created shortcuts will point at the same original as the copied.

Say you are copying a file structure containing documents and shortcuts to them (in another folder, for example). In the shortcuts area, you can specify what the new, copied *Shortcuts* should refer to: the documents that have also been copied to the target structure or to the original documents that are in their original location in the archive.

If you have selected **Documents** under *Archive level*, *subentries*, there will be additional options as regards data to be copied.

Documents

☒ Copy documents

☐ Copy version history

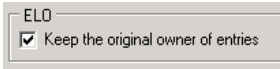
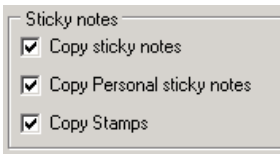
In the *Documents* area you can specify whether the documents are to be copied. If yes, you can determine whether the version history of the documents should be included.

Attachments

☒ Copy attachments

☐ Copy version history

In the *Attachments* area, you can decide whether to copy attachments and their version histories.



In the *Sticky notes* area, you can select which of the sticky notes to copy that may be affixed to the documents (sticky notes, personal sticky notes or stamps).

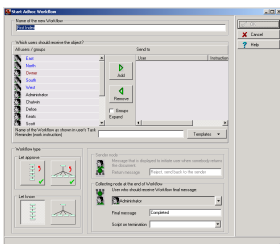
Here, you can select whether to keep the original document rights or owner for the newly pasted ELO object.

If you want to abort copying the file structure, click on *Cancel*.

When you have entered all your settings, click on *OK*. The previously copied file structure is pasted into your chosen location in the archive in accordance with your settings.

When pasting a copied file structure, **ELO** automatically retains the *correct* structure. It is also possible to paste an entire folder into an index. **ELO** copies the entire file structure to the target location every time. That means it is also possible to move ELO objects across several levels.

## Start Adhoc workflow



Select *Start Adhoc workflow* to open a window of the same name that will let you define and start a new workflow.

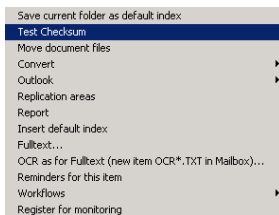
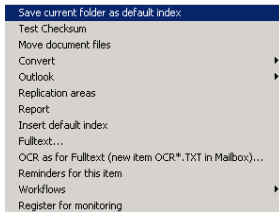
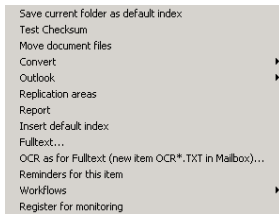
The Adhoc workflow is better suited for simple sequential or parallel business processes, e.g. to quickly and easily share certain documents among several employees. You can enter all your settings (e.g. selecting the employees or workflow type) in one, convenient dialog box.

Information on the topic *Adhoc workflow* can be found in the chapter **System settings**.

## General

The *General* context menu group contains the following functions.





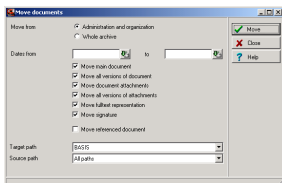
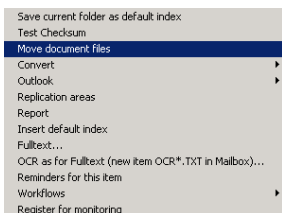
**Please note:** If you start **ELO** as an administrator, you will see the menu item *Run database test*. This tests the operation of the ODBC driver. This option is only available to the administrator.

**Save current folder as default index:** Say, for example, that you have a folder with a user-defined index or a *default index* to which you have added some extra indexes. This function allows you to define the entire index as a default index. It is then available from the *Insert default index* command.

**Test checksum:** In **ELO Access Manager**, the system administrator can turn on an option to calculate a checksum. From then on, all new documents are checked and the checksum saved. Using the *Test checksum* command, you can call up the checksum report, which displays a line with the checksum for every version of a document. At the same time, the document is checked again. If the checksum is correct, the line is black. If no checksum was calculated when the document was saved (for example, if you filed it before turning on this option), the line is dark red. If the document has been modified, the line is bright red. So you can see at a glance whether the current document or one of the previous versions has been modified.



To check several documents at once, start this function at folder or index level. Enter the object ID numbers (shown in the index form on the *Options* index card) in the fields *DocID start* and *DocID end* to determine the documents to be checked.



**Move document files:** Using this function, you can easily move files, file versions, file attachments and/or versions of file attachments and referenced documents (logical copies) out of **ELO** onto another medium. For example, the documents may no longer need to be readily accessible in the archive. The filing structure is retained.

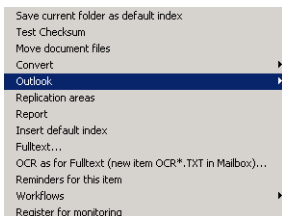
Select the ELO object from which you want to move the files. Point to *General* in the context menu, then click on *Move document files*. The *Move documents* window appears. The relevant ELO object is selected in the *Move from* area. If you want to move the files of an entire archive, click on the *Whole archive* button. Under *Dates from*, you can define a time period. Then, only these documents are moved (within the selected range). Determine what should be moved by selecting the corresponding option and then entering the target path. If your target path does not appear in the list, you (or the system administrator) first have to create it. Select the source path if you only want to move documents from a particular path. Click on *Move* to move files from ELO to another medium.

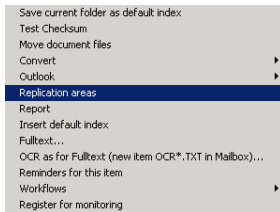


You **cannot** retrieve the files using the import function. If you only want to *export* files temporarily, use the export function.

**Convert:** Files imported from previous versions of ELO without being converted have the extension *.elo*. In that format, they cannot be indexed for fulltext. The *Convert* feature converts these files into TIFF files (.tif), so that their content can be transferred into the Fulltext database.

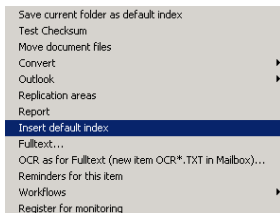
**Outlook:** This command lets you link a selected index to MS Outlook, transfer the index content to Outlook and synchronize.





**Replication areas:** Here, you can edit the individual replication areas. Make the necessary changes.

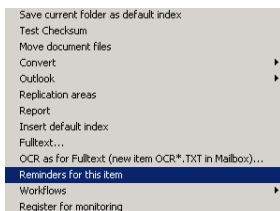
**Report:** displays the report data for the selected object in a window. The latest date is at the top. Normally, the details for a single day are displayed, but you can also narrow the search to include particular entries or users. You can do this by clicking on the *Options* button.



**Insert default index:** This function is only available on structure levels. Using this command, you can insert an additional default index into the selected or open folder while holding down the Ctrl key.

**Fulltext:** Transfers the contents of the selected document into the fulltext database. But this function is only available if the optional **ELO** Fulltext module is installed.

**OCR as for fulltext:** By selecting this option, a file is created in the mailbox of the active user which contains the fulltext data for the active document.



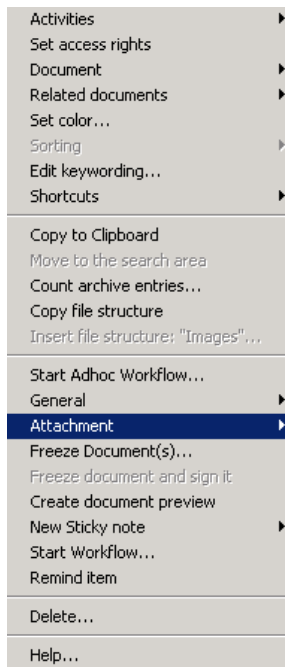
**Reminders for this item:** Click on this to see any task reminders for the selected document.

**Workflow:** Use this feature to check whether the selected document is or was part of a workflow and, if so, which one.

## Attachment

You can attach picture, sound and video files to any document archived in ELO using the *Attachment* function. That means, you can attach almost any file to a document filed in **ELO**, including standard text files or executable programs (.exe files).

You can also see the *history* (changes) of a file attachment via the *Version history*.



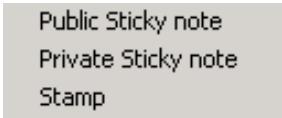
## Freeze document

The *Freeze document* function lets you file the temporary state of a document as a TIFF document that cannot be modified.. ELO generates a TIFF file from the current document and makes it the current working version. The starting document is also filed as a previous version of the frozen file for documents that have the status *Freely editable*.

## Freeze document and sign it

This feature is only available in **ELO** if a signature component has been installed. A document is "frozen" and then signed.

## New sticky note



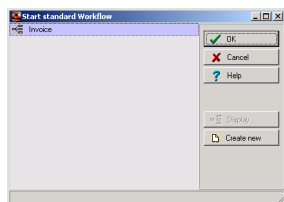
Public Sticky note  
Private Sticky note  
Stamp

A submenu opens when you point to *New sticky note*.

Select one of the three note types. Write the new note and affix it to your document by clicking **OK**.

More detailed information on **Sticky notes** can be found in this chapter in the section **Affix sticky note**.

## Start standard workflow

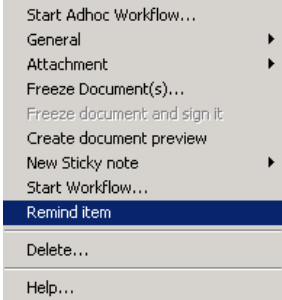


**ELO professional** includes workflow management. This allows you to send documents on a predefined route between employees.

The documents appear in the tasks area for the relevant employee. The *Start standard workflow* menu item opens the *Start workflow* window. Select an existing workflow and start it by clicking **OK**.

Information on the topic *Standard workflow* can be found in the chapter **System settings**.

## Remind item

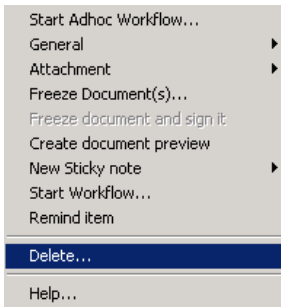


Start Adhoc Workflow...  
General  
Attachment  
Freeze Document(s)...  
Freeze document and sign it  
Create document preview  
New Sticky note  
Start Workflow...  
**Remind item**  
Delete...  
Help...

**ELO** can automatically make documents available to you or a colleague at certain times. For that to happen, you just have to set a task reminder date for the document.

When the task is due, the document reappears on your screen - since every time you start ELO it checks in task reminder to see if something is pending.

Refer to the chapter **Remind item** for more information on reminders.



The *Delete* option in the context menu allows you to delete the current entry in the archive. A confirmation dialog appears before the entry is deleted.

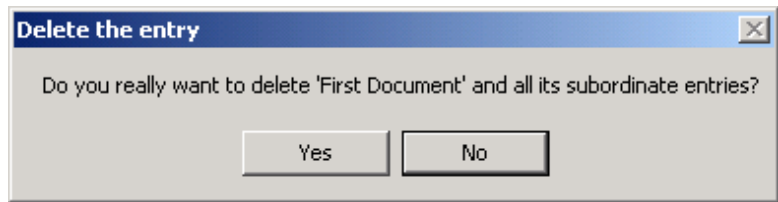


Fig. Confirmation dialog when deleting documents

## Help

The *Help* in the context menu launches the context-specific online help.

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# The Archive toolbar



Fig. Toolbar in the 'Archive' work area

The archive toolbar contains different icons, depending on the archive level you are in. Clicking on one of them performs a command. Some commands can also be performed by clicking on the **ELO***professional* menu bar or using shortcuts.



Some icons may be hidden. You can easily change this setting in the *Archive* index card, accessible via the *Window, customize toolbar* menu. If the toolbar is too wide for the screen, ELO adds a second row of icons.

## Overview of icons

The following list describes what each icon does.



Back to archive root



One level up



With this button you can return to the last document view.



With this button you can proceed to the following document view in the sequence of views.



Insert document on the left side



Create structure element on the left side



Create structure element on the right side



Edit existing entry



List of scanner profiles



Scan and staple pages



Staple page to existing document



Document check-in



Check out and open document



Collect Outlook documents



Start Adhoc workflow



Delete selected item





Lock levels



E-mail document



Fax document



Print document



Sign document



Search within active document



Quick search via full indexing



Rotate left 90° (scanned document or image file)



Flip (scanned document or image file)



Rotate right 90° (scanned document or image file)



Display QuickInfo



Slide show of content of a selected archive item



Select area for OCR (Scanned document or image file)



Zoom cursor



Zoom 25 %



Zoom 50 %



Zoom 100 %



Fit width



Fit page



User-defined zoom



Full screen (explanations in the chapter **Mailbox**)



User script 1; the user script button may be replaced by a separate icon. (More information in the chapter **Mailbox** and in the section on **ELO scripting interfaces**).



This shows the page count for TIFF files. This window allows you to navigate through the separate pages of a TIFF file.

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# Archive view - tree view and list view

## Document views

Two different views for ELO can be shown in the archive. Up until now only the list view of documents and ELO objects has been available.

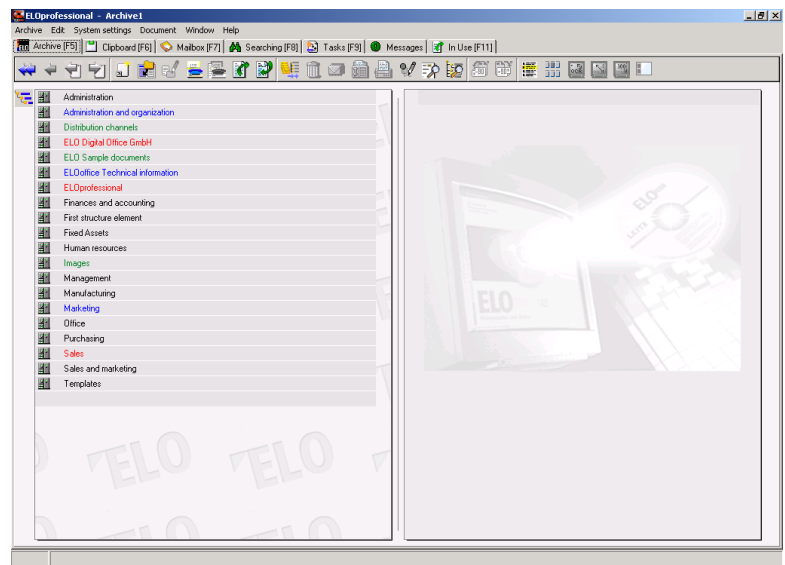


Fig. List view in the 'Archive' function area

## Activating tree view

When displaying documents in the *Archive* area you can choose between the traditional list view and a view incorporating a tree structure (tree view).

For this, activate the option *Use the tree view when starting next time* in *System settings, Options, View index card*.

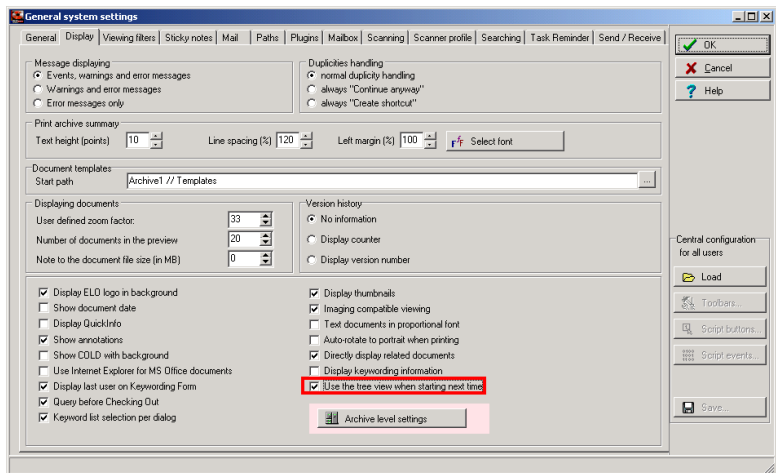


Fig. Option to activate 'Tree view'

Close your ELO Client after activating *Use the tree view when starting next time* and restart ELO. The archive area will then be shown in *Tree view*.

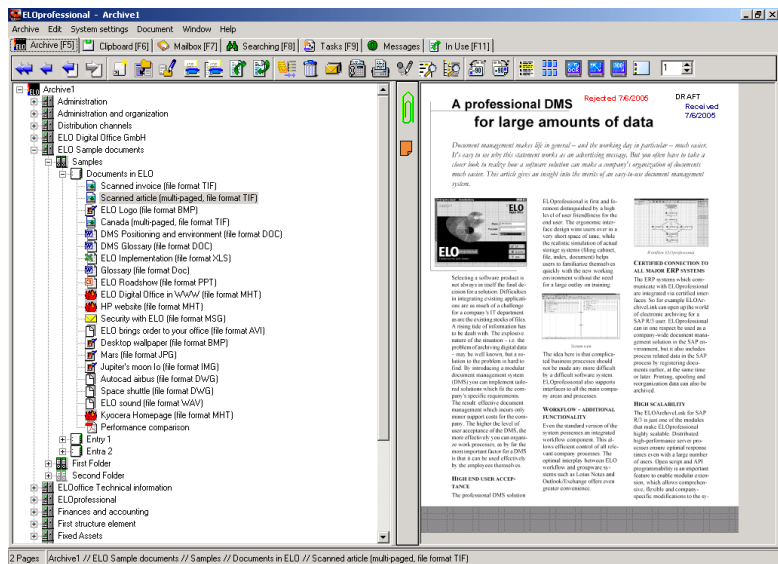


Fig. Tree view in the 'Archive' function area

If you wish to reactivate the list view, deactivate the *Use the tree view when starting next time* option in *System settings, Options, View index card*. **ELO** must be restarted in order to reactivate the list view.

## View options in tree view

The keywording information taken from the keywording name for displaying ELO objects can be expanded in the tree view with further information from the index fields.

Fig. Setting object view for tree view

Activate the *Column with high priority* option in *Management of keywording forms* to display information in the tree view.

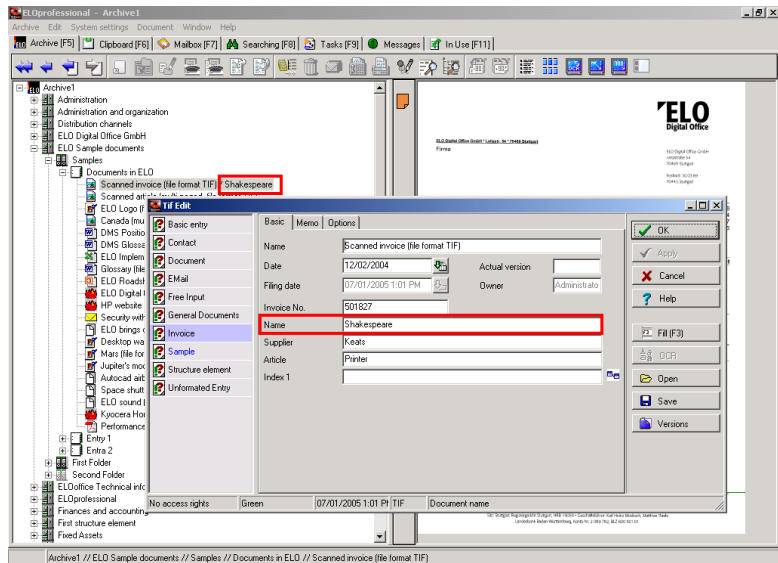


Fig. Displaying index information in tree view

The information will be shown in the left window in the *Archive* area.

## Multiple selection in tree view

One of the main benefits of the tree view is multiple selection in the *Archive* area. In the *Archive* area it is possible to select multiple ELO objects, but only on the right-hand side of the main screen. Click on an ELO object on the left-hand side of the screen in the tree view. The documents and structure elements contained in this will be shown on the right-hand side of the screen. Press the Ctrl key and select the document entries by clicking on them. Hold down the SHIFT key and select a range of documents. The selected entries are ready for further actions.

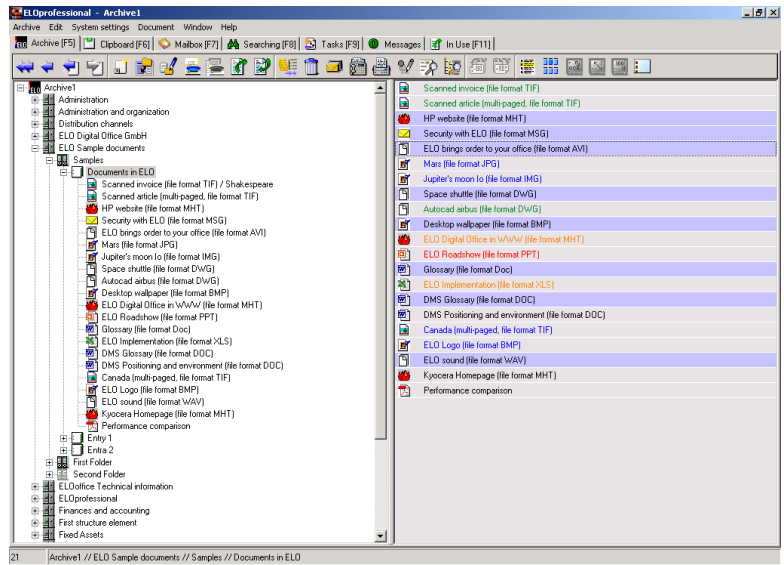


Fig. Multiple selection in tree view

## Moving objects

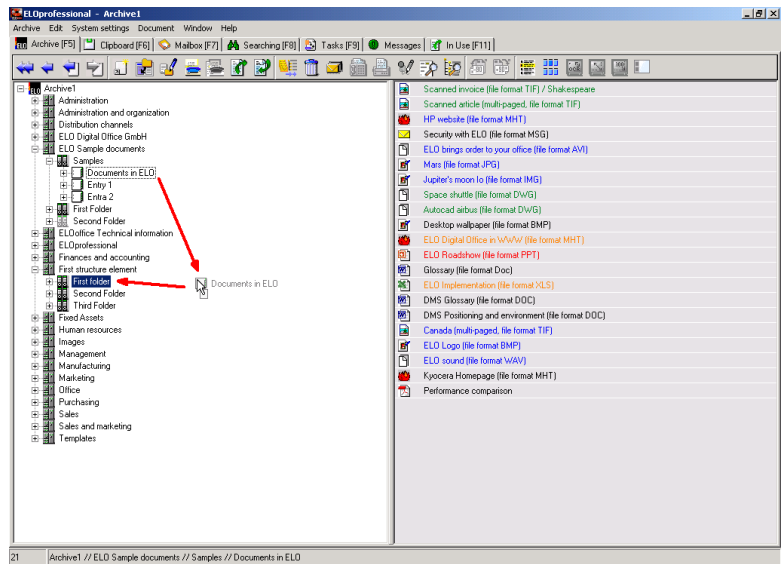
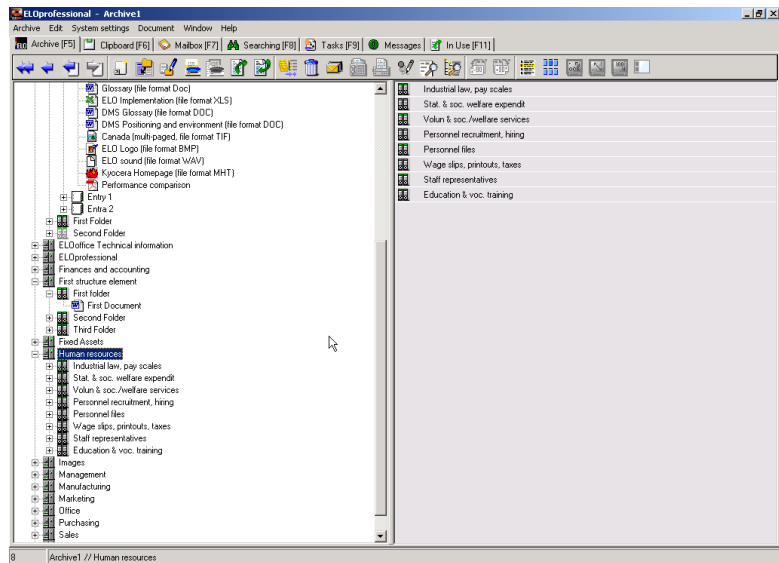


Fig. Moving objects in the archive

Using the tree view it is possible to quickly move entire archive trees. Click on the object on the left-hand side in the tree view and drag and drop it into the archive area where it is to be located in future.

## Overview of different archive areas

Within the tree view, by opening several branches in the archive it is possible to display different areas of the archive at the same time. This is not possible in the list view.





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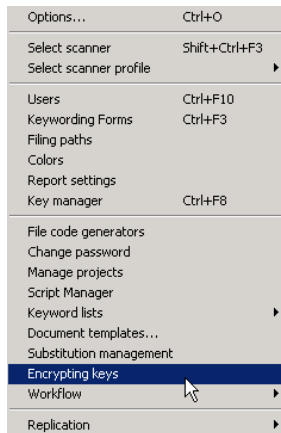
# Encrypting documents

**ELO professional** can encrypt (encode) documents. The only way to access encrypted documents is with a password. To encrypt a document you first have to assign it to a predefined encrypting key. Access from "outside", e.g. via Explorer is then no longer possible.

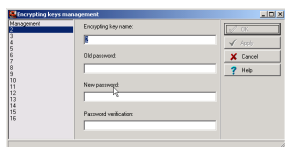


You can file documents in encrypted form using encrypting keys and various passwords. Therefore:

- Think very carefully about the name of the encrypting key and passwords.
- Consider carefully who you want know the password and be authorized to use it.
- Keep the passwords corresponding to the encrypting keys secure. Encrypted data can no longer be accessed without a password.



Documents are automatically encrypted using an index form. So you first have to determine the individual *encrypting keys* and, as far as possible, give them different names. To do this, click on *Encrypting keys* in the *System settings* main menu.



Set the passwords and names for the encrypting keys.



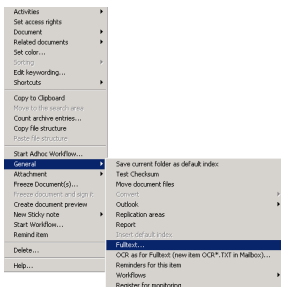
Then, when the index form is created, select the relevant *Encrypting key* you want to use to encrypt the document.



You only have to enter the password once per *ELO session*. It then remains active so that you can open all encrypted files without reentering the password. The password cannot be deleted or changed.

# Fulltext

## Indexing documents for fulltext



If you have installed the option **ELO***professional* Fulltext module, you can add the entire contents of a document in the fulltext database retroactively. The advantage is that you can search on any term in the document. That means you can search the fulltext database for a term and then see a list of all the documents in which the term appears.

Adding every document to the fulltext database is not recommended, because there is a risk of the database becoming extremely large and the search being extremely slow. We recommend you use this feature of ELO prudently.

1. In the archive, select the document with the content you want to add to the fulltext database.

2. Right-click to open the context menu. Point to *General* then click on *Fulltext*. This opens the *Fulltext database* window.

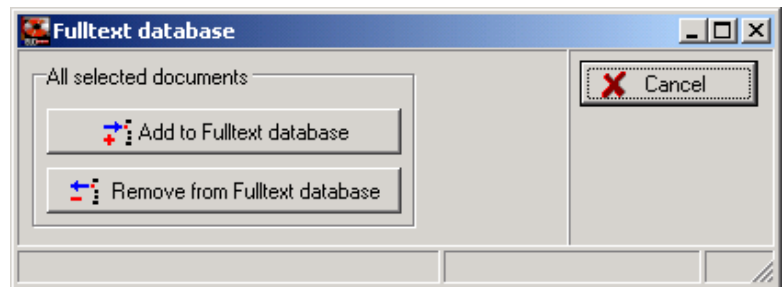


Fig. Adding documents to fulltext

 Add to Fulltext database

## Adding documents automatically

☐ Index document for Fulltext search

3. Click on the button *Add to fulltext database*. That indexes the content of the document.

You can also add documents to the fulltext database during keywording.

There are two ways to do this.

- When creating or modifying an index form (*System settings, Keywording forms*), turn on the *Index document for fulltext search* feature. Checking this box means that every document filed using this index form will automatically be added to the fulltext database.



It is a good idea to only turn on this function for selected forms, or even use a dedicated form so that the fulltext database does not get too large.

- When keywording a document, click on the *Options* index card in the index form.

☐ Include in Fulltext Database

## Removing documents from fulltext

 Remove from Fulltext database

Here, you can turn on the *Include in fulltext database* function. This document will then be included in the database when it is filed.

1. Follow steps 1 and 2 as described under **Adding documents to the fulltext database**. This opens the *Fulltext database* window.

2. Click on *Remove from the fulltext database* to remove the contents of the document or of all the documents in the selected index, folder, level or cabinet from the database.



You can find detailed information on **Fulltext** in the manual for the **ELOprofessional** Fulltext module.

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# Linking to Outlook

Outlook is a desktop information management program - a communication control center that organizes e-mails, faxes, notes etc. as objects in folders. You can link this application to **ELO***professional*. That means you file incoming e-mails, faxes etc. straight to your ELO archive from Outlook.



**Please note:** If you wish to link to Outlook or other Office programs, the option for installing macros must be activated during installation. Otherwise the setup program for installing macros can be run retrospectively. An Outlook link is not complete without macros having been installed.

## Index link

**ELO** features three different ways to link indexes. First, you will learn how to set up a standard index link.

## Setting up the outlook folder

So that ELO can create a link to Outlook, you have to specify the Outlook folder. That is folder where you can file *ELO indexes*.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	
Document templates...	
Substitution management	
Encrypting keys	
Workflow	
Replication	

1. In the menu bar, click on *System settings*, then *Options*. The *General system settings* window appears.

2. Click on the *Mail* tab. The *Mail* index card is now active.

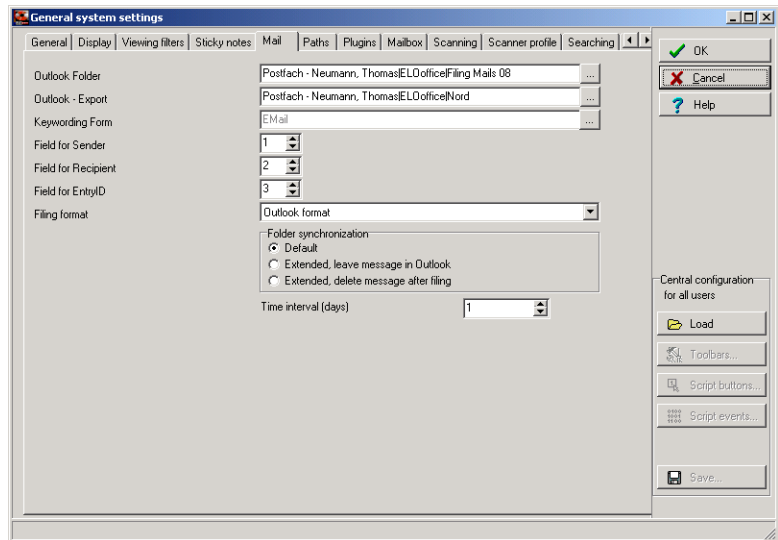
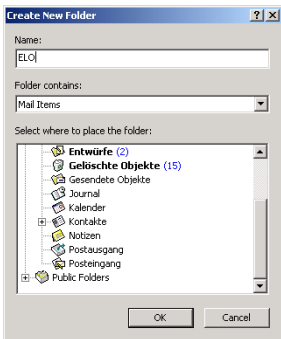


Fig. Setting options for transfer to Mail



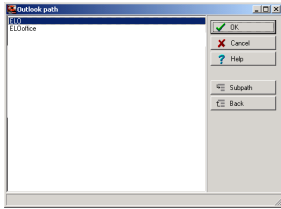
3. In the **Outlook folder** field, enter the MS Outlook folder that you want to contain your ELO indexes.



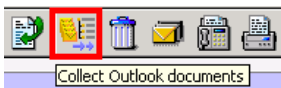
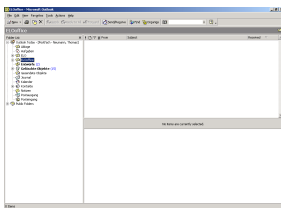
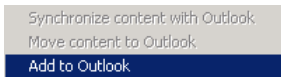
First create a corresponding folder in Outlook, e.g. ELO. When creating this folder in Outlook, choose **Mail items** from the drop-down list *Folder contains*:



Click the *Select* button to select the Outlook folder.



## Outlook, index link



4. The *Outlook path* window opens. By default, the *Personal folder* that Outlook creates automatically on installation, or an individual mailbox is displayed.

Select it, then select the folder you created in Outlook as the Outlook folder by clicking on the *Subpath* button.

If the link fails to work, you probably forgot to select *Mail items* in the Folder contains list when creating the folder in Outlook. (To change this: click *Properties* in the context menu for the folder.)

To link an **ELO***professional* index in Outlook, proceed as follows:

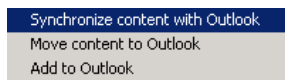
1. In the ELO archive, select the index you want to make available to Outlook (e.g. January).

2. Open the context menu. Point to *General*, then *Outlook*. Click on *Add to Outlook*. The index is created in Outlook as a subfolder in the Outlook folder. If necessary, turn on the *Folder list* command from the *View* menu. You can now easily create an Outlook link for the structure element by dragging and dropping.

You can now drag and drop every incoming e-mail to your ELO index from Outlook or have it filed there automatically. Refer to your Outlook documentation. If necessary, you can link additional indexes to Outlook.

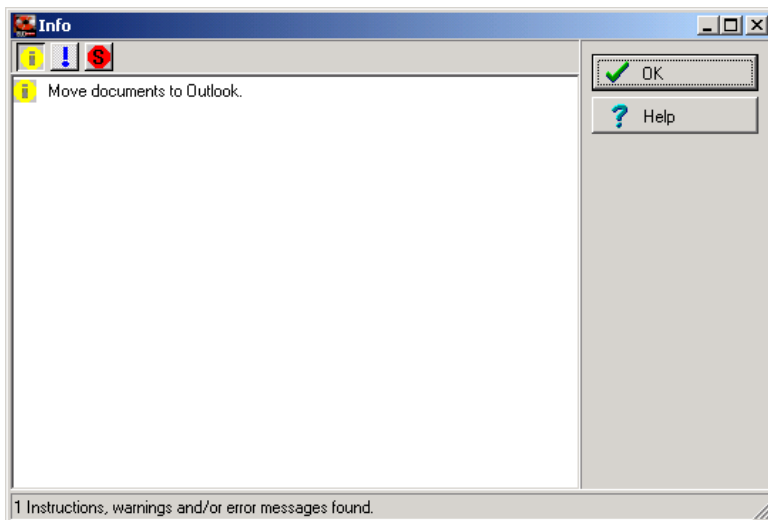
You must click on the *Collect Outlook documents* button in the *Archive* in order to transfer e-mails to the archive. That refreshes the ELO archive and your e-mails are transferred from Outlook to the relevant index in ELO. E-mail attachments are automatically transferred as file attachments.

## Moving content to Outlook



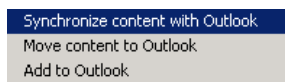
When you have set up the link, you can copy the entire contents of the structure element to Outlook.

Right-click to open the context menu. Point to *General*, then *Outlook*. Click on *Move content to Outlook*.



The Info window shows that the index content has been moved.

## Synchronizing content with Outlook



The *Synchronize content with Outlook* function transfers new documents in the index to MS Outlook.

Right-click to open the context menu. Point to *General*, then *Outlook*. Click on *Synchronize content with Outlook*.

Now documents are only transferred where they do not match those in MS Outlook. This saves time with large index content and you can be sure that your documents are identical in ELO and in Outlook.

## Outlook macros

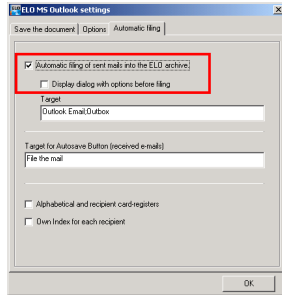
When you install ELO, it creates a link to the MS Office applications on your system. These new macros let you transfer files from the applications into ELO.





You can also create a link to MS Office programs at a later date. A separate installer sets up the integration with MS Office programs.

## Automatic filing of sent mails to ELO



Several macros are installed by **ELO** that help you to file sent and received e-mails.

**ELO** can file a sent e-mail in your archive immediately. The e-mails are sorted by recipient. If you select the *Own index for each recipient* option, ELO creates a unique subindex for each e-mail recipient.

To call up the settings, click on the left ELO macro icon in Outlook. The *ELO MS Outlook Settings* windows appears.

## Configuration settings

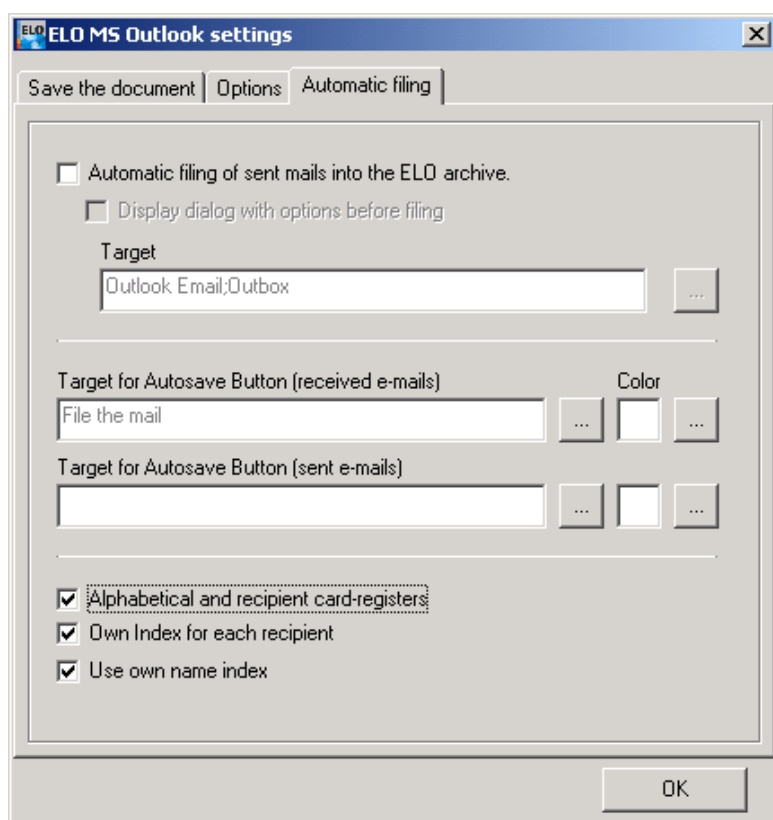


Fig. Configuration dialog for archiving e-mails

If necessary, activate the *Automatic filing of sent mails into the ELO archive* function. **ELO** creates a filing cabinet **Automatic filing** with a definable subfolder.

Select the relevant target using the selection button.

Now when you send e-mails, copies are filed in this Outbox folder. If you checked the option to create a unique subindex for each recipient, indexes are created in this folder. In doing so, a separate index is created automatically for each recipient. You can select the respective settings using the options *Alphabetical and recipient card-registers*, *Own index for each recipient* and *Use own name index*.



**ELO***professional* has an *E-mail* index form especially for e-mails. It has two input fields: After filing, *field 1* contains the name of the sender and *field 2* that of the recipient. If this index form is not available, you should definitely create it, or have your administrator create it so as to optimize how your sent e-mails are filed in the archive.

In the *ELO Outlook settings* dialog, you can also modify the following settings:

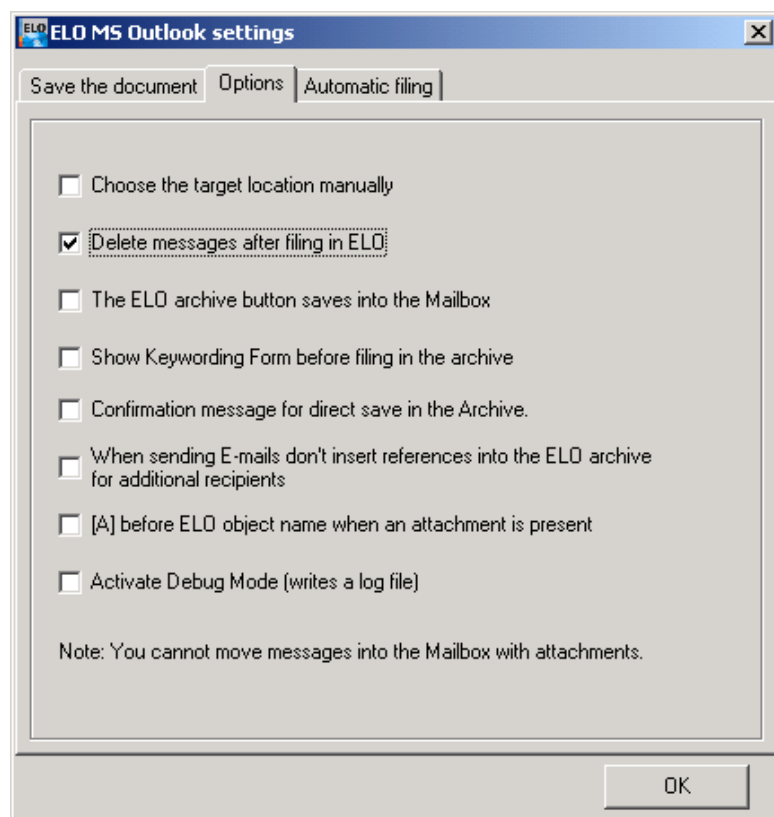


Fig. Outlook configuration - options

**Choose the target location manually:** When filing e-mails a dialog box appears, where you can select the target index or folder for the document in ELO.

**Delete messages after filing in ELO:**After you have transferred the e-mail, the data is deleted from Outlook.

**The ELO archive button saves into the mailbox:** The transferred e-mails are filed in the mailbox.

**Show keywording form before filling in the archive:**Before the document can be stored in **ELO**, the keywording form is opened so that you can enter further keywording information.

**Confirmation message for direct save in the archive:** You will receive a message when e-mails are saved directly in the archive.

**Activate debug mode:** If this option is activated, a log file is created which contains all messages relating to filing e-mails. Only use this option when troubleshooting.

**[A] before ELO object name when an attachment is present:** E-mails with attachments are denoted by the prefix [A].

## **Save the document**

Set the format in which to save archived e-mails.

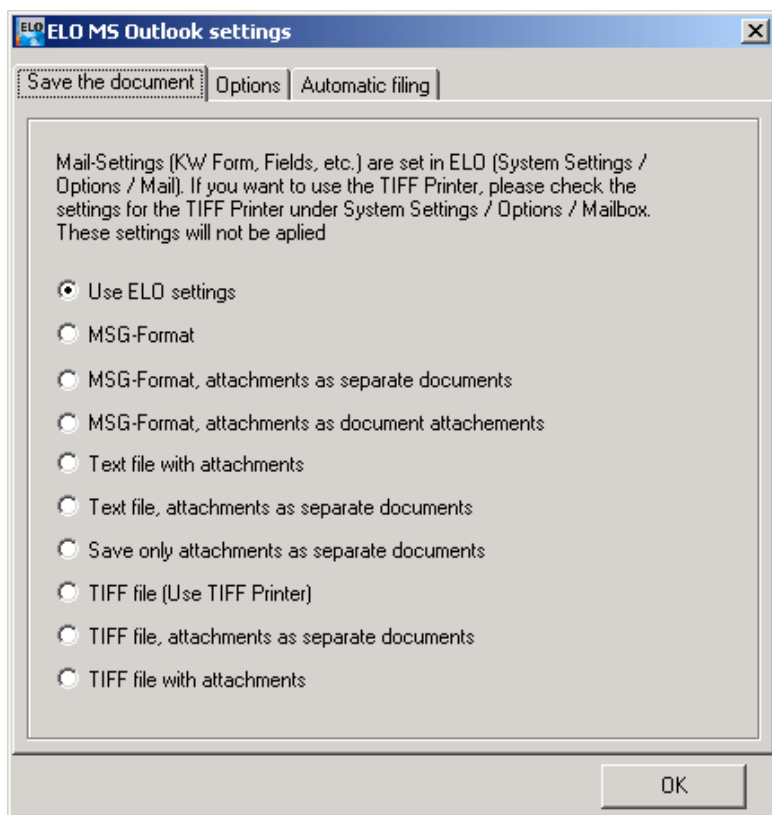


Fig. Outlook - saving documents

## Filing received e-mails



In Outlook, you can transfer all the selected e-mails to an ELO index or mailbox using a macro. The advantage is that all the formatting and attachments are preserved. You can then reply to or forward the e-mails from **ELO** later.

1. Start **ELO**. To file e-mails, the program has to be running. The e-mails are then filed in the current archive.
2. Select the e-mails you want to file. Click on the right-hand ELO icon (*ELO archive transfer*). A dialog box appears, where you can specify where to file the e-mails in the archive.

## Searching in the archive

2. Depending on the index form you have selected, a search form opens where you can enter the data you are looking for, e.g. to search for the sender of an e-mail.

4. The search results are shown clearly listed in ELO in the *Searching* index card.

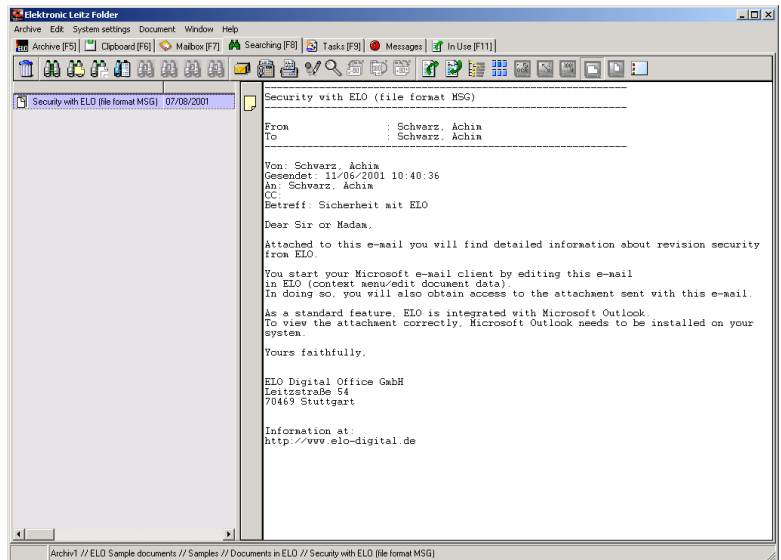


Fig. 'Searching' function area

## Displaying e-mails in ELO

Behavior when selected: AT-MSG



 New entry

 View with external application

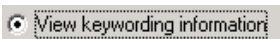
You can of course also open and view e-mails and attachments in your archive. But you may have to make a small change to the settings in ELO:

In ELO, click on *System settings*, *Options* and then on the *Viewing filters* index card.

In *Behavior when selected*, click on the *Search* button on the right next to the input field.

The *Document viewing mode* window appears. Click on *New Entry* and enter the *file extension* **MSG** in the *File extension* pane. (If it is already shown in the list, ELO is already correctly configured.)

In the *Action when clicking on the icon* area, click on the icon *View with external application*. (MS Outlook is then launched when you click on the icon in ELO.)

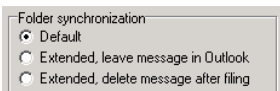


In the *Action when clicking on the text* area, select *View keywording information*. This setting means that by clicking on *Text* in **ELO**, the keywording, which includes the entire e-mail text, is displayed.

Confirm with *OK*.

## Extended index link

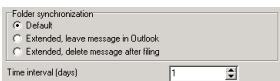
In addition to the index link to Outlook described thus far, there is also the *Extended index link*.



Using the extended index link to Outlook, the folder structure in Outlook is copied into **ELO** in its entirety. Optionally, you can also decide whether to leave the e-mails in Outlook or to delete them once they have been copied to the archive.

## Time interval

The time interval option allows you to instruct e-mail to be filed after a certain time period has elapsed.



**Example:** You may want to set up the following process: You want e-mails to be transferred from the Outlook structure, then you want the e-mails to be deleted in Outlook. You only want e-mails more than 7 days old to be transferred. Turn on the setting *Index link, Extended, Delete e-mail after importing* and set the time interval to 7 (days).

## Setting up the extended index link

In order to set up a fully functional extended index link, several other configuration settings must be made. If necessary, under *System settings, Options, Mail index card*, select the *Index link, Extended* setting.

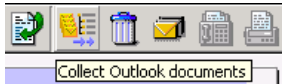
The following conditions must also be satisfied:

1. The EloMail mask must be set up with an *EntryID* (group name *ELOOUTL3*) and entered in the Mail options.
2. The `okeydata` (or `okeyudata` when running with Oracle SQL) column in the `objkeys` database table must have at least 150 characters. Please change the properties in SQL Enterprise Manager in the appropriate table.
3. As with the normal Outlook connection, the Outlook folder must be entered in the mail options.



4. Then you must select an index in **ELO** and select the entry in the *Allgemein* context menu under *Outlook, Index link*. The corresponding object will now be filed in Outlook.

With these settings you can work with the extended Outlook link.



By clicking on *Collect Outlook documents* e-mails are transferred from Outlook into **ELO**.

---

## Playing video clips

In **ELO***professional* you can archive a wide range of document types, including videos.

Filing videos in ELO works in exactly the same way as for every other document: for example, drag and drop it into your mailbox from Windows Explorer. From there, you keyword the video as usual and file it in your archive.



Create a dedicated index form for videos, so that you can enter information such as the video format, file size, contents, running time etc. in a standardized way.

To run an archived video in ELO, proceed as follows:

1. Opening the filing cabinet, folder and index containing the video file.
2. **Right-click** on the document entry for the video. The context menu opens.
3. Point to *Document*. A submenu opens.
4. Click on *Open*. The video normally plays immediately. If it does not, click on *Play*.



*Play*



*Pause*



*Stop*



Progress bar

To stop a video, click on the Stop button. Click on the *Play* arrow and the video continues playing. The progress bar shows you where you are in the video.

---

# Version control

It is easy to view, open and edit archived documents in **ELO**. You can, for example, make copies, or update the contents. But often, it is important to keep the original document or the successive stages of editing a document. Examples include product information, guidelines, working instructions, regulations, documents relating to product liability, ISO 9000 documents etc.

This allows **ELO** to retain the original file when changes are made to a document. The Version control feature is used to accomplish this. Depending on how *Version control* is set up, it may also prevent you from editing and modifying a document. This is vital (and even a legal requirement) for some documents, such as wills, tax and legal papers, invoices etc.

## Setting up version control

You can tailor version control to your requirements in two different areas.

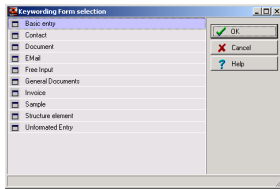
- Directly in the index form: This means that - initially, at least - all the documents you file using it have the preset type of version control.
- During keywording. Even if you have used an index form to file a document, you can still set or change the type of version control. The new version control settings are then only applicable to this one document.



If **Read-only** is selected in the *Version control* input field in the index form, it cannot be changed during keywording.

Changing the version control setting in an index form afterwards does *not* affect documents that have already been filed. Their status does not change. This is a critical security factor and ensures that documents filed as read-only cannot be manipulated retroactively.

**To set or change version control in an index form, proceed as follows:**



1. Select *System settings, Index forms*, then *Select*. The *Keywording form selection* dialog appears and displays all existing index forms.

2. Open the index form for which you want to change the version control settings by double-clicking.



3. Select the type of version control. To do this, click on the drop-down arrow in the *Document status* field. You have the following options:

**Freely editable/Manual sorting:** You can modify your document freely without retaining the previous version.

**Version controlled/Alphabetical order:** If a document is modified, the previous version is saved, which means that the document receives a *version history*. But only the most recent version is visible in the archive. You can find more detail on this point and on how to use version control in the following tutorial.

**Read-only/Sort by document date:** If this option is selected, the document can no longer be modified. This is particularly important for invoices or tax assessments.



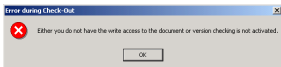
The other options you can select in the *Document status* drop-down box relate to the sort order for structure elements, as do the additional settings behind the settings *Freely editable*, *Version-controlled* and *Read-only*.



4. Confirm with **OK**.



You can open and even edit a document archived as read-only. But you then have to save it with a different name. The original document is retained unaltered.



If you try to modify and save a document filed as "read-only", you will see a dialog box informing you that the document is write-protected. If you accept the warning message by clicking on **OK**, you are given the option of saving the document with another name.

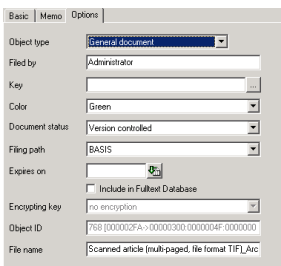
## Version history

The following tutorial will explain how version control works and how to use it. Use any document. First check that version control is turned on for that document.

1. Open the *Edit document* window by double-clicking on the document entry. (Alternatively, right-click then select *Edit keywording* from the context menu.)

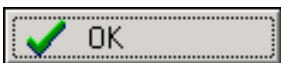
2. Click on the *Options* index card. The *Edit other documents* dialog appears.

3. If *version-controlled* is shown in the *Document status* field, proceed to point 5. But if the field contains *Freely editable* or *Read-only*, continue from step 4.



4. Click on the arrow next to the *Document status* field. The drop-down list opens. Click on *Version-controlled*.

5. Close the input window by clicking on **OK**.



You have ensured that version control is activated for the document.

## Modifying the document

To fully understand the version control feature, you have to edit a document.

1. Right-click on the selected document entry in the archive. The context menu appears.
2. Point to *Document* in the context menu. Then click on *Check out and edit document*. The application software opens. The title bar in the application does not display the name of the document as you saved it in ELO - instead it shows an internal document number. In ELO, the document can now be found in the *In Use* area. In the archive it is locked and cannot be edited.
3. Make any changes you like to the document, e.g. in a text file, delete a few words.
4. Click on *Save* and close the application.



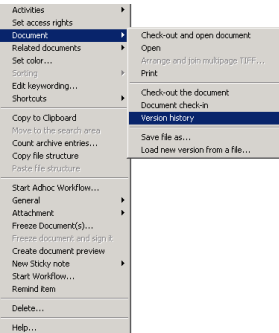
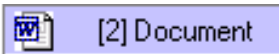
If *Info display* is activated (*System settings, Options, Display*), you see that a new document was filed.



5. The document is now in the *In Use* area.
6. Select the document and then click on *Document check-in*.
7. In the dialog box that opens, enter the relevant information for the document version.

8. Click on *OK*. The document is checked-in to the archive again.

# Viewing the version history



To understand the changes that have been made to documents, you can use the *Version history* feature in the context menu. This allows you to see all modified documents and, if required, to restore any earlier version.

1. Once again, right-click on a document entry. The context menu appears.

2. Point to *Document* in the context menu, then click on *Version history*. The *Version history* dialog appears.

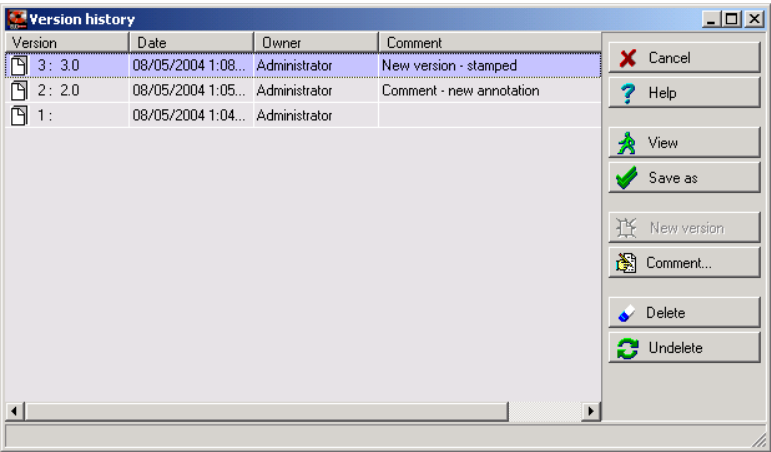
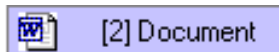
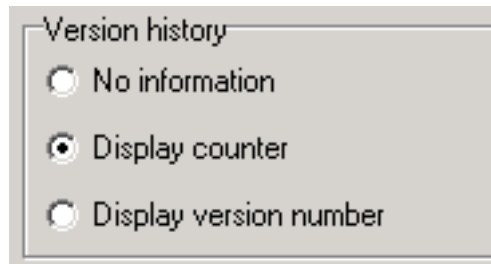


Fig. Displaying version history

# Version history with counter

The version history has a counter, that you can turn on (or off) in *System settings*, Options, on the *Display* index card.





If the counter is on, the number of document versions is displayed in list view in the archive.

In the *Version history* window, you can see all the versions of your document that exist in **ELO**, including the date and time it was edited and by whom, additional comments and, where assigned, another individually definable version number. The document at the top of the list is the current version.

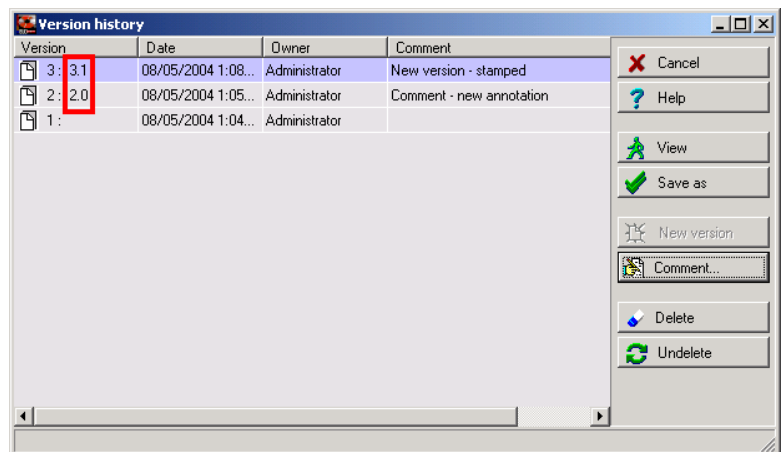


Fig. Displaying the versions of a document



ELO assigns version numbers automatically - every version of a document is assigned a new number. Furthermore, you can enter your own version number and an additional comment.

Opening document version

Each version of a document listed in the version history can be viewed again.

1. Select the version you would like to view again.

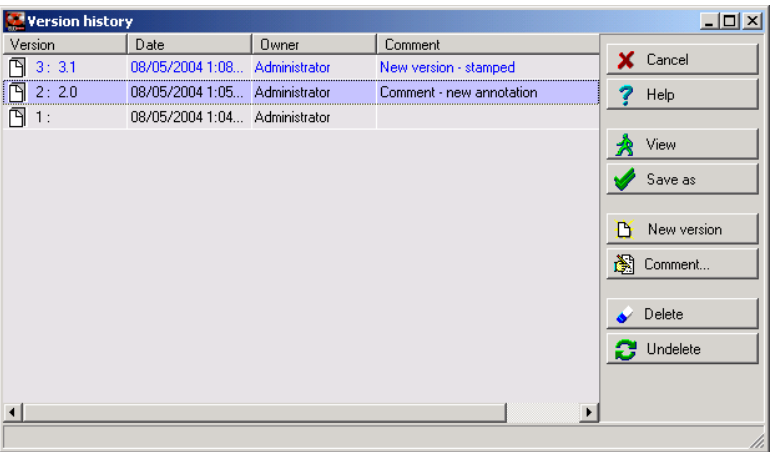
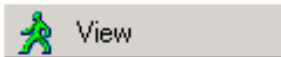
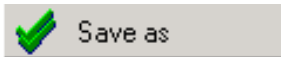


Fig. Selecting document versions



2. Click on View.

3. Another notification dialog opens. Confirm with OK. The document is displayed in the relevant application.



Use the *Save as* feature to open the document and save it outside **ELO** (without version history).

The document is opened in read-only form in the application (e.g. MS Word). The read-only status is shown in the title bar.



This write protection is essential from a security perspective. But it is no guarantee that the different versions of the document cannot be manipulated at a later date.

The read-only version of the document can be printed and, if required, saved under a different name (*File, Save as* menu). The original file is retained unaltered.

This ensures you can track every change to a document. Any version of a document can be easily restored, saved under another name and archived in ELO again.

In general, if you want to be sure that a document cannot be edited, enter *Read-only* in the version control field. With this done, the document can no longer be modified. The *Version control* function, when used in conjunction with the *Version history command*, ensures the highest degree of flexibility and security.

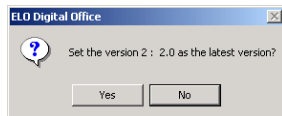
### Creating a new current version

For every document with a version history, it is possible to make the previous version the current version again.

1. Call up the version history for the selected document using the context menu.



2. Click on the document you wish to make into the new *Latest version*.



3. A confirmation dialog opens.

4. Confirm by clicking on Yes. The selected version is made the current working version. In the *Version history* dialog, the current version is shown in color.

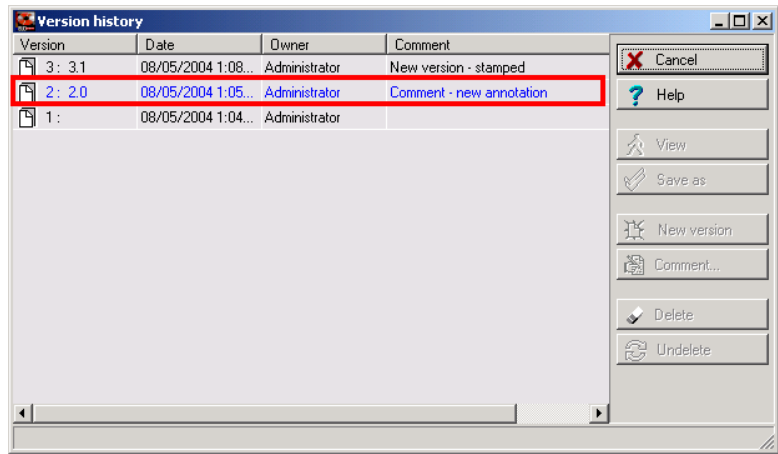


Fig. Displaying the working copy

5. **ELO** now shows Version 2 as the current version.

## Deleting versions

In the dialog for displaying versions and the version history you can delete versions from the version history. The user must have the right to *Delete versions* in order to perform this procedure.

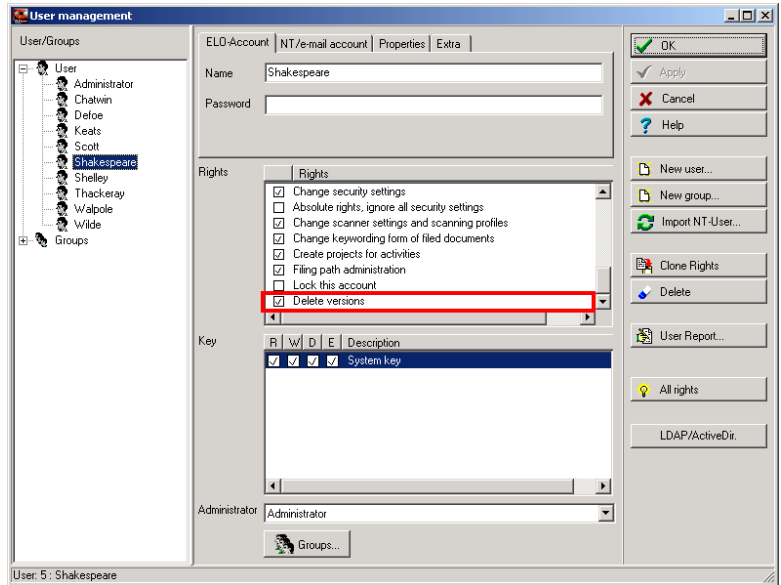
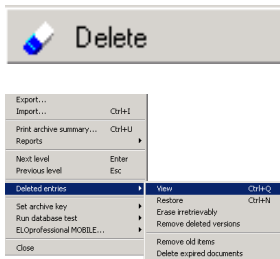


Fig. Archive right 'Delete versions'



To delete a document version from the version history, select the entry in the *Version history* dialog. Click on *Delete*.

The version will then be deleted without further questions or marked with a deleted marker. If you have selected the *View* option in the *Archive* menu, *Delete/restore entries*, the deleted version will continue to be shown in the *Version history* but is marked as deleted.

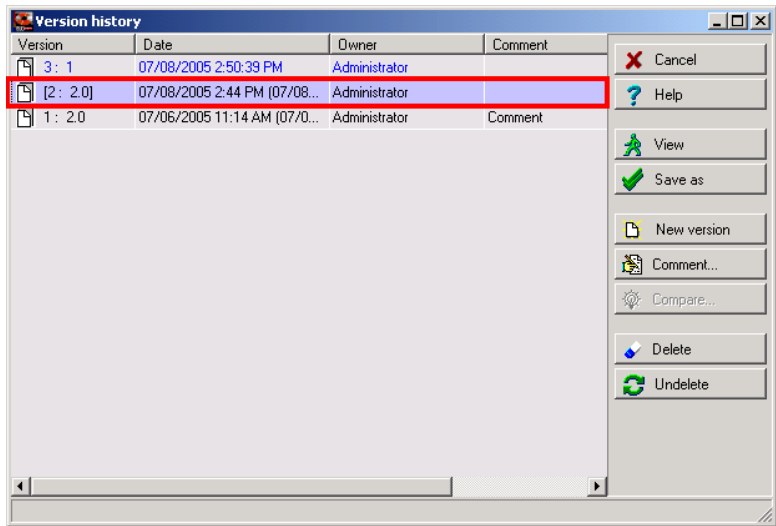


Fig. Deleted document version



## Version history for attachments

With the Restore button you can restore a deleted version of a document and undo the deletion.

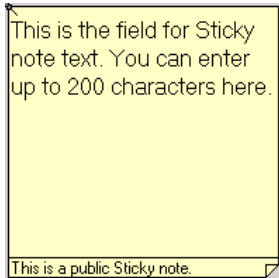
There is also a version history for attachments to a document. The procedure is identical. The version history for attachments can be called up from the context menu under *Attachment*.



Remember: The administrator sets your user rights (i.e. whether you can edit documents). Some of the **ELO** features that have been described here may not be available to you.

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# Affixing sticky notes



Sticky notes are small, practical tools for affixing short messages, notes or memos to a document. They are self-adhesive and can be deleted after use without a trace. Sticky notes are an essential part of day-to-day office life.

Happily, these practical tools are also available in your electronic archive. ELO even lets you use three different types of sticky note:

## The three types of sticky note

- **Public sticky note:** By default, these "regular" sticky notes are yellow. They contain the text you enter and are visible to all users. The footer contains the date, time and *sticky note*.
- **Private sticky note:** By default, these are pink. They contain the text you enter and are only visible to the author. The footer contains the date, time and author's name.
- **Stamp:** Similar to "regular" sticky notes, but white by default. The footer contains the date, time and author's name.



**Please note:** You cannot remove a stamp from a document. So use this option with caution.

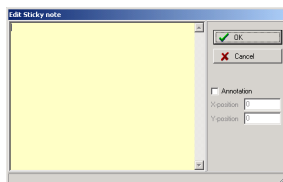
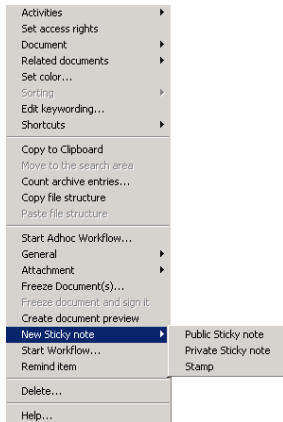
You can customize the size and color of sticky notes. You can enter a maximum of 200 characters. The sticky notes are securely affixed to your document. Even if you transfer documents to the mailbox from the archive, or set it as a task reminder, the sticky notes remain available until you delete them. As mentioned above, there is one exception to this: **Stamps cannot be deleted!**

## Affixing sticky notes

### In the archive

You can affix sticky notes to a document in the *Archive*, *Searching* and *Tasks* areas. You can affix several sticky notes and mix different types.

1. Open a filing cabinet, level, folder and index.
2. Right-click on a document to affix a sticky note to it. The context menu opens.
3. Point to *New sticky note* and select the type of note you want to affix.



The *Edit sticky note* window appears.

4. Write your note and confirm by clicking on *OK*.





The sticky note is displayed as an icon on the sticky note bar. If there are several sticky notes affixed to a document, the regular notes are at the top, followed by the private notes, then the stamps.

### Via the context menu

In other **ELO** areas (e.g. Mailbox), you can bring up the sticky notes using the sticky note bar context menu. This option is also available in the *Archive* work area. For more information, see the section on **Sticky notes**.

### Viewing sticky notes

Sticky notes are only useful if you can read them at all times. In **ELO** this is not a problem.



Public sticky note



Private sticky note



Stamp (sticky note which can no longer be removed)



To read a sticky note, point to the note icon. The sticky note is enlarged. If you move the mouse away, the sticky note is closed again.

Using this method, sticky notes are available to you in every **ELO** area:

- in the mailbox,
- in the *Tasks* area and
- in the *Searching* area if a document is found with one or more sticky notes.

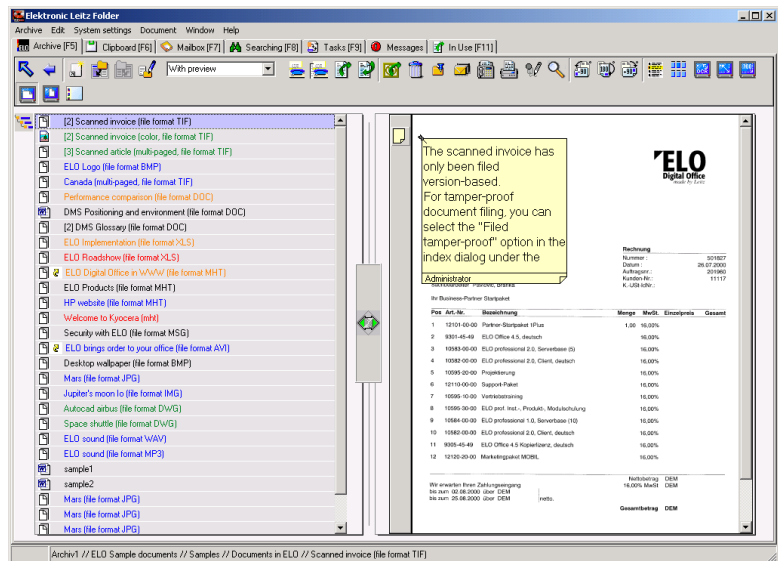


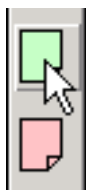
Fig. Finding sticky notes

## NB:

As soon as you affix a sticky note to a document, it is automatically affixed to all logical copies (shortcuts) of the document as well.

## Creating, editing and deleting sticky notes

Sticky notes have a dedicated context menu. This lets you make any necessary changes to an existing note and create new ones. This context menu is available in the split bar in almost all work areas (archive, reminder tasks, mailbox etc.).



**Right-click** on the sticky note icon that you want to edit or delete. The context menu opens.

There are six options in total:



**New:** Used to create new sticky notes. If you point to *New*, a submenu opens containing the three sticky note types.

**Edit:** Opens the window *Edit sticky note*. Make your changes to the existing note text here.

**Settings:** Opens the *General system settings* window to the *Sticky notes* index card. This is the place to customize your sticky notes - for example their size and color. Refer to the following section for more information.

**Delete the entry:** Removes the selected sticky note.



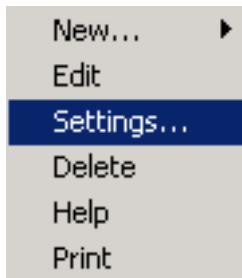
If you have made a copy of a document with a sticky note, when deleting the note it is also removed from all copies. Stamps cannot be deleted! The user (who has affixed a release stamp, for example) is shown in the stamp's footer.

**Help:** Launches online help.

**Print:** using this command, you can print the text of the selected note.

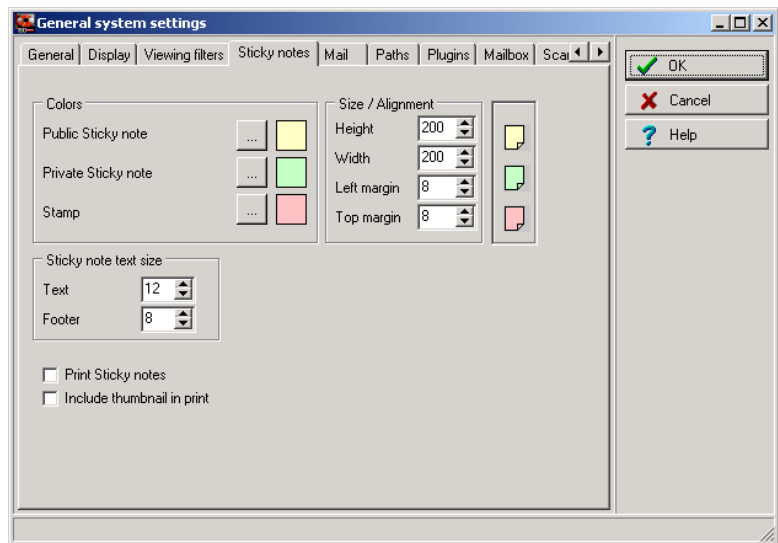
## Customizing sticky notes

There are two ways to change the size and color of sticky notes and well as the font size for the main text and footer:



- In the split bar context menu *Settings*
- In *System settings*, under *Options*, *Sticky notes* index card.

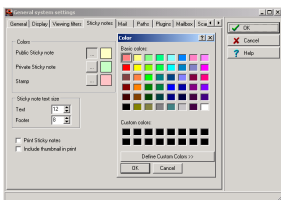
Both routes bring you to the *Sticky notes* index card. Modify the settings here.



## Assigning a color

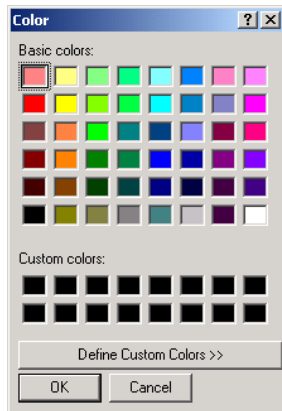
In the colors area, you can assign a new color to the three sticky note types. At the same time, and using the small colored rectangle, you can check the current note settings.

Remember: changing the color also affects all existing sticky notes. The same applies to changes to the format and font size.





1. Click on the square with the three dots next to the sticky note to change its color. The *Color* dialog appears.



2. In *Basic colors*, click on the color you want to apply to the sticky note. The color is selected (surrounded by a border).

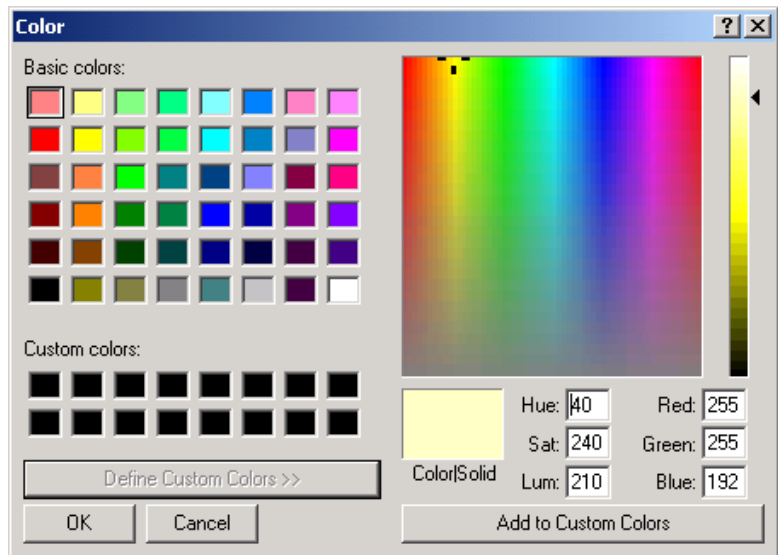
3. Confirm the settings with *OK*.

The sticky note is then displayed in the chosen color. The setting applies to all notes of that type. To change the color for another sticky note type, for example the stamp. repeat steps 1 to 3.

## Defining colors

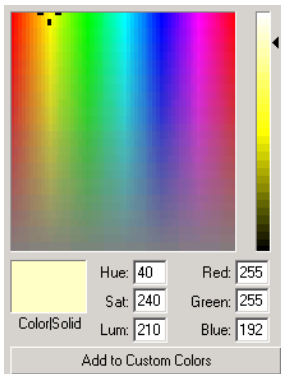
If you can't find a suitable color in the *Color* dialog, you can define a custom color.

1. In the *Color* window, click on *Define custom colors*. The window expands.



2. Click on one of the dark rectangles in *Custom colors* to select it.

3. Click once on the colored bar on the extreme right. That sets the luminosity, marked by an arrow. You can change the setting again at any time.



4. Now click in the large, rainbow-colored window. Hold down the mouse button and move through the colors. In the small *Color/Solid* window, the color is displayed with the luminosity setting.

5. Release the mouse button when it displays the color you want. Now you can change the luminosity setting with the slider on the right-hand side if necessary, or try another color by moving through the colors with the mouse button held down.



6. Click on *Add to custom colors*. The color shown in the *Color/Solid* window is set in the *Custom colors* area. You can now select it at any time. Move the mouse to another area of the color window and click on *Add to custom colors* again. The next rectangle along in the *Custom colors* area is now set to that color.

7. If necessary, repeat steps 2 to 6 to select rectangles in the *Custom colors* area or to change colors you have already defined.

## Applying custom colors

You can apply a custom color to a note in the same way as a standard color. You simply select the color from *Custom colors* rather than *Basic colors*.



1. Click on the square with the three dots next to the sticky note to change its color. The *Color* dialog appears.

2. Click on a color that you have just defined in the *Custom colors* area.

3. Confirm with *OK*. The newly-defined color is then applied to the selected sticky note type.



If you know the precise values for your color, you can enter them next to *Basic colors*. Or use the values of the newly defined color to reproduce it.

## Format and font size

Try out a few settings until you find the right font size, note size and margin for your purposes.

Size / Alignment

Height: 200

Width: 200

Left margin: 8

Top margin: 8

Icons: Orange, Green, Pink

In the *Size/Alignment* area of the *Sticky notes* index card, you can define the size of the sticky note and the top and bottom margins. You must enter whole numbers.

Sticky note text size

Text: 12

Footer: 8

In the *Sticky note text size* box, you can set the font size for the main text and footer text (in whole numbers).

You can check each change immediately, by pointing to the sticky note icon next to the *Size/Alignment* fields. This opens a sticky note preview. If it looks satisfactory, click on *OK*.

General system settings

General | Display | Viewing filters | Sticky notes | Mail | Paths | Plugins | Mailbox | Scanning | Scanner profile | Search

Colors

Public Sticky note: [Orange icon]

Private Sticky note: [Green icon]

Stamp: [Pink icon]

Sticky note text size

Text: 12

Footer: 8

☐ Print Sticky notes

☐ Include thumbnail in print

Size / Alignment

Height: 200

Width: 200

Left margin: 8

Top margin: 8

Icons: Orange, Green, Pink

Preview: This is the field for Sticky note text. You can enter up to 200 characters here.

Footer: This is a private Sticky note.

Buttons: OK, Cancel, Help



**Please note:** Changes to size and alignment effect all sticky notes.



---

# Chaos filing

Maybe you want to file documents without regard for your archive structure. For example, because you do not yet know which filing cabinet you want to file them in, or you simply want to file them temporarily. Chaos filing lets you do just that.



Documents in the chaos file are not visible and are not listed anywhere. The only way to find documents in the chaos file, or view and file them in the *normal* archive structure is by using keywording or the *Searching* index card. Don't take the *chaos file* name too literally, but do use this feature with care.

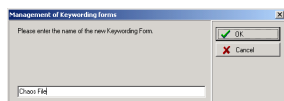
## Creating a keywording form for the chaos file

You need a special keywording form to be able to carry out chaos filing for a document.

1. In the *System settings* menu, select *Keywording forms* [Ctrl+F3].

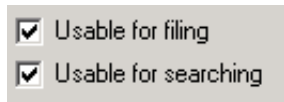


2. In the *Management of keywording forms* window, click on *New form*.

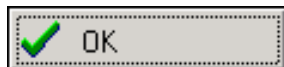


3. Enter the name **Chaos file**, for example.

4. In the *Filing clause* field, enter an asterisk\*.



5. Check *Usable for filing* and *Usable for searching*. You do not have to create special form fields (keywording attributes) for this keywording form.



6. Confirm with *OK*.

## Filing a document in the chaos file

Type	Name
DIR	Invoice 2385
DIR	A\W: Quotation 0457
PDF	BARCODE
PDF	Cold
TIF	Scanned invoice (file format TIF)
DOC	DMS Positioning and environment

You can now use the new document form for the chaos file.

Using the newly created document form, *Chaos file*, you can keyword a document in the mailbox and file it.

1. Double-click on the document entry, or **right-click** to open the context menu. Select *Edit keywording*.

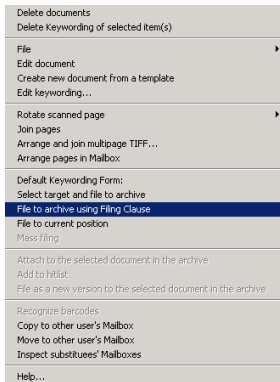
2. The *Edit document* window appears. Select the *Chaos file* form.

The screenshot shows a software window titled "General document Edit [new entry]". It has a left sidebar with a list of document types: Basic entry, Chaos File (highlighted), Contact, Document, EMail, Free Input, General Documents, Invoice, Sample, Structure element, and Unformatted Entry. The main area has tabs for "Basic", "Memo", and "Options". The "Basic" tab is active, showing fields for "Name" (Invoice), "Date" (07/08/2001), "Filing date" (07/27/2004), "Actual version" (2.0), and "Owner" (Administrato). On the right, there are buttons for "OK", "Apply", "Cancel", "Help", "Fill (F3)", "OCR", "Open", "Save", and "Versions". At the bottom, a status bar displays "No access rights", "System color", "07/27/2004", "TIF", and "Document name".

Fig. Assigning the 'Chaos file' keywording form

3. In *Name*, enter a name and enter some keywords in the *Memo* index card.

4. Close the window by clicking on *OK*.

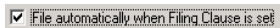


5. Open the context menu and click on *File to archive using filing clause*.

Because of the asterisk \* in the filing clause field in the index form, the document is filed in the chaos file.



You can speed up the process by turning on the *File automatically when filing clause is set* function in *System settings*, *Options*, the *Mailbox* index card.



With this option on, the document is **not** put back in the mailbox after keywording - instead it is filed at the specified target destination.

## Retrieving documents from the chaos file



Switch to the *Searching* area to retrieve documents from the chaos file.

1. Click on the first binocular icon *Find keywording*. The *Basic entry search* window appears.

2. Select the *Chaos file* index form. The *Search chaos file* form is displayed.

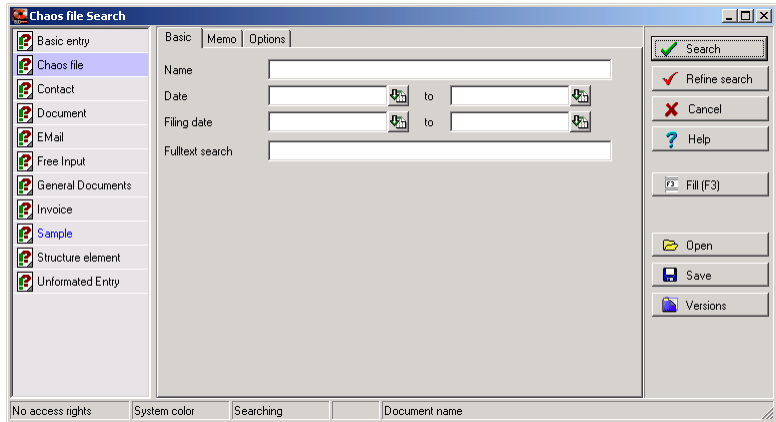
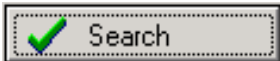


Fig. Searching the chaos file

3. Enter the full or partial document name in Name or search for the document by *Date/Filing date* or by the keywords on the *Memo* index card.



4. Click on *Search*.

All documents matching your search criteria are displayed. Now you can, for example, edit the documents, keyword them again and move them into your *standard* archive structure by dragging and dropping them into the index you want in the archive. You can also copy the documents to the mailbox: Select the *Copy to mailbox* function in the *Document* menu.



Remember: In the *Chaos file* search form, entering a \* or a % symbol in *Name* displays the entire contents of the chaos file.

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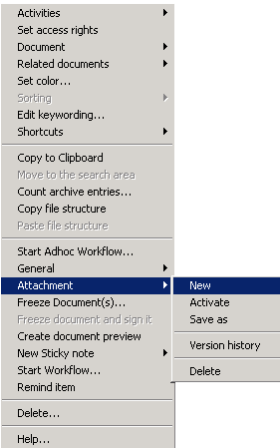
# Attachment



You can attach picture, sound and video information to any document archived in ELO using the **Attachment** function. That means that you can attach almost any file to a document filed in **ELO**, including standard text files or executable programs (.exe files). That means you can combine a wide range of different types of information in **ELO**. For example:

- In a property report, add a video about the property.
- Dictate a commentary about minutes of a meeting into a microphone and attach it as a Wave file.
- Archive a text together with a photograph or image related to it.

## Attaching speech, video and other files

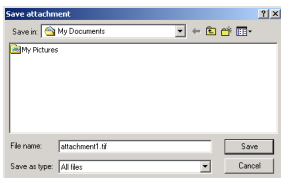


1. In the archive, select the document that you want to create a file for.
2. Right-click to open the context menu.

3. Point to *Attachment* in the context menu. A submenu opens. The commands in it do the following:

**New:** Clicking on *New* lets you select a file in Windows Explorer to attach to the document you selected in ELO. A copy of the attached file is archived in ELO. This deletes any previously attached files.

**Activate:** Click on *Activate* to open (run) an attached file, for example to view or edit it. This launches the relevant application.



**Save:** Clicking on *Save as* opens the *Save attachment* dialog. This lets you save a copy of an attached file outside **ELO**, e.g. on a diskette. This feature is for file attachments that you want to export out of **ELO**, or those that you do not want to run in **ELO** (.exe - files).

**Version history:** Displays the *history* of a document's file attachments and, as such, also shows earlier versions of file attachments

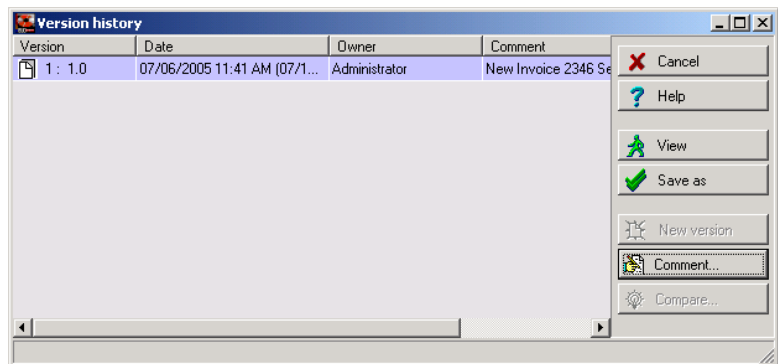
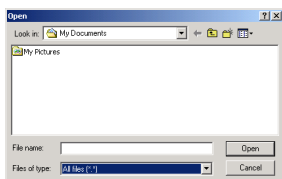


Fig. Version history of file attachment

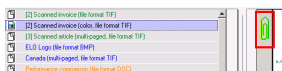
**Delete:** Deletes an attachment.



Using the *Version history* feature, you can also restore attachments which have been deleted. This is only possible with a version-controlled document.



4. Click on *New*. The *Open* window appears. Select the file you want to attach and click on *Open*. **N.B.:** The correct file format may not be shown in the *Files of type* window. If you know the path and name of the file, open the folder and enter the name in the *File name* field. You can also enter the placeholder *\*.\** and click on *Open*. This displays all the files in the current folder. Select the correct file and click *Open* again to confirm. A copy of the attached file is archived in **ELO**.



5. A paperclip appears next to your document. It signifies that a file is attached.



Clicking on the paperclip opens the attached file - i.e. the *Activate* command is run. But if you click while holding down the Ctrl key, the *Save* command is executed. This also opens the *Save attachment* window.

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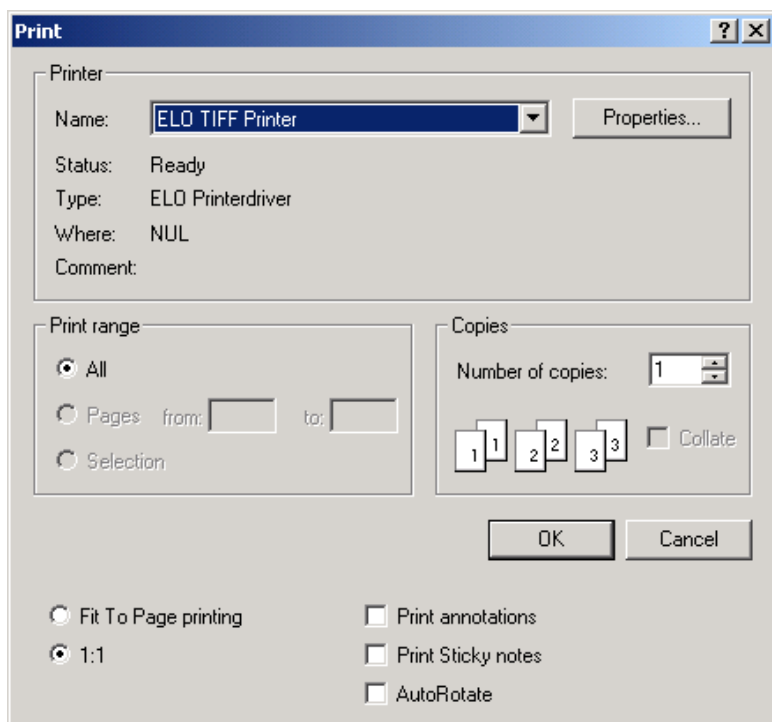
## ELO printer

Using the ELO printer (installed automatically during **ELO** installation) you can file any document directly to your mailbox as a TIFF file from an application program, e.g. MS Word.

The advantage of this is that the document is saved as a graphics file and is therefore unaffected by any changes to your application software. Moreover, your document can no longer be modified accidentally either.

1. Start **ELO**.
2. Switch to your application software. Create a document in the usual way.
3. In the Print dialog box in the application software, select *ELO printer* and click on *OK*.





4. Then click on the *Refresh mailbox* icon in your mailbox and your new file, e.g. under the name *ELOE001.TIF* will be shown.

---

## Scanning into the archive



If you are using a feed scanner (with ADF), you can scan several pages in a row using the icon *Scan and staple pages* from within the archive. As soon as you finish the scanning process, **ELO** joins the pages into one document. But in this case, you should make sure you scan the pages in the correct order, otherwise you may have to separate, sort and scan the pages again later.

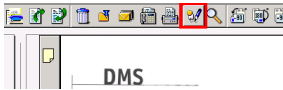
After scanning, the *Select document form* window appears. Select a keywording form and keyword the document you have scanned in. You can find further information on the topic of **Scanning** in the section on **Scanning documents**.

---

# Signing documents

## Digital signature

A digital signature allows you to sign documents with a "signature" so that you can verify their integrity and authenticity later. That means you can secure information in **ELO** using a signature card. To be able to sign documents, you need an authenticated card with your individual details.



Signing the document ensures secure transfer of data, even via e-mail. Any changes to documents can be instantly identified. Please note that you can only sign TIFF documents.



You can sign a document by clicking on the *Sign document* icon on the **ELO** toolbar.

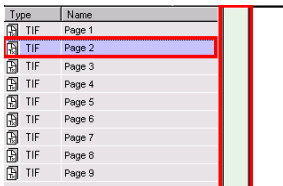
## Signing

The software is run and the signed document certificate is created.

## Bulk signature

Scanned documents that arrive in the ELO Mailbox are collected together and can be given a multiple signature (**qualified digital signature**) before being filed in the appropriate part of the archive.

Within the **ELO** archive, documents can be provided with a qualified digital signature. But documents and data can also be authenticated in the inbox area of the archiving system (the mailbox), using a bulk signature.



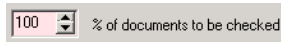
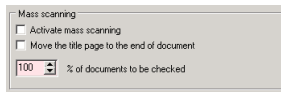
The use of digital signature allows the documents to be joined together and assigned a personal signature, even in larger quantities. The signature can be matched again to the "natural person" at any time, just as with any other qualified digital signature.

1. After you have selected the bulk signature option, the documents to be signed are moved to the mailbox.

2. Depending on your settings for the number of documents to check before signing, documents in the mailbox are examined and checked.

3. Once the set number of documents has been examined, the middle bar changes color from *red* to *green*. Only then are the documents ready, so that the content of the mailbox can be bulk signed. Then the documents are immediately filed and archived in **ELO**.

## Digital signature options



You can alter settings and options for document signing in *System settings*, *Options* in the *Mailbox* index card.

Bulk signing in the mailbox is only possible if you have checked the *Activate mass scanning* option.

This setting determines the percentage of documents that have to be examined before bulk signing. The *50%* setting means that 50% of the documents have to be displayed in the viewer before they can be digitally signed.

---

## Display QuickInfo



[3] Scanned article (multi-paged, file format TIF)  
Date=09/08/2001  
Filing date=09/08/2001

If you hover the mouse pointer over the icons in the toolbar, a small QuickInfo field opens below the icons. This tells you what command or what action the relevant icon launches.

A **extended** QuickInfo field is available in Archive view for all ELO objects (cabinet, folder, index and document). This extra ELO QuickInfo field displays the text in the entry fields of your keywording form. This allows you, for example, to instantly see the filing clause or the keywords entered.



You can turn the **Display extended Quickinfo fields** on or off by clicking on the *Display QuickInfo* icon.

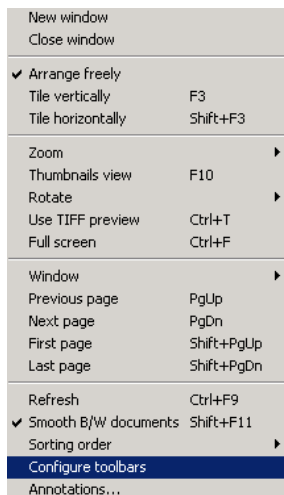


The extended QuickInfo display gives you initial information about a document, without opening it.

---

# Configuring toolbars

Every index card has its own toolbar, offering quick access to a range of functions using icons. You can configure which icons are displayed. This feature is particularly useful, because it lets you customize **ELO** to best meet your needs and requirements. You can simply hide icons which are not used, or only rarely.



In the *Window* menu, click on *Configure toolbars*. This opens a selection dialog box containing all the functions and corresponding icons available in the ELO index cards (*Archive*, *Clipboard*, *Mailbox*, *Searching*, *Tasks* and *In Use*).

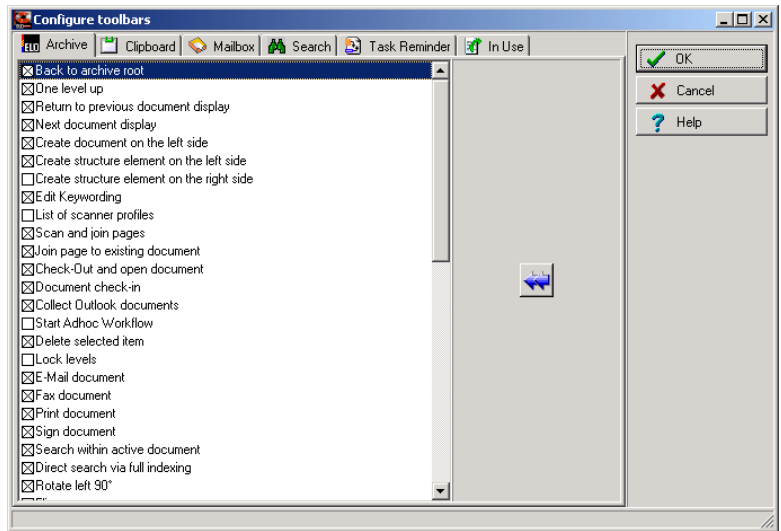


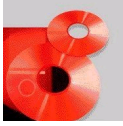
Fig. Configuring the toolbars

Click on the tab of the index card whose toolbar you want to change. Selecting a function displays the corresponding icon on the right.

To add or remove an icon from the toolbar, check the box next to the particular function. The icon is only displayed on the toolbar if the check box is marked with a **x**.



Using this procedure, you can customize all the toolbars to your specific requirements. But we do recommend that you keep the *E-mail* and *Adhoc workflow* icons on the toolbars for the all the index cards.



# Chapter 4

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## The clipboard

The clipboard is a sort of repository that helps you to organize your archive. Every ELO object, from a single document to an entire filing cabinet can be copied to the clipboard and pasted back to another location in your archive. That allows you either to move objects to the new location or to make copies of them. The object is then available twice in your archive (once as a shortcut).

This chapter will tell you how to get the most out of the clipboard. It includes the following items:

- Copying documents to the clipboard
- Pasting documents from the clipboard
- The Clipboard toolbar
- The Clipboard context menu



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# Copying documents to the clipboard

Documents can be copied to the clipboard quickly and easily. As an example, the screenshot shows three documents on the clipboard. The first is selected and is displayed on the right.

Fig. Copying documents to the clipboard

There are three possible ways to copy documents to the clipboard:

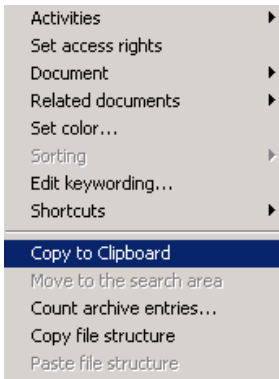
- Via the context menu
- By dragging and dropping
- Using a second ELO window



Remember: Documents are deleted from the clipboard when you close **ELO**, in other words they are no longer there when you restart the program. To avoid this, click on *System settings* in the menu bar, then *Options*. Then on the *General* index card, check **Save clipboard**.

## Copying using the context menu

An object in your archive can easily be copied to the clipboard using the *Archive* context menu. Open the structure element containing the document.



1. In the archive, **right-click** on the document entry you want to copy to the clipboard. The context menu opens.

2. **Left-** click on the *Copy to clipboard* command. The document is immediately copied to the clipboard. The original document remains in its original filing location in the archive. Please refer also to the notes in the section on **The logical copy**.

## Copying by dragging and dropping



The quickest way of copying an object to the clipboard is by dragging and dropping.

1. Left-click on the document you want to copy to the clipboard.

2. Drag the document to the tab of the *Clipboard [F6]* index card. The document is now on the clipboard.

## Copying using a second ELO window

The clearest way is to open a new ELO window. You can immediately see what is happening.

1. Open a second ELO window. In the *Window* menu, click on *Tile vertically*.

2. In the first ELO window, click on the *Clipboard [F6]* index card.

3. Drag the document from the archive on the left to the *Clipboard [F6]* area in the right-hand ELO window.

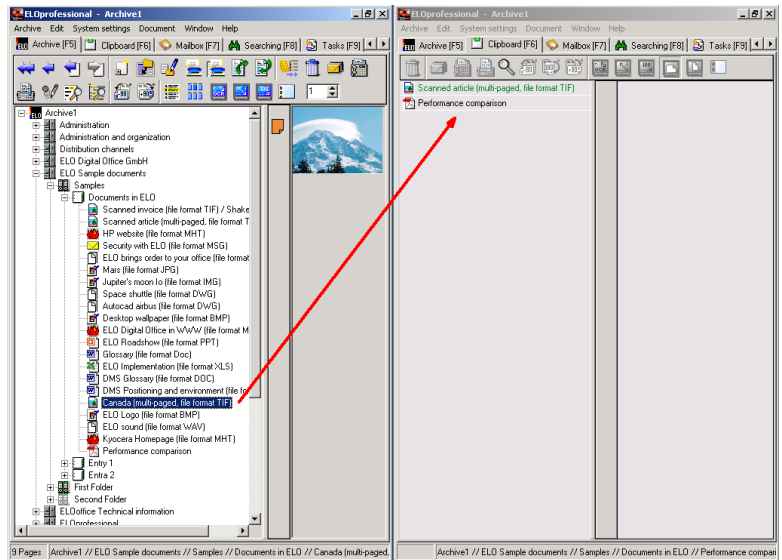


Fig. Dragging the document to the clipboard

By dragging and dropping, move the document from an ELO window to the clipboard in the other window.

---

# Pasting documents from the clipboard

Documents that you copy to the clipboard can either be archived in another location, or copied to the Reminders area. They cannot be moved or copied to the mailbox.

There are two ways to paste a document from the clipboard to another location in the archive.

## Move from the clipboard by dragging and dropping

1. First navigate to the location in the archive where you want to paste the object. Open the relevant structure element.
2. Switch back to the clipboard by clicking on the index card or pressing F6.
3. Drag the document from the clipboard to the tab of the *Archive* index card.

You have successfully **moved** the document to the index you have already opened. It is **no longer** in its original location. If, on the other hand, you want to create a **copy** (shortcut) to the document, hold down the **Ctrl key while dragging**.



You can also move or copy several documents at the same time. When selecting (not dragging), hold down the Shift or Ctrl keys.

## Moving from the clipboard using second ELO window

Once again, the process is clearer with two ELO windows. Open the filing cabinet, folder and index in one **ELO** window. In the second, open the clipboard. Then simply drag the document from the clipboard to the index opened in the other ELO window.

---

# The Clipboard toolbar



The clipboard also has a toolbar, and the icons it contains allow you to access a range of functions.



The icons that are displayed depend on your settings in the *Window* menu, *Configure toolbars*.



Clicking on the icon *Delete from clipboard* deletes the document item marked from the clipboard. The object itself remains unaltered in the archive.



Send selected document by e-mail



Fax document



Print document



Searches for a term in the selected document and highlights matched text.



Rotate page (only scanned documents or image files)



Select area for OCR (scanned document or image file)



Zoom selection



Full screen



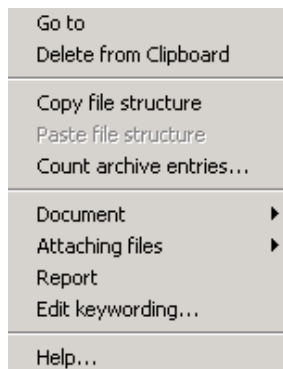
Page number display (scanned document or image file)



The function of these icons should be clear and self-explanatory. Complex functions, such as **OCR** or **User scripting** are described in detail elsewhere in this manual. Use the index to this manual to find out more about these functions.

---

# The Clipboard context menu

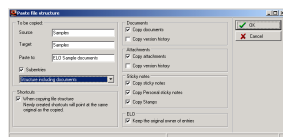


The clipboard context menu contains additional commands, explained briefly below.

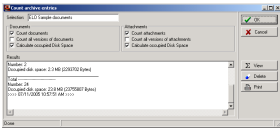
**Go to:** This takes you straight to where the document is filed in the archive.

**Delete from clipboard:** Removes the selected document from the clipboard. The original is retained in its original location in the archive.

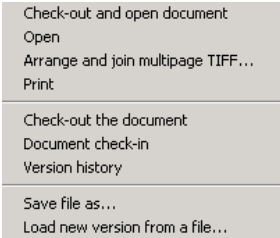
**Copy file structure:** This function copies a complete filing structure to the clipboard. From there, the copied filing structure can be applied throughout the archive. This is very useful if, for example, you have to create the same folders and indexes for accounting purposes every year.



**Paste file structure:** If you have copied a file structure (a filing cabinet, folder or index), switch to the location in the archive where you want to insert the copy. In the context menu, click on *Paste file structure*. You can find more information in Chapter 3, **The archive** under **The commands in the context menu**.



**Count archive entries:** This function calculates the number of documents in a folder, for example, and how much disk space they require. Select the relevant ELO object (filing cabinet, folder or index) and click on *Count archive entries* in the context menu. You can find more information in Chapter 3, **The archive** under **The commands in the context menu**.



**Document:** You can edit, view, print etc. documents on the clipboard just as you can in the *Archive*.

Remember that a document you check out to edit has to be checked in again from the *In Use (F11)* area.

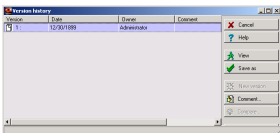
**Check-out and open document:** This function checks out the document. It appears in the *In Use* area again.

**Open:** To view and open a document, click here.

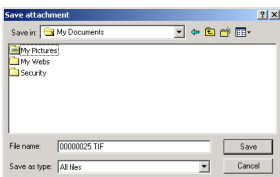
**Print:** You can print a document using this command.

**Check-out the document:** To prepare a document for editing and to transfer it to the *InUse* area, click on this button.

**Version history:** There, you can see an overview of the version history of the documents.



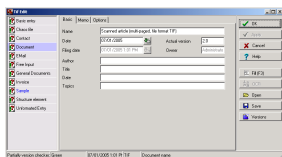
**Save file as:** This function lets you save the selected document as a copy outside **ELO**. This is useful if, for example, you want to work on a copy of a document without adding to the version history. The original document remains on the clipboard.





**Load new version from a file:** This function lets you make any file the current working version of a document.

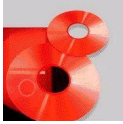
**Report:** Report displays the report data for the selected object in a window. The latest date is at the top. Normally, the details for a single day are displayed, but you can also narrow the search to include particular entries or users. You can do this by clicking on the *Options* button. You can find more information on this in the chapter **System settings** under the heading **Reports**.



**Edit keywording:** This option opens the keywording form for the document. This means you can edit the keywording for the selected document directly from the clipboard before moving it to another location in the archive.

**Remember:** Changing the keywording of a document on the clipboard also changes the keywording of the original document in the archive.

**Help:** This function launches online help.



# Chapter 5

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## The Mailbox

The Mailbox is your organizational control center in **ELO**. It gives you optimal and effective document management, a wide range of features yet is easy to use.

You can scan documents in from your Mailbox and decide how and where to file a document. You can assign keywording forms (document forms) to documents, copy them, enter keywords or make changes to the documents.

Documents already in the archive can be moved to the mMailbox repeatedly, for example, to forward them to another colleague on the network.

If the optional Barcode module is installed, documents can be read and indexed quickly, securely and cost-effectively using barcodes.

We will explain the features and tasks of the Mailbox in detail in the following sections:

- Mailbox functions
- The Mailbox toolbar
- The Mailbox context menu

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# Mailbox functions

Every **ELO***professional* user has their own personal Mailbox. It is the *central organizational repository* and is used to receive all types of documents, such as:

- Graphics
- Word processing files
- Faxes imported from a fax program
- Documents sent from a scanner on the network

In the Mailbox, all documents are keyworded and archived via a keywording form. But the Mailbox offers you many more features. For example, you can forward documents to a colleague's mailbox on the network, attach documents, sort individual pages of a document and much more besides.



To access the Mailbox, click on the *Mailbox* index card.

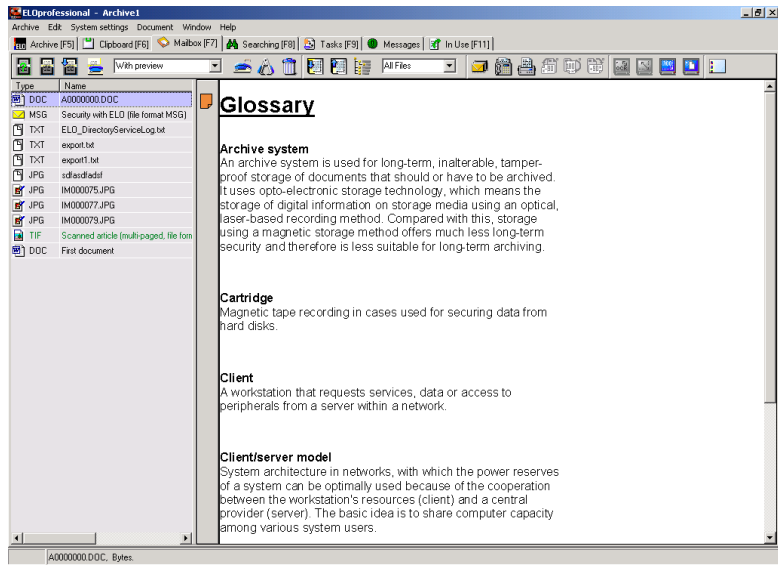


Fig. 'Mailbox' index card

The screenshot shows a mailbox. A document is selected and is displayed on the right.

---

# The Mailbox toolbar



Fig. Mailbox toolbar

The toolbar contains many different icons. Clicking on one of them performs a command. Some commands can also be performed by clicking on the **ELO***professional* menu bar or using shortcuts.



Some icons may be hidden. You can easily change this in the *Mailbox* index card, accessed via the *Window, Configure toolbars* menu.

## Selecting a scanner

If you use several scanners, you can set up the scanner you want to use here.



Clicking on this icon opens the *Select source* window.



Clicking on this icon scans new pages into the Mailbox.

You can find more information about scanning and how to create scanner profiles in **The scanner profile index card** in the **System settings** chapter.



Scanning double-sided pages is no problem using the *Scan pages* feature. Using the command *Arranging pages* (in the mailbox context menu), ELO sorts the individual TIFF pages in the correct order. You can find information about this in the section **The Mailbox context menu** and in chapter 2 under **Scanning documents**.

## Rescan page

If a document has been scanned in, it can be scanned in again.



Click on *Rescan page* to rescan.

## Scanning and joining pages

If you are using a feed scanner (with ADF), you can scan several pages in a row using the icon *Scan and join pages*.



After scanning, **ELO** joins the individual scans together into one file. Scan the pages in the right order to start with to avoid separating and sorting later.

## Select scanner profile

Here, you can select a scanner profile.



Open the drop-down menu and select the settings you want to use to scan.

## Join pages

In the Mailbox, all the pages of a scanned document are present as individual TIFF files (unless you used the *Scan and join pages* function).



Click on this icon to join the selected pages.

	PDF	Cold
	JPG	Page 1
	JPG	Page 2
	JPG	Page 3
	TXT	Import.txt

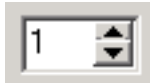
The screenshot on the left shows the Mailbox entry for a three-page document (selected), i.e. three individual TIFF files that you want to join.

1. Select the pages you want to join. Click on the first entry (Page 1.tif) then on the last (Page 3.tif), while **holding down the Shift key**. **All four** pages are now selected. If, however, you want to select **selected pages individually** click the first entry then on each subsequent entry while **holding down the Ctrl key**.



2. Click on the *Join pages* icon. All selected files (pages) are joined to the top-most entry in order (from top to bottom). (**Important:** If the mailbox entries are not in the order in which you want to join them, you can rectify this simply by dragging and dropping. To do this, click on an entry and drag it (by holding down the mouse button) to the right place.

3. The info display window appears and lists the pages you have added. Click *OK* to close the info display.



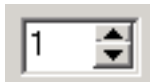
The page number display is now visible in the toolbar. Use it to scroll through a multipage document.



If you are using a small monitor, the icons are continued in a second row. Icons that do not fit on the first toolbar are wrapped onto a second, starting from the left. If you do not like this, increase the monitor resolution or hide certain icons using the *Configure toolbars* command from the *Window* menu.



There are many advantages to having your scanned documents available in the Mailbox as individual pages. It means you can, for example, change the page order of a document or join several different documents to form a single one.



**Example:** Say you are scanning images from a trade fair or brochure. Once you have joined these files in a single document, you can leaf through them using the page number display arrows just like in a catalog.



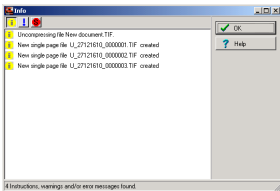
Documents, e.g. two MS Word documents, cannot be joined with this feature.

## Split pages

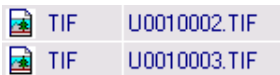


Multipage documents can be split again as well. Select a document.

Then click on the *Split pages* icon.



The info display appears. Here, you can read which document was split and what file names **ELO** has assigned to the individual pages. Split pages always start with the letter "U", unlike scanned pages, which always start with a "D". Remember that the format for scanned file names can be modified. If required, change this setting in **ELO** system settings.



On the left you can see the mailbox entry for a split, two-page document. The identical *Job number U001* shows that the files were originally one document. The sequential numbering of the entries (0002 and 0003) identifies the split pages.

Moreover, the entries for the individual pages of a split document are displayed in a different color in the mailbox. So you can quickly identify them at a glance.

## Deleting selected entries

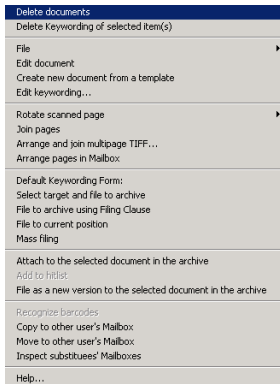


To delete entries in the mailbox, select them.

Then click on the *Delete selected item* icon. If you want to delete several entries at once, proceed as follows:

- Select a continuous list of entries by holding down the Shift key.
- Holding down the Ctrl key at the same time allows you to select individual entries.





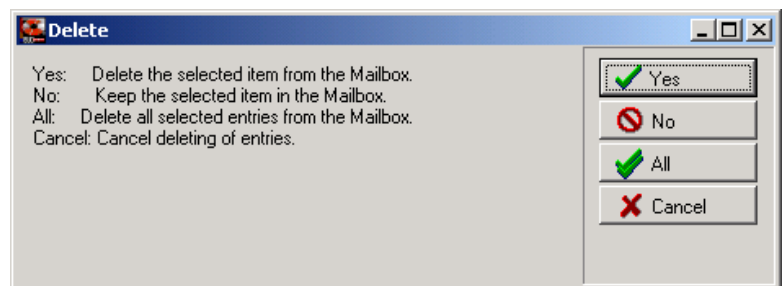
Then click on the *Delete selected item* icon again (Trash can).

You can also delete mailbox entries from the context menu: **After** selecting the objects, **right-click** to bring up the context menu. Now select *Delete documents*.

Once you have initiated the delete command, the info display appears and shows you the deleted entries. Confirm with **OK**.

## Important

Exercise caution when deleting! You will be asked to confirm before the items are actually deleted. However, once you have started deleting, a document deleted from the mailbox can only be restored from the Recycle Bin.



## Refresh mailbox

While you are working in the mailbox, documents sent to you *from outside* (e.g. from colleagues) do not enter your mailbox directly. Instead they are collected in an in-tray.



Clicking on the *Refresh mailbox* icon will transfer the contents of this "in-tray" to your mailbox.

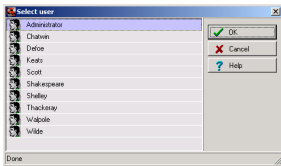


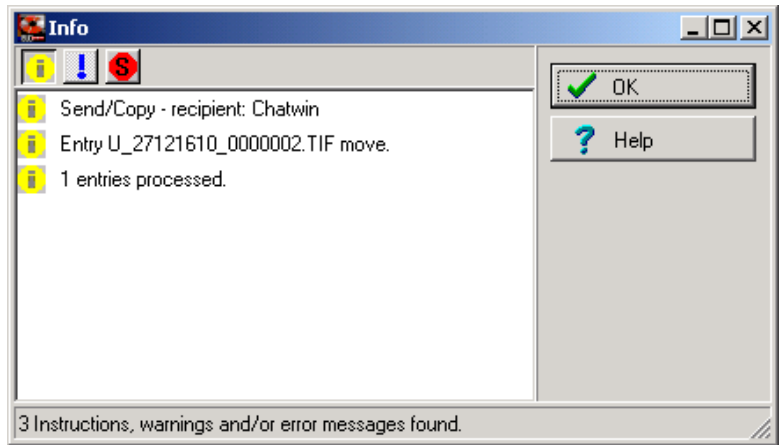
So that your Mailbox is automatically refreshed when you switch to it, turn on this function on the *Mailbox* index tab in *System settings, Options*.

## Sending pages

The Mailbox doesn't just let you receive documents. You can also send documents (or copies) over the network to other users or groups (e.g. entire departments). This feature can save you considerable time and stem the deluge of paper, because you no longer need to make photocopies.

1. Select the documents that you want to send.
2. Click on the *Move to other user's mailbox* icon. The *Select user* dialog box opens.
3. Select users or the group and confirm by clicking on *OK*.
4. The info display appears and gives information about the transfer that has just been completed. Confirm with *OK*.





The document is now in the mailbox of the user you selected (and no longer in your own). If you want the document to remain in your mailbox send a copy. To do this, use the *Copy to other user's mailbox* command in the context menu by right-clicking after selecting the documents.

### Select target and file to archive



This icon opens a dialog that allows you to select a target and to file selected documents in the archive.

Clicking on the icon opens the following dialog.

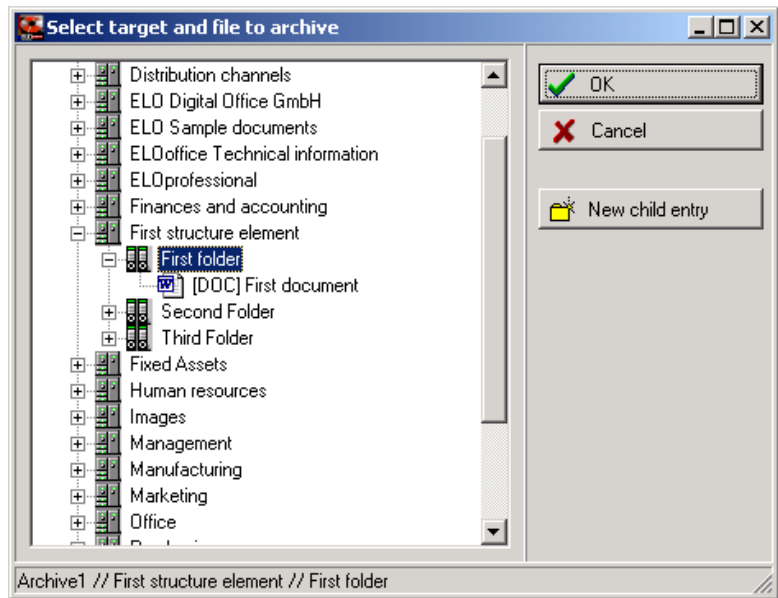


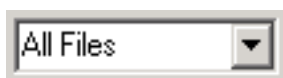
Fig. Selection dialog for filing documents in the archive

Select a structure element, a folder or an index where you want to archive the document.



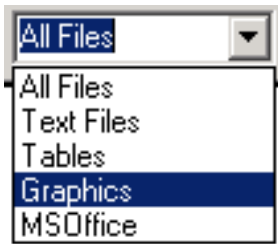
**Please note:** If you file several documents at the same time, all documents are filed in the structure element which was selected for the first document. When creating shortcuts when filing using the select target and file feature, the shortcuts are also created in the first structure element selected. The options defined (filing location, shortcuts) for the first document to be filed also apply for all other documents when filing several documents simultaneously.

## File filter type



In the Mailbox, you can use the *File type filter* to choose which file types to display in list view - e.g. only graphics.

The filter feature makes the Mailbox far clearer if it contains lots of documents and different types of document. The *File type filter* window in the toolbar shows you what file format is being displayed in the Mailbox.



1. Click on the arrow next to the display window. All of the document type filters you can use are displayed.

**All Files:** Displays the entire contents of the Mailbox.

**Text files:** Only shows documents created using a word processor (e.g. MS Word).

**Tables:** Only shows documents created using a spreadsheet application (e.g. MS Excel).

**Graphics:** Only shows documents created using a graphics program (e.g. MS Paint).

**MS Office:** Only shows those documents created with an MS Office application.

2. Click on the file type you want to display. Immediately, only files of this type remain visible in Mailbox list view.



You can easily modify the File Type Filter settings according to your needs. You can modify displayed file types and the corresponding file formats, remove them from the list or add others. To find out more, refer to the **Viewing filters** index card in the **System settings** chapter under **Options**. There, you will find an overview of the file formats supported by **ELO**.

## Send e-mail

You can send a document by e-mail.



You can use the *Send e-mail* icon for this.

## Fax document

If you have fax software installed, you can send a selected document via ISDN or modem to other fax machines. (For fax client settings, see chapter on **System settings**.)



This can be done via the Fax icon.

## Print document



You can print a selected document directly from the Mailbox.

To do this, click on the Print document icon.

## Rotate scanned pages



The *Rotate scanned pages* function lets you rotate all scanned documents, as well as graphics and image files.

Simply click on the corresponding icon. Using this function you can, for example, realign incorrectly scanned documents without having to rescan them.

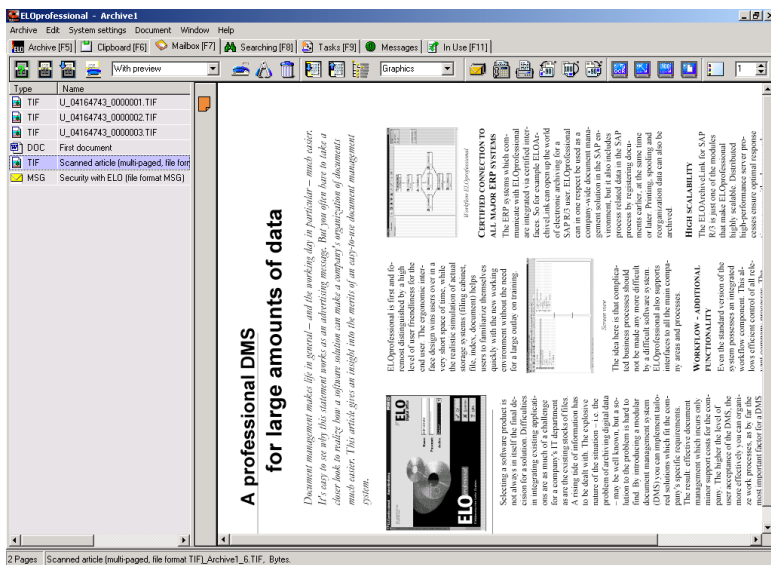


Fig. Rotating scanned pages



The scanned page shown is rotated 90° to the left (see example above).



The scanned page shown is rotated by 180°, in other words it is turned upside down.



The scanned page shown is rotated 90° to the right.



This activates the OCR functionality. You can use this to select an area of the active document in which character recognition can be launched.

## Document view

Documents are often too small on the screen or only partially visible. That is why you can set screen magnification to one of several zoom settings.



Simply click on the corresponding monitor icon.



*Zoom cursor:* The document view is defined by the area of the screen selected with the cursor.



*Zoom 25 %:* The document is reduced to 25% of its original size.



*Zoom 50 %:* The document is reduced to 50% of its original size.



*Zoom 100%:* The document is shown actual size.



*Fit width:* The document is displayed to fit across the screen.



*Fit page:* The whole document is displayed in the view pane and as large as possible.



*User-defined zoom:* The document is displayed magnified by a predefined zoom factor. You can set this zoom factor in *System settings* under *Options*. On the *Display* index card in the *User-defined zoom factor* field, enter the zoom factor you want.



**For quick changes:** The option *User-defined zoom* on the *Display index card* can be accessed directly with the left mouse button when the mouse pointer is positioned over the icon.

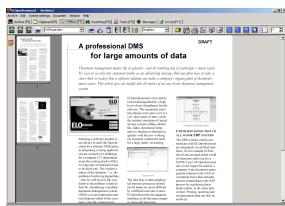
The mouse pointer changes to a hand in Document view. You can then drag the document around in the view pane with the left mouse button.

## Full screen



For the Document view, you can select the maximum width of the **ELO** window.

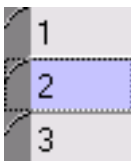
Clicking on the *Full screen* icon hides (and reveals) the list view. It makes the entire width of the **ELO** window available for document view.



Thumbnail views are also displayed on the left side of the screen, giving you a quick overview of all pages in the document. Clicking on a thumbnail activates the corresponding page of the document.



Go to *System settings*, *Options*, *Display* and click on *Display thumbnails*.



With multipage TIFF documents, you can also use the tab on the right-hand side of the ELO window to scroll through the individual pages.





Clicking the icon a second time restores list view.

## Page number display



The page number display lets you scroll through multipage TIFF documents.

It is only displayed when a multipage document is selected.

## User script



Scripts allow you to automate tasks and workflows in **ELO**. Some scripts are already implemented as standard.

You can also create your own scripts. Up to eight icons on the toolbar can be assigned and used to launch scripts. The Archive area has as many as 16 configurable buttons.

For more details on scripts, refer to the chapter on **System settings**, and the section on **ELO script management** in particular.

## Transfer text to keywording forms using OCR.

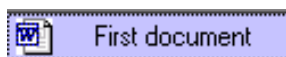


Using the **OCR** icon, you can transfer text quickly and easily from a TIFF document to be archived - e.g. the address field of an invoice - to your index form as keywording information.

Click on the icon to activate OCR functionality.



A scanned document is saved in TIFF format. All the information, including the characters in a scanned text, is saved in pixel form. With OCR (Optical Character Recognition) this image information (pixels) is converted into machine-readable characters. It can then be processed in the computer, e.g. as index information for an ELO keywording form. With OCR, it is important to have a clear font and a resolution of at least 200 dpi in the scanned document.



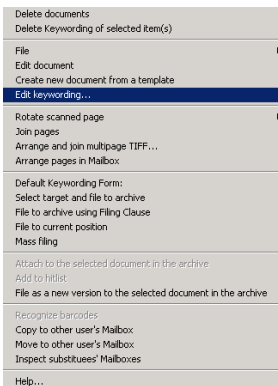
1. Click on the document you want to read in via OCR. It will be displayed on the right.



2. Click on the *OCR* icon.



3. Drag to select the area you want to transfer using OCR, e.g. invoice information.

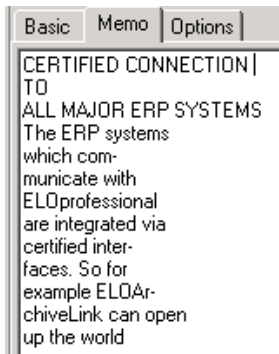


4. Open the keywording dialog using the *Edit keywording* context menu. Select the keywording form in which you want to use the OCR text.

5. Click on the input field on the keywording form where you want to insert the text, for example in the input field in the *Memo* index card.



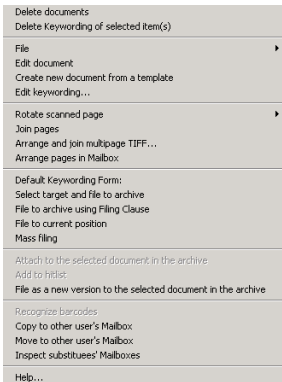
6. **In the keywording form**, click on the *OCR* button. That inserts the selected part of the TIFF document into the keywording form field.



This feature is available in all **ELO** work areas, except *Tasks*.

---

# The Mailbox context menu

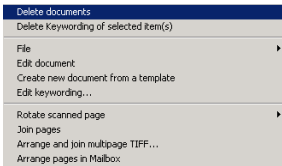


You open the context menu by **right**-clicking on a selected document entry. So you first have to select the document by left-clicking on it, then right-click on it again. The benefit of using the context menu is that it provides quick access to certain commonly used commands. For example, in the Mailbox context menu, you can:

- edit the document,
- send it to a colleague's mailbox,
- keyword it or
- archive it in a different way

Some of the commands in the context menu are available via the icons in the toolbar, with shortcuts or by using the drop-down menus from the toolbar. How you choose to perform a command in **ELO** is, of course, up to you. Choose your own preferred way of working.

## Deleting documents



This function is equivalent to clicking on the Delete icon on the toolbar. Select the documents to be deleted.

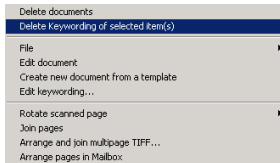
Then right-click to call up the context menu and select *Delete documents*.

Once you have initiated the delete command, the info display appears and shows you the deleted entries. Confirm with **OK**.



Exercise caution when deleting! Before the documents are deleted from the mailbox, you will be asked to confirm deletion. Once you have started deleting, a document deleted from the mailbox can only be restored from the Recycle Bin.

## Deleting keywording

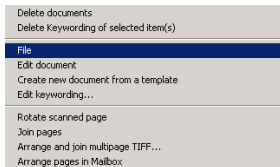


Documents first have to be keyworded using a keywording form before they can be filed in the archive from the Mailbox.

If you want to keyword a document again or with another keywording form, you have to delete the existing keywording. This function allows you to do this for several documents at once. Select the documents and then right-click to open the context menu. Click on *Delete keywording*. All the details you have entered, e.g. keywords, description etc., will be deleted. The documents remain unchanged and retain their original names (before keywording). The Mailbox entries for the documents will again be the names under which they were entered in the Mailbox.

You can then edit the documents again in a keywording form, keyword them and file them.

## File



The context menu option *File* covers four more functions:

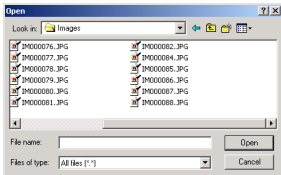
- Importing a file
- Save file as

The *Import file* command transfers a copy of a given file into your mailbox.

## Importing a file



The *Import file* command on the File context menu opens the Windows *Open file* window. Locate and select the required file as usual.



Then click on *Open*. The selected file is copied into your Mailbox.



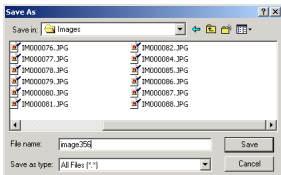
This method saves you having to open Windows Explorer to drag and drop a file to the Mailbox.

## Save file as

*Save file as* lets you export any file from the Mailbox, i.e. out of **ELO**.



You can, for example, save a Word document to a diskette.



In the mailbox, select the file you want to store outside **ELO**. In the *File* context menu, select *Save file as*. The Windows *Save file as* dialog is opened. Use this dialog to select the drive and the folder in which you want to save the selected file.

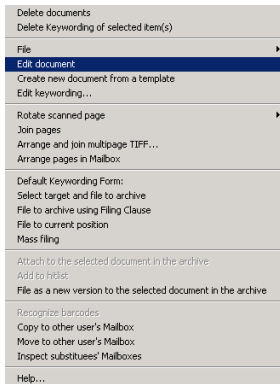
Then click on *Save* to store the file in the file system outside **ELO**.



Document templates let you create documents in **ELO** with a pre-defined layout, e.g. with a letterhead. In **ELO** there are global and personal document templates that you can create for yourself. To make these templates available in **ELO**, use the following two functions.

## Editing a document

In the Mailbox, you can edit documents before they are archived. Select the document and open the context menu.

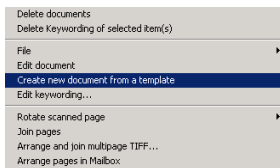


Click on *Edit document*. The selected document is opened in the application, e.g. MS Word. You can now make any changes you want to, subject to the capabilities of the application.

Then save the document again, close the program and return to **ELO**.

## Creating a new document from a template

**ELO professional** lets you use document templates to create a document, e.g. an MS Excel or MS Word document, right in the Mailbox. If, for example, you want to write a letter, forward (send) it and archive it, this feature makes all of these things easier.



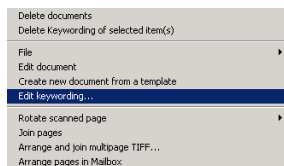
You no longer have to start the application separately, write the letter, then transfer it to **ELO**. You can do it all directly from **ELO**.

To help you to make the best use of these capabilities, **ELO** allows you to create as many document templates as you like. You simply have to create one or more templates in your applications (e.g. **Letter.doc** or **WinWord.doc**), transfer them to **ELO** and save them as document templates in the filing location in ELO previously defined. You can call up these templates using *Create new document from a template*.



You can find detailed notes on the procedure in chapter 2, under **Creating documents in ELO**.

## Edit keywording



To assign effective keywords to a document and archive it, use the keywording forms. They help you to file documents in a standardized way, e.g. using input fields for the *filing date*, the *document name* and for *keywords* (For more details, see the chapter on *System settings*, under *Keywording forms*).

For documents that have not yet been assigned a keywording form, the *Edit keywording* menu item opens either:






- the input window *Edit document* with the *Basic entry* keywording form or
- the input window *Edit document* with a default keywording form.

This depends on the settings you have chosen for the *Default keywording form* in the context menu.

For documents that have already been keyworded, the relevant index form opens to the *Edit document* input window.

Procedure for documents that you have not yet keyworded:

1. Select the document to archive and open it by right-clicking in the context menu.

	PDF	Cold
	JPG	Page 1
	JPG	Page 2
	JPG	Page 3
	DIR	Invoice 2385



2. Select *Edit keywording*. The *Cabinet edit* dialog box opens. Click on the keywording form you want to use. Note that the name of the editing window depends on the particular settings in your system.

3. Complete the input fields, and click *OK*.

The document is now keyworded and ready for archiving.

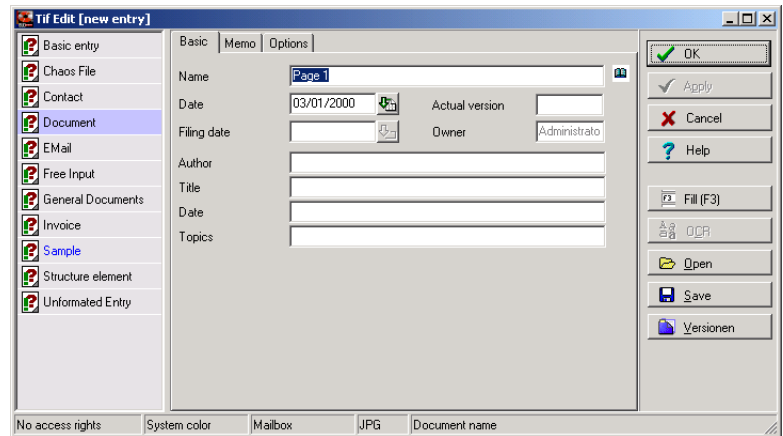
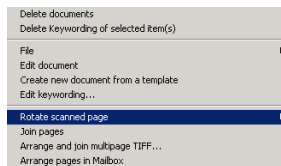


Fig. Keywording a document

## Rotating scanned pages



This function is equivalent to the *Rotate scanned pages* icons in the toolbar.

You can rotate any scanned document, including all graphics and image files you have imported from Explorer.

Say you have received a scanned document from a colleague via the mailbox that is the wrong way up. With *Rotate scanned page*, it is not necessary for your colleague to scan the document in again; you can correct the error immediately:

Rotate right 90°  
Flip  
Rotate left 90°

1. Select the document, then right-click to open the context menu.

2. Point to *Rotate scanned page*. Three rotation directions are shown in a submenu.

**90°:** The scanned page is rotated 90° to the left.

**180°:** The scanned page shown is rotated by 180°, in other words it is turned upside down.

**270°:** The scanned page is rotated 90° to the right.

Click to select a rotation.



A single page scanned document in the mailbox will remain permanently rotated. Multipage documents are only rotated for display.

Not all documents can be rotated, e.g. MS Word documents. The *Rotate scanned page* feature is therefore not available in either the toolbar or the context menu. You can see this at a glance:



Icons for functions that are not active are grayed out.

In the context menu, the respective command lines are in gray script with white highlighting.

## Create documents with separator pages (stapling)

This function makes it much easier to archive large volumes of multipage documents scanned in using the *Scan and join pages* command. With this command, **ELO** automatically separates the individual documents with blank separator pages scanned in at the same time.

In this way, you can quickly archive whole folders (blank page at the beginning, plus one per index).

You can find information on the precise procedure in the chapter on **Scanning documents**.

1. Create the separator pages / scan them in with the documents.
2. Select the documents in the mailbox.

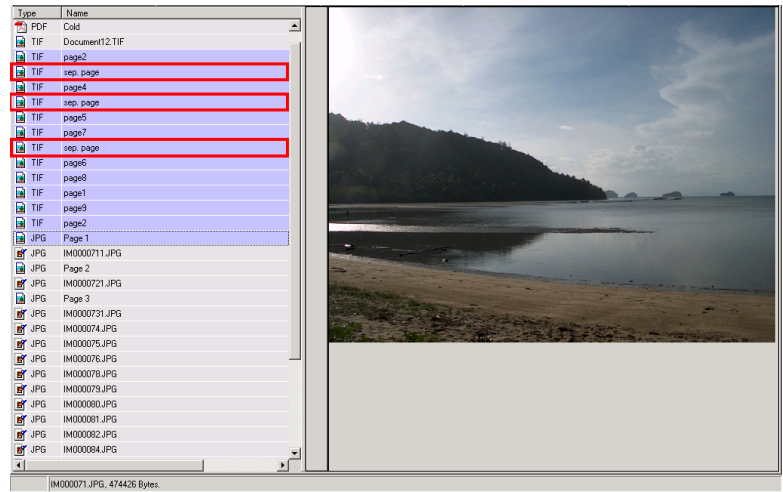


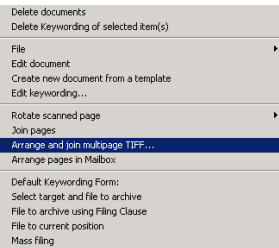
Fig. Selecting a document in the mailbox

3. Select the *Staple after separator pages* option from the context menu. The pages will be joined into documents.



However, a blank page as a separator sheet is relatively error-prone, and it is not possible with this method to scan empty pages as they will be recognized as separator pages and removed. So **ELO***professional* has an additional separator page function in the scanner profile, and a special ELO separator page to replace the blank sheet. **The advantage** of this is that you do not have to do any post-processing after the scanning process - the individual documents are ready and waiting in the mailbox. Please refer to the notes in chapter 2 under **Scanning documents**.

Arrange and join multipage TIFF



You can use this feature to rearrange the pages of multipage TIFF documents and to remove individual pages.

Right-click on the document entry. Select *Arrange and join multipage TIFF* from the context menu.

The *Change page order* window appears.

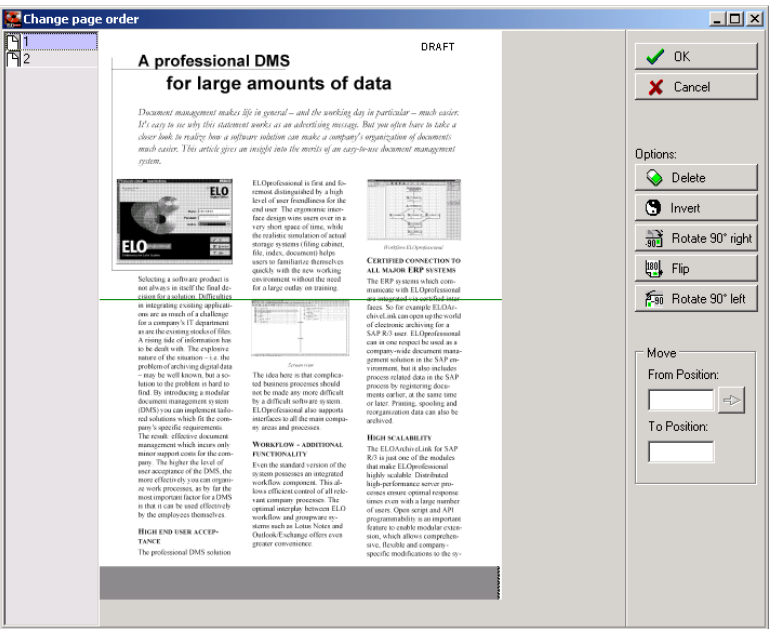
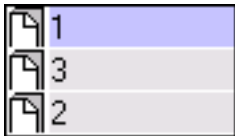
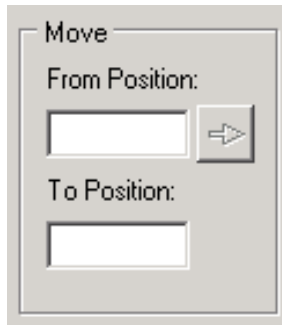


Fig. Changing the order of pages



1. First select the page you want to move (or delete) from the list.

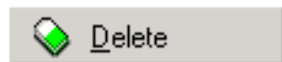


2. In the *Move* area enter the page you want to move and to where, and click on the green arrow next to **From position**. The new order is displayed in the list field.

3. Click *OK* when you have finished sorting.



You can also sort using drag and drop: just click on a page in the list, hold down the mouse button and drag to the new location.



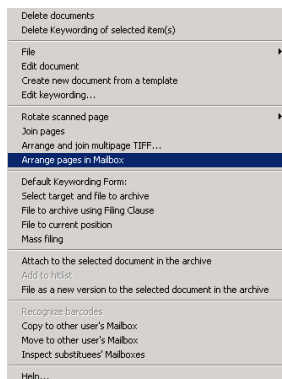
To delete a page, select it in the list and then click on *Delete*.



If individual pages of a scanned document are inverted (white areas black and vice versa), you can correct this with the *Invert* button.

## Arranging pages

This feature makes it easier to scan and arrange double-sided documents.



**Example:** Let us assume you are scanning 4 duplex pages with a feed scanner. First scan pages 1, 3, 5 and 7 (front sides). Then turn the pile over and scan the reverse sides, i.e. pages 8, 6, 4 and 2. Then select the individual pages in the mailbox (10001 to 10008) and choose *Arrange pages* from the context menu. ELO sorts the scanned pages into the correct order (10001, 10008, 10002, 10007, 10003, 10006, 10004, 10005). The *Join pages* command lets you join the four pages back into one document.

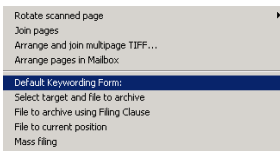
## Setting a keywording form as a default

Here, you can set the keywording form as the default that appears when you select *Edit keywording* or double-click on the document entry.

If, for example, you want to archive several invoices, set the *Invoice* document form as the default.

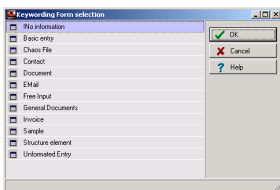
1. Select the document and open it by right-clicking in the context menu.

2. Select *Default keywording form*. The *Select document form* dialog box opens. Select the required keywording form and confirm by clicking on *OK*.



With immediate effect, the *Invoice* keywording form will now be called up when you click on *Edit keywording* in the context menu. You do not have to set this form again each time.

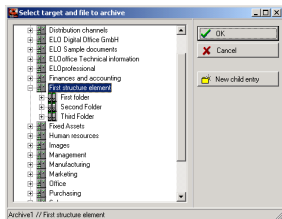
If, on the other hand, you want to archive several documents one after the other using different keywording forms, select *!No information* under *Default keywording form* in the context menu. The *Select document form* dialog box always opens first.



Keywording forms are absolutely essential for archiving your documents, and not only because they allow you to organize your documents effectively and in a standardized way. A keywording form also assigns a document to a certain document type (e.g. *Invoice*). And for every available document type, specific user-defined defaults are applied. These include for example **colors**, **keys** or the **filing location** in your archive.

In general, keywording forms are created by the system administrator. That is why we cover the topic of *Keywording forms* in the chapter on **System settings**.

## Select target and file to archive



If you select the *Select target and file to archive* function from the context menu, a dialog box appears, giving you an overview of the whole archive structure.

1. Select the document you want to archive.
2. Select *Select target and file to archive* from the context menu.
3. In the dialog box, select the filing location for the document within the archive and then press **OK**.
4. The document is filed in the archive. Where applicable, enter the required keywording information.



**Please note:** If you file several documents at the same time, all documents are filed in the structure element which was selected for the first document. When creating shortcuts when filing using the select target and file feature, the shortcuts are also created in the first structure element selected. The options defined (filing location, shortcuts) for the first document to be filed also apply for all other documents when filing several documents simultaneously.

## File to archive using filing clause

Default Keywording Form:  
Select target and file to archive  
**File to archive using Filing Clause**  
File to current position  
Mass filing

One of the prime purposes of the mailbox is to collate documents for archiving, then transfer them to the archive. The fastest way to achieve this is to transfer the documents to the archive using a filing clause in the keywording form.

It is necessary to enter this filing clause, i.e. the definition of the exact filing location (index, folder etc.), in the keywording form. When using *File to archive using filing clause*, **ELO** recognizes where to file the document in the archive (in which filing cabinet, folder, index etc.) by using the selected keywording form and its filing clause.



You can learn how to create and use the required keywording forms in the chapter on **System settings**.

Enter the information on the filing clause into the keywording form for the relevant file type. Under *System settings*, *Keywording forms*, *Select*, select the keywording form for the file type. Enter the relevant index information in the *Filing clause* field. For more details, refer to *Management of keywording forms* in the chapter on *System settings*.

Form name	Invoice
Filing Clause	L2+L2+L1
Kw. Form key	System key
<input checked="" type="checkbox"/> Usable for filing	<input type="checkbox"/> Index document for Fulltext search
<input checked="" type="checkbox"/> Usable for searching	

## File to current position in the archive

Default Keywording Form:  
 Select target and file to archive  
 File to archive using Filing Clause  
**File to current position**  
 Mass filing

*File to current position in the archive* is most appropriate if:

- *File to archive using filing clause* is not possible since there is no keywording form for the desired filing location, or
- several documents with different keywording information (different keywording forms) are to be filed in the same index.

To use *File to current position in the archive*, you just have to switch to **ELO** archive (click on the *Archive* index card) and open the folder/index where you want to file the document. Then return to the mailbox and keyword the documents you want to file, if you have not already done so. Then select the documents (by holding down the Shift or Ctrl key), open the context menu and click on *File to current position in the archive*. The selected documents are now filed to the index you just opened.



You can find detailed notes in the **File documents from the mailbox** chapter.



## Mass filing

Default Keywording Form:  
Select target and file to archive  
File to archive using Filing Clause  
File to current position

Mass filing

The *Mass filing* feature makes it easier to file several documents, because you do not have to keyword documents individually. Say you have a folder full of old documents (e.g. old invoices) that you want to archive, but do not necessarily want to keyword now.

The *Mass filing* feature allows you to file all the documents at once using one keywording form.

You simply have to scan in the documents then select *Mass filing* from the mailbox. All selected documents are then keyworded only once and filed with the same keywording form. For more information, refer to chapter 2, under **File documents from the mailbox**.

## Attach to the selected document in the archive

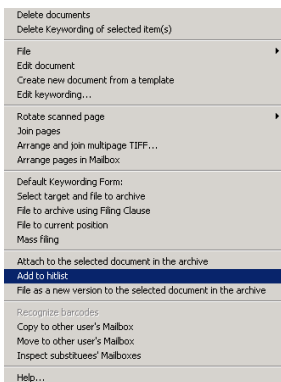
Delete documents  
Delete Keywording of selected item(s)  
File  
Edit document  
Create new document from a template  
Edit keywording...  
Rotate scanned page  
Join pages  
Arrange and join multipage TIFF...  
Arrange pages in Mailbox  
Default Keywording Form:  
Select target and file to archive  
File to archive using Filing Clause  
File to current position  
Mass filing  
Attach to the selected document in the archive  
Add to hitlist  
File as a new version to the selected document in the archive  
Recognize barcodes  
Copy to other user's Mailbox  
Move to other user's Mailbox  
Inspect substitutes' Mailboxes  
Help...

You can use this function to attach a TIFF document from the mailbox to an archived TIFF document.

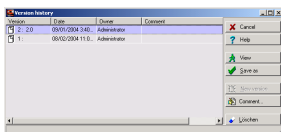
To do so, switch to the *Archive*. Open the relevant filing cabinet, folder and index and select the TIFF document. Then return to the mailbox and select the TIFF document there that you want to attach. Then right-click to open the context menu and click on *Attach to a selected document in the archive*.

## Add to hit list

The *Add to hitlist* function allows you to attach a TIFF document from the Mailbox to a TIFFdocument in the *Search* area.



## Link new version to archive document



## Barcode recognition



To do so, switch to the *Searching* area. Run a search, find the required document and select it. Then return to the Mailbox and select the TIFF document there that you want to attach. In the context menu, select *Attach to hit list*. The document from the Mailbox is attached to the document in the *Searching* area.

This function allows you to append a new document version to a document selected in the archive.

1. Select the document in the archive. Switch to the Mailbox.

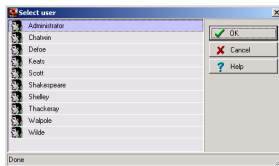
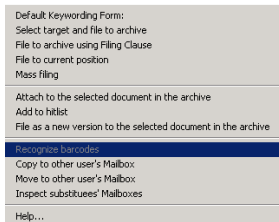
2. Select the document in the Mailbox that you want to become the current working version of the archive document. Select the *Link new version to archive document* function from the context menu. The document from the Mailbox is added to the version history of the archive document as a new current version.

Barcode recognition enables documents to be keyworded automatically using a barcode (held on the documents themselves). If a filing clause is present on the keywording form, the documents are also filed automatically in the archive according to the criteria given in the filing clause.

For a detailed explanation of barcodes and their use in **ELO**, refer to the manual for the **ELO** Barcode module.

This function is only available if the optional Barcode module is installed.

## Copying to another user's Mailbox



## Moving to another user's Mailbox

The *Copy to another user's Mailbox* feature lets you copy every document in your Mailbox to that of another user. Unlike *Move to another user's Mailbox*, the document is copied, not deleted from your Mailbox.

1. Select the document you want to copy. It can, but need not, be keyworded. Using the Shift or Ctrl key, you can also select several documents to copy at once.

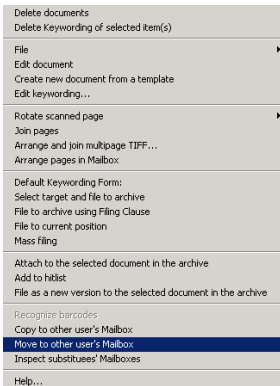
2. Right-click to open the context menu. Click on *Copy to another user's Mailbox*.

3. The *Select user* dialog appears. Select the user and confirm by clicking on *OK*.

4. The *Info display* appears (where configured). This confirms that you want to send the documents and indicates the recipient again. Confirm with *OK*.

This generates a second document that takes up additional disk space. You should therefore try to limit the number of unnecessary copies you make of large files.

The *Move to another user's Mailbox* feature lets you move every document in your Mailbox to that of another user. Without having to make photocopies, you can send documents rapidly over the network to a colleague or send memos to all departments.



1. Select the document in the Mailbox that you want to move. It can, but need not, be keyworded. Hold down the Shift or Ctrl key to select and move several documents at once.

2. Right-click to open the context menu. Click on *Move to another user's Mailbox*.

3. The *Select user* dialog appears. If you want to send the copy to a group, go to *System settings, Options, General* and click on *Group/user dialog for large number of users*. A dialog box appears to allow you to select groups also.

## Extended dialog box for users and groups

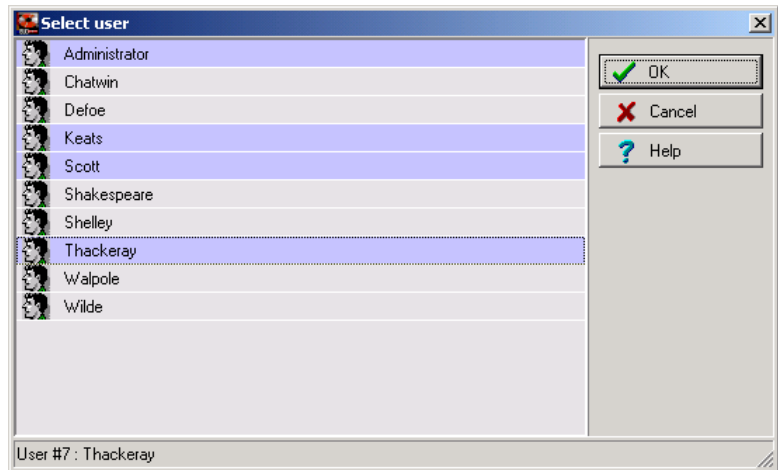
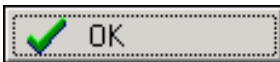


Fig. Selecting users and groups



This window displays all the recipients (**ELO** users and **ELO** groups) to whom you can send documents. Select the user and confirm by clicking on *OK*.



By using the Shift or Ctrl keys you can select several users.

4. The Info display appears (provided you have chosen the setting *Info display: Events, warnings and error messages* in *System settings, Options* on the *Display* index card). This confirms that you want to send the documents and indicates the recipient again. Confirm with **OK**.

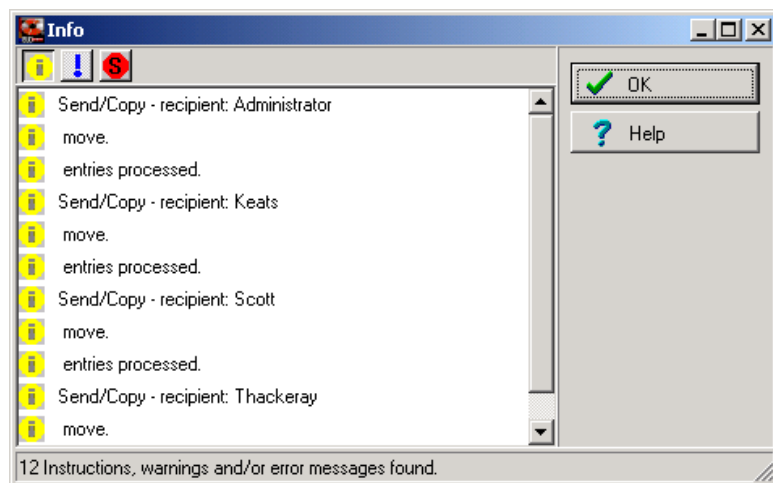


Fig. Info display for sending documents

The document is now in the Mailbox of the user you selected.



**It is no longer in your Mailbox.**

If you want to keep the document (e.g. to edit it), first file it in the archive and send it to the other user with the task reminder feature. Or you can use the *Copy to another user's Mailbox* function in the context menu.



When sending using task reminder, only a **logical copy** (a shortcut) is created; when copying from the Mailbox, on the other hand, a **physical copy** of the document is created (i.e. it is available twice in the archive).

## Inspect substitutes' Mailboxes

You can view documents in the mailboxes of ELO users for which you have an active proxy. From the Mailbox context menu, select *Inspect substitutes' Mailboxes*.

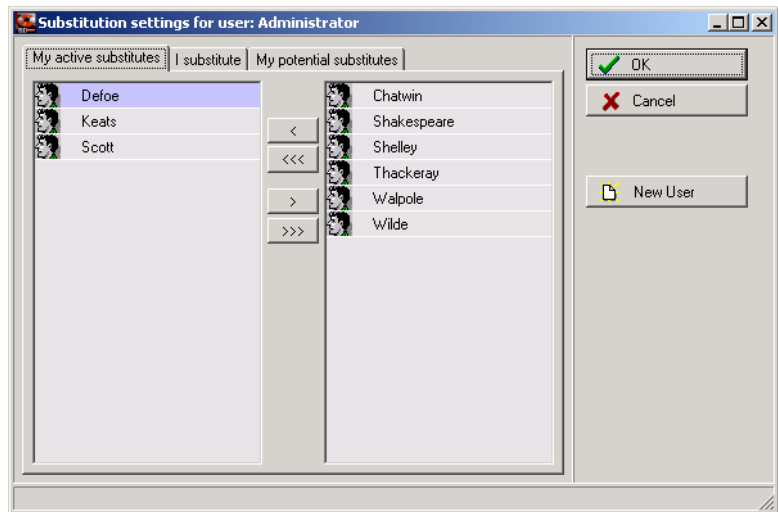


Fig. Substitution rules

For further details of proxies, refer to *Substitution settings*.

## Help

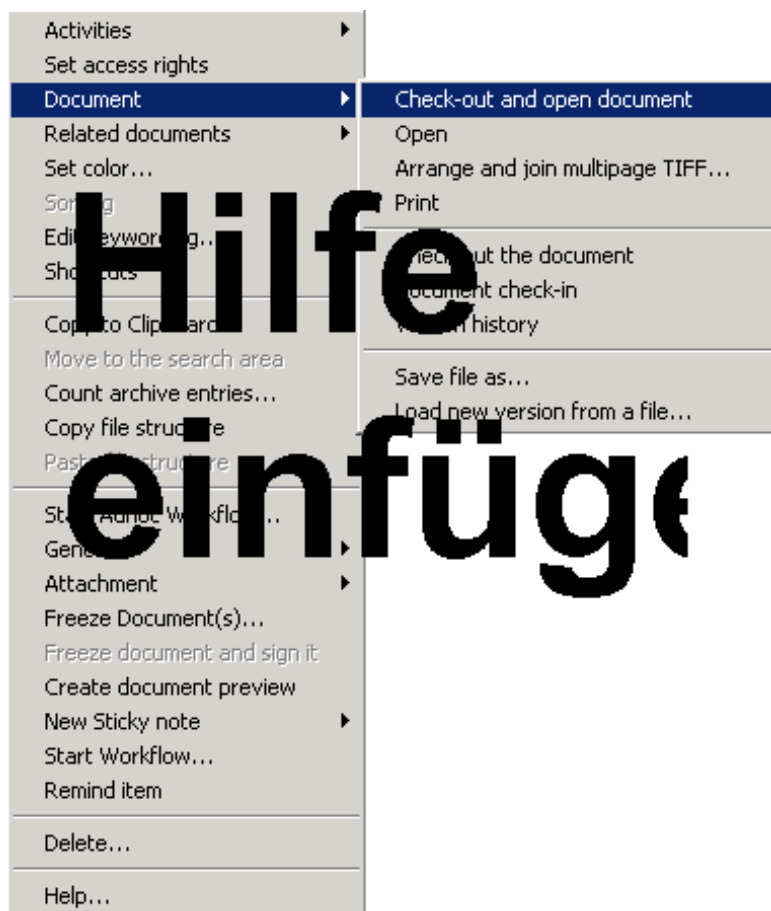
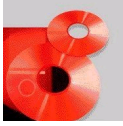


Fig. ELO online help

Clicking on the *Help* option on the context menu launches **ELO** online help.

Online help is always opened at the point where you can find the information you require. This means that you get the information that you need on the particular area of **ELO** where you are currently working. In this case, you will see Help on the *Mailbox* context menu.



# Chapter 6

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## Searching

This chapter covers the complex and extremely important topic of *Searching*. The benefit of an electronic data management and archiving system is after all the direct access it provides to the documents. And this includes being able to find all the documents quickly and easily: with **ELO***professional* and its flexible and sophisticated search mechanisms, this is not a problem.

**ELO** *professional* offers many search facilities, which also allow documents to be located quickly from large data volumes, for example full text search, wildcard search or searching via the keywording form.

You will learn about the following topics:

- Searching using the keywording form
- Searching all keywording forms
- Wildcard search
- Range search
- Complex search requests
- Universal search
- Find sticky note
- Fulltext search



- Searching the chaos file
- Assigning a search icon to a search form
- The Searching context menu
- Searching the contents of a document
- Tree view

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## Searching using the keywording form

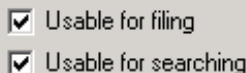


You can initiate a search for documents from any level of the archive. In the interests of keeping the search clear, **ELO** offers you several ways of filtering your search. You have several options for document searching: you can locate documents using e.g.

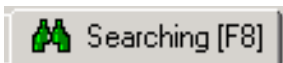
- the document's keywording form,
- the document's filing date,
- wildcards,
- sticky notes or
- the fulltext database (requires optional **ELO***professional* Fulltext module).



Remember: To be able to use a keywording form for searching, you have to check the *Usable for searching* box (*System settings, Keywording forms*).



For universal searching, you must also enter a suitable "group" name when creating the keywording forms.



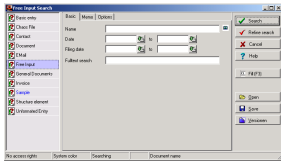
Click on the index card *Searching [F8]*.



To the left of the toolbar in the index card, you can see seven icons, each with a magnifying glass.



The icon on the left starts the general search. Clicking on this opens the *Basic entry search* window.



## The “Invoice search” form

All keywording forms that can be used as search forms are shown. Select the keywording form you used to keyword the document you want to find, e.g. **Invoice**. This filters the search, narrowing down only to those documents keyworded with that form.

Fig. 'Invoice search' form

The keywording form input fields are displayed on the *Basic* index card. This lets you search precisely for entries in these fields, e.g. for the *Supplier* or *Filing date*.

For example, enter the name **Smith** in the *Supplier* field. ELO will then search the archive, but only for the *Supplier* field in those documents archived with the *Invoice* keywording form.



For search input, you can use the keyword list, which is displayed by right-clicking and is available for all index fields in ELO. Of course, a keyword list must be present in the first place. You can find further information on this in the chapter on **System settings** in the **Keyword lists** section.

Basic	Part 1	Memo	Options
-------	--------	------	---------

You can create a total of 50 index fields (input fields) per keywording form. For reasons of clarity, not all of these index fields are displayed on the *Basic* index card of the search form; instead they are spread across additional index cards (*Index1* etc. in the illustration) if required.



If an index field is set up on a new index card, select the *New tab after this field* option in Management of keywording forms under *System settings, Keywording forms*.

Basic	Memo	Options
Name <input type="text"/>		
Date	<input type="text"/>	to <input type="text"/>
Filing date	<input type="text"/>	to <input type="text"/>
Fulltext search <input type="text"/>		

In the *Searching* area, the *Basic* index card includes the three default fields *Name*, *Date* and *Filing date* in addition to user-defined fields. The next line may be reserved for fulltext search.

## The **Basic** index card.

The Basic index card displays the index fields: three default fields and the user-defined index fields. The index cards *Index1* etc. each contain the additional index fields (input fields = keywording attributes).

## The index cards **Memo** and **Options**

**Memo:** If you enter text here, **ELO** searches the archived documents for the relevant entires on the *Memo* index card.

Object type: Word

Filed by: [text box] ...

☐ Search only in current file structure element

Expires on: [date picker] to [date picker]

File name: [text box]

Fig. Searching documents - 'Options' index card



**Other options:** If several users use the keywording form, you can select one of them under *Filed by* and search for documents by user.

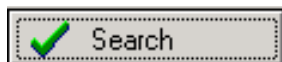
## Filter search and re-use last search

**Object type:** Use this to limit the search to a particular object type (Word, Adobe PDF etc.).

**Filed by:** If you want to search for a document based on user details, you can select a user here.

**Current cabinet/folder/index only:** If this function is enabled, only the area of the archive where you are currently working is searched.

**Expires on:** This function limits the search by the expiry date of the documents.



Click on the *Search* button when you have completed the search form.

## Re-use previous search arguments

Author	
Title	
Date	
Topics	
Fulltext search	



## Search results

This function transfers the previous search arguments into the next search.

To enable the transfer function, double-click on the label of the index field.

A small icon indicates that the argument will be transferred to the next search.

The search results are shown on the left; depending on your settings, several columns may be displayed according to the fields available or settings you have defined in *System settings, Options*, on the *Searching* index card.

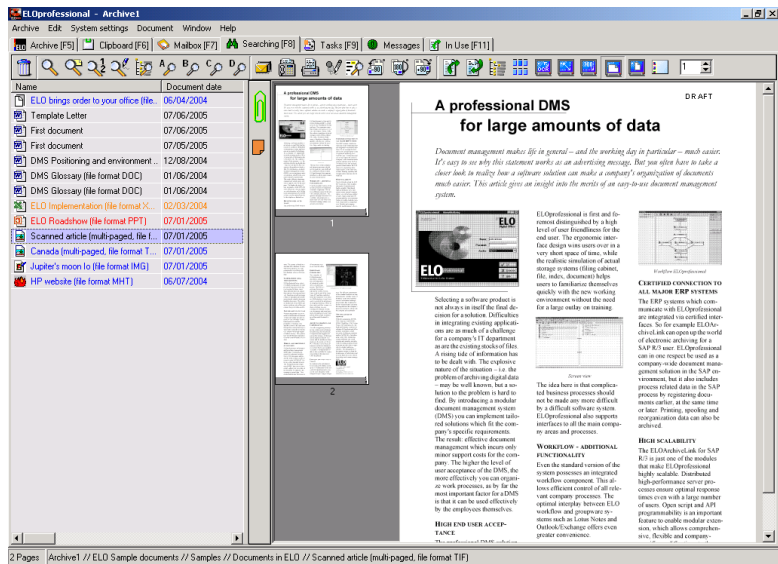


Fig. Displaying search results




Clicking on an *entry in the list* will display a folder on the right for a cabinet, or a document and its content (text or graphics).

Archive1 // ELO Sample documents // Samples // Documents in ELO // Scanned article (multi-paged, file format TIF)

Fig. Status bar

The status bar shows the filing location of the document.

If you click on the column header in list view (e.g. *Name*), the column will be sorted in descending order.

Name	Document...
 First structure element	07/27/2004
 Welcome to Kyocera (mht)	07/27/2004
 HP website (file format MHT)	07/27/2004
 ELO Implementation (file format X...)	10/08/2001



The *Searching* index card also has a context menu, accessed by right-clicking. Here, for example, you can turn on multi-column view for retrieved objects. You can find more information in the section on **The context menu for the Searching index card**.

# Searching all keywording forms

Searching keywording forms is very fast, because **ELO** only has to search a limited number of objects. But what if you do not know which keywording form has been used to archive a document? No problem. The *Basic entry* search form and hash symbol (#) will reveal all.

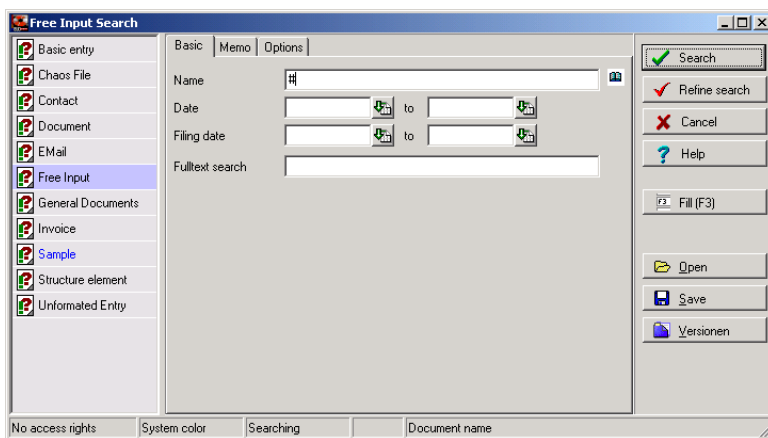
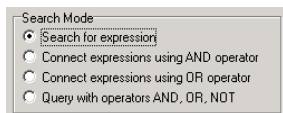


Fig. Searching all keywording forms

## Searching with the # sign

Searches with the *Basic entry* search form includes only the fields *Name*, *Date*, *Filing date* and *Fulltext search*. In the *Name* field, enter the hash sign (#) then the search term, e.g. **#Offer**.



**ELO professional** then searches **all input fields on all keywording forms** (including the *Memo* index card), where a **search mode** of *Search for a term* is set (*System settings*, *Options*, *Searching* index card).



But you do not even need to enter the whole keyword. **ELO** will also find parts of words. If you enter, e.g. **#book**, **ELO** will find all objects with the string *book* in any of the keywording fields, e.g. *bookshop*, *to book* or *handbook*.



This feature of **ELO** may mean that a large number of documents are returned and clarity and order is lost. With this search feature, **ELO** will also display filing cabinets, folders, levels and indexes if the keywording matches. So try to enter the exact keyword or link keywords to limit the number of hits.

You can find notes on linking options (**Search mode**) in the chapter on *System settings*, in the **Options** section under **The Searching index card**.

### Limiting the #search.

However, searching the whole database with the *Basic entry* search form may create problems at the SQL Server level. This is because searching with the hash sign (#) triggers a full table scan of all tables, which may cause 100% SQL Server utilization for hours at a time.

For this reason, you should restrict the # search to a single document type (one keywording form) wherever possible. This will reduce the load on SQL Server, which manages the database.



This means that you should launch the # search from a different search form by selecting a different search form than *Free entry search* when you click on the *Find keywording* icon. This will restrict the search to this document type.

Of course this restriction is only feasible if you know which document type the required document belongs to (i.e. which keywording form was used to keyword the document).

### Display previous search requests

If you have already carried out several search requests, clicking on the *Fill* button will call up a list of previous search requests.

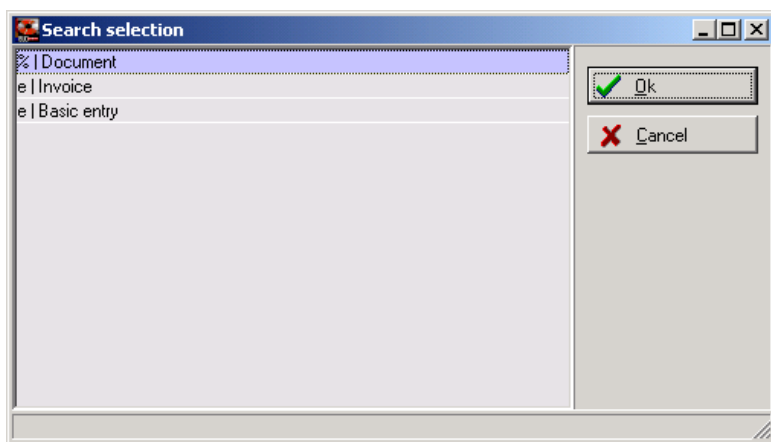


Fig. Displaying previous search requests

Select the entry in the list and click on *OK*. The entries are transferred to the search form.

---

# Wildcard search

You can also search using the standard Windows wildcard `*` in the various index fields in the search form. In other words, you can use the wildcard `*` to search for sequences or strings in a keywording attribute.



As well as the `*` sign, you may also use the SQL-specific `%` wildcard character.

## Search for sequences

There are various options for this kind of search, which we will present using the examples below:

Let's assume you are looking for companies whose name contains the letters `"ei"`. In the *Company* field in the search form, enter `*ei*`. The query will return all documents containing the letters `"ei"` in the company name, e.g. **Heine**mann, **E**instein etc. In other words, the search looks for the range between the two asterisks.

## Search "beginning with" or "ending with"

If, on the other hand, you omit either of the boundaries indicated by the `*`, you will define a search *beginning with* or *ending with*. This search option can be set as a default in the keywording forms. This is not visible.

Say you are searching for every customer whose Customer number begins with **15**. In the search form, enter in the *Customer number* field: `15*`. ELO will find all documents where the entry in the *Customer number* index field **begins** with 15. If you enter `*en` in the *Supplier* index field, the search will return all documents where the entry in the *Supplier* index field ends with *en*.



You do not need the wildcard `*` in the *Name*, *Date* and *Memo* fields. Here, **ELO** displays all documents which contain the input string in any form in the input field.



---

## Range search

An extremely efficient way of finding specific documents is the range search ("from/to"). This is an ideal way of restricting the search range. It speeds up the search and narrows down the number of hits considerably.

Supplier

Say you are running a marketing campaign and you want to find all suppliers whose name begins with c, d, e, or f. In the Supplier index field on the search form, enter **c-f**. The search will only return documents where the initial letter in the relevant index field (keywording attribute) matches the selection criterion **c-f**.

Invoice No.   
Name   
Supplier   
Article   
Index 1   
Fulltext search

Of course you can narrow down the input for the range search still further. For example, if you enter **be-du** in the index field on a search form, you will only see the documents meeting this search criterion in the index field. The search will only display documents containing e.g. *Beck*, *Booker*, *Caesar*, *Dilbert* or *Dunhill* in the relevant index field. It will not display *Albert*, *Baker*, *East* etc.

Invoice No.

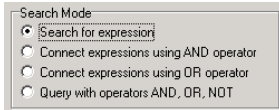
Of course the same functionality works with numbers: if for example you enter **3-5** in the *Invoice number* index field, only those documents will be displayed with a number in the *Invoice number* index field beginning with **3**, **4** or **5**.



In our examples, we used the hyphen as a separator for the range search; but you can also use one or more different separators, or a word. You can define these in *System settings*, *Options* on the *Searching* index card.

---

# Complex search requests



You can formulate further search requests using the Boolean operators AND, OR and NOT. In *System settings, Options*, on the *Searching* index card, use the *Search mode* area to specify how **ELO** should handle the search request you enter.

- **Search for expression:** Only one word or part of a word is wanted. If "der" is entered, ELO will find e.g. "Dervish" and "Wilder". Problem: this may return too many hits.
- **Connect expressions using "and":** Enter two words (or parts of words) separated by a space. Entering "a b" will find entries with "a" and "b", e.g. "handbook".
- **Connect expression using "or":** Enter two words (or parts of words) separated by a space. Entering "a b" will find all entries containing the letters "a" or "b" or both.
- **Query with operators "and", "or", "not"** You can link several search arguments together with "and", "or" and "not". For example, entering "a and b and not c" will find entries containing an "a" and a "b", but not a "c", for example "handbag" or "handlebar".



The Boolean operators "and", "or" and "not" set in *Search mode* are only applicable to the *Name*, *Date* and *Memo* fields. You can perform universal combined searches for individual index fields (keywording attributes) using the index that you entered under additional items when you created the keywording form. For more information, refer to the **Universal search** section.



---

# Universal search

**ELO** lets you perform a universal search for particular properties. This speeds up and simplifies searching, especially in very large archives.



To understand the universal search fully, you need to know something about *Keywording forms*. So please read the chapter on **Keywording forms**.

To perform a universal search, define the same group (e.g. name) for certain keywording attributes (e.g. supplier, recipient) in different keywording forms. It is fairly easy to select and administer these group names using the context list (**right-click** in the Group field). Because the different keywording forms now have the same entries entered in the *Group* field, there is a sort of logical horizontal link between them. The diagram below should clarify this.



Universal search  
using an index.

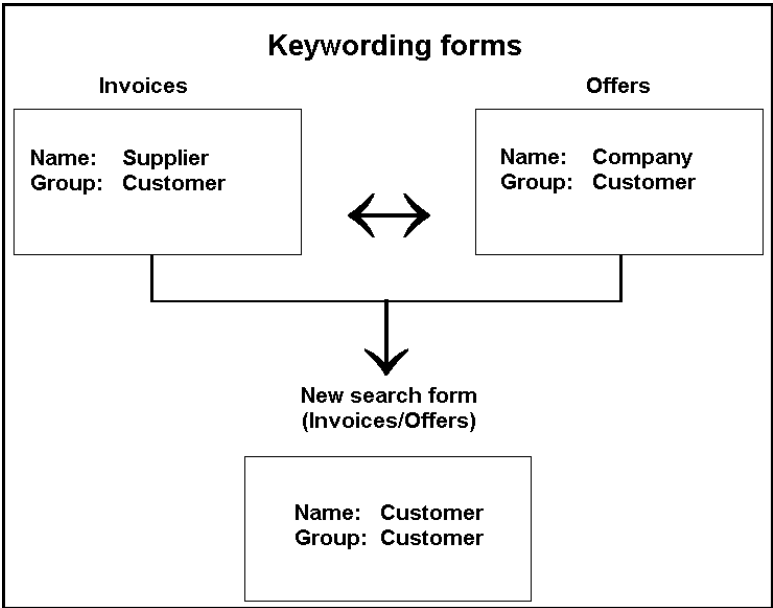


Fig. Plan of 'Universal search'

An example

Say you have created various keywording forms: Each keywording form has an index field for *Customer*, *Company* etc. In **each** of these index fields, you have entered **Customer** under *Group* in the respective keywording form.

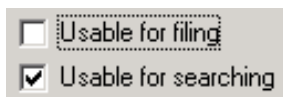
Creating a new  
search form

Imagine one day you need all the invoices, orders and offers for a customer. In the *System settings, Keywording forms* area, you create a search form with an index field, e.g. *Search*. In this index field, enter *Group Customer* as well.

Field name:	<input type="text" value="Customer"/>
Keyword group:	<input type="text" value="Name"/>



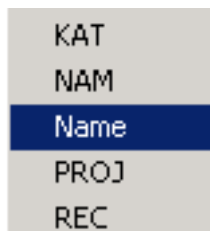
A search form that searches by *Group* must have the option *Usable for searching* selected.



☐ Usable for filing  
☒ Usable for searching

However, the option *Usable for filing* must be *disabled*.

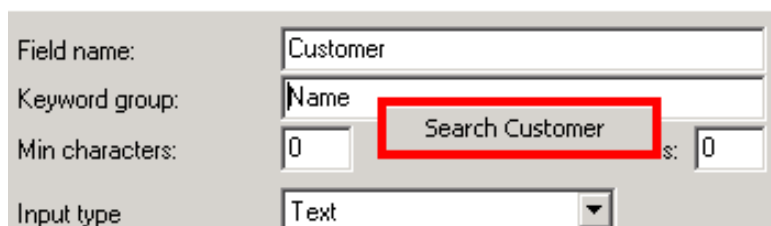
## Using the context list



KAT  
NAM  
Name  
PROJ  
REC

When creating your keywording forms, be sure to use the context list available by right-clicking in the fields. All existing groups are displayed and can be selected.

You can also use the context list to check which group names are used where. Select a group from the context list then right-click again in the Group field that is now completed: you can see all the forms that also have this entered in the Group field.



Field name: Customer  
Keyword group: Name  
Min characters: 0  
Input type: Text

Search Customer

Fig. Keywording forms with same Group field

Using this *search form*, all you have to do is enter the customer name in the *Search* field. Then, ELO will not search the whole archive, but only those keywording forms that have **Customer** entered in the *Group* field.

---

# Finding sticky notes



The second magnifying glass icon from the left serves another useful search purpose: finding sticky notes.

1. Click on the magnifying glass icon. The *Find sticky note* dialog box opens.

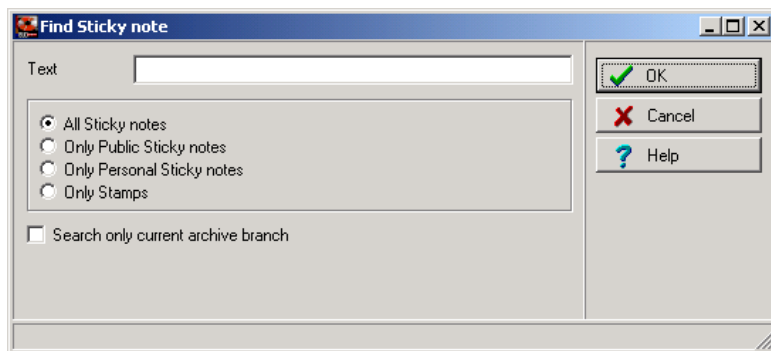
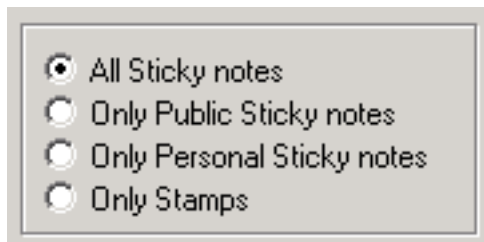


Fig. Finding sticky notes

2. Enter the text to find. A keyword is sufficient, as **ELO** searches the entire note text. *Problem:* your search may match too many notes. To avoid this, you can enter several terms and link them with logical operators. You can find more information in the chapter on **Searching**.
3. Select which sticky notes you want to find:



☐ Search only current archive branch



4. Click on **Search only current archive branch** if you only want to search the archive branch in which you are currently working.

5. Confirm with **OK**.

All documents that have sticky notes affixed to them containing the text you searched for are displayed. The status bar gives you information about where the document is located.

The sticky note is displayed as an icon on the gray sticky note bar. If you point to it, the sticky note is enlarged and you can read the text.

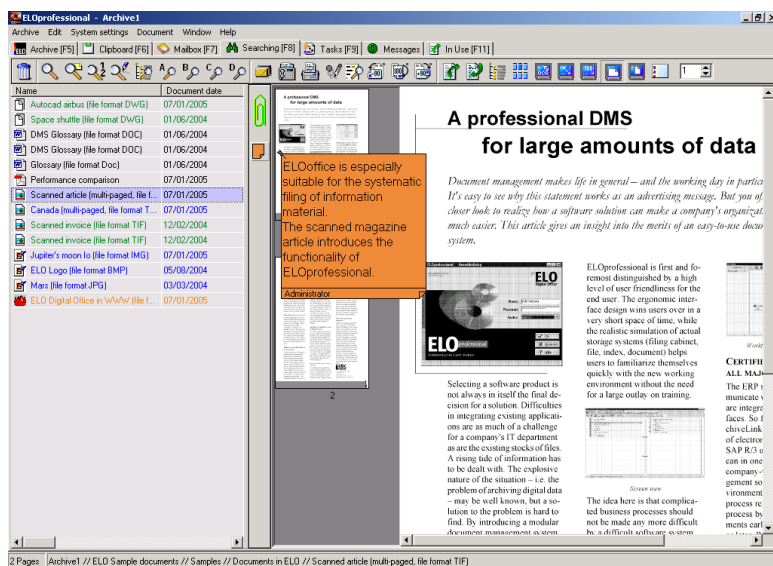
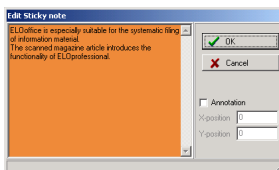


Fig. Finding and displaying sticky notes



To edit the note, click on the icon to open the *Edit note* window.

Make your changes then confirm by clicking *OK*.



The sticky note bar also functions as a split bar. You can use it to change the proportions of the left and right areas of the window. Point the mouse at the left edge of the sticky note bar until the mouse cursor becomes a move symbol. Then hold the mouse button down to drag the gray bar to the left or the right.

The sticky note bar also has its own context menu, which you can open by right-clicking.

# Finding version comments

Documents which have been filed in the archive as "version-controlled" can be assigned a version comment when archived. This comment can be subsequently edited using the keywording dialog box.

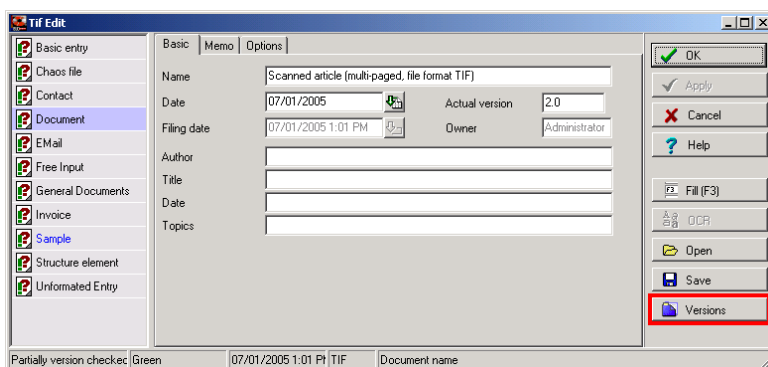


Fig. Keywording dialog with 'Versions' button

Using the *Versions* button you can open the *version history* of a document.

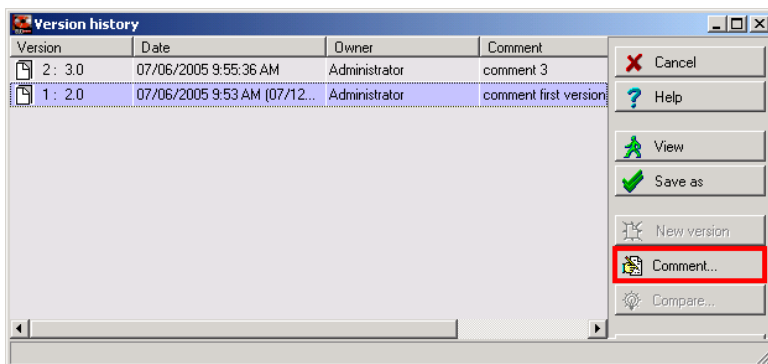


Fig. Version history



Clicking on the *Comment* button opens a dialog box with the version number and version comment.

In the *Searching* area you can use the Find version comment button to search for comments on the version history of an archived document.

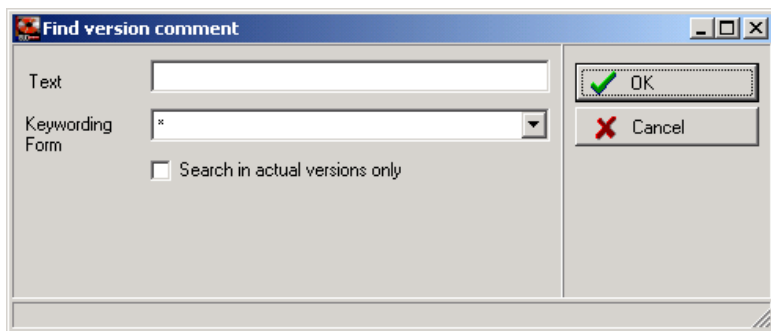
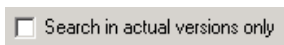


Fig. Finding version comments



You can restrict the search to the working versions of documents using the *Search in actual versions only* option. Remember that you can set other filters by selecting *Document form*. As a result, only documents keyworded using this keywording form will be searched.

---

# Fulltext search

Using Fulltext search, you can search for any terms in full-text indexed documents.



Fulltext searching is only possible if the optional **ELO<sub>professional</sub>** Fulltext module is installed.



Clicking on the *Fulltext search* icon opens the *Fulltext search* window.

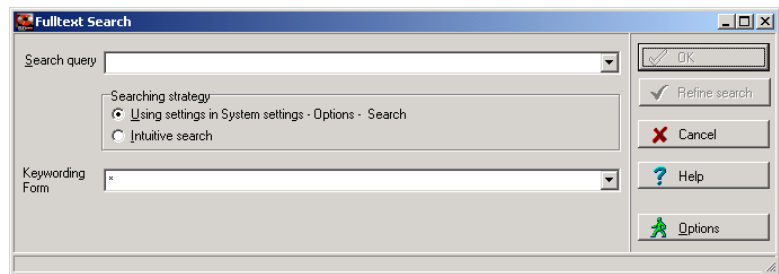


Fig. 'Fulltext search' dialog

In *Search query*, enter the term you want to find in the full-text database. You can also use the wildcard \* for this.

## Search strategies

You can also define a search strategy. Two strategies are currently available:

### Linked search terms by search mode

This strategy links several terms with the logical operators **AND**, **OR** and **NOT**. The search mode you set in *System settings*, *Options* and on the *Searching* index card is active.



Clicking on the *Options* button takes you directly to the *System settings*, *Options* area, *Searching* index card, where you can change the search mode as required.



You can find detailed information on the search mode in the **Complex search requests** section.

## Intuitive search

The second search strategy, **Intuitive search** lets you search for the documents that seem relevant to the terms you entered without performing a detailed search. A statistical evaluation of the weighting of the documents and search terms determines which documents are returned and their position in the list.

A screenshot of a web interface element labeled "Keywording Form". It features a text input field containing an asterisk (\*) and a small downward-pointing arrow on the right side, indicating a dropdown menu.

From the *Keywording form* list box, you can also limit a full-text search to documents filed using a particular keywording form. If you want to search documents filed with any keywording form, you must enter "\*" in the input field.

The results from the intuitive search are displayed in a ranking order based on the closeness of the match to the search term. Documents with the closest match are displayed first.



You can find detailed information on **Fulltext** in the manual for the ELO Fulltext module.

---

## Combined fulltext search

The combined fulltext search allows you to restrict the search to specific attributes, i.e. documents with specific attributes.



1. Click on *Search for entries* on the toolbar.

2. A dialog box opens with the available search forms.

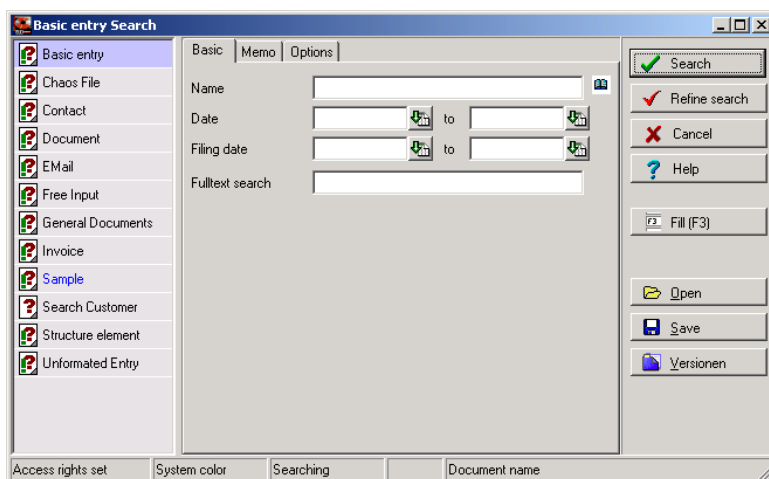


Fig. Combined fulltext search

3. Select the search form you require. In our case, *Basic entry* has been selected.

4. Enter a search term in the *Name* index field. All documents will be searched for this word in the Name field.

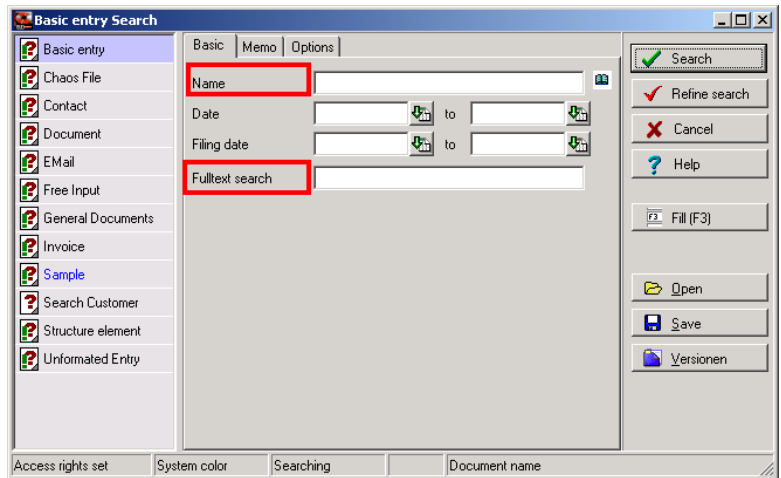


Fig. Combined fulltext search

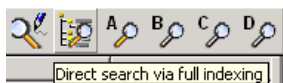
5. Then enter a search term in the *Fulltext search* field. The documents already found will be searched for the term entered here. Your result set will be the intersection of the two search requests.

---

# Direct search

## Function

The direct search function, via the *Direct search* button, enables you to search the Name, Memo, Index lines, Full text, Sticky notes and Version history fields for character strings.



Click on the *Direct search via full indexing* icon in the *Searching* toolbar.

Then the *Direct search* dialog box opens. Under *Following fields are to be searched*, check the relevant options in order to search the areas required.

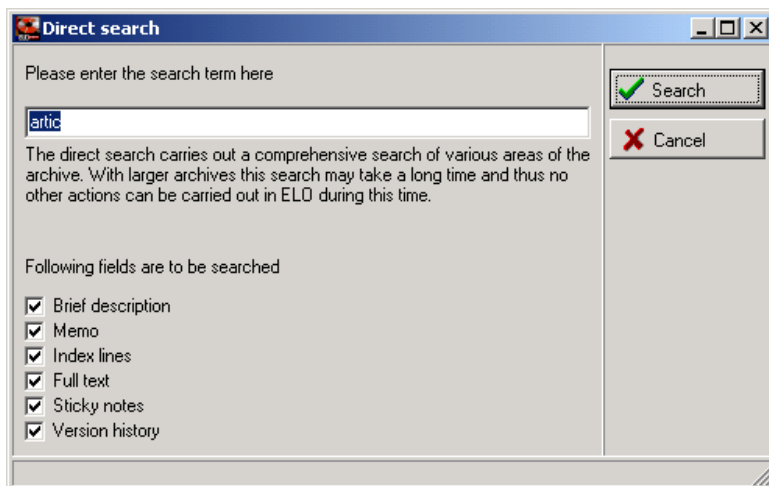


Fig. Direct search

The search results are displayed in the *Searching* work area.

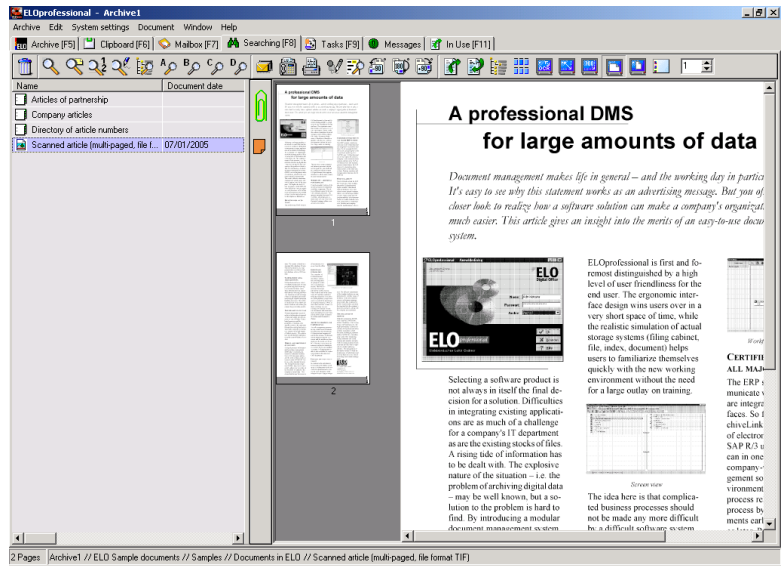
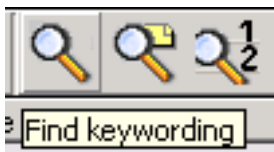


Fig. Displaying results of direct search

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## Searching the chaos file

To search for documents in the *Chaos file*, you need to use the *Chaos file* keywording and search form. Refer to the chapter **Chaos filing** for more information.



1. Click on the first magnifying glass icon *Find keywording* and select the *Chaos file* search form.

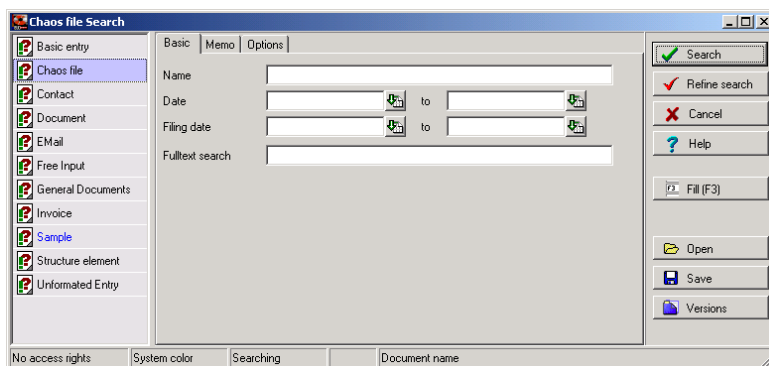


Fig. Searching the Chaos file

2. Enter the full or partial document name in *Name* or search for the document by *Date/Filing date* or by the keywords on the *Memo* index card. Then click on OK.



In the *Chaos file* search form, entering a \* or a % symbol in *Name* displays the entire contents of the chaos file.

---

## Assigning a search icon to a search form

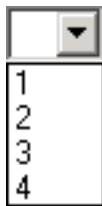


All the available search forms are displayed under the first magnifying glass icon *Find keywording*. Each search form can also be assigned directly to one of the search icons (A, B, C and D icons from the left). In other words, you can assign search forms that you use regularly to these icons. This lets you open the search form immediately, e.g. *Invoices* without having to call up the drop-down window.

1. In the *System settings* menu, select *Options*. In the *General system settings* window, click on the *Searching* index card.



Fig. Suchanfragen auf Icons legen



2. To do this, click on the drop-down arrow next to the *Direct search* field. The numbers 1 to 4 are shown. These represent the magnifying glass cons available for direct searching from right to left.



3. Click on the first entry. The adjacent field is now enabled. Click on the arrow symbol to the right. All the search forms available as search forms are then displayed.

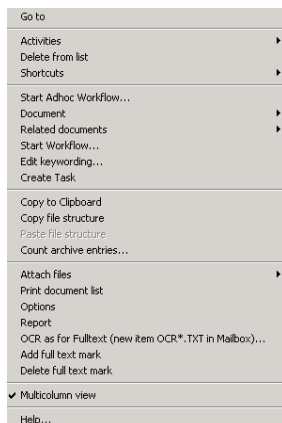


4. Click on *Invoice*, for example. You have successfully linked the first free magnifying glass icon with the *Invoice* search form. Now, when you hover over the magnifying glass icon number 4 with the mouse on the *Searching* index card, the QuickInfo field displays *Invoice*. Repeat the process to assign search forms to other magnifying glass icons.



---

## The Searching context menu



The context menu opens when you **right-click** on a document or object entry. It includes the following commands:

- **Go to:** Takes you straight from the *Searching* index form to the selected document (in the relevant filing cabinet, folder, level or index of your archive).
- **Activities:** Edit, view, create and assign activities for the selected document.
- **Delete from list:** Deletes the selected entry (though only from the list of search results).
- **Shortcuts:** Displays the shortcuts for the active document in the archive.
- **Start Adhoc workflow:** Opens the ad-hoc dialog for sharing the document.

- **Document:** Here, you can open, edit, print the document, etc.
- **Related documents:** Allows you to link the current document with other documents.
- **Start workflow:** Opens the selection dialog for a default workflow.
- **Edit keywording:** Opens the keywording form for the selected document.
- **Create task:** A task is created that refers to the selected object.
- **Copy to clipboard:** The selected object is copied to the clipboard.

- **Copy file structure:** The filing structure for the selected object, e.g. a filing cabinet, is copied.
- **Paste file structure:** The filing structure you just copied for the selected object is pasted in the selected position in the archive.
- **Count archive entries::** The documents contained in the selected object, version history documents and attachments etc. are counted and their size calculated.
- **Print document list** This command lets you print a list of the returned documents.
- **Options:** Switches to *System settings, Options, Searching* index card.
- **Report:** Displays the report data for the selected object.
- **OCR as for fulltext:** The saved full text is called from the database and transferred to the mailbox in a file.
- **Multicolumn view:** Displays the search result in columns with the search form keywording information. Clicking on the column header toggles the sort order of the search list (A-Z, Z-A).

Name	Document date
sample1	08/03/2004
sample2	08/03/2004
First document	08/02/2004
BARCODE	08/03/2004

You can adjust the column width individually from the column header. When you move the mouse over the column header, the cursor changes. You can set the column width from here.

Name	Document date	ent date
BARCODE	✓ Invoice No.	004
Invoices 02/2004	✓ Name	004
Invoices 02/2004	✓ Supplier	004
Invoices 02/2004	✓ Article	004
Invoices 02/2004	✓ Index 1	004
Scanned invoice (file format TIF)		07/08/2001

You can hide individual columns. Move the mouse to a header and right-click. A context menu appears. It contains all the columns. Clicking on a column entry deactivates or activates the selected column. This option is only available if the *Multicolumn view* option is checked in *System settings, Options*, on the *Searching* index card.

**Help:** Launches *online help*. It offers quick access to information, hints and tips about using **ELO***professional*.



Help opens automatically at the relevant place - in this case right at the *Searching context menu*.

# Searching the contents of a document

Using the *Search within active document* function, you can, for example, search the contents of a selected TIFF document for a particular term. This option is only available for those documents that ELO can search.

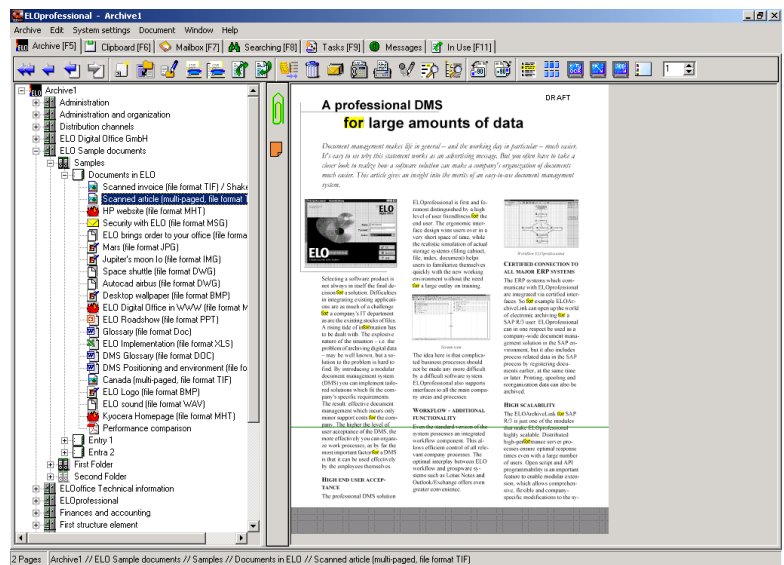


Fig. Searching a document



1. In the toolbar, click on the *Search within active document* icon. First select a document that you want to search for a term. This option is only available for those documents that ELO can search.

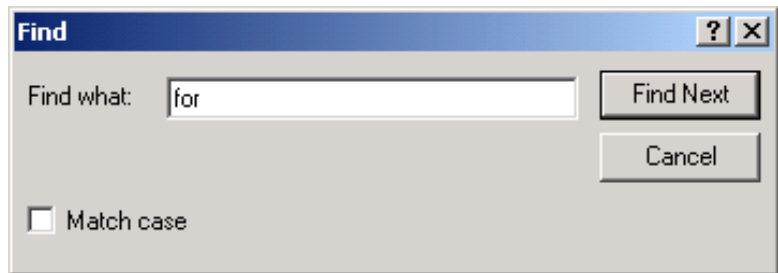


Fig. Entering a search term

2. You can enter the search term in the search dialog that subsequently appears. If you want to match the case, click the check box in the search dialog. **ELO** highlights occurrences of the term in yellow.

---

# Displaying search results

## Tree structure

If you wish, you can have **ELO** display the results of your search as a tree structure. **ELO** then shows all objects that match your search, including their position in the tree structure.

1. In the toolbar, click on the *View tree-structure* icon.
2. Instead of a hit list, the tree view is displayed immediately. Expand the tree view to the entry you want.

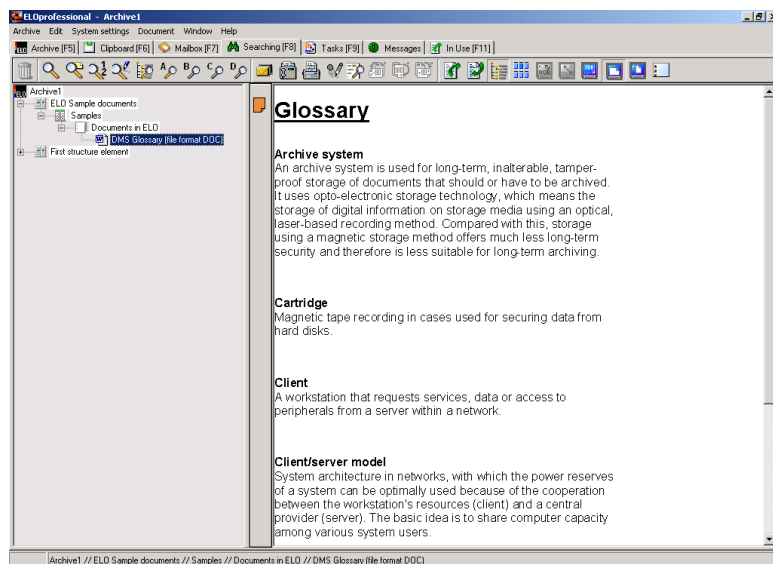
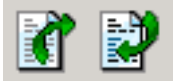


Fig. Displaying search results in tree view



You can edit and check out all documents directly from the hit list. In the *Searching* view, you can also check in documents that have already been checked out and edited.



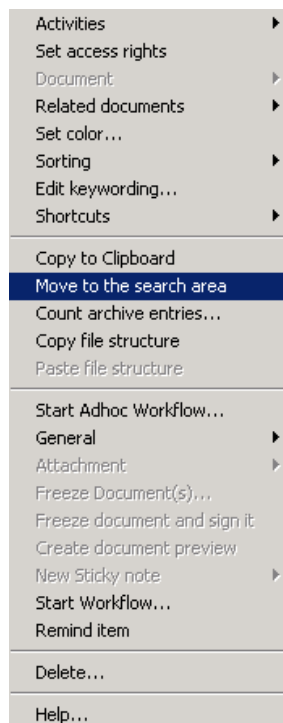
To do this, click on the relevant icon in the toolbar: *Check out and open document* or *Document check in*.



---

## Selecting search results

From the context menu in the *Archive* area, you can move structure elements to the *Searching* area.



Select the ELO structure element (the cabinet or folder etc.) you want to move to *Searching* work area. Select the *Move to the search area* command by right-clicking in the context menu.

# Selecting multiple records

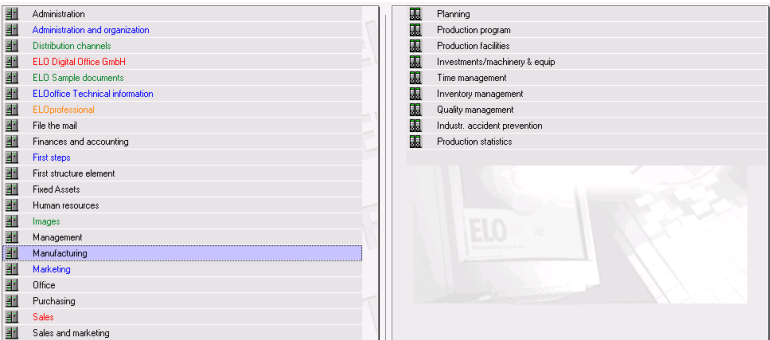











Fig. Moving the cabinet to search view

The content of the cabinet *Manufacturing* is moved to the search area.

Name	
	Planning
	Production program
	Production facilities
	Investments/machinery & equip
	Time management
	Inventory management
	Quality management
	Industr. accident prevention
	Production statistics

You can select multiple entries on the right-hand side of the screen by holding down the Ctrl key while clicking on the respective entries with the left mouse button. You can then perform actions on all the selected entries simultaneously. You can, for example, delete several entries in one easy step. To do this, click on the Delete icon in the toolbar. **ELO** will ask you to what to do next. There are three possibilities:

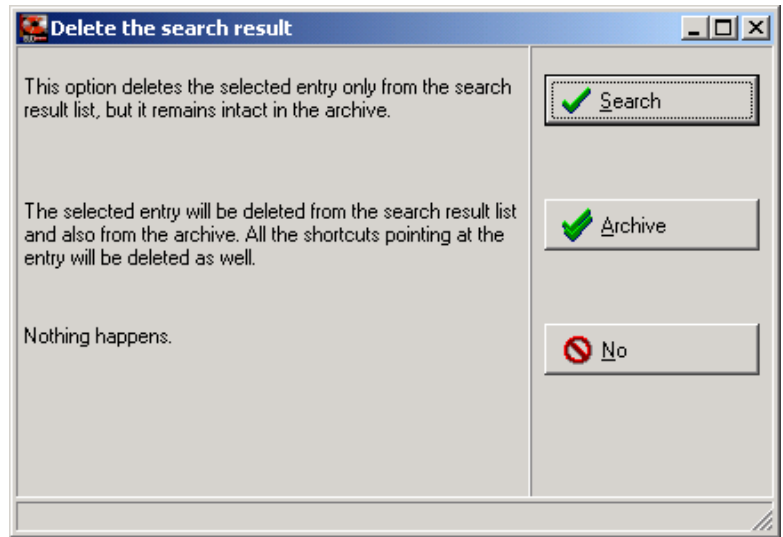


Fig. Deleting search entries

- *Search*: The selected entries are deleted from the *Search* area. Entries are not deleted from the archive.
- *Archive*: The selected entries are deleted from the search view and the archive.
- *No*: The command is aborted.



**Please note:** If you wish to move a new structure element to the search view, the former entries in the *Search* area must be overwritten.

---

# Searching using the Thesaurus

Another option for the user to search for standardized terms is to use the Thesaurus. Search terms and sequences of terms can be copied to a field using the Thesaurus.

1. In Management of keywording forms, assign the *Thesaurus* data type to the appropriate field of the relevant search form.
2. In the *Searching* work area, open the general search function and, from there, select the search form. In the following example, the *General document* search form is used.

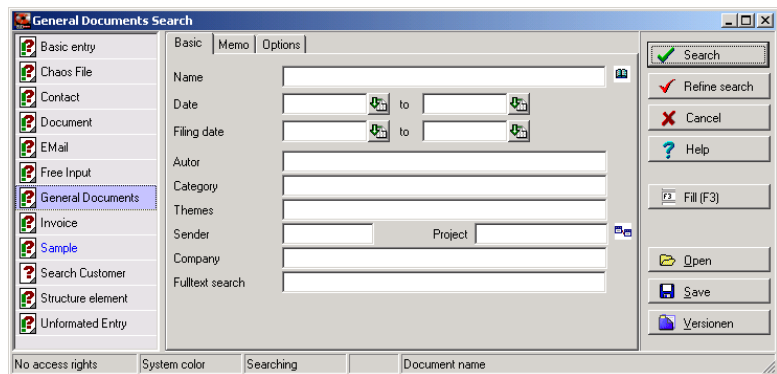


Fig. Search form with Thesaurus for an index field



3. The *Thesaurus* data type is denoted by an icon next to the field. Right-click in the field. Then the *Thesaurus* dialog box opens.

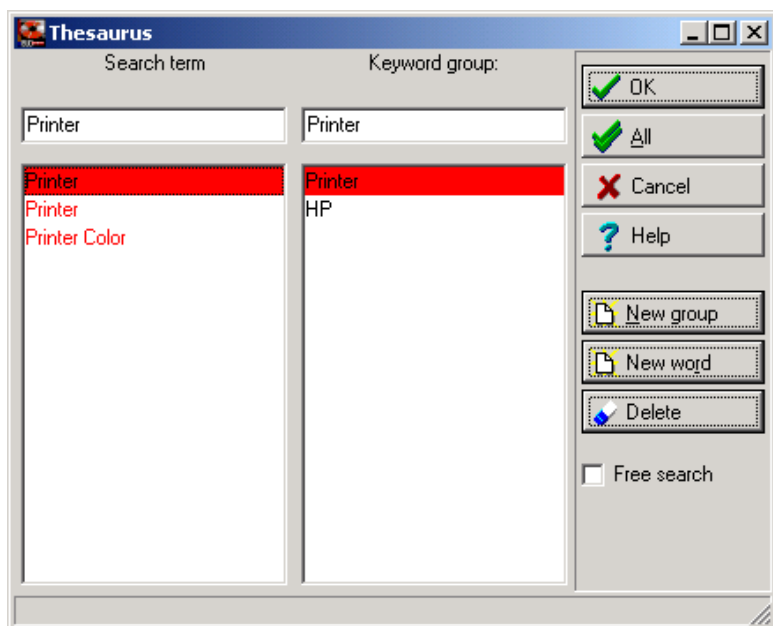
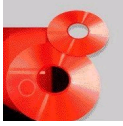


Fig. Thesaurus for 'Name' index field

4. Enter a character string to search for. The thesaurus offers you a selection of terms to choose from. Select the term you want to move in the right column and click on *OK*.
5. The term is copied into the *Description* index field.



# Chapter 7

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## Activities, Tasks and Reminders

Activities can be assigned to structure elements as well as documents. As with task reminders, they allow you to assign deadlines and job instructions to documents, to forward these to colleagues or to have **ELO** remind you of the need to edit a document.

The Tasks work area is a dedicated **ELO** area where you can file documents and other objects that you will need to access at a particular time. For clarity, all the documents are arranged by date and priority. Like a personal assistant, **ELO** will automatically remind you of documents in task reminders, because **ELO** checks in *Tasks* or in the reminders every time it is opened to see whether there is something that needs editing.

As well as the deadline for documents, the Tasks list also includes all documents in a workflow.

Moreover, it is possible to forward documents with deadlines, placing them in the Tasks section of another user (or a whole group). If you want a document to be made available to another user to view or review at a time of your choosing, set up a task reminder. And to cover for occasions when you are on holiday, on a business trip or ill, you or the administrator can set one or more people to deputize and to respond to your reminders. This ensures that the task reminder will be dealt with promptly.

The next chapter explains how best to use task reminders and activities and addresses the following topics:

- Defining projects
- Creating activities
- Creating task reminders
- Organizing task reminders
- The Tasks toolbar
- The Tasks context menu

---

# Creating projects

To be able to work with activities, you first have to create a project. Activities are always assigned to individual documents or projects.

## Creating a project

1. Before the user can use the new *Activities* function, they first have to create a project.

In the *System settings* menu, click on *Manage projects*.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

2. The *Activities - prepare projects* window appears. If you have not yet created a project, the boxes are empty.



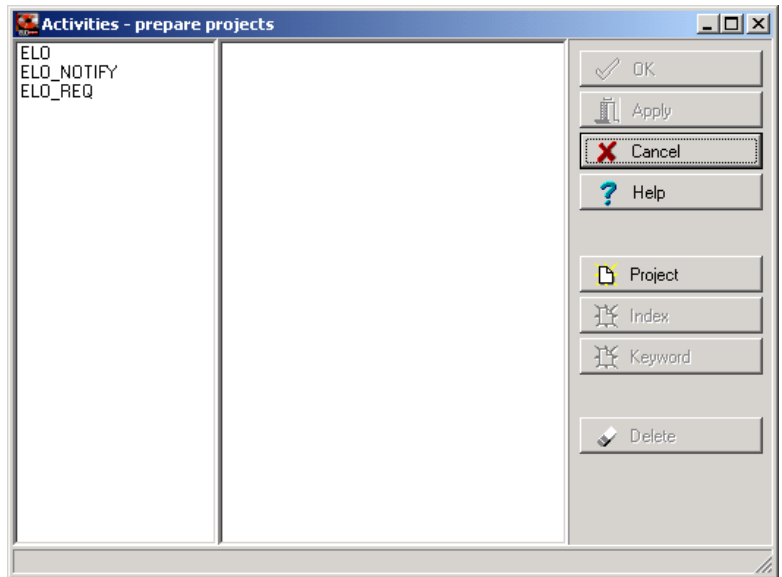
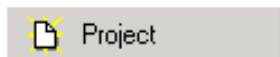


Fig. Activities - creating a project



3. By clicking on the *Project* button, open the *Add new project options* window.

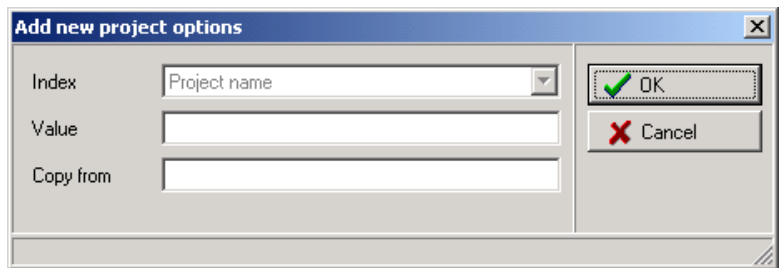
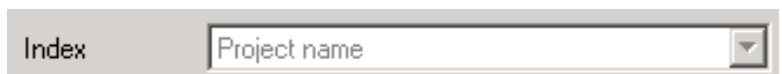


Fig. Entering a project name

The dialog box contains three fields. In the first field, *Project name* is entered by default. You cannot change this.



4. In the second field, *Value*, enter a name for the project you want to create.



The third index field, *Copy from*, is used to copy settings from a project that has already been created to a new one. This function is only useful once you have at least one project set up. It is described in more detail in one of the following paragraphs.



5. Click on *OK* once you have completed all the fields. The name of your project now appears in the *Activities - prepare projects* window (Project form). We have created a project called ELO.

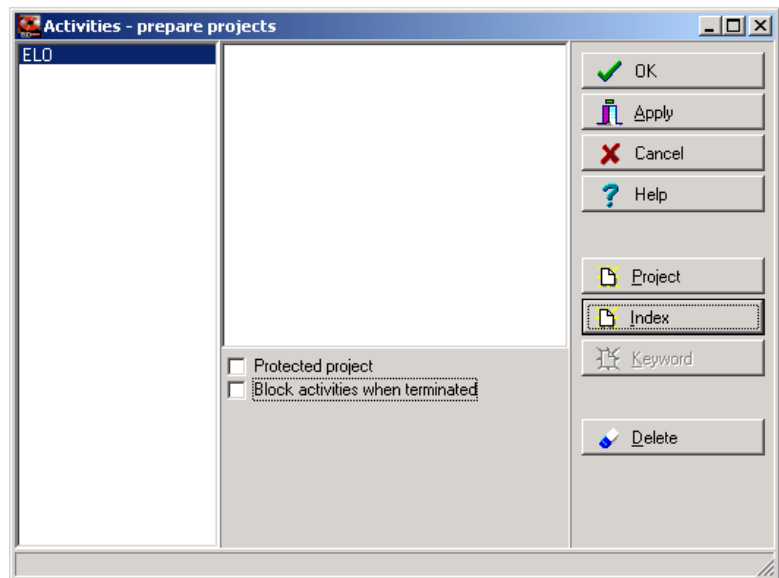
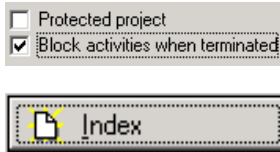


Fig. 'ELO' project created

You can enter the project as a *Protected project* and lock the activities once created.

*Block activities when terminated* means that all activities can no longer be edited once they have been created. So once an activity has been created, it remains in this form and cannot be changed further.



6. You activate the desired option by left-clicking on it. A tick then appears in the selected check box.

To assign specific information to a project, you can use the index fields. Click on the *Index* button.

7. The *Add new project options* dialog opens again, containing two fields.

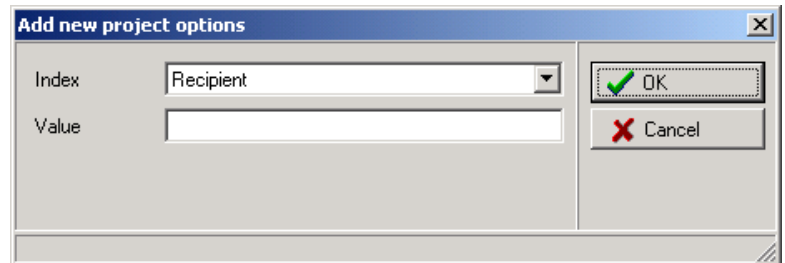


Fig. Defining 'Recipient' field

In the drop-down menu for the first field, opened by clicking on the arrow, you can choose the particular field of the activities form to which you want to make changes. There are 14 fields available in the activities form. The first four fields bear the names *Recipient*, *Sending mode*, *Receiving status* and *Transmission Id* and are always displayed in the activities form. These names are not set in stone, however. You are free to modify all 14 field names.

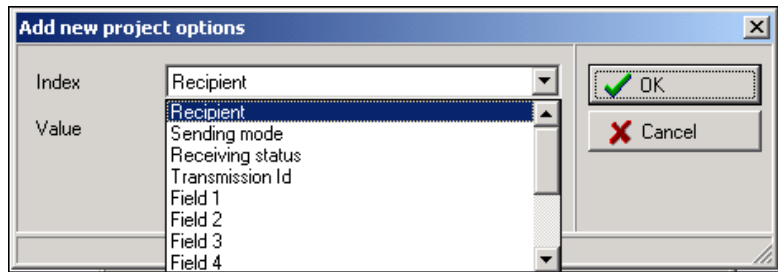


Fig. Project - defining options

Using these fields, activities forms can be set up according to each project. If, for example, you enter **Addressee** in the *Value* field, this entry appears where the *Recipient* field once was.

Later, you can see the changes that you made reflected in the activities form. You have not accepted the default - instead, you have selected a field name that corresponds to the project.

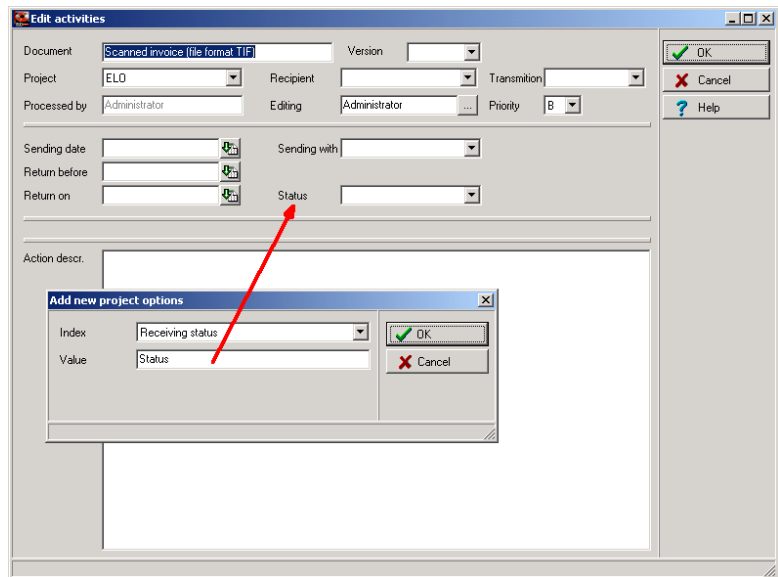
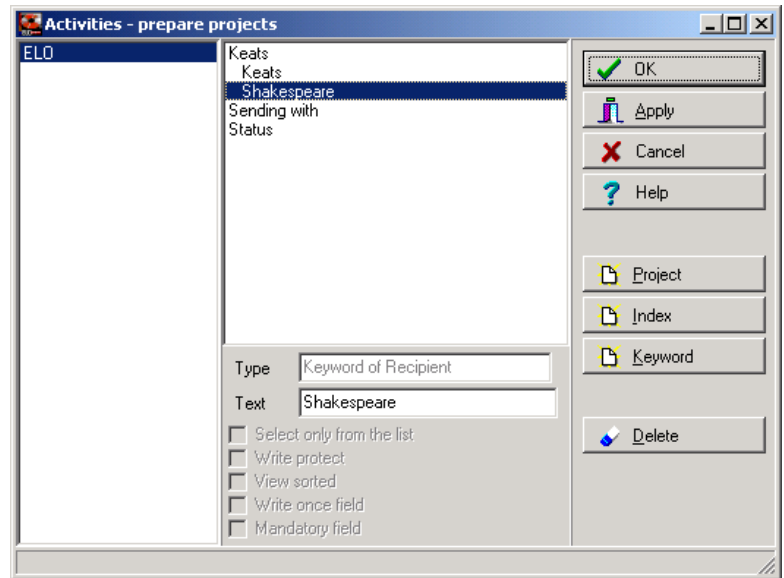


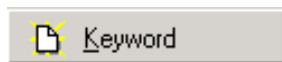
Fig. Entering project options - 'Recipient' field

8. Confirm with *OK*. You can now see your entry on the right in the *Activities - prepare projects* window.



You have the option of attaching keyword lists to the fields, from which the user can select entries in the corresponding field on the activities form. This is useful where, for example, you have determined which employees should receive *memos*, *orders* etc.

The user then no longer has to use the keyboard. Instead, they can select a name from the list in the *Recipient* field.



9. Click on *Keyword*.

In the *Value* field you can enter the keywords, such as names. If you want to create several keywords, separate them using the symbol *<...>*. Then confirm with *OK*.

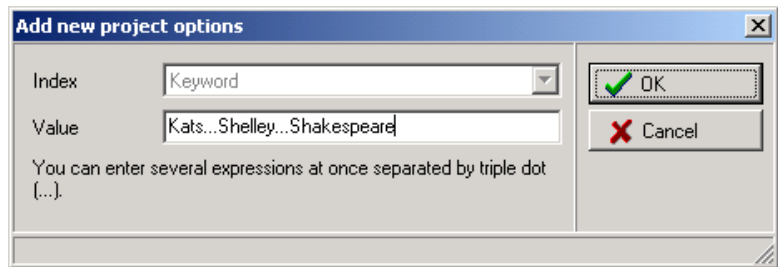


Fig. Entering project options

You can now see the keywords as subentries in the right window.

10. You can change a keyword by first highlighting it. It appears in the *Text* field. Then click in the field. You can edit it there. Your changes are reflected immediately in the keyword list.

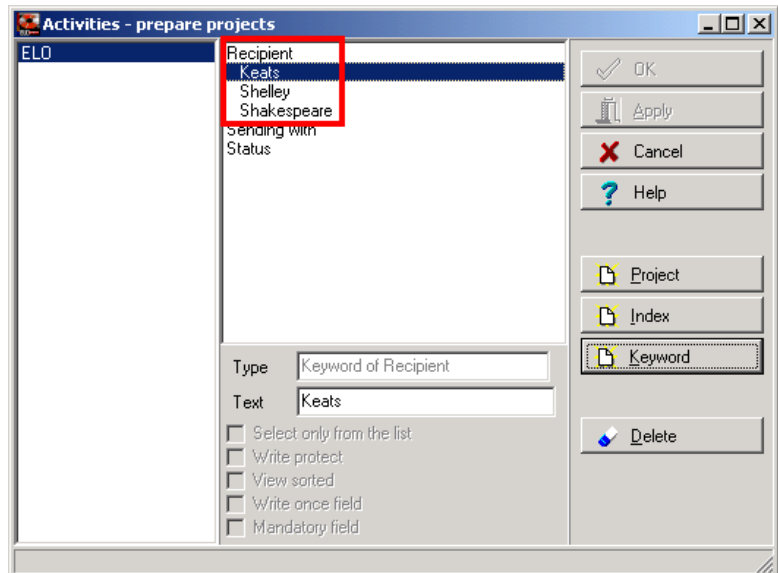


Fig. Defining terms for the 'Recipient' field

In the *Activities form* you can open the drop-down menu by clicking on the arrow in the index fields and selecting a keyword from the list.

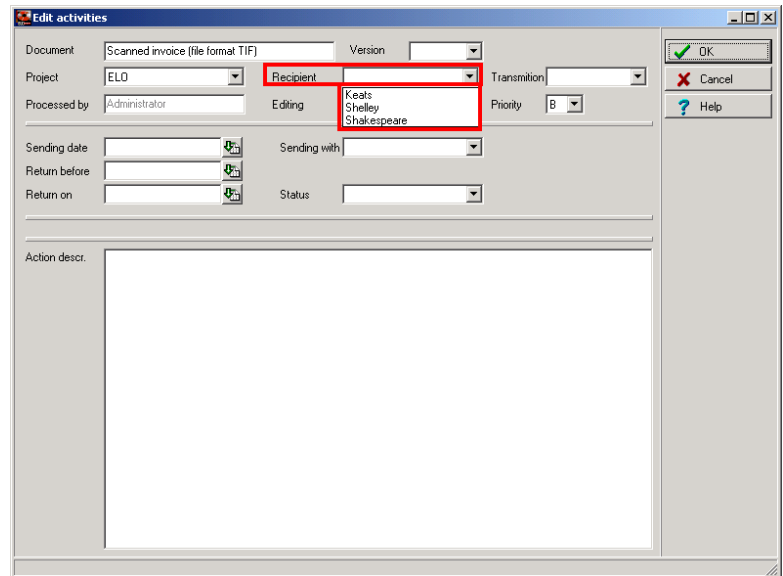
The image shows a software window titled "Edit activities". It contains several form fields: "Document" (set to "Scanned invoice (file format TIF)"), "Version" (empty), "Project" (set to "ELO"), "Recipient" (a dropdown menu that is open, showing a list with "Keats", "Shelley", and "Shakespeare"), "Transition" (empty), "Processed by" (set to "Administrator"), "Editing" (empty), "Priority" (set to "B"), "Sending date" (empty), "Sending with" (empty), "Return before" (empty), "Return on" (empty), and "Status" (empty). There are also buttons for "OK", "Cancel", and "Help" on the right. At the bottom, there is a large text area labeled "Action descr." which is currently empty.

Fig. Activities form - selecting a keyword

11. Follow the process described above for the other fields in the *Enter new project options* dialog.

If you leave the *Value* field empty, the entry that appears in the activities form is the one you selected in the drop-down menu in the *Index* field. That way, you can use a default entry if it is applicable for your project. But then you can't create a keyword list because the entry is not displayed in the *Activities - prepare projects* window. In the activities form, you can only use the keyboard for entries in that particular field unless the field is write protected (more on that below). If you want to accept the entry and create a keyword list, enter the same name in the *Value* field that you selected in the *Index* field.

## Options

In the *Options* area, modify settings for the fields.

- ☐ Select only from the list
- ☐ Write protect
- ☐ View sorted
- ☐ Write once field
- ☐ Mandatory field

You have five options available for every field.

- ☐ Select only from the list

*Select only from the list:* The user can only select entries from the keyword list.

- ☐ Write protect

*Write-protect:* The entry cannot be changed.

- ☐ View sorted

*View sorted:* The list entries are sorted alphabetically.

- ☐ Write once field

*Write once field:* A stamp is affixed to the ELO object.

- ☐ Mandatory field

*Mandatory field:* The user must complete this field.

Activate these functions by clicking on the relevant option. The check box is ticked.

The additional 10 index fields (which you can rename to suit your project) appear in the activities form if they are not blank. The blank fields are hidden.



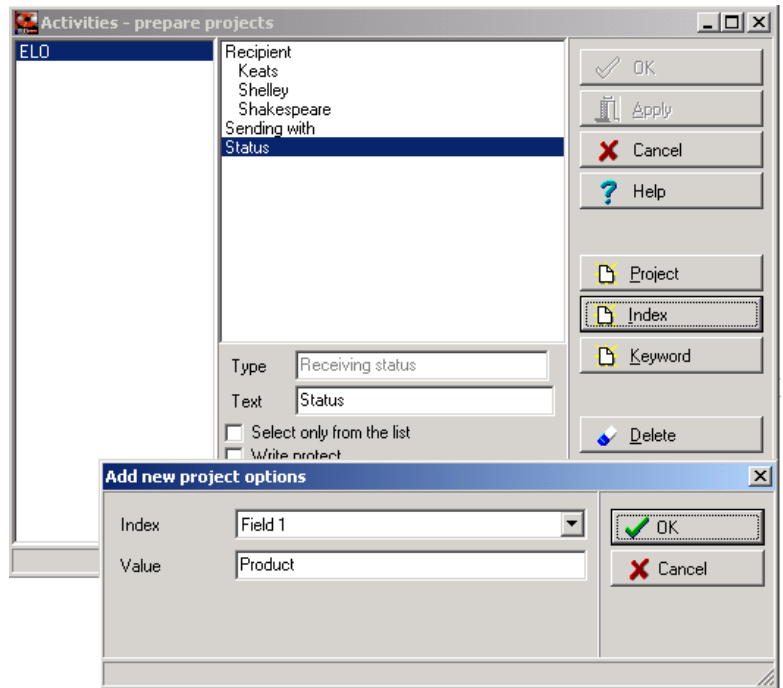
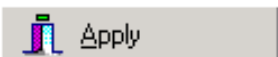


Fig. Entering project options

In this case, the activities form contains *Field 1* called *Product* and *Field 2* called *Contact*. The remaining eight fields are not shown on the input form.

Fig. Editing activities



12. Click on *OK* once you have modified the settings. You can, of course, come back and make changes at any time.

13. If you want to create a second project immediately, click on *Apply*. This keeps the project form open.

---

# Activities

## Creating deadlines and job instructions

Activities can be assigned to structure elements as well as documents. As with task reminders, they allow you to assign deadlines and job instructions to documents, to forward these to colleagues or to have **ELO** remind you of the need to edit a document.

## How they differ from task reminders

One way in which they differ from task reminders is that activities are always associated with a project that you first have to create. The advantage of this is that the user can choose from several types of activity. As well as the index fields already available in task reminder, the activities form also offers 10 additional index fields for user-defined keywording. That means they can be specifically tailored to every project.

## Activities are not deleted

Unlike task reminders, activities are not deleted after they have been completed. Instead, they are displayed in a list. That makes it easier to track workflows. At any time it is possible to monitor who edited an activity associated with a document and when. You can call up just such a list for every document from the context menu.

## Creating a selection list

Another feature not previously offered by task reminders is the ability to create selection lists for fields, from which the user can select commonly used information. This avoids typing errors. As administrator, you can also decide whether users are allowed to enter other text or only choose entries from the list.

## Replicating activities

Unlike task reminders, activities are assigned a GUID and time stamp allowing them to be replicated. Because these dates are not edited concurrently, there is no locking mechanism and replication conflicts are resolved according to the *most recent change is valid* principle.

## Transferring project data

The *ELO* project has been created. The data for this project can also be used for the second project *ELOoffice manual*. The *Copy from* option is a simple way of transferring it.

1. In the *Copy from* field, enter the name of the project containing the data you want to copy to another.

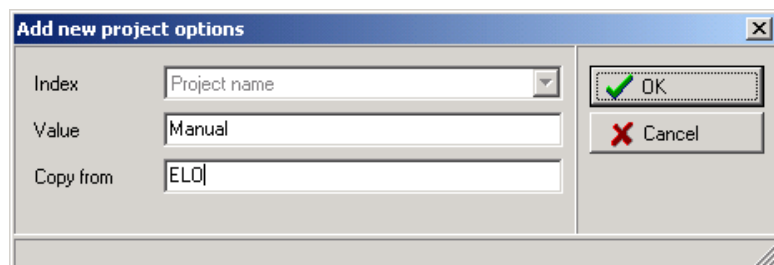
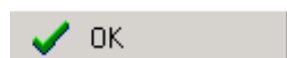


Fig. Entering a new option for a project



2. Clicking on *OK* confirms the entries and the project you just created is displayed in the *Activities – prepare projects* window complete with the transferred information.

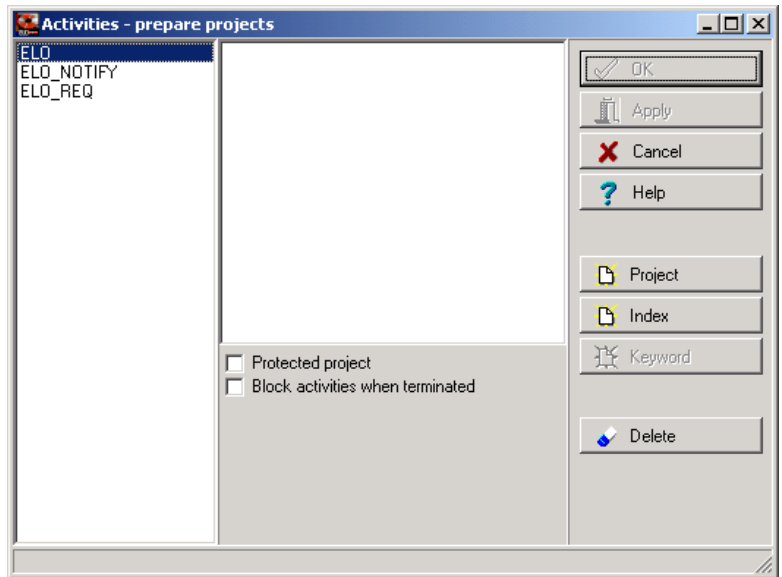
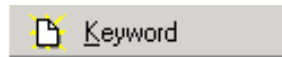


Fig. New project added



At this stage, you can still make project-specific changes.



Say, for example, you need to add to the *Recipient* list. To do this, select the entry *Recipient* and click on the *Keyword* button.

3. The extra people are entered In the *Add new project options* field.

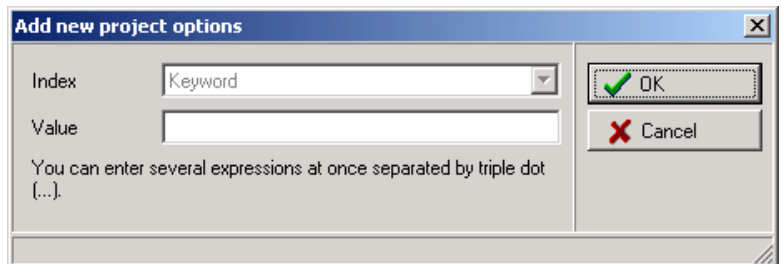
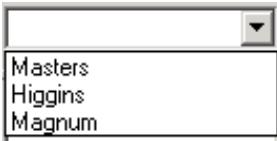


Fig. Entering people



The entries *Masters*, *Higgins* and *Magnum* are added to the keyword list. You can also edit the entries in the Text field.

4. Follow the same procedure for the other fields. You can insert additional fields by clicking the *Index* button and – as described under *Creating a project* – selecting a field from the drop down menu.

### Notes about the recipient

The recipient does not have to be an ELO user. It is also conceivable that the information is needed when creating an activity without forwarding the activity. This occurs, for example, if you create letters that are sent to external recipients.

### Informing the recipient

There are several ways of informing an internal recipient of a newly created activity. If ELO users want to inform one another of an activity or allow a colleague to edit an activity they can, once they have created the activity, move the corresponding document to the employee's task reminder area. In the Memo index card, they will be informed that an editing deadline has been set and the activity can be called up from the document's activities list.

Another option is to send a short message to the recipient alerting them to the fact that a new activity has been created.

Within a workflow (see the section on Workflows) the job instructions for a user may be: *"Edit the most recent activity"*. The user who is to carry out the task is alerted in the Messages and Tasks view. This creates a link between the *Workflow* and *Activities*.

---

# Configuring the activities form using scripts

You can also configure the system and project data using the scripting interface.

## Registering a new project

To register a new project, you first have to enter a value in the pseudo-project *ELO\_SYSTEM* with the major number 1 (You can set the minor number to 0 and it is then assigned the first available number automatically) and the value entry <Project name>. Under this project name you can record the lists for the Sending mode field, the Return status, the Recipient, Transmission ID and the ten additional fields.

A list always contains a heading with the minor number 1 then an unrestricted number of possible values. This value may include a string of "trigger" characters that mean the field is processed in a particular way:

## The special characters

If the heading begins with a ! symbol, the user may only select from the list. Otherwise, the user can also enter their own values.

- A + symbol denotes a mandatory field. The data set can only be saved once all mandatory fields have been completed.
- A minus sign (–) denotes a read-only field, which can only be modified using scripts, not the input dialog.
- A \* denotes a field that can only be written to when creating the record. It cannot be modified subsequently.

You are free to use these special characters in any combination, but bear in mind that only certain combinations make sense.

Remember to check that the actual heading begins with an alphanumeric character, because you can add to the list of special characters at any time.

If a value and list have not been defined for one of the ten fields, it is not displayed in the activities keywording form.

The following major number entries are predefined in the system:

- 10 Recipient field
- 11 Send modes
- 12 Recipient status
- 13 Transmission Id
- 30..39 User-defined field 1..10

## Sample script

```
Set Elo=CreateObject("ELO.professional")

` Existing entries ` are deleted first, the script always enters a
` complete project data set.
call Elo.DeleteProjectOptions( "ELO" )

` The recipient list (Major No. 10)
` is defined. The user can only select
` one entry from this list, user
` cannot enter custom values
call Elo.InsertProjectOptions( "ELO", 10, 1, "!Recipient" )
call Elo.InsertProjectOptions( "ELO", 10, 7, "thomas" )
call Elo.InsertProjectOptions( "ELO", 10, 2, "scott" )
call Elo.InsertProjectOptions( "ELO", 10, 3, "palgrave" )
call Elo.InsertProjectOptions( "ELO", 10, 4, "innes" )
call Elo.InsertProjectOptions( "ELO", 10, 5, "filbert" )
call Elo.InsertProjectOptions( "ELO", 10, 6, "gerard" )

` The Send mode list is also a
` predefined field and does not accept
` custom entries
call Elo.InsertProjectOptions( "ELO", 11, 1, "!Recipient" )
call Elo.InsertProjectOptions( "ELO", 11, 2, "View" )
call Elo.InsertProjectOptions( "ELO", 11, 3, "Release" )
call Elo.InsertProjectOptions( "ELO", 11, 4, "Edit" )
` Status
call Elo.InsertProjectOptions( "ELO", 12, 1, "!Status" )
call Elo.InsertProjectOptions( "ELO", 12, 2, "Released" )
```



```

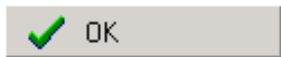
call Elo.InsertProjectOptions( "ELO", 12, 3, "Edited" )
call Elo.InsertProjectOptions( "ELO", 12, 4, "Unchanged" )
` First user-defined field,
` Name "Product", Select
` exclusively from the default list
call Elo.InsertProjectOptions( "ELO", 30, 1, "!Product" )
call Elo.InsertProjectOptions( "ELO", 30, 2, "ELOprofessional" )
call Elo.InsertProjectOptions( "ELO", 30, 3, "ELOoffice" )
call Elo.InsertProjectOptions( "ELO", 30, 4, "ELOviewer" )

` another user-defined field,
` the user can select from the list
` or enter a custom
` value
call Elo.InsertProjectOptions( "ELO", 33, 1, "Submodule" )
call Elo.InsertProjectOptions( "ELO", 33, 0, "Internet" )
call Elo.InsertProjectOptions( "ELO", 33, 0, "SAP Link" )
call Elo.InsertProjectOptions( "ELO", 33, 0, "Backup server" )
call Elo.InsertProjectOptions( "ELO", 33, 0, "Mobile" )
` another field, no default list
call Elo.InsertProjectOptions( "ELO", 34, 1, "Additional" )
` End

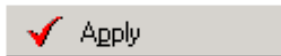
```



Enter the script in Script Manager. When you have entered all your settings, click on *Apply* or on *OK*. Click on *Test* to run the script.



Click on *OK* to close the *Script Manager* window when you have made all your changes.



If you click on *Apply*, *Script Manager* stays open and you can continue working on another script.

## Configuring the list view using scripts

As with the system and project data associated with an activity, you can also configure what columns are displayed in the activities list view using the script interface. You can either apply the settings globally or set them for each user individually. To do this you have to compose a line of text for each column describing which field should be displayed there, how wide the columns should be and the heading. A single column description is composed as follows:

```
<Field number> : <Width>: <Heading>
```



The individual fields are separated by a colon. The heading cannot contain colons or semicolons.

The entire line is composed of up to 16 column descriptions - each separated by a semicolon.

<Column1>;<Column2>;...The entire line is composed of up to 16 column descriptions - each separated by a semicolon.

<Column1>;<Column2>;...

## Example

```
Set Elo=CreateObject("ELO.professional")
hdrline="10:100:Name;"
hdrline=hdrline & "4:50:Version;"
hdrline=hdrline & "7:80:Edited by;"
hdrline=hdrline & "11:80:Sent by;"
hdrline=hdrline & "12:80:Version type;"
hdrline=hdrline & "13:80:Due date;"
hdrline=hdrline & "14:80:Returned;"
hdrline=hdrline & "15:80:Status;"
hdrline=hdrline & "3:80:Recipient;"
hdrline=hdrline & "9:30:Priority;"
call Elo.DeleteProjectOptions ( "ELO_SYSTEM\2\1" )
call Elo.InsertProjectOptions ( "ELO_SYSTEM", 2, 1, hdrline" )
```

The description that is generated is stored in the Activity options in the "ELO\_SYSTEM" area with a major identifier of 2 and a minor identifier of 1. That is the default selection for all users who do not have any individual settings.

You can now create more (different) descriptions and save them for specific users. To do this, use the same major number of 2, but a different minor number. The minor number is composed of the value 10 plus the ELO user number. So ELO user 7 has a minor number of 17. The `DeleteProjectOptions` command ensures that any old, existing description is deleted before the new entry is entered. Here too, the specific minor number has to be selected for user-specific settings.

The following column numbers are available:

1	Internal activities - GUID
2	ELO object GUID for the linked document
3	Recipient
4	Version/Revision
5	Internal time stamp for the activity (last save)
6	Project
7	Name of the current editor
8	Name of the owner/creator
9	Priority (A...C)
10	Name
11	Send date DD.MM.YYYY
12	Send modes
13	Due date DD.MM.YYYY
14	Return date DD.MM.YYYY
15	Return status
16	Memo
17	File name
18.27	User fields 0..9
90	Sent date in ISO format YYYYMMDD
91	Due date in ISO format YYYYMMDD
92	

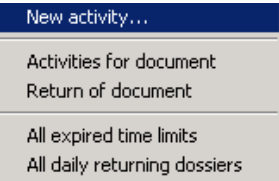
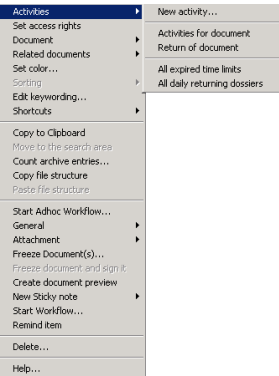
# Creating activities

Once your administrator has created a project, the Activities function is available in the context menu on the Archive index card. You can now draft job instructions and forward them to colleagues, receive job instructions and messages and set documents you want to edit further as task reminders.

## The Activities sub-menu

Open the context menu by right-clicking on the entry. Point to *Activities* and a submenu opens.

It includes the following items:



**New activity:** You can create activities for all types of documents, as well as for structure elements, e.g. folders. Clicking on *New Activity* opens the *Edit activities* window (Activities form). You can make the necessary changes - e.g. the document to which you want to assign an activity, the project you want the activity to belong to, when it needs to be edited etc. then allocate a recipient to the activity.

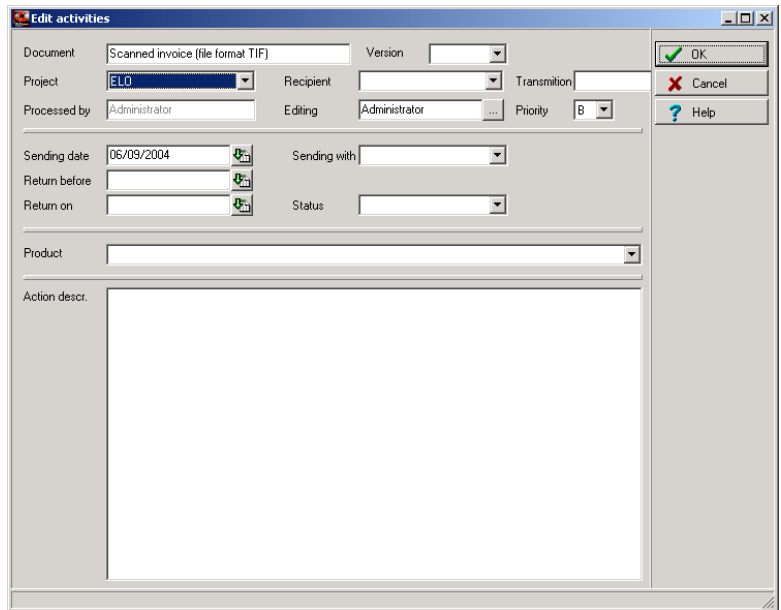


Fig. Editing an activity

Activities for document

*Activities for document:* Here you can see which activities have already been set up for a document and when and by whom they were set up etc. All activities created for a document are displayed in an activities list.

Return of document

*Return of document:* An activities list is displayed containing only those documents that have not yet been returned. If you want to conclude an activity, you can select this option and then call up the activity you want to edit by double-clicking.

All expired time limits

*All expired time limits:* This list displays all activities for a document which are already overdue.

All daily returning dossiers

*All daily returns:* Here you can see which activities are due today.

The activities list can also contain extra information about a document when creating an activity, e.g. the version or status of the document. Because your administrator controls the settings, your activities list may look different to the one illustrated here.

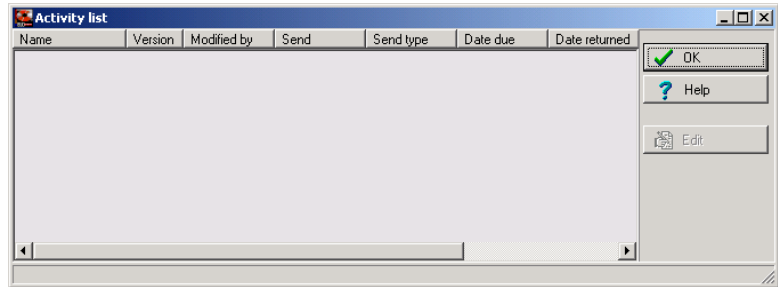


Fig. Activity list - display options

## The activities form

Fig. The activities form

The activities form contains the following fields:

Document

**Document:** The brief description of the element you used to open the context menu is entered in the Document field. You can change this if you want to create an activity for another element.

Project

**Project:** You can open the drop down menu containing all the available projects by clicking on the arrow. Select the project belonging to the document. You cannot enter anything using the keyboard.

Processed by

**Created by:** This is the name of the person who created the activity for a document. If that person forwards the activity to another recipient for editing, this field still bears their name. It cannot be changed. This ensures you can always trace who initiated an activity. The recipient can enter him/herself in the Editing field (see below).

Version

**Version:** The current version of the document is automatically displayed in the version field. If there are several versions of a document, you can choose here which version to create an activity for.

Recipient

**Recipient:** Here, enter the name of the employee who will receive the activity to edit it.



Remember that the description of *Recipient* is merely used as an example. Depending on the project, your system administrator can choose a different one when configuring the activities form. This is also true for the *Transmission*, *Send mode* and *Status* fields.

Editing

**Editor:** Anyone editing an activity can enter their name in this field. Right-clicking opens a window that lists all users.


Transmission

**Transmission:** The transmission number is a logical clip with which you can group together and link several documents. It can be entered manually or automatically when creating an activity. Depending on the project, this field may have a different name.

Priority

**Priority:** This field lets you set the priority for an activity. You can choose between *A* for *high*, *B* for *medium* and *C* for *low*.

**Sending date:** The sending date records when an activity was issued and sent out. If you leave the sending date empty, the current date is entered automatically when you save. Clicking on the green arrow on the right brings up a calendar where you can enter the desired date. Select the month with the single arrow and the year with the double arrow.

Sending date   Sending with

Return before

Return on

Product

Action descr.

June 2004

	Su	Mo	Tu	We	Th	Fr	Sa
23			1	2	3	4	5
23	6	7	8	9	10	11	12
24	13	14	15	16	17	18	19
25	20	21	22	23	24	25	26
26	27	28	29	30			


Today 

Fig. Entering a sending date via the calendar function

Return before  

Return on  

**Return before/Return on:** You can also use the calendar to enter the due date for the activity and the date it was actually returned. If you omit the return date, no further action is expected after the activity has been concluded. An activity that has been concluded is no longer displayed in Tasks view. It is however, permanently accessible in the activities list for logging and monitoring.

Sending with

**Sending with:** Here, you can enter the sending mode for the document.

Status

**Status:** In this field, you can enter a note about the current status of a document to alert the recipient or editor. The system administrator can rename this field if necessary.





Product

Contact

*Additional fields:* Additional fields set up by your administrator are listed one below the other in the activities form.

*Job instructions:* Here, enter the necessary job instructions regarding editing the activity - for you or the recipient.



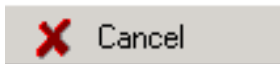
Action descr.

Fig. Entering job instructions



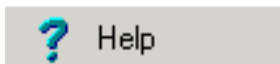
OK

Confirm by clicking on *OK*.



Cancel

If you want to discard an activity, click on *Cancel*.



Help

The *Help* command calls up online help.

---

## The activities list

From the context menu in archive view, you can select to display a list of all activities related to a particular document. To do so, right-click on the corresponding entry in the archive and on *Activities*, *Activities for document*.

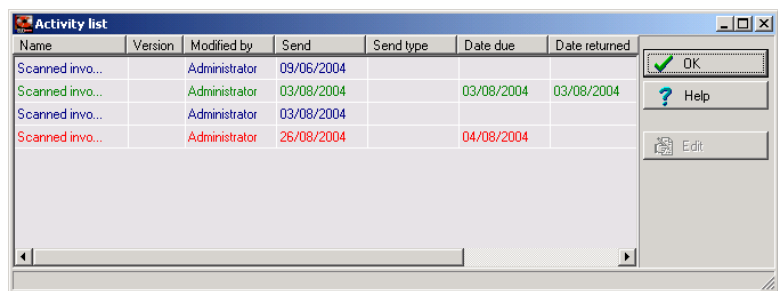


Fig. Displaying activities for a document

The list can be sorted by clicking on the relevant header.

The highlight colors have the following meanings:

**Black:** The due date has not been reached and will not be for at least another three days.

**Green:** The activity is complete.

**Blue:** There is no set due date for this activity, it is an event.

**Dark red:** The activity is due within the next three days.

**Red:** The activity is overdue.



To edit an activity from this list again, first click on the relevant entry. Then click on *Edit* or open the activity by double-clicking.



You can also select several activities at once and edit them. In this case, all the fields with different entries are grayed out in the activities form. They are marked with an asterisk and can only be edited individually. Changes in the remaining fields are saved in all affected data sets.

### Notification of a newly created activity

Activities that are not yet completed are displayed in your Tasks view.

If your activity is intended for a colleague, you have several ways of informing them. After creating an activity you could place the document in their Task reminders. The icon on the *Messages* tab flashes red so that the employee concerned is aware of having received a message regarding the document. The document is also displayed in the Tasks view. They can open the activities list from the context menu and edit the activity.



Remember that the two functions *Notify when read* and *Notify on deletion* should be activated (see the section **Create task reminder**).

### Send message

You have the option of sending the recipient a message to alert them to the new activity. Read more in the section **Sending your own messages**.

### Integrating activities into a workflow

Within a **workflow** (see *Workflow*) the job instructions for a user might be: "Edit the most recent activity". The user who is to carry out the task is alerted in the Messages and Tasks view. This creates a link between the Workflow and Activities. Once the activity has been edited, the workflow can continue. This link can be very useful if, in a workflow that is largely repetitive, certain tasks are always different.

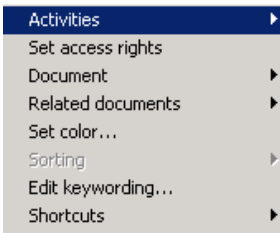
### A practical example

What follows is a practical example to illustrate the *Activities* feature. Thanks to some illustrative steps, you can come to understand the potential of the feature.



A new project has been created called *ELOoffice manual*. This sample project is about revising a manual. The *Technical documentation* division has been charged with overseeing the creation of a new manual.

First, the Heads of the *Technical documentation*, Development and Product Management divisions meet jointly to discuss what changes need to be made to the new version of the manual, which chapters may have to be rewritten or added to and who is responsible for which area of the project.



The results of the discussion are minuted and the minutes archived in ELO. The project manager now creates different activities for this document and forwards them to his colleagues.

A new activity is created using the context menu in *Archive* view. The activities form that appears is not, initially at least, linked to any particular project. In the *Document* field it only includes the name of the document used to open the form. All the other fields are empty.

Non-specific activities forms

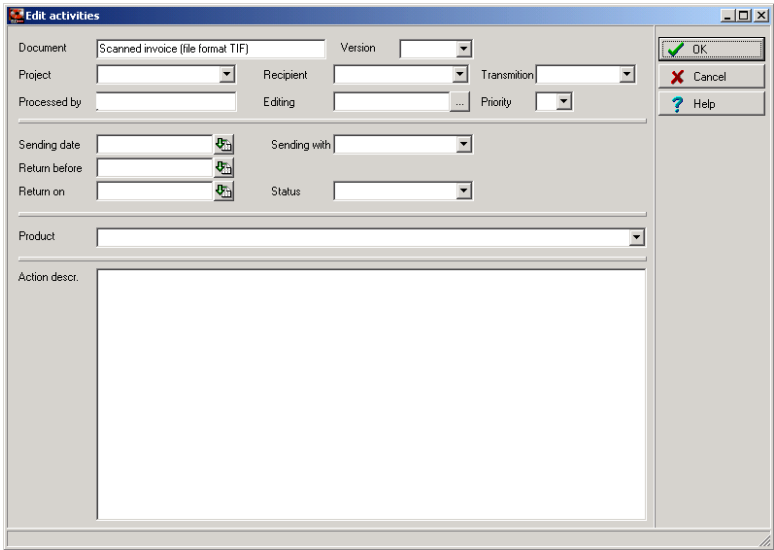
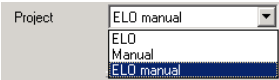


Fig. Creating non-specific activities forms



In the *Project* field drop-down menu, you can select the entry *ELOoffice manual*.

The fields in the activities form change. The form is now linked to this project and includes all the settings as set by the administrator.

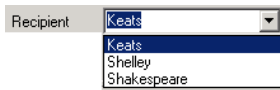
Fig. Activities: selecting a project

The *Created by* and *Editing* fields are automatically completed with the name of the current user - in this example with the name *Smith*.

Fig. Automatische Feldbelegung

In the **Creating activities** section, we have already outlined the fields in the activities form. Alongside the standard fields *Document*, *Project*, *Created by*, *Version*, *Editing*, *Priority*, *Sending date* and the two return fields *Return before* and *Return on*, found on every form, the administrator has set up the following project-specific fields:

**Recipient:** For this field, the administrator has used the **ELO** defaults.



Recipient: Keats  
Keats  
Shelley  
Shakespeare



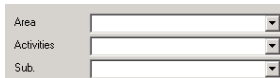
Transmission:



Sending with:



Status:



Area:  
Activities:  
Sub.:



Location:



Area:



Activities:



Sub.:

In addition, to make entry easier, he set up a keyword list containing commonly used names that can be called up by clicking on the arrow. That said, users are also free to enter their own names.

*Transmission:* He has also used the *Transmission* field.

*Sending with:* The *Sending with* index field was set up to allow the user to either enter a value or to leave the field blank if the information is not relevant for the receiver or editor.

*Status:* As far as the *Status* field is concerned, he set up a list but also allowed free entries.

Moreover, the administrator set up four further fields that can be used to enter project-specific information.

If the recipient needs this information, the location of the document outside of **ELO** can be included when creating an activity for a document.

A project mostly involves employees from different departments. For the sake of clarity, users should enter their department or division here. This is a mandatory field, i.e. for organizational reasons the field must be completed when creating a new record.

The user should enter their area of responsibility in the *Activities* field. This field cannot be left blank either, because it simplifies classification for the recipient.

Here, the user can enter who will relieve them in their absence so that the recipient knows who to contact.

If all the compulsory fields are not completed, the activity cannot be created. A dialog box then appears with the warning *Please complete compulsory fields*. The activity is only created once all the necessary fields have been completed.

An activity is attached to a document for clarity.

1. The minute-taker, in this case Mr Smith, creates the minutes in MS Word and files them in ELO in the *Manual* filing cabinet, the *ELOoffice* folder and in the *Preparation* index.

2. He then selects *Activity, New activity* from the Archive context menu. Project Manager Schumann should be informed of the minutes so he knows to begin the next steps of the workflow.

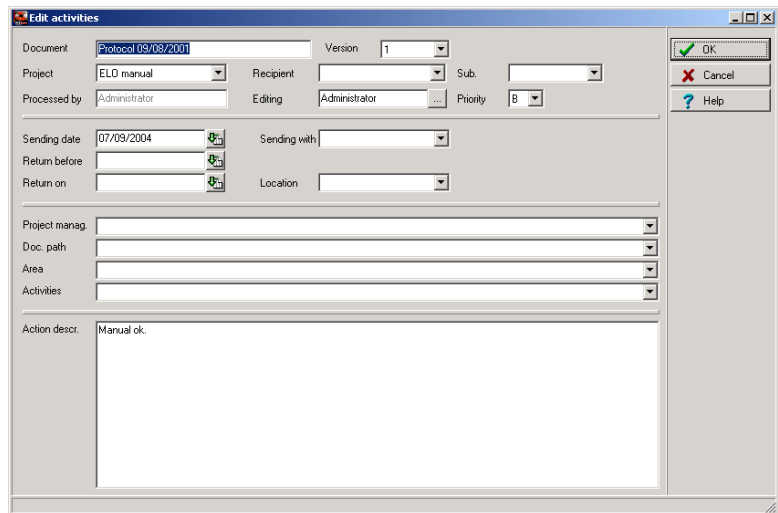


Fig. Creating a new activity

3. A short message informs the project manager that the minutes have been completed and that an activity has been created for him.




Fig. Entering an activity in the activities list

The activity that has just been created is listed in the activities list. A return date is not entered. The *blue* type means that the activity is not expected to be returned. It is classified as an *Event*.



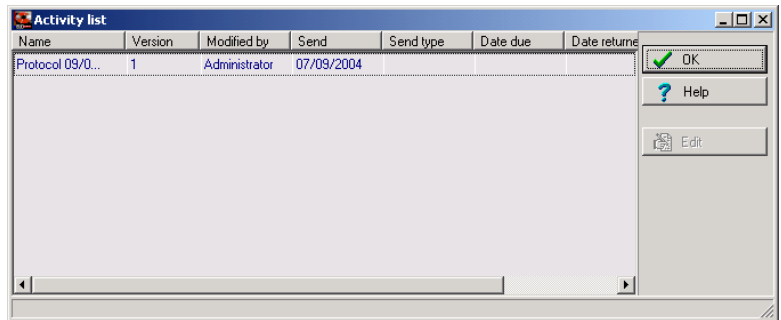


Fig. Activities list with activity entered

4. All Heads of Division involved in the project and who took part in the meeting receive an activity related to the minutes reminding them to inform their divisions and to tell the Project Manager who is responsible for which areas within the division.

One of these activities looks like this:

Document: Protocol 09/08/2001    Version: 1

Project: ELO manual    Recipient:    Sub:   

Processed by: Administrator    Editing: Administrator    Priority: 8

Sending date: 09/07/2004    Sending with:   

Return before:   

Return on:    Location:   

Project manag: Administrator

Doc. path: \projects\north

Area: Support/documentation

Activities: Ready for print

Action descr: Manual ok. Checked

Fig. Editing an activity - job instruction

The list for this document is expanded accordingly.

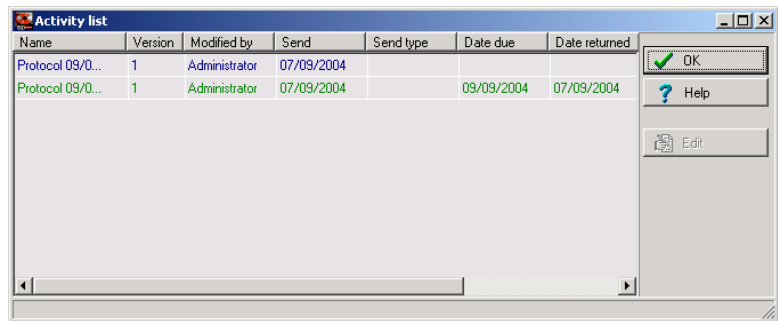


Fig. Activities list expanded by one entry

The black type for the new entry means that it is not due within the next three days.

5. The Project Manager places the document in the Task reminder area for each Head of Division so that it is listed in Tasks view and the Tasks associated with it can be completed. The document is automatically displayed in his own Tasks view.

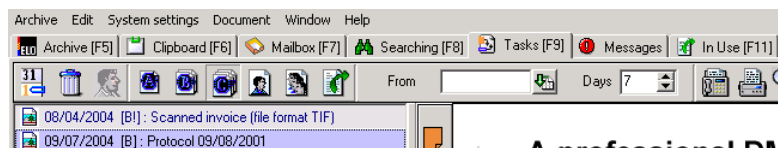
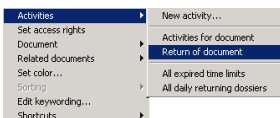


Fig. 'Tasks' area

As soon as each Head of Division has completed his or her task and informed the Project Manager, the latter can conclude the activity.

6. He now has two options to conclude the activity. He selects *Activities*, *Return of document* from the list.



A list is brought up containing details of all the activities pertaining to the document that have not yet been completed. There are two activities in this example.

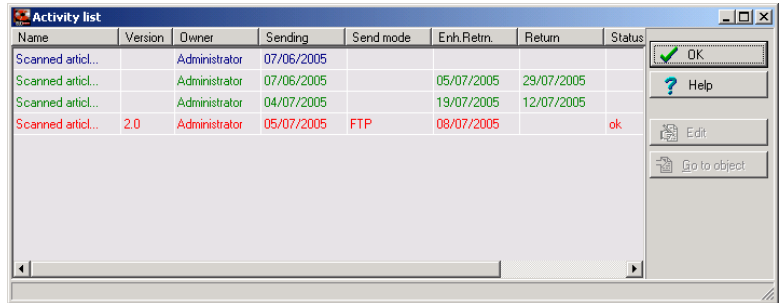


Fig. Activities list with incomplete activities

He opens the activity he wants to complete and enters the current date. It is then deleted from his tasks view and the list shown above.

The other option is to open the activities list from *Activities for document*.



Fig. Edited activities list

This list displays all the activities pertaining to a document. Once you have entered the due date, the green typeface shows that the activity is concluded and it remains in the list.

After a while, all the preparations for the project are concluded and the actual work can begin.

Different employees in the technical documentation department are supposed to make the changes as logged by the developers in the relevant chapter of the manual, additional employees are then given single chapters for proof-reading. Finally, the manual is checked once again by the Project Manager and is then forwarded to the Managing Director for release.

7. Because these workflows regularly reappear when creating a manual, the Project Manager defines some workflows that can be started for all documents belonging to the current project.

One such workflow could look like this.

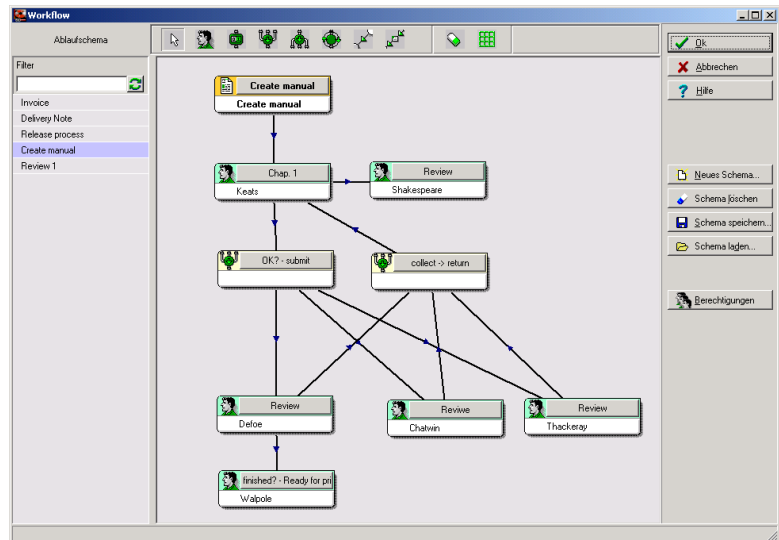


Fig. 'Edit manual' workflow

The document, in this case *Chapter 1*, is edited by Keats and then passed on to Chatwin and Thackeray for proof-reading and to Defoe to test the product's features. The document is then returned to Keats who can make further changes, before it is forwarded to the Project Manager. Within the workflow depicted above, it is possible to integrate activities. Defoe may not only be responsible for testing the manual, but also for carrying out additional tasks that cannot always be predicted.



8. The Project Manager changes the workflow.

Defoe is now also responsible for editing a new activity that has been assigned to this document and for which he is entered as the recipient. He is informed of this as soon as he completes his current workflow task. There is therefore no need for further notification.

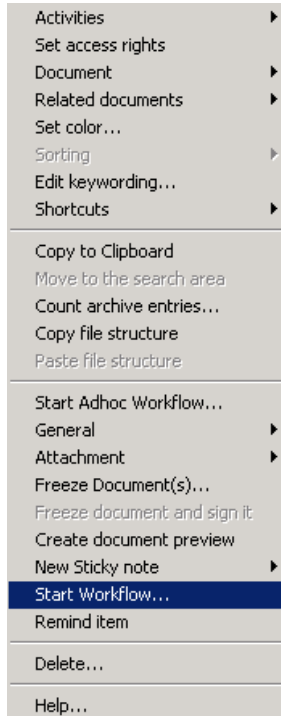
This example illustrates just a small part of range of options and uses available to you using the *Activities* function in **ELO**.

The most important functions are:

- You create activities for a document within a project. There is a separate keywording form for every project.
- You can have **ELO** remind you to edit the document. There are up to fourteen fields available for keywording.
- You can also create activities for your employees to get job instructions to them.
- Activities can be integrated in the workflows.
- Since activities cannot be deleted from the activities list even after completion, you can always check who created and edited an activity, and when.
- Unlike task reminders, activities are replicated when documents are copied.

---

# Creating task reminders



Placing a document in the Tasks area is very simple:

1. Drag and drop the object, e.g. a document, to the tab of the *Tasks* index card (or use the *Remind item* command in the context menu). The *Create/Edit Task in Task reminder* window appears.

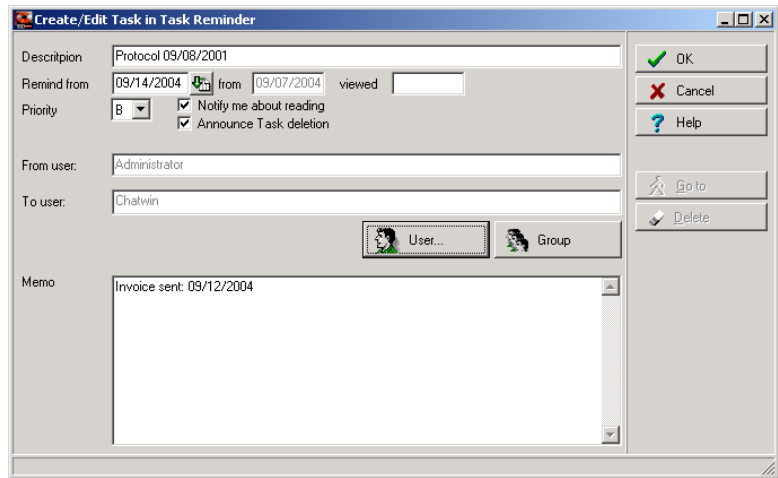


Fig. Creating task reminders

## 2. Complete the fields:

**Description:** This is the name of the object that you have set as a task reminder. You can also enter a new name for the task reminder.

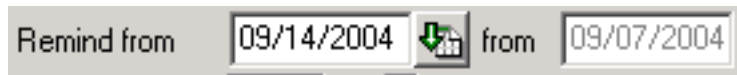


Fig. Task reminder - specifying a date



**Remind from:** Enter the date when you want the object to be made available again. A calendar is available.

**From:** This specifies the date on which you set the task reminder for the object.

**Viewed:** Displays the date on which the document was first "looked at" in the Task reminder area.

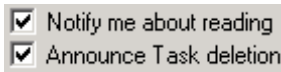




**Priority:** Here, you can set how urgent the task is. By clicking on the arrow symbol, you can choose from three priority levels: **A** (high), **B** (medium) and **C** (low).

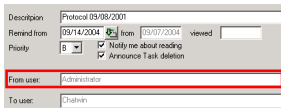


It is a good idea to set a priority level, because in the Tasks view (*Tasks [F9]* index card), the tasks can be selected or arranged by priority.

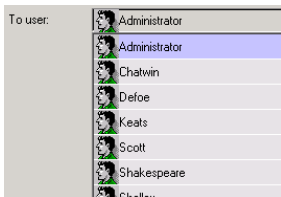


**Notify me about reading:** You are informed as soon as the recipient views the document.

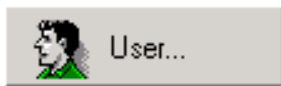
**Announce task deletion:** You are informed when the document is deleted from the Task reminder area.



**From user:** Displays the user who added the document to the Task reminder area. For reminder documents that you receive over the network from a colleague, this is the sender.



**To user:** In this field, you can determine who (or which group) you want to send the document to as a task reminder. Click on the arrow icon and select a user (or group).



**User:** Select a user you want to inform of the due date.



**Group:** Select a group that you want to inform of the due date.



**Memo:** Here you can add a note to your task reminder document. Then you, or your colleague receiving the task reminder, will know exactly what it is about. The memo is displayed in the same way as a sticky note.



3. Confirm with *OK*. The document is now present in your Tasks area, or that of a colleague, if you have selected a different user.

---

# Organizing tasks

On the *Tasks* index card you can organize all the due dates for the documents in the Task reminder area. These documents are displayed complete with sticky notes, the date and priority (A, B or C).

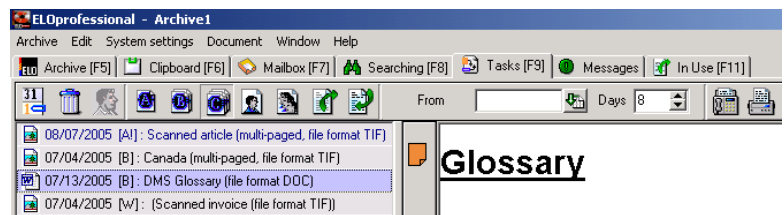
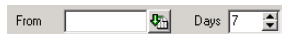


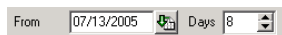
Fig. Organizing tasks

## Filtering the display

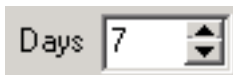
If there are a lot of documents in the *Tasks* area, you can filter the display to improve clarity. You have two choices:



**Option one:** Specifying a period of time in the toolbar. Then, only those objects are displayed for which the task deadline is within that period.



In the *From* field, enter the date from which you want to start displaying objects, for example 05.01.2001.



In the *Days* field, enter the time period (from the *From* date), e.g. 7 days.

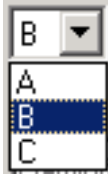
Using these arguments, documents are only displayed with a task reminder date of between January 5 and January 12, 2001.



*Hint:* You can also enter your task reminders in Outlook. You can find more information about this in **System settings** in the **Mail** index card.



**Option two:** Filtering the tasks displayed by priority.



Every time you put a document in Tasks, the *Create/Edit Task in Task reminder* window opens. In this window, you can set the priority level for the document and more besides. In Tasks, you can then display the documents by priority.



You can set how to display documents by priority in *System settings, Options*, on the *Task Reminder* index card: **View tasks of selected and higher priority** or **View tasks of selected priority only**.

In the toolbar, you can see the three icons **A**, **B** and **C**.



Click on icon A – *High priority*. The *Tasks* area then only shows documents with **high (A)** priority.



Clicking on icon B – *Medium priority* – will display documents of priority A and B (or just B).



Clicking on icon C – *Low priority* – shows all documents (or just C).

## Show standby and group dates



Set how you want tasks to be displayed by clicking on the icon.

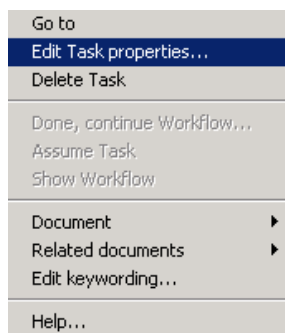
Using the two icons *Show standby dates* (V) and *Show group dates* (G) you can display these.



The Task reminder document (Group dates) are displayed according to the selected priority. Group dates are shown once you have clicked on the Group dates icon. Group dates can be identified because the group name is shown in the display line.

You can find more information on standby dates in the **System settings** chapter under the heading **Substitution management**.

## Changing task reminder dates for a document



You can change all the reminder data for a document (deadline, priority, memo etc.).

1. Right-click on the document entry in the *Tasks* area. The context menu opens.

2. Select *Edit task properties*. The *Create/Edit Task in Task reminder* window appears. It shows you all the data relevant for the reminder.

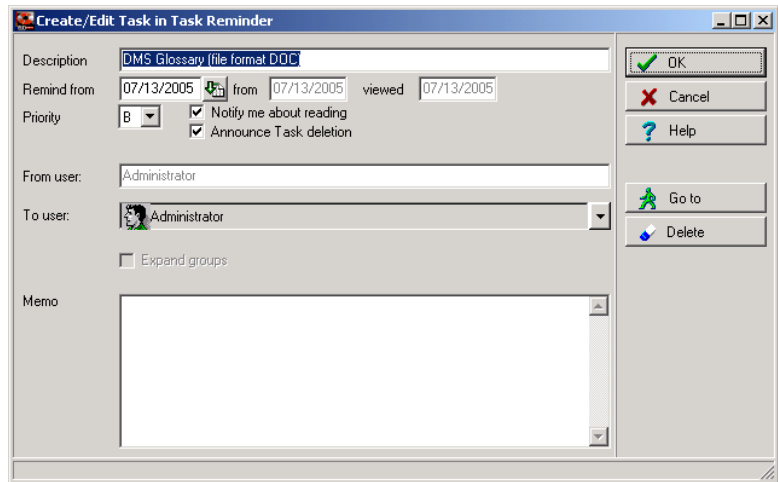
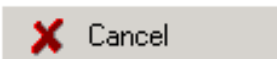


Fig. Creating and editing task reminders

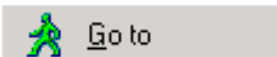


The *Create/Edit Task in Task reminder* window can also be opened by double-clicking on the document entry in the Tasks area.

### 3. Make your changes - e.g. to the deadline.



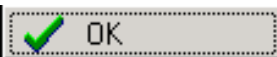
If the changes you have entered are wrong or if you want to revert to the existing reminder data, click *Cancel*.



Clicking on *Go to* takes you directly to the archive location of the document in *Tasks reminder*. Note, however, that this interrupts any changes you were making in the *Create/Edit Task in Task reminder* window and exits the window without saving them.



Clicking on *Delete* removes the selected document from Task reminder.



4. Click on *OK*. The input window is closed and your changes take effect.

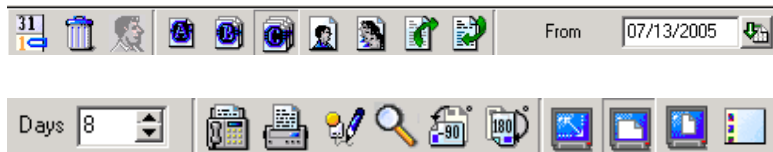


Fig. 'Tasks' toolbar

The toolbar contains additional commands or settings, outlined briefly below.



The *Collect task reminder entries* icon. While working in Tasks, the window is not automatically updated. In other words, if someone sends you a document during this time, it is not shown. Clicking on this icon refreshes your tasks.



Clicking on the *Delete task* icon removes the selected document entry from Tasks view.



Clicking on the *Done, continue workflow* icon continues the current workflow.



*High priority:* Only tasks that are high priority are shown.



*Medium priority:* Tasks of high and medium priority are displayed.



*Low priority:* All tasks are displayed.



The *Show standby dates (V)* icon.



The two icons *Show standby dates* (V) and *Show group dates* (G) allow you to display task documents with standby and group dates respectively.



Using the *Check out the document* icon, you can check a document out from the *Tasks* area and move them to the *In Use* area.



Search within active document.



All the other icons (Print, Fax, Rotate, Views, User script(s)) and fields have already been described at length in previous chapters.

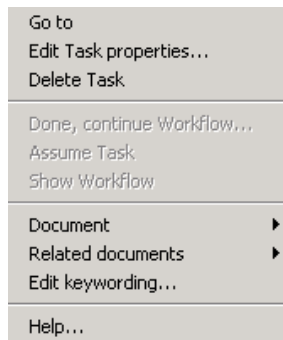


The icons that are displayed depend on your settings in the *Window* menu, *Configure toolbars*.



---

## The Tasks context menu



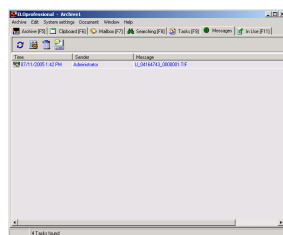
The context menu contains the following functions:

**Go to:** This takes you straight to where the document (selected in Tasks) is filed in the archive.

**Edit Task properties:** Opens the *Create/Edit Task in Task reminder* window to change the Task properties.

**Delete task:** Removes the selected object entry.

**Done, continue workflow:** After editing, use this command to proceed with the workflow.



**Show workflow:** Workflow documents are marked in blue type and by the symbol **[W]**. Using the *Show workflow* command, you can display the entire workflow.

**Adopt workflow:** If a workflow document is directed at a group, it is present in several users' Tasks areas. The entry in the list is gray. Using the *Adopt workflow* command, you adopt the workflow document. It is then no longer in the Tasks area of the other group members.

**Document:** This function lets you view, check out and edit documents right from the Tasks area, as well as viewing their version history or saving them as a file in the file system.

**Related documents:** Using this function, you can see the other documents linked with the selected one.

**Edit keywording, Document, Help:** You can find more information in the section *The Archive context menu*.



Refer to the chapter *System settings* under *Workflow* for more information.



# Chapter 8

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## Messages

The *Messages* area creates transparency within the ELO Client. That means, depending on how you've set up the *Messages* area, you will receive notification and information about processes to do with tasks, workflows and the mailbox.

You will, for example, receive a message when a colleague deletes a document that you sent them as a task reminder. Conversely, you will receive a message if someone sends a document to your Mailbox, creates a task for you or a workflow document arrives.

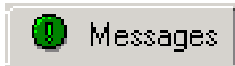
Moreover, you can also send short text messages to other **ELO** users that are then also received and displayed in the Messages area.

The **Messages** chapter addresses the following topics:

- The Messages window
- Editing the Messages display
- Sending your own messages

---

# The Messages window



You can open the Messages window by clicking on the Messages index card or using the shortcut *F10*.

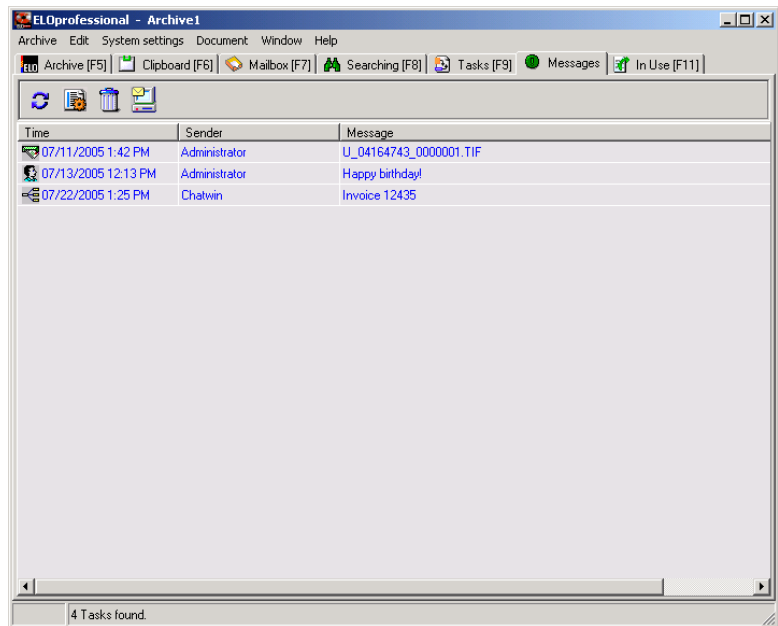


Fig. 'Messages' function area



Whenever you receive a message over the network, the icon on the *Messages* tab flashes red. It also flashes on start-up, if there are pending tasks to edit. All new messages are displayed in red, older messages in blue.

The following information is displayed: the date and time of the message, the sender and the message itself. That may either be a short description of a document, the workflow name or an actual short message that may be up to 50 characters in length.








	07/27/2004 2:47 PM	1	ELO Implementation (file format XLS)
	08/27/2004 12:20 PM	Administrator	U_27121610_0000003.TIF
	09/07/2004 2:33 AM	Administrator	Manual ok.
	09/07/2004 2:37 AM	Administrator	Invoice
	09/07/2004 4:28 AM	Administrator	HP website (file format MHT)

Fig. Description of message types

	07/27/2004 2:47 PM
	08/27/2004 12:20 PM
	09/07/2004 2:33 AM
	09/07/2004 2:37 AM
	09/07/2004 4:28 AM

The icons by the date and time immediately show you what type of message it is.



A workflow document has been sent to your Tasks area by user xy.



User xy has placed a document in your Tasks area.



You have received a document from user xy in your Mailbox.



User xy has sent you a short message (this is displayed directly in the text field).



User xy has seen the document you sent to his Tasks area.



User xy has deleted the document you sent to his Tasks area.



Which messages are displayed depends on two factors:

- ☒ Announce viewing of a Task
- ☒ Announce Task deletion

How you have set up your Messages area and whether (when creating a task for another user) the two functions *Announce viewing of a task* and *Announce task deletion*.



---

# Editing the Messages display



You can customize how messages are displayed. You can determine which messages are displayed, delete messages and refresh them. All these functions can be accessed from the icons in the toolbar.

## Options



You can make most of the changes using the *Options* icon.

Clicking this opens the *Options* window.

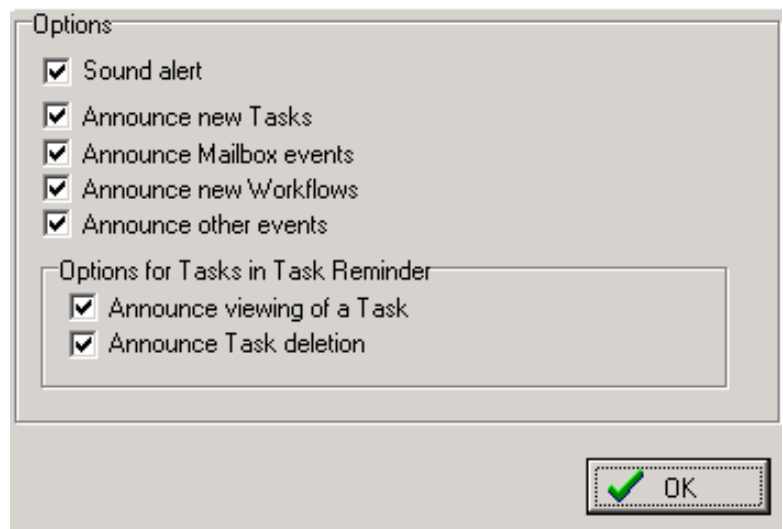
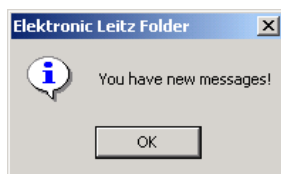


Fig. Options for 'Messages' area



**Sound alert:** Sets the *alert*. Whenever you receive a message over the network, you are notified by a dialog box as well as a flashing icon on the tab. In *System settings, Options* on the *General* index card, you can set how often **ELO** checks the system for new messages.



The dialog box displays new messages when they arrive.

**Announce new tasks:** If this function is enabled, a message is displayed if someone places a document in your Tasks area. You can also see the messages that are generated automatically when a user reads or deletes a document you placed in their Tasks area.

**Announce Mmailbox events:** Displays a message if an ELO user sends a document to your Mailbox over the network.

**Announce new workflows:** As soon as a workflow document arrives in your Tasks area, a message is displayed.

**Announce other events:** The short text messages sent to you are displayed here.



Events that have already been displayed **cannot** be hidden again by changing the settings.

Options for Tasks in Task Reminder  
☒ Announce viewing of a Task  
☒ Announce Task deletion

In the *Options for Tasks in Task reminder* area, you can determine which of the two features

- Announce viewing of a task, and
- Announce task deletion

should be checked by default when creating a task in the *Create task reminder* window.

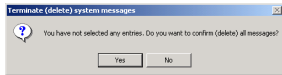
## Removing a message

You can remove messages from messages view.



Select the relevant message and click on the *Delete message* icon.





## Refreshing messages



If no message is selected, the *Delete system messages* window appears. You are asked whether you would like to delete all messages. Confirm by clicking either *Yes* or *No*.

You can refresh the messages view independently of the default settings in *System settings* under Options on the *General* index card.

To do so, click on the *Refresh messages* icon.

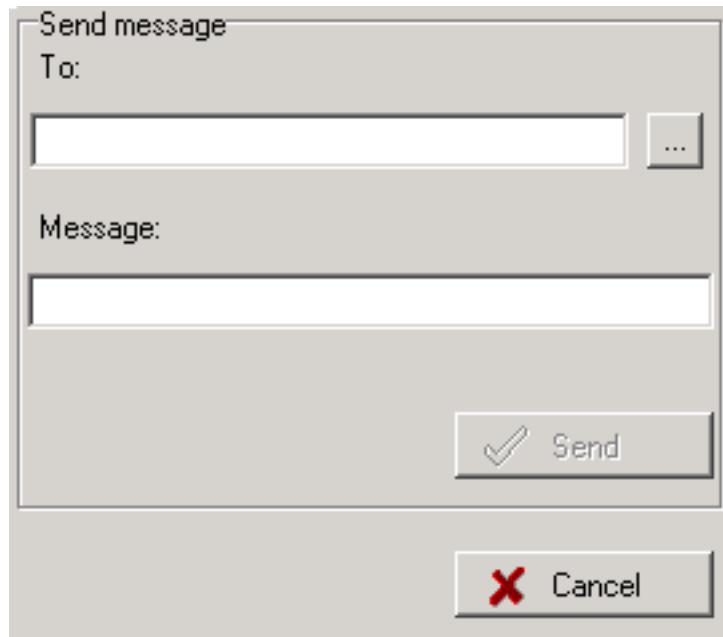
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## Sending your own messages

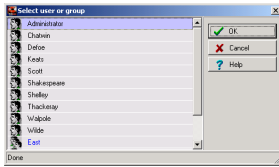
In the *Messages* area, you can send short messages over the network to other ELO users. These messages may be up to 50 characters in length.



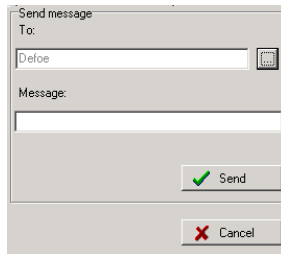
1. Click on the *Send* icon. The *Send message* dialog appears.

A screenshot of the 'Send message' dialog box. It has a title bar 'Send message'. Below the title bar is a 'To:' label followed by a text input field and a small button with three dots '...'. Below that is a 'Message:' label followed by a larger text input field. At the bottom right, there are two buttons: 'Send' with a checkmark icon and 'Cancel' with a red 'X' icon.

2. Click on the button next to the *To* field.



3. The *Select user or group* dialog appears. Select the user or group (groups are shown in blue). The user is now shown in the *To* field.



4. In the *Message* field, enter the text you want to send, e.g.:

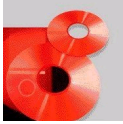


Fig. Enter a message

5. Click on *Send*. A dialog appears, confirming your message has been sent.

Time	Sender	Message
 07/11/2005 1:42 PM	Administrator	U_04164743_0000001.TIF
 07/13/2005 12:13 PM	Administrator	Happy birthday!

6. The message is now in the recipient's message area.



# Chapter 9

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## In Use

The *In Use* area offers an overview of all the documents currently in use. It is the central organizational resource for all documents you want to edit and modify in **ELO**.

This chapter will cover:

- Checking out documents for editing
- Checking in documents
- Opening and editing documents and
- Editing documents quickly.

---

## *In Use* index card

In the *In Use* view, you can check at any time which documents are unavailable to you because they are being edited. These can continue to be edited from here and, once all the changes have been made, copied back to the archive.

### Icons

Below, we will give you an overview of the toolbar icons in the *In Use* area.



*Document check in:* Your local working copy is copied to the archive as a new version.



*Renew document lock:* Clicking on this icon you can renew the document lock for the selected document, in case it has been lifted.



*Edit document:* The working copy is opened for editing in the application in which it was created.



*Discard document changes:* The working copy is deleted, the original version is unlocked in the archive.



*Fax document:* The working copy is faxed.



*Print document:* The working copy is printed.



*Search within document:* With this function you can search within the current document. This function is mainly available for TIFF files.

The other icons perform the same functions as in other areas.



# Checking out documents

## Checking out the document for editing

To edit a document filed in the archive, click on the *Check out and open document* icon. **ELO** sets a document lock and creates a copy in the In Use area. **ELO** also launches the particular application so you can edit the document.

You can now edit the document for as long as you need to and save it along the way. Take care not to change the file name. Even if you close the application or **ELO**, the document remains reserved for your use. You can resume work as many times as you like.

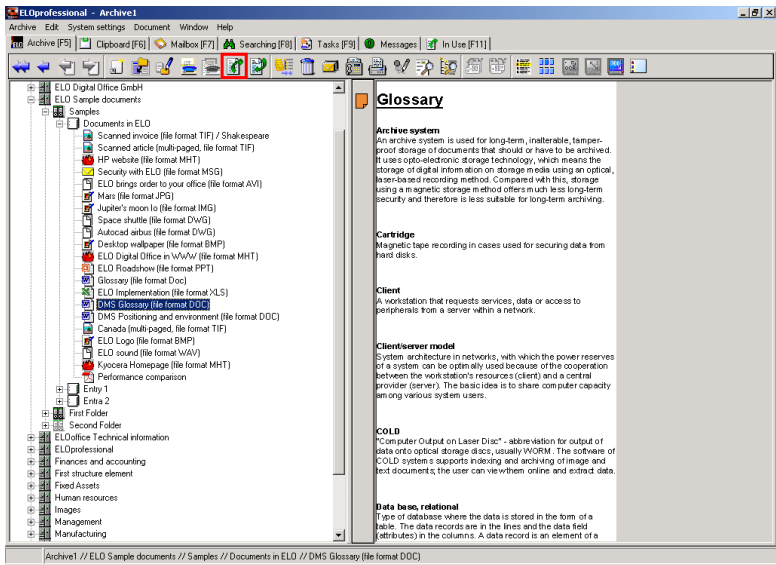


Fig. Checking out and editing a document



After checking out the document, an icon is appended showing that it is locked. The locked documents are listed in the *In Use* area.

**Viewing and editing checked out documents**

On the left side of the *In Use* window is a list of all documents which are unavailable to you because they are being edited.

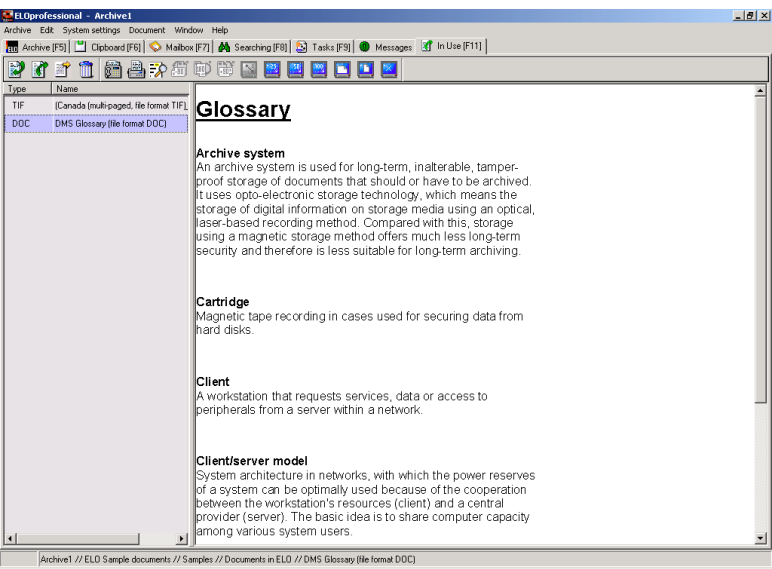


Fig. Overview of checked out documents

When you select an entry by clicking on the text field, it is displayed on the right-hand side. Several functions in the context menu and on the toolbar are now available to you:



- *Go to*: Switch to the document in the archive.
- By clicking on the *Document check in* icon, you can move the entry back to the archive. **ELO** will then ask for a version number and version comment. These entries help give you a clearer overview in version history.
- In *Edit document*, you can open the file in the corresponding original application. You can then make the changes you need to - you can also save to the cache. As long as the document is reserved for you, you can repeat this process as often as you wish.
- You can, of course, also print or fax this version of the document. In addition, the usual zoom and rotate functions are still available.
- If you want to cancel the changes you have made without updating the archive, you can click on *Discard document changes*. This command deletes your local working copy and opens the lock on the original document in the archive.

---

# Checking in documents

## Checking in

Once you have made your changes, you can move the document back to the archive using the *Document check in* icon or the context menu.

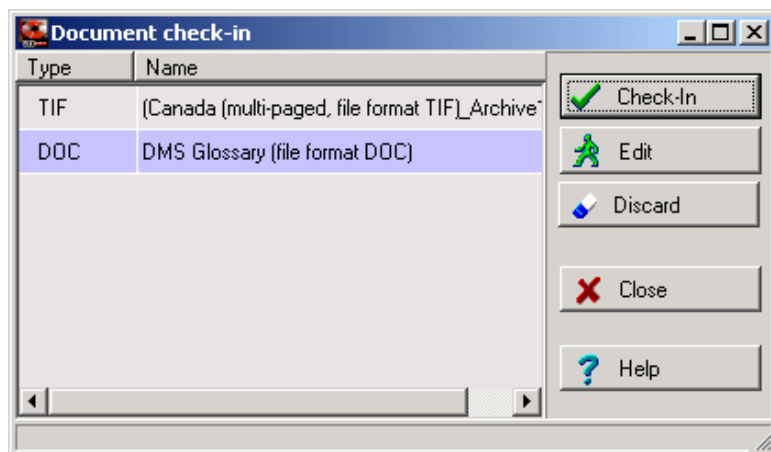


Fig. Checking in a document

**ELO** asks whether you want to allocate a version number of your choice and a version comment.

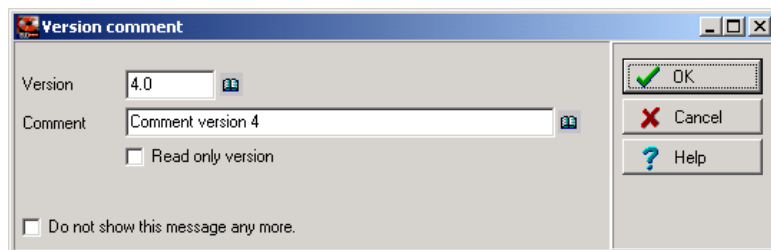
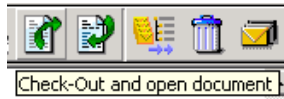


Fig. Entering a version comment

## Quick document editing



Here, you can save the notes about the changes made to the document for the version history.

If you just want to make a quick change to the document before checking it straight back in again, there is a simpler and easier way in the Archive view.

First click on the document and, via the context menu or the *Check out and open document* icon on the toolbar, open the application for editing. Make the changes then save the document again. In **ELO**, you can now click on the *Document check in* menu item or icon directly from the Archive, without switching to another view.

A dialog is now displayed with a list of all locked documents. The current working document is already selected, so all you have to do is click on *Check in* and the file is moved back to the archive.

---

# Checking indexes in and out

## Check out and check in



In the *Check out* area, or in the *In Use* area, you now have the option of copying whole ELO objects, or structure elements (cabinets, folders, indexes etc.) to the *In Use* area. This allows you to check out whole sections of the archive.

Select the structure element in the archive and click *Check out and edit document*. The *Check out the working index* dialog opens.

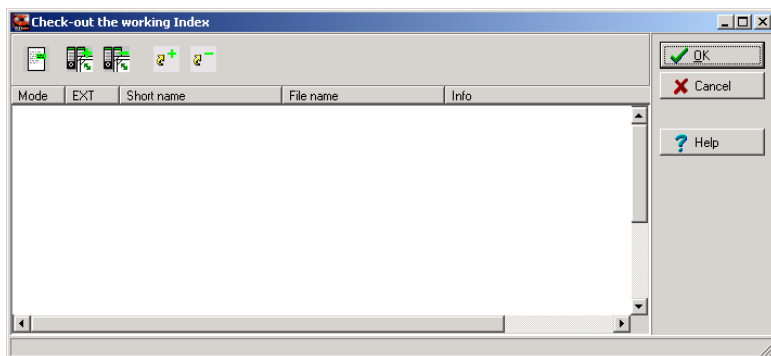
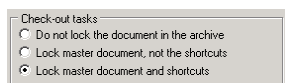


Fig. Checking out a working index



In the *System settings* menu, *Options*, on the *Mailbox* index card, you can set defaults for the check out process.

Remember: This function now lets you transfer whole indexes and folders - i.e. any ELO object - along with all the documents it contains, to the *In Use* area and to block access and editing rights for other users.

**Checking out** **ELO** now saves the original file name with every document. In conjunction with the ability to check out an entire index, you can also now work in a project-based way. To enable you to do this, the *check out directory* now contains a subdirectory for the index. All the documents are saved here with their original file names. Linked documents can be used actively if the application is working with relative paths. **ELO** can be configured so that real documents can be checked out to be written and locked in the archive, but shortcuts can only be opened read-only without an archive lock. These check out settings can also be customized individually for each document. At *check out*, **ELO** also saves a list with hash values related to the files so that, on *check in*, **ELO** can check to see which documents have been modified.

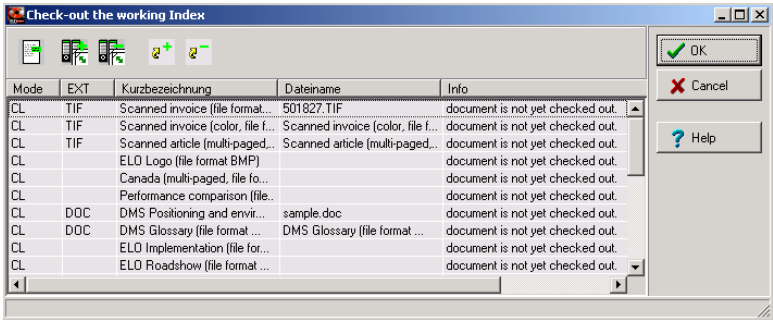


Fig. Checking out an entire index

In the *Check out the working index* dialog, you can see a list of all checked-out documents and ELO objects.

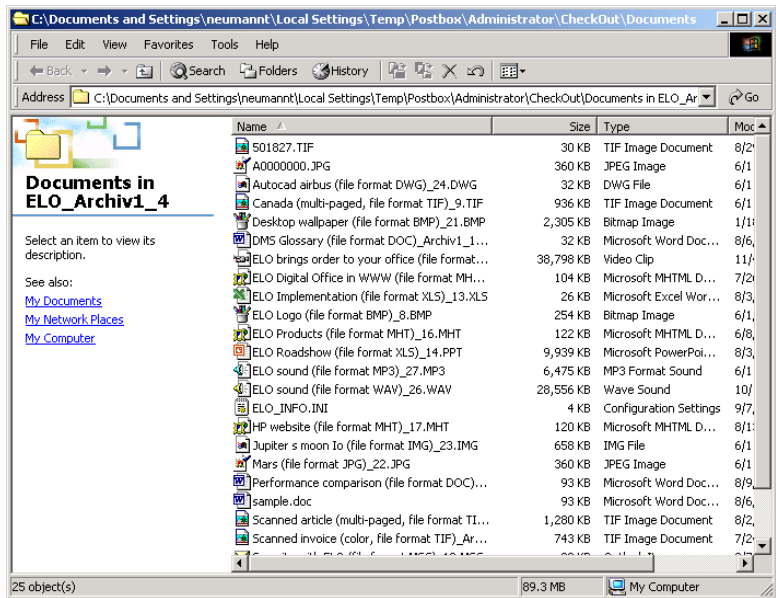


Fig. Directory with checked-out documents

## Editing checked-out documents in the index

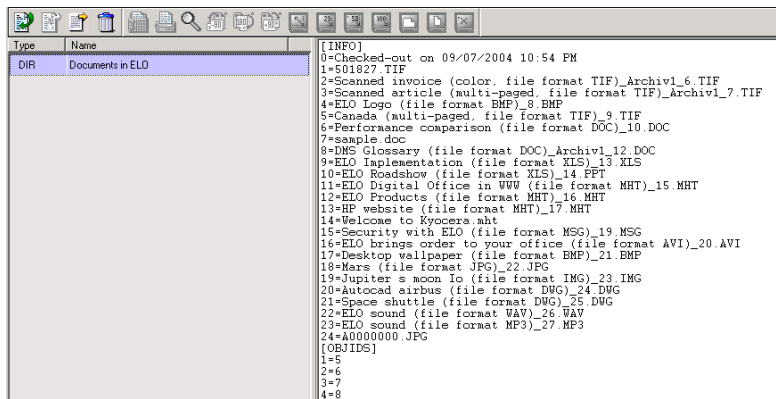


Fig. Checked-out index in 'In Use' area

Alongside the checked out index, you will also find an information list about the checked out documents.



When you want to edit the documents, click on *Edit document*. **ELO** switches to the folder containing the documents that you can now open and edit in your application.

## Checking in

When *checking in*, **ELO** automatically suggests only updating the modified documents. The user can also customize this setting for each document individually, if required. The user also has the option to retain the lock at *check in*, thereby creating an interim update with the option to edit further. If new files were created during editing, the system recognizes this automatically and **ELO** suggests importing these as new documents.

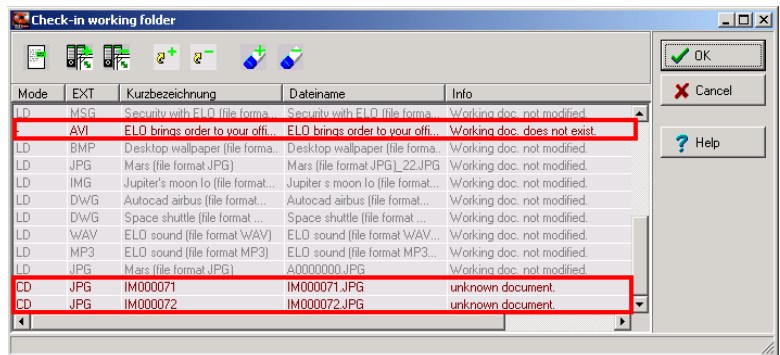
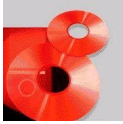


Fig. Checking in an index again

Three documents are highlighted in the screenshot above. The first shows a document that has been deleted from the checked-out index. The bottom selection shows two documents that were added to the checked-out index (in Explorer).



# Chapter 10

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## The Archive menu

This chapter presents the commands within the *Archive* menu. Below, we will outline how to organize your archive, how you can import and export data and find out about the structure of your archive.

This chapter includes information about the following topics:

- The commands in the Archive menu
- Exporting data and documents
- Importing data and documents
- The ELOviewer
- Printing an archive summary
- Creating reports about the archive
- Displaying archive reports
- Information about your system
- System diagnosis
- Access Manager diagnosis
- Navigating in the archive
- Security settings
- Deleting and organizing
- Managing and organizing keys
- Issuing keys for ELO objects
- Settings for replicating documents



## The commands in the Archive menu

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	▶
Next level	Enter
Previous level	Esc
Deleted entries	▶
Set archive key	▶
Run database test	▶
ELOprofessional MOBILE...	▶
Close	

Clicking on *Archive* in the menu bar in **ELO***professional* opens a drop-down menu containing all the commands in the *Archive* menu.

From here, you can import and export documents, archives and sections of the archive, display reports or restore documents you have deleted.

What's more, you can also use the features of **ELO***professional* MOBILE from here. You can start a full reconciliation of the archive, or different MOBILE activities, query the status of replication groups or place a replication marker.

Below, we will first give you a short overview of the entries in the *Archive* menu. Then we will explain the menu entries, commands and submenus.



Some of the commands can also be called up from icons in the toolbar or from entries in the context menu. Please bear in mind the entries and shortcuts in the index.

---

## Brief overview, menu commands

<b>Export</b>	The <i>Export</i> menu option launches the Export Wizard, which allows you to prepare individual objects in the archive - a folder or a document to copy the data to another medium, e.g. an MO drive or CD-ROM.
<b>Import</b>	The <i>Import</i> menu option launches the <i>Import</i> Wizard. This allows you to import part of an archive - a folder or single document - that was previously exported to another location using the <i>Export</i> menu option back into your <b>ELO</b> <i>professional</i> archive.
<b>Print archive summary</b>	This command lets you create and print various summaries of the archive. This lets you display the archive setup (archive structure) and the contents of individual filing cabinets and folders clearly. The summary is created from your current position in the archive.
<b>Reports</b>	Using this menu command you can create different reports about your documents, your data, the structure and the different archive processes. Mainly for security reasons, the logging of processes and workflows is essential for an electronic archive. You can find out about logged activities and even display a system diagnosis. This is especially helpful for analyzing errors.
<b>View report</b>	Using this submenu command, you can display an overview of archive activities. You also have the option of determining which procedures to monitor.
<b>Task reminder/mailbox report</b>	The report feature logs certain actions related to the <i>Tasks</i> or <i>Task reminders</i> and <i>Mailbox</i> work areas. Using the date fields you can restrict the report data generated to a specified period. You can also view report data for those users for whom you have administrator rights. Using the <i>Print</i> button, you can print a report list using the currently selected printer.

<b>System info</b>	Selecting <i>System info</i> allows you to generate a summary of the keys, users and groups involved in the archive. You can also run system diagnosis, which analyzes and monitors the various settings in the archive - analysis of document paths, database settings, scanner settings and keywording forms.
<b>System diagnosis</b>	System diagnosis allows you to analyze and monitor different settings in the archive - analysis of document paths, the database settings, scanner settings and keywording forms.
<b>Access Manager diagnosis</b>	This dialog shows information about users logged into the ELO system. You can also log a selected user off the system.
<b>Server status</b>	Here you can query the status of the ELO server.
<b>Next level</b>	Using this menu entry you can go to the next level in the archive. For example, you can change from the filing cabinet level to the folder level.
<b>Previous level</b>	Using the menu entry <i>Previous level</i> , you can move up a level in the archive (i.e. back).
<b>Deleted entries</b>	Here you can either make objects you have deleted visible again, restore them or delete them irretrievably. Please use this function with caution and bear in mind that permanently deleted entries cannot be restored.
<b>View</b>	Clicking on the View entry allows you to make all deleted ELO object entries - filing cabinets, folders, levels, indexes or documents - visible again. Such objects are shown in [square brackets] allowing them to be distinguished from other available objects.
<b>Restore</b>	This function lets you remove the deletion marker from ELO objects you have already deleted - cabinets etc. These objects are then available again in the archive. This function applies to the currently selected object and the objects it contains.

<b>Erase irretrievably</b>	Please exercise the utmost caution when using this function. Selecting this menu entry means that documents marked for deletion will be deleted from the archive once and for all. It is not possible to restore these documents. Please remember that even a comprehensive backup schedule will result in some disruption if you need to restore documents.
<b>Remove deleted versions</b>	Using this menu item you can remove deleted document versions from version-controlled documents.
<b>Remove old items</b>	This function allows you to delete documents or filing paths you no longer need - e.g. after a backup.
<b>Delete expired documents</b>	Using this menu entry, documents which have passed their <i>expiry date</i> can be removed from the archive.
<b>Set archive key</b>	The <i>Access Manager key</i> menu opens the <i>Select key</i> window to lock an archive. It can then only be viewed by employees who have the relevant key.
<b>ACL database</b>	With this menu you can define users who are authorized to create cabinets in the archive.
<b>Run database test</b>	Using this menu, you can call the following functions: <i>Check access rights</i> , <i>Document manager consistency test</i> , <i>Character set check</i> and <i>File structure cycle test</i> . These functions are mainly intended for the administrator.
<b>ELO professionalMO-BILE</b>	This menu option allows you to synchronize the data in your archive with that in others and to monitor replication options (these are only available if the relevant module is installed).
<b>Close</b>	The <i>Close</i> command closes your <b>ELOprofessional</b> session. The login dialog is then displayed so that you can select a new archive.

# Export and Export Wizard

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	▶
Next level	Enter
Previous level	Esc
Deleted entries	▶
Set archive key	▶
Run database test	▶
ELOprofessional MOBILE...	▶
Close	

The Export Wizard makes it easy to copy individual objects from an archive, such as a folder, to another hard drive, a CD-ROM or a streaming tape drive. That means you can export whole sections of your archive to another storage device or remove them completely from the archive. You might want to do this when you come to the end of a retention period, for example. Below, we describe the steps involved in exporting any ELO object - cabinet, folder, level, index etc.

1. In the archive, navigate to the location from which you want to export objects. To export a folder, switch to folder level. In our example, the folder *Press cuttings* is highlighted. It is exported along with all subentries.

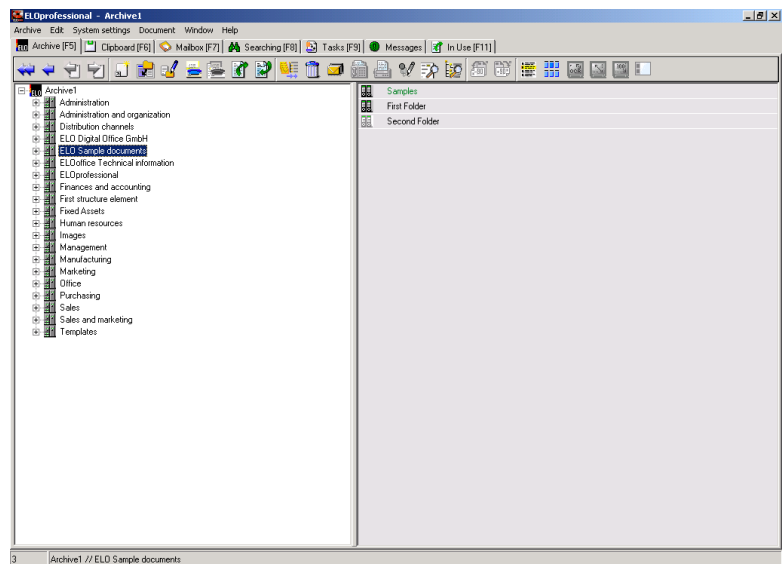
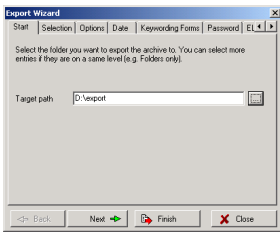


Fig. ELO object selected for export



2. In the menu bar, click on *Archive* and select the option *Export*. The *Export Wizard* window opens to the *Start* index card.



3. In *Target path*, enter the path for the storage medium or the storage location. In our example, the storage location selected to which to export data is the directory D:\Export.



You can enter the drive information and directory for exporting the data set yourself or by clicking on the selection button. A confirmation dialog will then appear. Select the relevant folder, if necessary.



Please remember that the selected directory should not contain any other files or folders.

4. Click on *Next*.

5. The Export Wizard shows the *Selection* index card. The current archive level is shown in a box on the *Selection* index card. In our example, it is the folder level. You can select a single folder by clicking on it. The folders displayed are, of course, dependent on the structure of your archive and the available archive entries. Here is an example with several possibilities to choose from.



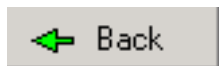
Fig. Export - 'Selection' index card

6. You can either choose a single entry from the list or you can activate the checkbox *Export all items*. All objects displayed in the box are selected and are then exported.

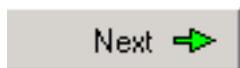


Fig. Export - 'Selection' index card

In our example, the entry *Press cuttings* is selected. Then click on *Next*.



In the Export Wizard you can move forward and back by clicking on the *Back* button to go back a step to make changes to what you have entered thus far.



Using the *Next* button, you can move forward a step.



Using the button *Finish* you can make the export process quicker and simpler. If, for example, you regularly export the same settings with identical Export Wizard settings, you can click on *Finish* to accept those settings.

7. After clicking the *Next* button on the *Selection* index card, the *Options* index card appears. Tick the relevant checkboxes.



## Options



Fig. Export - 'Options' index card

### Include documents

If the checkbox is not ticked, only the archive structure is copied - i.e. all ELO objects but not the documents.

### Include documents from the chaos file

Ticking this checkbox means all the documents in the chaos file are also copied. The documents are not visible in the archive when reimported, but are available in the database. You can only access these documents using the *Search* function.

### Delete documents after exporting

Ticking this checkbox means that all documents are deleted from the archive after they have been exported. However, the documents are only marked for deletion and can be restored again using the *Archive, Deleted entries, View* function.

### Export all document versions

Ticking this checkbox means all version-controlled documents are exported along with all versions of them saved in the archive.

## Export all attachment versions

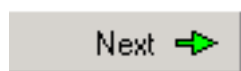
All documents with attachments and the individually filed attachments are exported together with all the versions, assuming they were filed as version-controlled.

## Replace shortcuts with originals

Any shortcuts are replaced with the original files when exporting. Some documents may then be available multiple times in the export data set.

## Export keyword lists

Existing keyword lists are exported and made available to the user again after importing the data.



8. Click on *Next*. The *Date* index card appears. If you only want to export documents from a specific period, you can define that period here.

In our example, the option *All documents, no date restriction* was not checked. Documents from the period 01.12.2002 to 31.01.2003 will be exported.

## Date

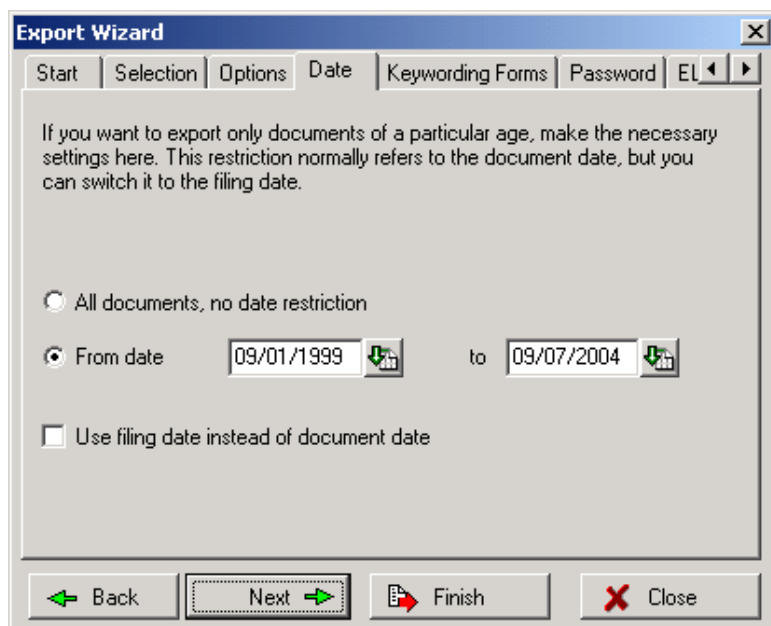
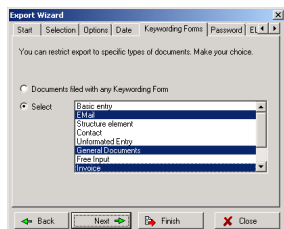


Fig. Export - 'Date' index card

## Use filing date instead of document date



Ticking this checkbox means documents are selected for export using their filing date. If the *From date* feature is not checked, then obviously the *Use filing date instead of document date* checkbox is not available.

9. Click on *Next*. The *Keywording forms* index card appears. Here, you can limit the export to certain document types by selecting the relevant keywording forms. All available keywording forms are displayed. If you check the option *Documents filed with any keywording form*, all the documents will be exported.

In our example, the keywording forms *E-mail* and *General document* are selected.



You can select multiple forms individually by holding down the CTRL key while clicking on the entries in the list.

## Documents filed with any keywording form

### Select



All documents are exported (in our example, all documents from the selected folder).

Select the keywording form(s). Documents are only exported if they were keyworded using one of the selected keywording forms.

Click on *Next*.

10. The *Password* index card appears.

To export encrypted documents and other encrypted ELO objects you need the password for the relevant encrypting key. To export encrypted documents, enter the *Password* for the encrypting key in the *Password* field. The passwords and encrypting keys are set in the *System settings*, *Encrypting keys* by the administrator or a user with administrator rights.

## Password

The screenshot shows the 'Export Wizard' dialog box with the 'Password' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs: 'Start', 'Selection', 'Options', 'Date', 'Keywording Forms', 'Password', and 'EL'. The 'Password' tab contains the following text: 'If you want to export documents protected by encrypting keys, check 'Export encrypted documents' and enter the appropriate passwords. These documents will be decrypted during export.' Below this text is a checkbox labeled 'Export encrypted documents'. To the right of the checkbox is a 'Trade' field with a numeric keypad (2-8) and a 'Password' field with a text input box. Below the 'Password' field is a section titled 'If no password is entered, encrypted documents will be treated as follows:' with two radio button options: 'Export ignores document and passes on.' (selected) and 'Import stops and asks for the password'. At the bottom of the dialog are four buttons: 'Back' (with a left arrow), 'Next' (with a right arrow and highlighted with a dashed border), 'Finish' (with a red arrow), and 'Close' (with a red X).

Fig. Export - 'Password' index card



Remember that you can only export data if you have *Exporting* permission (*System settings, Users, User management*).

## Export encrypted documents

If the document contains encrypted documents and you also want to export these - they will be unencrypted when exported - you need to enter the password for the appropriate encrypting key. To do so, tick the checkbox *Export encrypted documents*.

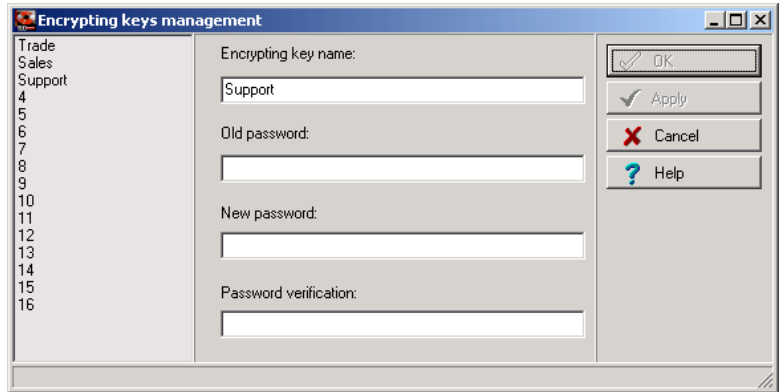


Fig. Managing encrypting keys

## Password

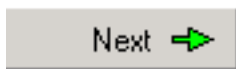
Here you can set the password for the encrypting key. In our example, the password has been entered for the encrypting key *Support*.

## The Export Wizard skips the documents and continues.

When exporting, you are not asked to re-enter the passwords. Permissions for documents - known as document keys - are not requested.

## The export stops and asks for the password.

When exporting, the password for the encrypting key is requested for each encrypted document. If you do not want export encrypted files, disable this function.



11. When you have entered all your settings, click on *Next*. The *ELOviewer* index card appears.

12. In the dialog boxes, enter the name of the export archive and select an empty directory in which you can enter the data for the export viewer (or for CD-ROM preparation).

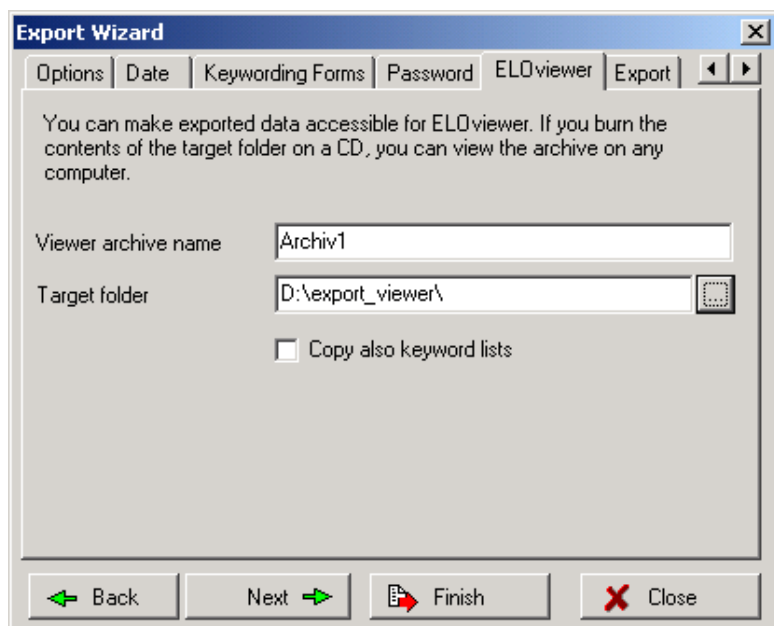


Fig. Export - 'Viewer' index card

13. Then click on *Next*. The *Export* index card appears.



14. Click on *Finish*. **ELO** starts by creating the export data-set. The data is copied to the directory. In the report window for the *Export* index card, a status report is generated.

In the report window on the *Export* index card, a report is generated on the progress of the export procedure.

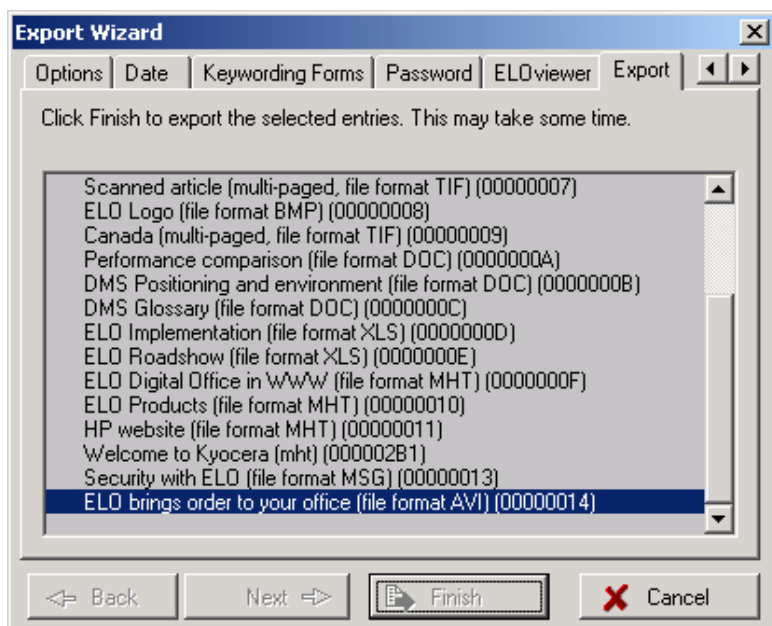
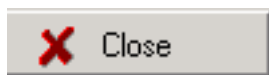


Fig. Export - 'Export' index card



15. You will then receive notification that the export has been completed successfully. Click on *Close*. The Export Wizard closes. The export dataset is now in the directory you selected.

---

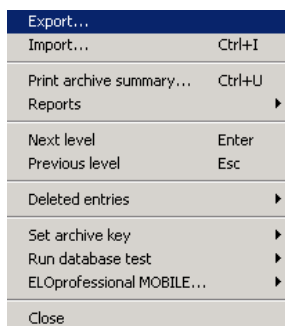
# Stand-alone archives

You can create a stand-alone archive – or a CD-ROM for publication – in **ELO***professional* using the export procedure as described in the previous section.

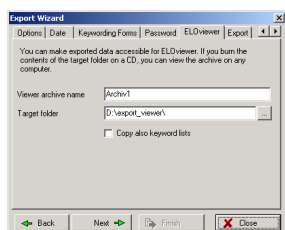
To create a stand-alone archive, proceed as follows.

1. Create a folder into which you can copy the data for the stand-alone archive during the export procedure. The directory should not contain any other files.

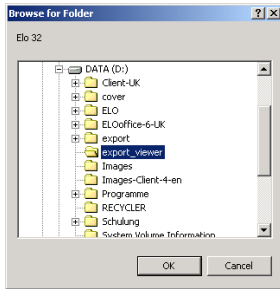
2. In the archive, select the section (cabinet etc.) to set up as a stand-alone archive. Then select *Export* from the *Archive* menu. The Export Wizard opens.



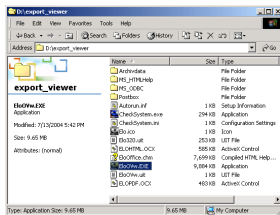
3. Proceed as described above for creating an export dataset until you reach the *ELOviewer* index card.







## Start viewer



4. Select the directory you created in which you want to copy the data for the stand-alone archive. Then click on the *Finish* button on the *Export* index card. The data is copied to the directory. You will then find all the data necessary for a stand-alone archive in the directory selected above.

To start the stand-alone archive, click on the file `EloOVw.EXE`.

To place the stand-alone archive on another medium, e.g. a CD-ROM, you have to copy all the files and folders in the directory to the CD. The data has to be on the top level of the CD, so that the CD can auto run.

After starting the ELOviewer and the stand-alone archive, you can view the data in the Archive, Clipboard and Searching areas and search the documents in the archive. The stand-alone archive can also be run on computers that do not have ELO installed.

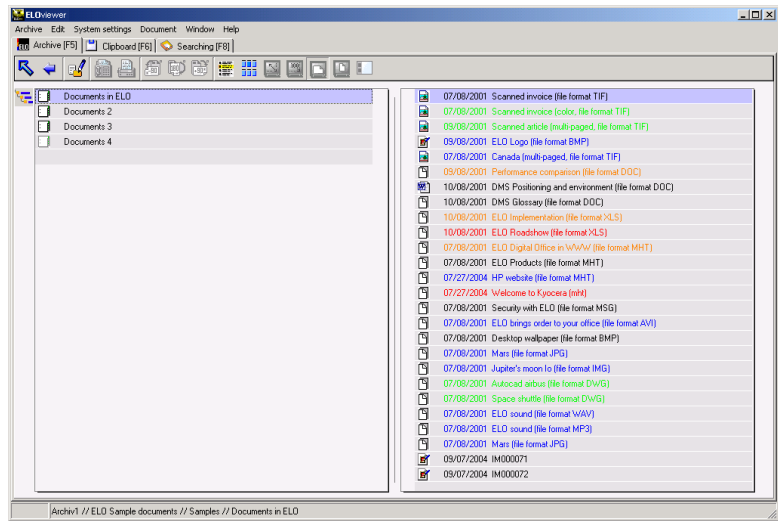


Fig. Displaying data in the stand-alone archive

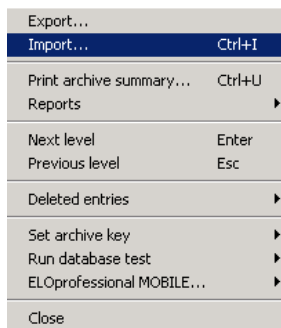


Remember that you have to consider the size of the data when creating a stand-alone archive, because the data medium has limited capacity.

---

# Importing and the Import Wizard

Using the Import Wizard you can reimport archives back into **ELO**. This function can be used together with the Export function, for example to move documents and other ELO objects from one archive to another.



1. In the *Archive* menu, click on *Import*. The *Import Wizard* dialog box opens. The *Source* index card is active.

2. In the *Source* field, enter the path containing an archive export dataset.

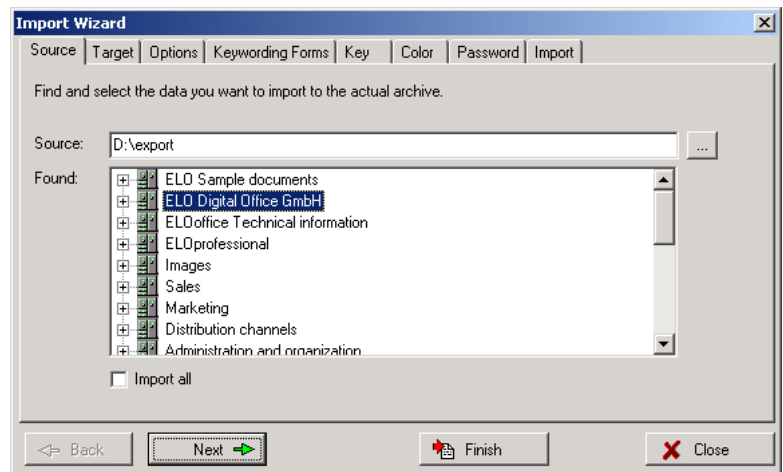
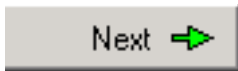
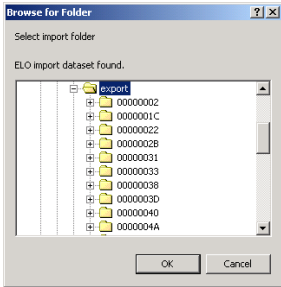


Fig. Import - 'Source' index card



3. Click on the Select button. The *Browse for folder* window appears.



4. Select the directory containing the export data. Select the folder containing the section of the archive you exported and click on OK. The path is now entered in the *Source* field. All sections of the archive found at this location are shown in the *Found* field. Uncheck *Import all* if you only want to import certain objects, such as a single index or folder.

5. Click on *Next*. The *Target* index card appears. A summary of your current archive is displayed on the index card. Select the target path for the import data. The folder *DEMO Testimport* is selected in our example.

## Target

If you ticked the checkbox *Import all* in the *Source* index card, **ELO** suggests the option to *Use current position in the archive*.

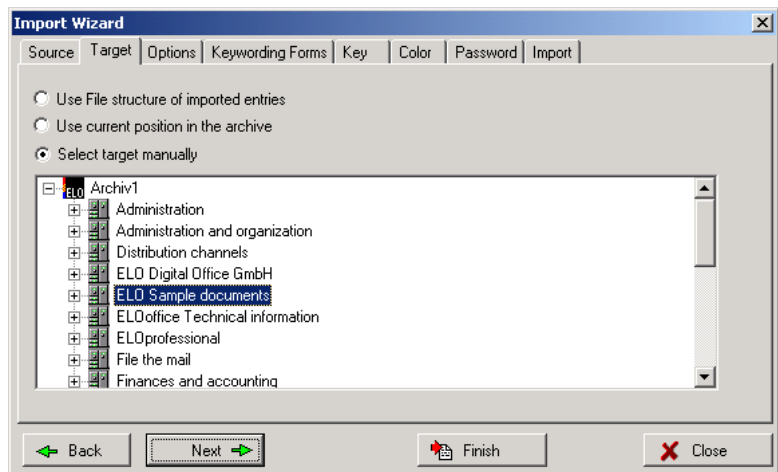


Fig. Import - 'Target' index card

### Use file structure of imported entries

This setting inserts the exported section of the archive back in its original archive location.

### Use current position in the archive

The section of the archive is imported to your current location in the archive. You do not have to be at folder level to be able to import a folder.

### Select target manually

Using this option, you can specify the import path manually, following the structure of the current archive.

6. Then click on *Next*. The *Options* index card appears.

### Options

If you activate this option, new entries are created in the archive for all imported objects - cabinets, folders, levels, indexes - irrespective of whether the objects are already available in the archive.

### Create own file structure

A new file structure is created. The archive structure is not affected by this and new objects are added to it.

If you do not check this feature, the import data is added to the existing structure and mixed with the existing documents and indexes. Existing ELO objects are, however, not overwritten. The imported documents are added, even if they are already present.

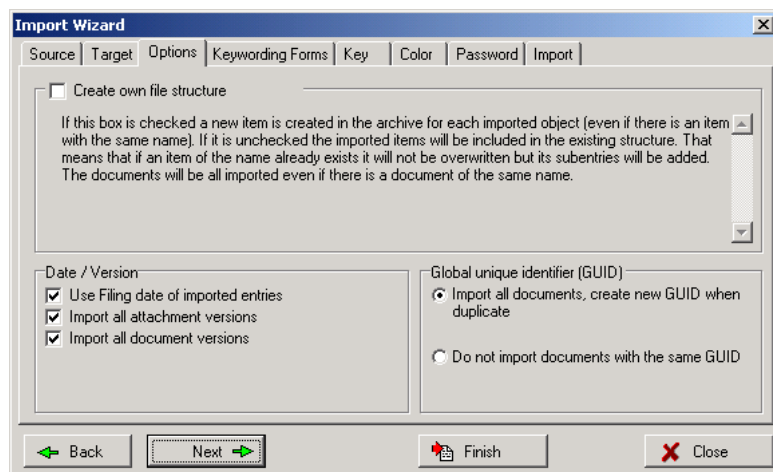


Fig. Import - 'Options' index card

**Use filing date of imported entries**

Turn on this function if you want the imported objects to retain their original filing date. Otherwise, the imported ELO objects will be assigned today's date as a filing date.

**Global Unique Identifier (GUID)**

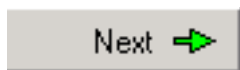
Each ELO object is given a Global Unique Identifier (GUID). This means every object can be addressed individually and when importing, objects can be uniquely identified to avoid duplication.

**Import objects independently of their GUID**

If you select this option, all objects are imported irrespective of their GUID.

**Do not import objects with GUIDs in use in the archive.**

If you select this option, **ELO** checks the GUID of the ELO objects so that duplicates are not imported or filed in the archive.



7. Select the relevant options. Then click on *Next*. The *Keywording forms* index card appears.

In the reports window on the *Keywording forms* index card, the keywording forms are displayed that are needed for importing the ELO objects but which are not available in the current archive. You may first have to create the forms in *System settings*, *Keywording forms* or activate the option *Import keywording forms with the data*. With the option *Import keyword lists* you can integrate keyword lists in the export data set.

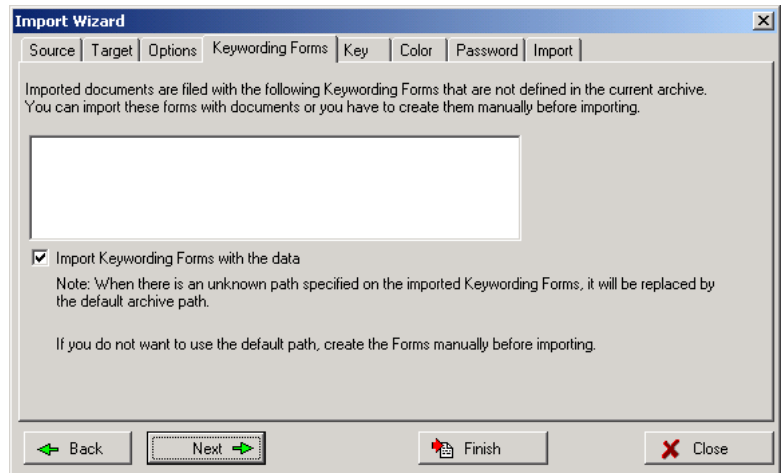


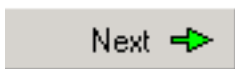
Fig. Import - 'Keywording forms'

## Import keywording forms with the data

If you check this feature, the keywording forms are imported along with the data. Turn on this option if not all the keywording forms are available in the target archive.



Please bear in mind that any document path information about these keywording forms is not imported. These are not imported, because they are most likely no longer valid in the target archive. The documents using these keywording forms are filed in the default path. If you want to file them in another location, you have to create the keywording forms manually before importing.



8. Click on *Next*. The index card *Key* appears. In the report window on the index card, the keys are displayed that have been assigned to individual users or groups and that are not present in the current archive.

## Key

The missing keys can be replaced by selecting the option *Replace* and selecting a key available in the archive – in our example, the system key. Otherwise, the option *Import keys with the data* is active by default.

9. Click on *Next*. Missing keys are also replaced if necessary, depending on the settings. The *Color* index card appears. Enter your settings here so that missing colors can be replaced by those colors that are available.

## Color

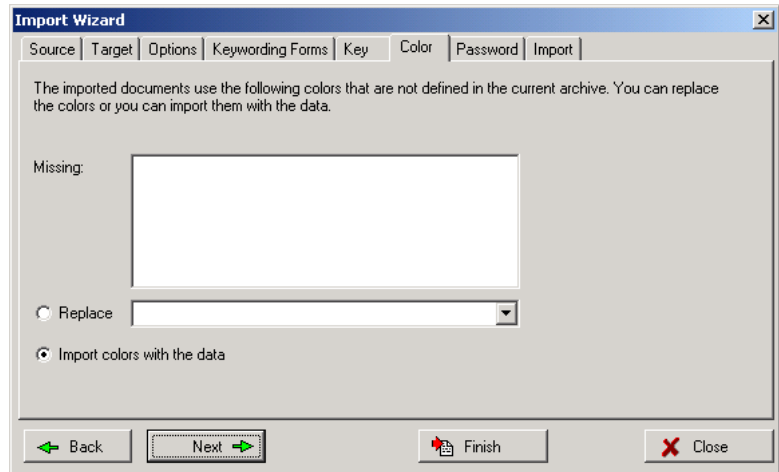
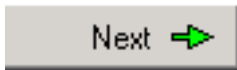


Fig. Import - 'Color' index card



10. Click on *Next*.

The *Password* index card appears. If your import dataset includes encrypted ELO objects encrypted using a particular key, you have to enter the relevant passwords - in our example, for the *Accounting* encrypting key etc. – in the *Password* field.



# Password

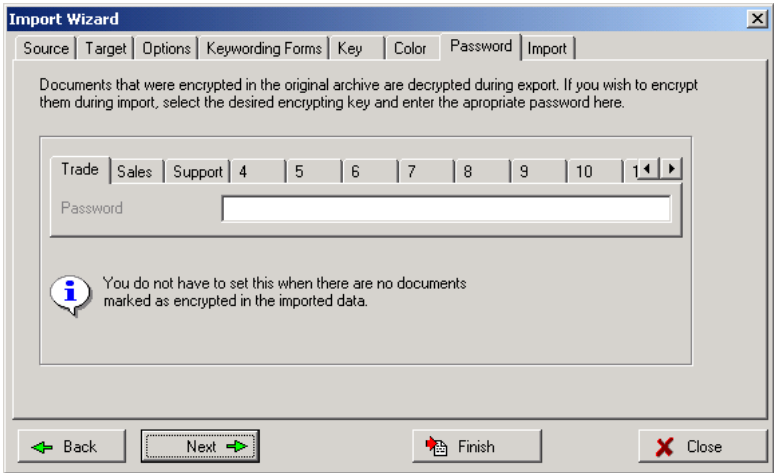
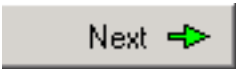


Fig. Import - 'Password' index card

In our example, the archive is imported without encrypted documents. **ELO** verifies the import dataset and notifies you where appropriate. If it does not contain any encrypted documents, the *Password* field is grayed out.



Please familiarize yourself with the keywords *Encrypting key*, *Encryption* and *encrypted objects* using the index.



11. Click on *Next*. The *Import* index card appears.

## Finish

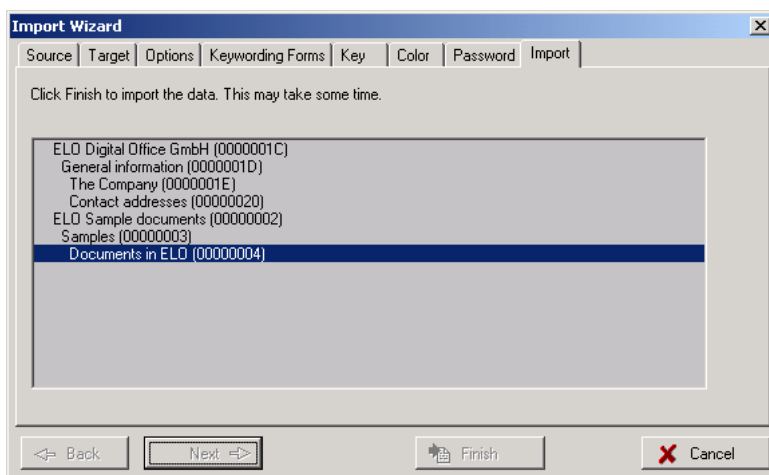
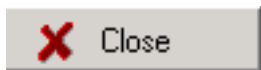


Fig. Import - 'Import' index card



12. Click on *Finish*. In the report window on the *Import* index card, a report is generated on the progress of the import procedure. Here, you will find information about any errors when importing datasets.



13. Once the report window informs you that the import procedure has been successfully completed, you can click on *Close*. That concludes the import procedure.

---

# The ELOviewer

## Displaying export datasets

The **ELOviewer** is a stand-alone program and can optionally be bundled with all export data sets. It allows the an exported dataset to be viewed without needing ELO installed. If it is not available in your installation, you can download it from the **ELO** website.

To use the **ELOprofessional** exported dataset viewer, you need the most recent version of **ELOprofessional**. The ELOviewer adopts all the settings from **ELO**. If you want to make changes at a later date, there is only limited provision to do so.

## Installation

Follow the steps below to install:

1. In the **ELOprofessional** mailbox directory, create a subdirectory called *ViewerPostbox*.
2. Unpack the files from the downloaded file into this folder.
3. Now create the subdirectory *Administrator* und *COLD* in the viewer directory. If you are working with *COLD* documents, copy all the background documentation into the *COLD directory* from the default *COLD* directory.
4. If yoy also want to use your keyword lists in the viewer, copy all or some of your \*.SWL files and the file *STICHWORT.TXT* from the mailbox directory to the *ViewerPostbox* directory.

## Creating an export dataset with ELOviewer

1. After installing ELOViewer, you can start a data export using the menu option *Archive, Export*.

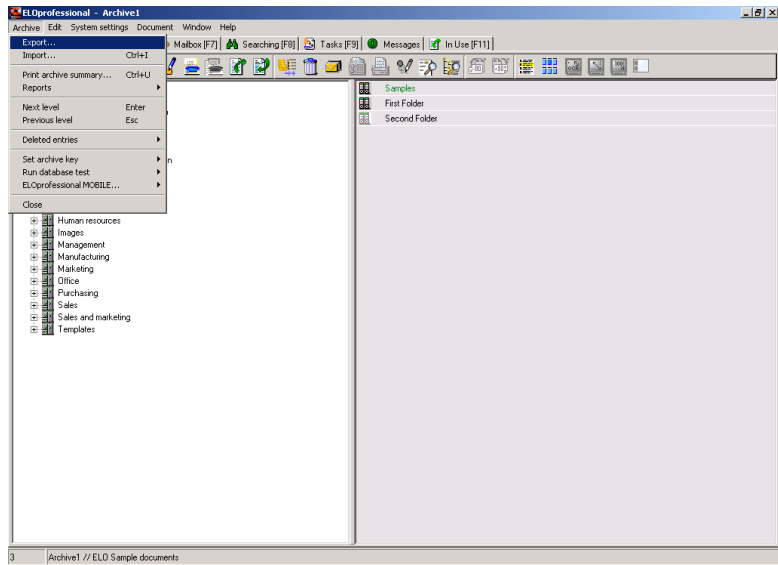


Fig. Creating an export dataset

2. Once you have installed the ELOviewer, an additional index card (*Viewer*) appears in the export dialog.

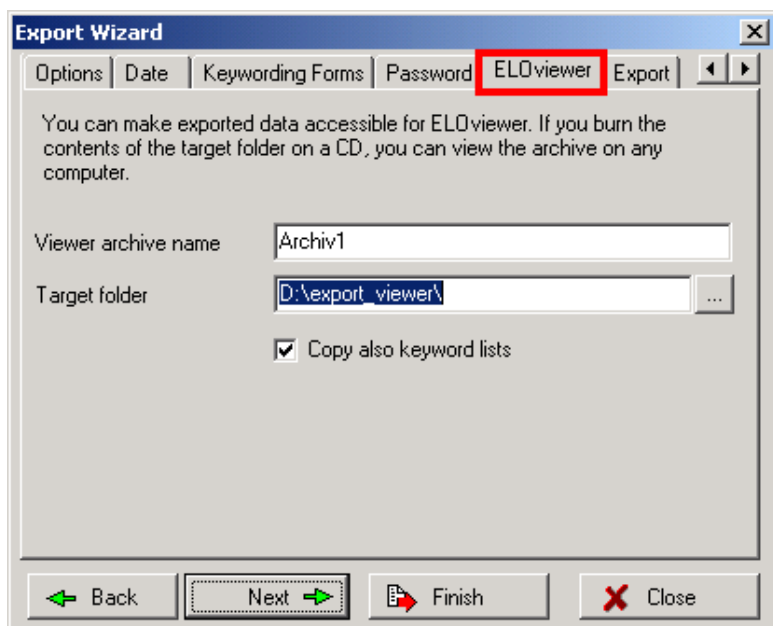


Fig. Creating an export dataset - 'Viewer' index card

3. Follow the same procedure as used for exporting an export dataset. In the *Viewer archive name* enter a name for the archive. And in the *Target folder* field, select an empty target folder for the stand-alone archive. Make the necessary changes.

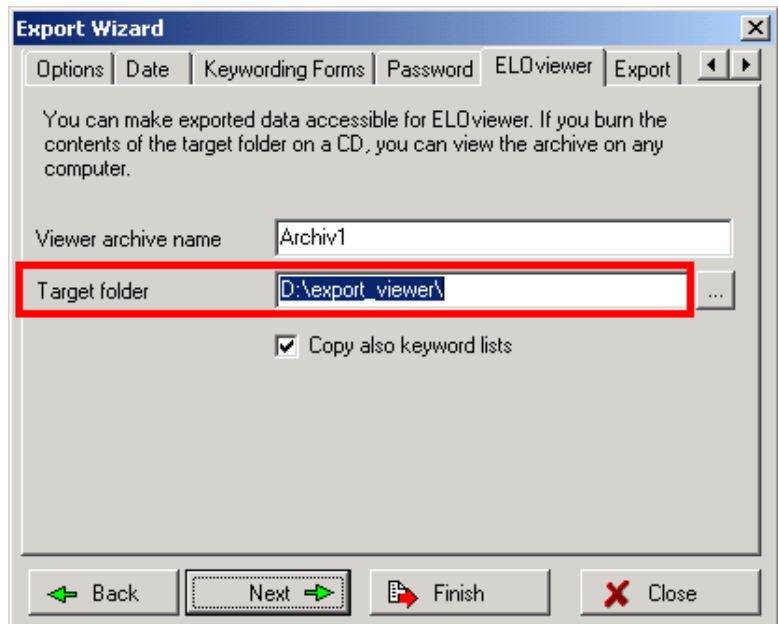
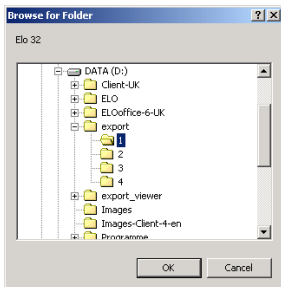


Fig. Selecting a target directory for the viewer



4. On the *ELOviewer* index card, select an empty folder in which to store the data using the corresponding button.

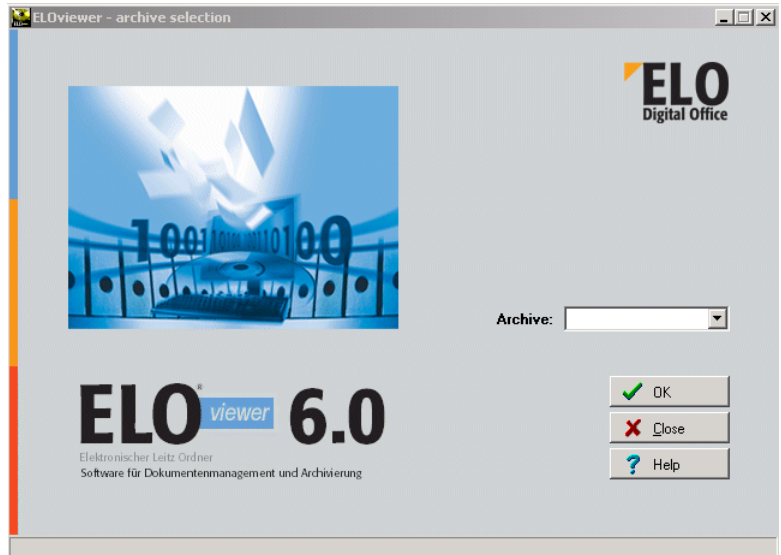


Fig. Viewer start screen

5. The export dataset and the program data for the ELOviewer are stored in the selected directory.
6. The ELOviewer is then started automatically. You will find the directory structure and the documents from your export dataset in the viewer display.
7. Close the ELOviewer using the menu entry *Archive, Close*.

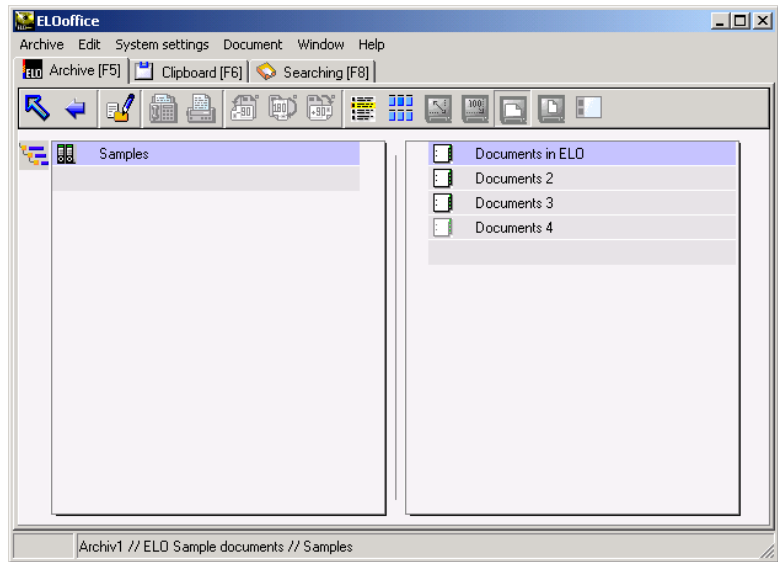


Fig. Documents in ELOviewer

8. In the archive from which you exported the data, you will find a status dialog box in the export wizard confirming that the viewer dataset has been successfully created.



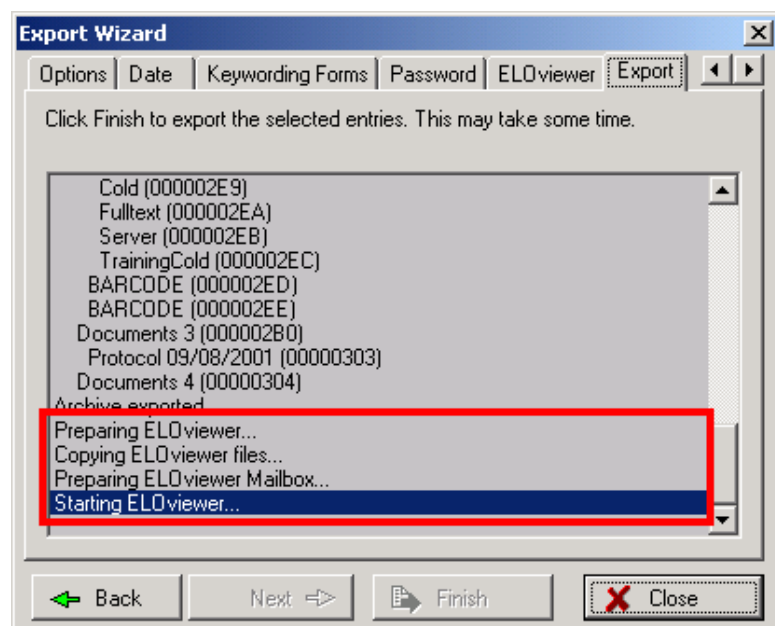


Fig. Creating viewer data - status report

## An export dataset on CD

In the directory selected for the export dataset and the viewer you will find the program files for the viewer and the archive data.

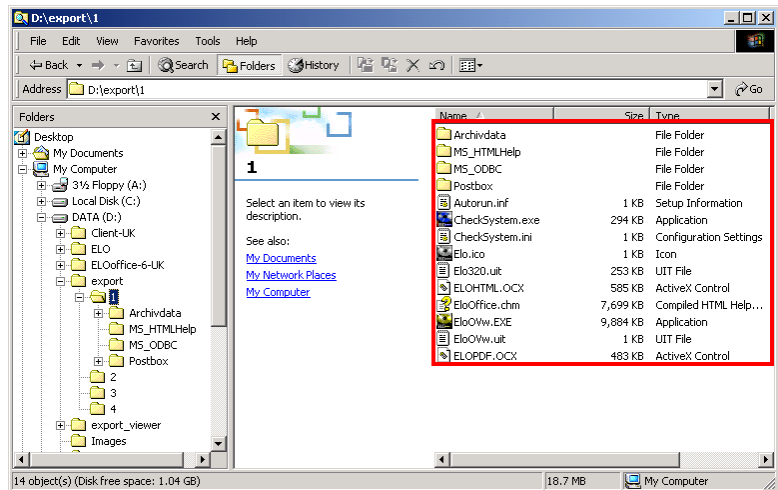
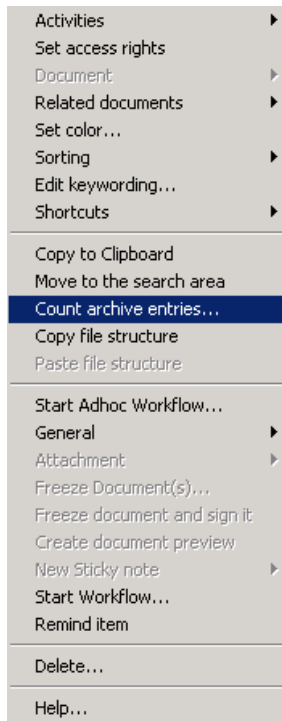


Fig. Copy export data to CD

To create a CD with the relevant data, you have to copy all the files and folders in the particular folder to the CD. To do this, use any commercially available CD burning program.



Bear in mind that the size of the export dataset cannot exceed the storage capacity of the CD. Check the capacity before you even create the export data from the *Count archive entries* option in the archive context menu.



The context menu opens. Open the menu item *Count archive entries*. The window *Count archive entries* opens.

Using the *View* button, you can see a summary of the storage space required.

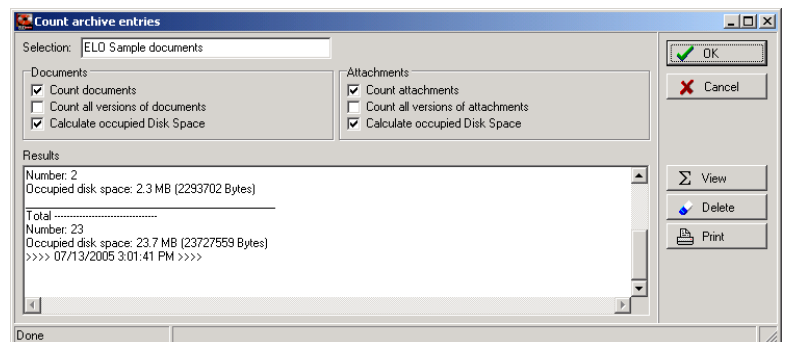


Fig. Displaying storage space

This summary is shown in the *Results* window.



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# Using the ELOviewer

## Opening ELOviewer

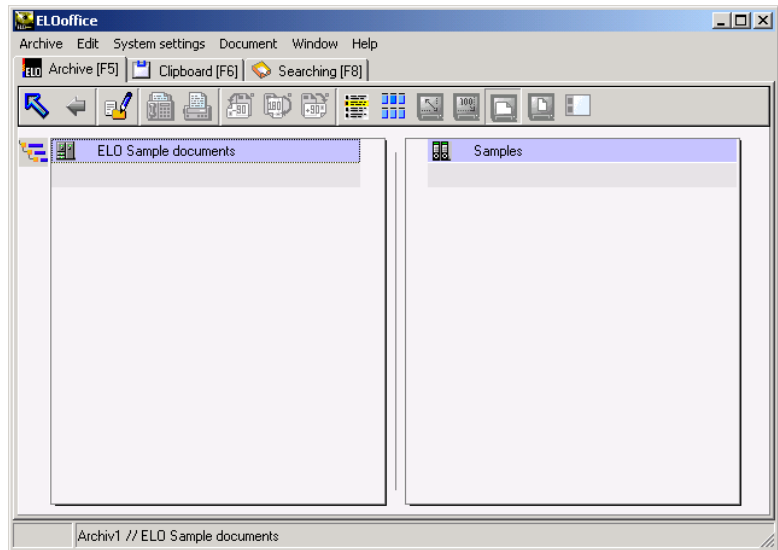
1. The ELOviewer starts automatically when you insert the CD. If it does not, start the viewer by clicking on the file *EloOVw.exe*.
2. The start-up screen appears.



Fig. ELOviewer start screen

3. The main screen is opened showing the exported data.

## Archive view



### What features does the ELOviewer offer?

You can display the documents in ELOviewer, print them and search through the documents.

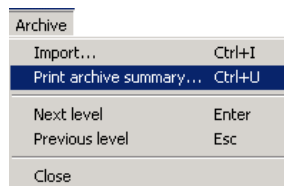
The *Clipboard* index card works in the same way as in **ELO**professional. From the menu option *General system settings* you have the option of making changes that do not directly affect the directory structure or the content of the documents.



In the ELOviewer it is not possible to save either the archive directory, the keywording or the content of the files and then save them elsewhere in ELOviewer.

Changes are not usually reflected in the archive. You can save documents to external media, such as diskette, CD-R/CD-RW etc.

## Print archive summary



1. One of the features of ELOviewer is the *Print archive summary* feature. You can print out the whole archive summary for reference. In the menu bar, click on *Archive* and select the option *Print archive summary*. The *Print archive summary* window appears.

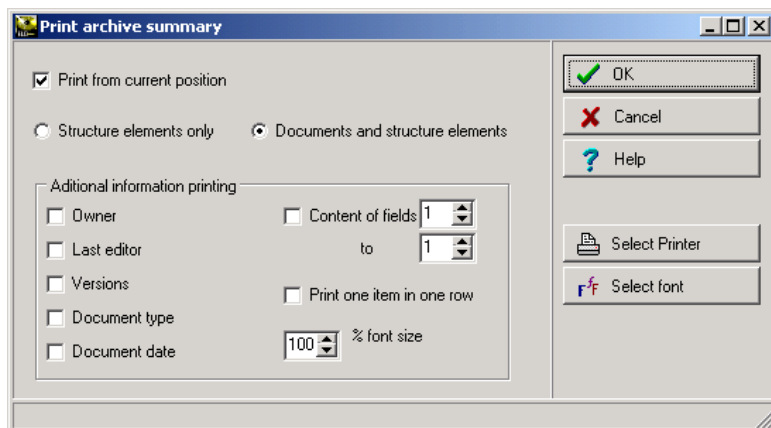


Fig. Printing the archive summary

2. Select what you wish to print out.

## General system settings

In the menu bar, click on *System settings, Options*. The *General system settings* window appears. You can change the settings in the *Display*, *Viewing filters*, *Sticky notes* and *Searching* index cards.

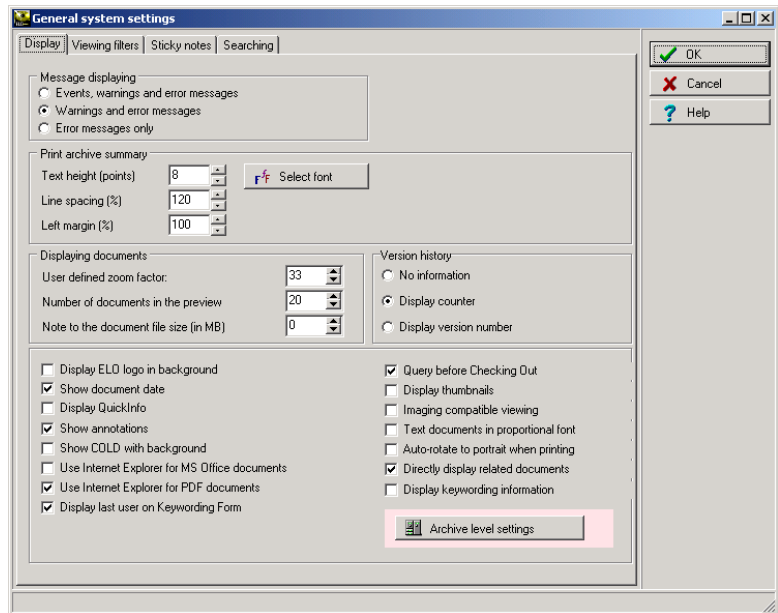


Fig. Viewer system settings

If you keep the default settings, you can use all the documents in the archive.

## Navigating in the archive

When you start the program, the *Archive* index card is in front by default.

In this view, the work area resembles an open Leitz folder. The following screenshots show scaled down parts of the ELO work area.



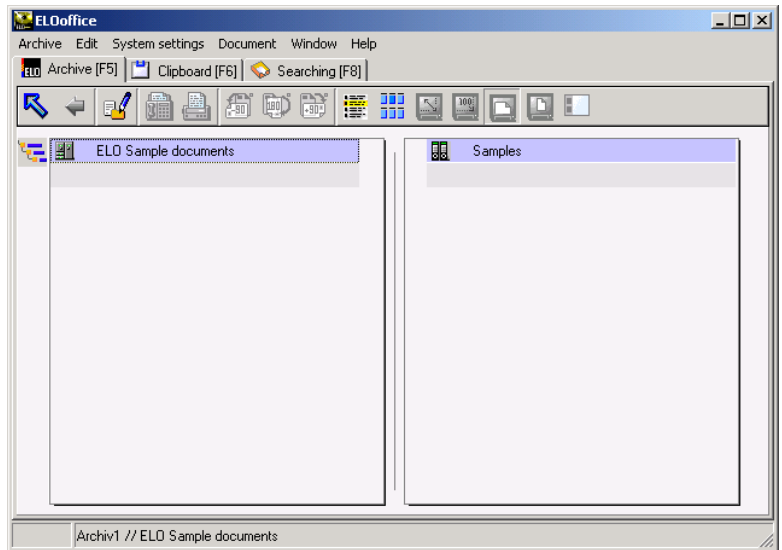


Fig. ELOviewer main view

The archive entries are always on the left side, i.e. the name or description of the filing cabinet, folder, index or document. Using the icons, you can see whether it is a filing cabinet, folder etc.

The right side of the ELO work area always displays the content of the archive entry selected on the left-hand side. If you select a filing cabinet on the left, you can see what it contains – the folders – on the right. You are at the filing cabinet level. To see the contents of a folder, you have to leave this level. Single-click on the folder whose contents you want to view/edit.

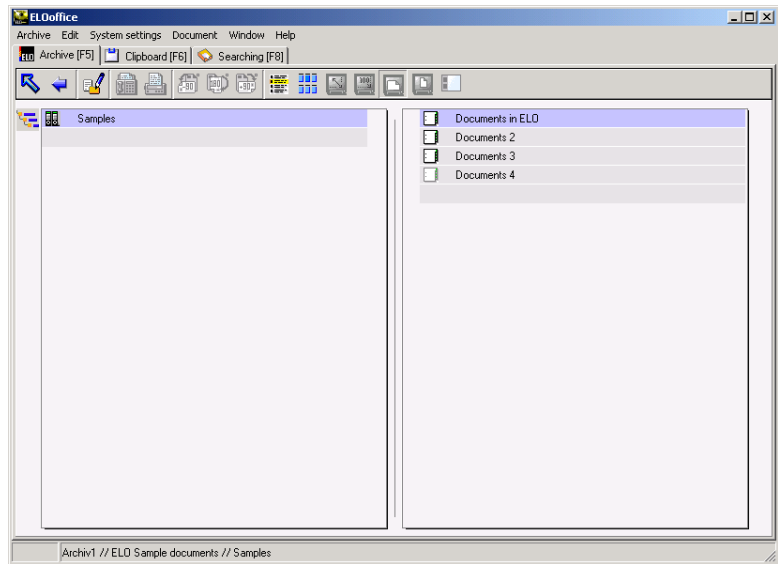


Fig. Viewing the contents of a folder

The folders are now on the left side and the index selected in the folder is now displayed on the right.

This means that you have changed from the filing cabinet level to the folder level.

If you select an index on the right, the indexes move to the left side. The documents contained within the selected index are now shown on the right. You have changed archive level once again. You are now at index level.

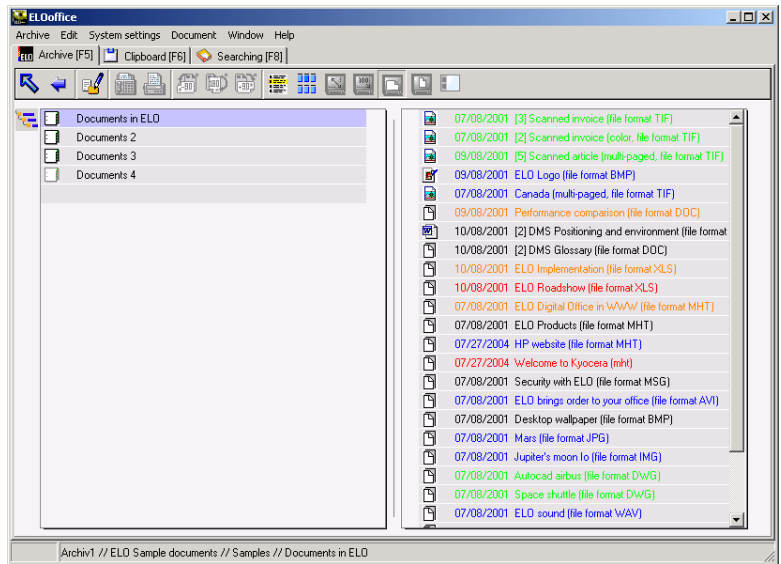


Fig. Viewing the contents of an index

If you click on a document, the list of documents is displayed on the left. On the right, you can see whichever document is selected in the left pane. Now, for example, you can edit, copy, send or print the document.

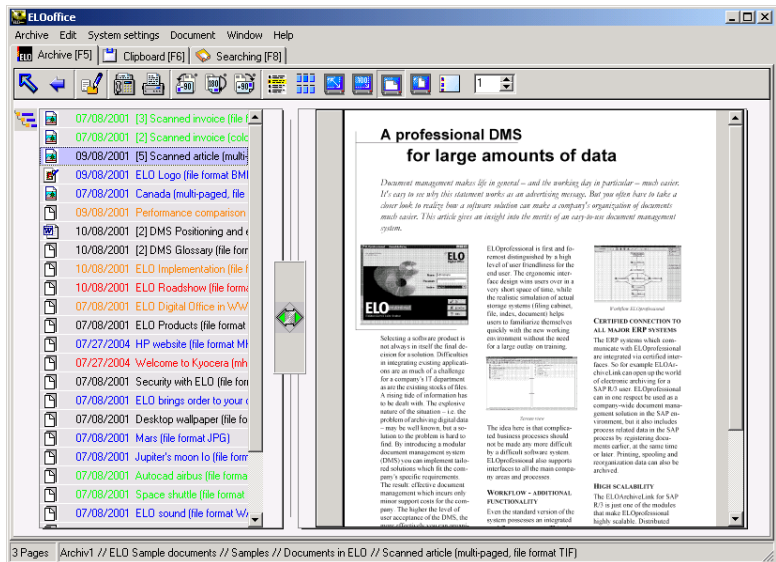


Fig. Viewing a document

## The Searching index card



You can initiate a search for objects from any level of the archive.

Click on the index card *Searching [F8]*. To the left of the toolbar in the *Searching* index card, you can see two pairs of binoculars as search icons.

The binocular icon on the left is for a general search. All keywording forms that can be used as search forms are shown. Select the keywording form you used to keyword the object you want to find.

The binocular icon on the right serves another useful search purpose: finding sticky notes. Enter the text to find. A keyword is sufficient, as **ELO** searches the entire note text.

## The Clipboard index card

The *Clipboard* index card show you the contents of your clipboard. The Clipboard allows you to move or copy individual sections of your archive. You can temporarily copy filing cabinets, folders, levels, documents and indexes to the clipboard so that you can then move or copy them to another folder, for example.

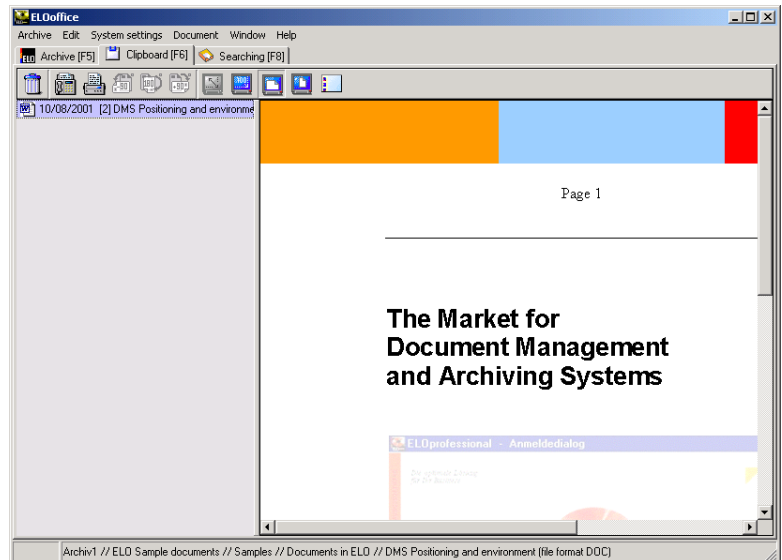


Fig. 'Searching' area

The quickest way of copying an object to the clipboard is by dragging and dropping.

1. Left-click on the object you want to copy to the clipboard.
2. Drag the document to the tab of the *Clipboard [F6]* index card. Now release the mouse button. The object is now on the clipboard.

## Processing export data

All documents in the archive are classified as export files. These cannot be changed and then moved back to the archive. If you still want to edit a document, you can do so using the *Open* function. Proceed as follows:

1. Right-click on the document name. A context menu opens.

2. Then click on *Document* followed by *Open*.

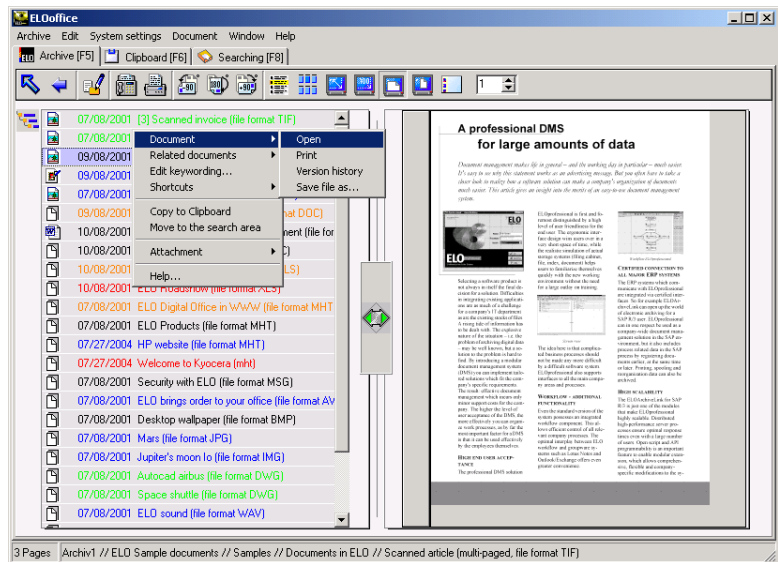
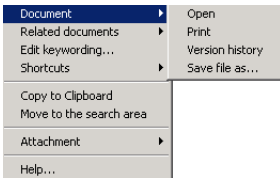
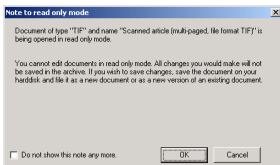


Fig. Viewing a document



Another warning dialog appears to alert you to the fact that your changes will not be reflected in the archive.

3. Click on *OK*.

Once you have opened the document, you can now make changes to it and save them to an external medium (disk, drive etc.).



You cannot save this modified document back into the archive.

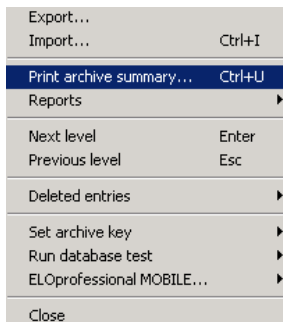
## Closing ELOviewer

You can close the ELOviewer by clicking on *Archive*, *Close*.

Import...	Ctrl+I
Print archive summary...	Ctrl+U
Next level	Enter
Previous level	Esc
Close	

---

# Print archive summary



*Print archive summary* provides an overview of the entire archive. Filing cabinets, indexes, folders and documents are listed systematically.

1. In the *Archive* menu, click on *Print archive summary*. The *Print archive summary* dialog appears.
2. Click on *Options* to ensure the summary only contains the information you need.

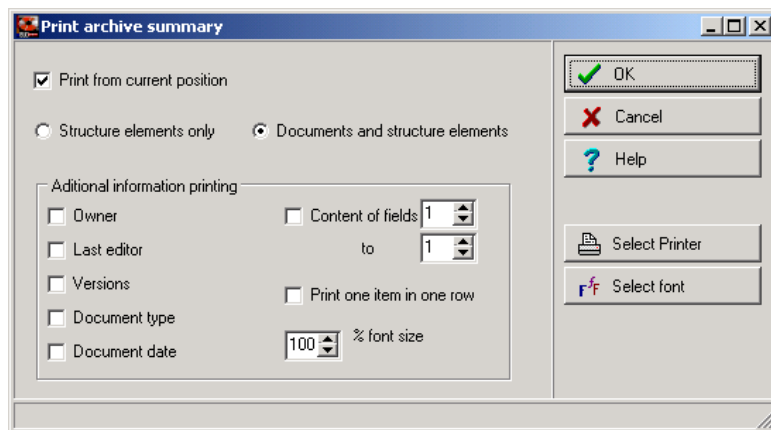


Fig. Printing the Info sheet with archive information

The following settings are available when printing an archive summary:



**Print from current position**

If you only want to print a section from the current archive, select this option. The summary will then be printed from the current position. Say you have entered a filing cabinet and selected the option *Folder* under *Print to level*, then only the folders from the open cabinet are included in the printout. As well as the structural information and the content of your filing cabinet, you can print additional information, depending on the checkboxes you tick in the *Additional information printing* area.



Before you start printing using this option, double-check that you are at the right place in your archive.

**Structure elements only**

If you have selected this option, only structure elements are printed out and not the summary of the structure elements in the document.

**Structure elements and documents**

If you have selected this option, the structure elements and documents will be printed out.

**Printing additional information**

This option allows you to print a summary of the metainformation.

**Owner**

If you tick this box, the owner of the document is displayed.

**Last editor**

If you check this option, the last person to edit the ELO object is shown in the archive summary.

**Versions**

If you tick this option, a summary of the versions of all version-controlled documents is included in a list. In the printed archive summary you will find the version numbers, the counter and any supplementary comments.

**Document type**

You will find brief information about the document type in the summary, e.g. whether it is a PDF, TIF or e-mail object (MSG).

**Document date**

If this option is ticked, the data will also be printed.

**Content of fields ... to**

Here you can enter whether index fields are to be printed on the archive report, and if so which.

## Print one item in one row

## Percent font size

☐ Owner

☐ Last editor

☐ Versions

☐ Document type

☐ Document date



This option enables you to print out in columns.

This option lets you reduce the font size to the percentage you specify.

2. Tick the checkboxes to have the information included in the archive summary printout.

3. Click on the *Select printer* button to select the printer to use. The *Print Setup* dialog appears.

4. Select the printer and confirm by clicking *OK*.

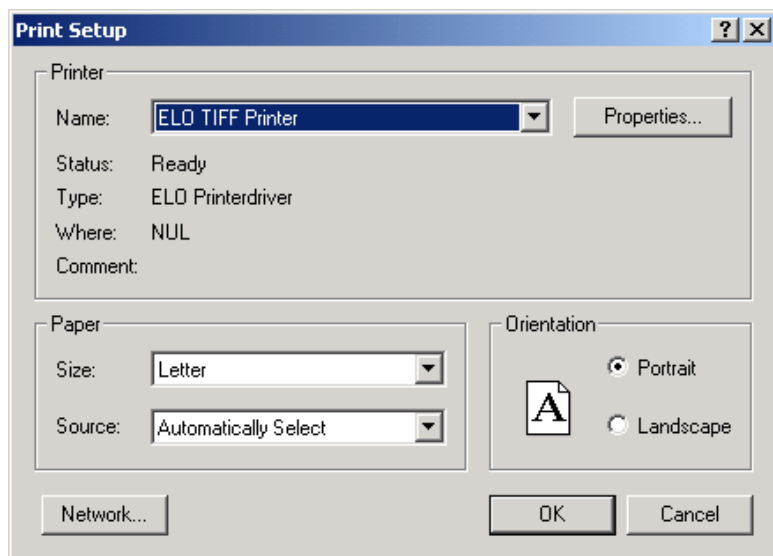


Fig. Selecting a printer

5. Click on *Select font*. The *Font* dialog appears. Select the font, style and size to use to print the archive summary.

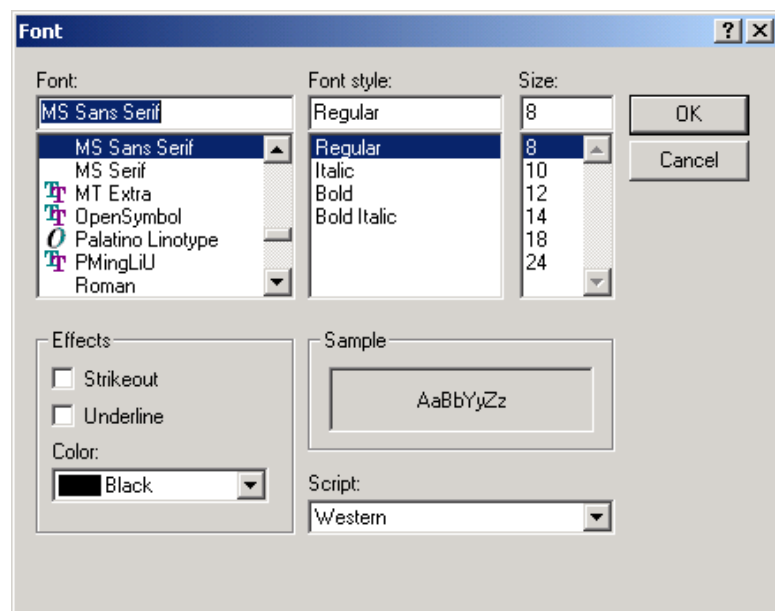


Fig. Selecting fonts

6. Confirm the dialog box by clicking on *OK*. A summary of the current archive is sent to the selected printer. The summary generated also includes information about the size of the ELO objects and the document dates.

If you want your summary to include different information, repeat the process changing the appropriate settings.

The following screenshot shows an example.

ELO Sample documents						
Samples						
Documents in ELO						
Scanned invoice (file format TIF)				30 KB	07/27/2004	
Owner:	Administrator					
Last User:	Administrator					
Version 2 :	09/03/2004	3.0				
Version 1 :						
Invoice No. :	501827					
Scanned invoice (color, file format TIF)				760 KB	07/27/2004	
Owner:	Administrator					
Last User:	Administrator					
Version 2 :	08/02/2004	2.0	Ann. Chatwin			
Version 1 :						
Scanned article (multi-paged, file format TIF)				1310 KB	09/08/2001	
Owner:	Administrator					
Last User:	Administrator					
Version 5 :	09/07/2004	5.0				
Version 4 :	09/07/2004	4.0				
Version 3 :	08/02/2004	3.0	Annotation 2			
Version 2 :	08/02/2004	2.0.1	Sorted or unsorted			
Version 1 :	09/08/2001	1.1	Mixed C23			
ELO Logo (file format BMP)				259 KB	09/08/2001	

Fig. Section of 'Archive summary' print out



Please note that a complete archive summary may be very large.

# Generating reports

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	
Next level	Enter
Previous level	Esc
Deleted entries	
Set archive key	
Run database test	
ELOpessional MOBILE...	
Close	

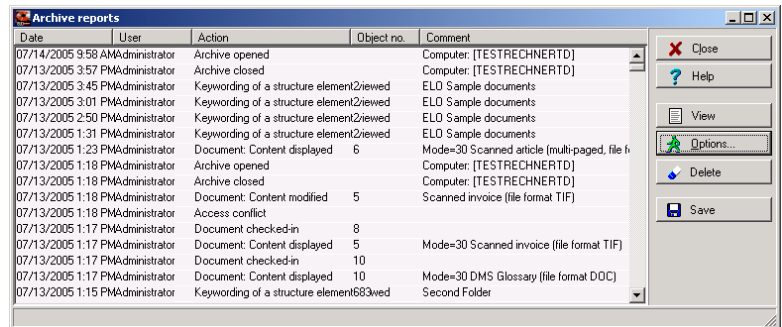
## View report

View Report...
Task Reminder/Mailbox report
System info
System Diagnosis
Access Manager Diagnosis
Server status

With the help of the *Reports* menu command, you can generate reports about the documents and data in the current archive and about different processes in the archive. Mainly for security reasons, the logging of processes and workflows is essential for an electronic archive. The reports that are generated can help you with analyzing errors, if necessary.

1. In the *Archive* menu, open View Report from the submenu.

Using this submenu command, you can display an overview of archive activities. The *Archive reports* window appears.



Date	User	Action	Object no.	Comment
07/14/2005 9:58 AM	Administrator	Archive opened		Computer: [TESTRECHNERTO]
07/13/2005 3:57 PM	Administrator	Archive closed		Computer: [TESTRECHNERTO]
07/13/2005 3:45 PM	Administrator	Keywording of a structure element2viewed		ELD Sample documents
07/13/2005 3:01 PM	Administrator	Keywording of a structure element2viewed		ELD Sample documents
07/13/2005 2:50 PM	Administrator	Keywording of a structure element2viewed		ELD Sample documents
07/13/2005 1:31 PM	Administrator	Keywording of a structure element2viewed		ELD Sample documents
07/13/2005 1:23 PM	Administrator	Document: Content displayed	6	Mode=30 Scanned article (multi-paged, file f...
07/13/2005 1:18 PM	Administrator	Archive opened		Computer: [TESTRECHNERTO]
07/13/2005 1:18 PM	Administrator	Archive closed		Computer: [TESTRECHNERTO]
07/13/2005 1:18 PM	Administrator	Document: Content modified	5	Scanned invoice (file format TIF)
07/13/2005 1:17 PM	Administrator	Access conflict		
07/13/2005 1:17 PM	Administrator	Document checked-in	8	
07/13/2005 1:17 PM	Administrator	Document: Content displayed	5	Mode=30 Scanned invoice (file format TIF)
07/13/2005 1:17 PM	Administrator	Document checked-in	10	
07/13/2005 1:17 PM	Administrator	Document: Content displayed	10	Mode=30 DMS Glossary (file format DOC)
07/13/2005 1:15 PM	Administrator	Keywording of a structure element683wed		Second Folder

Fig. Displaying a report

2. Set up the report to include the actions you want. You can determine the processes that are logged – *Edit document, delete document, close archive etc.* under *Options*.



3. Click on *Options*. The *Report filtering options* window opens.

Fig. Creating options for a report

### From date - To date

In these two fields you can enter a period during which to log and display.

### User

Here, you can choose between displaying report data for a single user or for *All users* of the current archive.

### Object no.

Entering a value in this field allows you to restrict the report to individual ELO objects. Entering "0" (zero) in the *Object no.* field logs all the objects in the archive. By double-clicking on an entry in the *Archive reports* dialog box you can select all the entries for an object in the report that is running.

## Show all

The *Show all* button ticks all the checkboxes in *Options* view where you enter settings for the actions to be logged. Whether all the checkboxes are selected depends on your settings under *System settings*, *Report settings*.

## Small report

Using the *Small report* button activates the settings for a restricted report. You can modify these settings from *System settings*, *Report settings*. In the *Set report information* dialog you can determine which activities to log in the restricted report.

## Extended report

This button activates the settings for an extended report. You can modify these settings from *System settings*, *Report settings*. There, you can set the activities you want to log in an extended report.

## Full report - settings

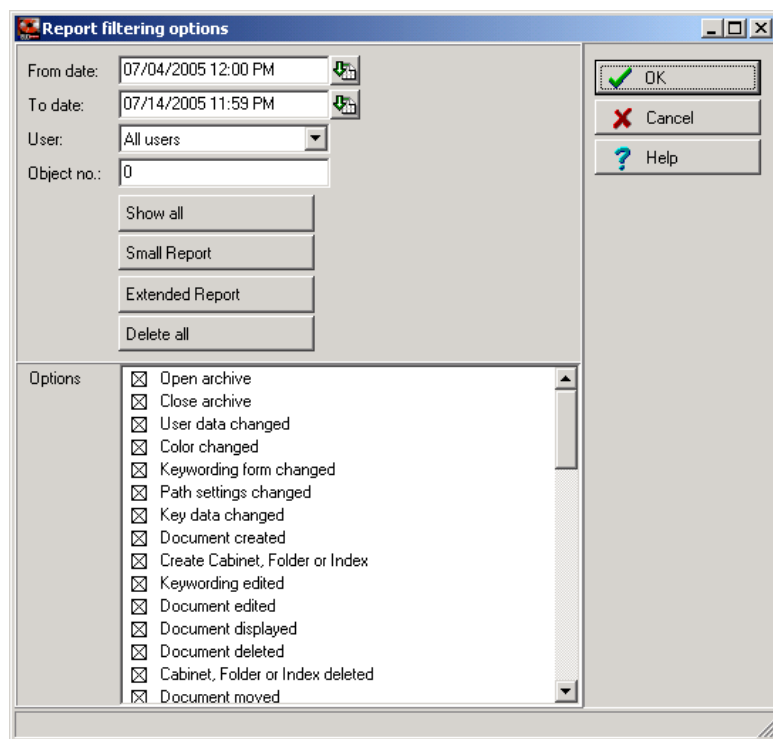


Fig. Specifying report options

## Delete all

Using the *Delete all* button, you can disable all the checkboxes in the dialog box.

## Options

Here you can select those actions to log in the archive report by activating the specific checkboxes. Using the *Small report*, *Extended report* and *Delete all* you can select the checkbox settings by simply clicking.

Summary of the archive actions you can log:

- 01) Open archive
- 02) Close archive
- 03) User data changed
- 04) Color data changed
- 05) Keywording form changed
- 06) Path settings changed
- 07) Key data changed
- 08) Document created
- 09) Create cabinet, folder or index
- 10) Keywording edited
  
- 11) Document edited
- 12) Document displayed
- 13) Documents deleted
- 14) Cabinet, folder or index deleted
- 15) Document moved
- 16) Document shortcut created
- 17) Cabinet, folder or index moved
- 18) Cabinet, folder or index shortcut created
- 19) Shortcut to document or file structure element deleted



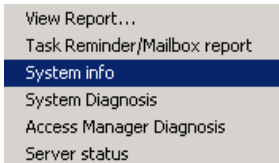
- 20) Force access to a database entry, lock removed
- 21) Color changes to documents or file structure elements
- 22) Key changes to documents or file structure elements
- 23) Password changed
- 24) File attachment added, modified or deleted
- 25) *Access Manager* - delete documents
- 26) Create workflow schedule
- 27) Modify workflow schedule
- 28) Delete workflow schedule
- 29) Start workflow
- 30) Placing an object in a workflow
- 31) Forwarding an object to a workflow
- 32) Change active workflow
- 33) Delete active workflow
- 34) Overrun in a workflow
- 35) Error in a workflow decision node
- 36) File converted
- 37) Report for task reminder
- 38) Report for Mailbox
- 39) Miscellaneous
- 40) Substitute called for

- 41) Substitution deleted
- 42) Clearance for substitution issued
- 43) Clearance for substitution rescinded
- 44) Substitution activated
- 45) Substitution deleted by issuer
- 46) Document checked out
- 47) Document checked in
- 48) Document displayed
- 49) Structure element displayed
- 50) File collected from substitute mailbox
- 51) Version deleted



All settings correspond with the parameters defined in *System settings*, *Report settings*.

## System info



1. Select *Archive, Reports, System info* from the menu bar. The *System info* dialog box opens. In the *System info* dialog box you can see at a glance the *Keys, Users and Groups* currently being used in or logged into the archive.

2. Activate the corresponding options in the *Key, User and Groups* areas.

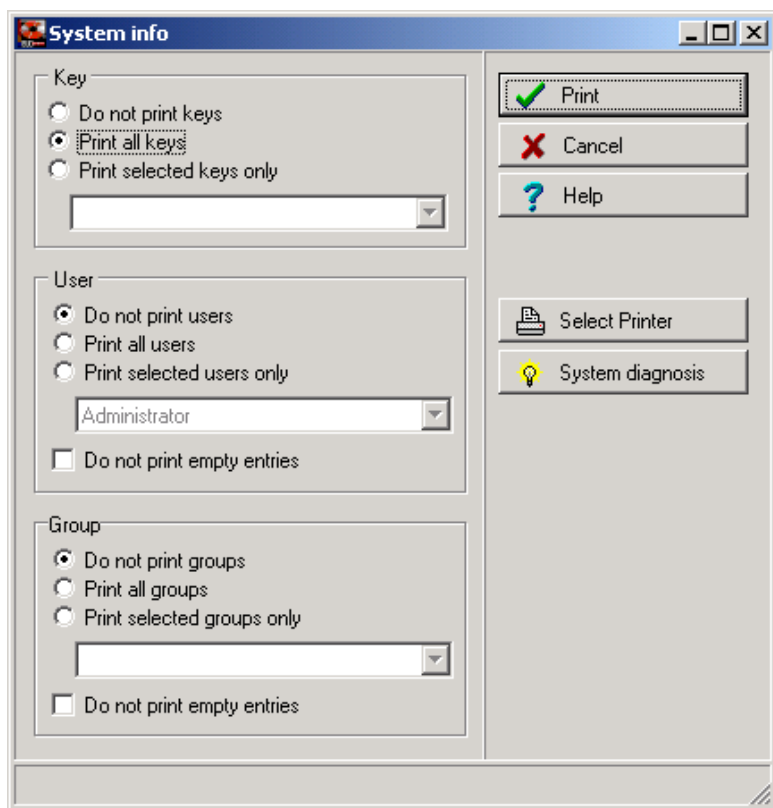
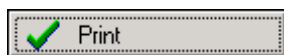


Fig. Infocenter

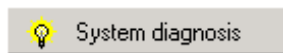
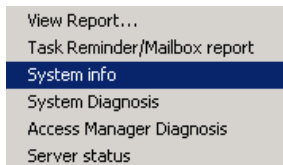


## System diagnosis

### 3. Click on *Print*.

Depending on the printer you have selected - using the *Select printer* button - a list is generated that also includes the individual rights for users and groups.

4. Using the *System diagnosis* button or the *Archive, Reports, System diagnosis* menu, open the *ELOpProfessional – System Information* dialog box.



This has an overview of the most important **ELO** settings. Error messages or warnings are shown in color.

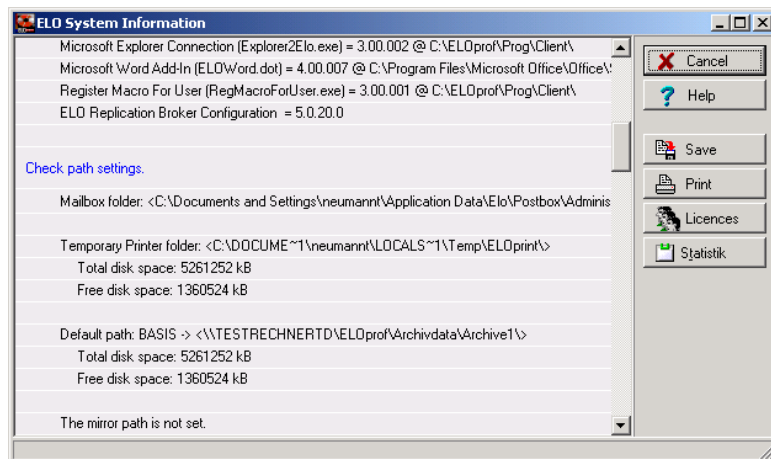
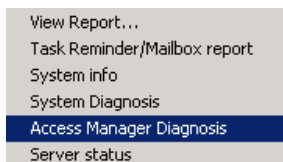


Fig. Displaying system and archive information



System diagnosis allows you to analyze and monitor different settings in the archive - analysis of document paths, the database settings, scanner settings and keywording forms.

## Access Manager diagnosis



1. Select *Access Manager diagnosis* from the *Archive, Reports* submenu.

The *Access Manager status* dialog box opens.

2. Optionally, choose from the display criteria *All entries*, *Entries in use*, *Clients* and *Fulltext*.

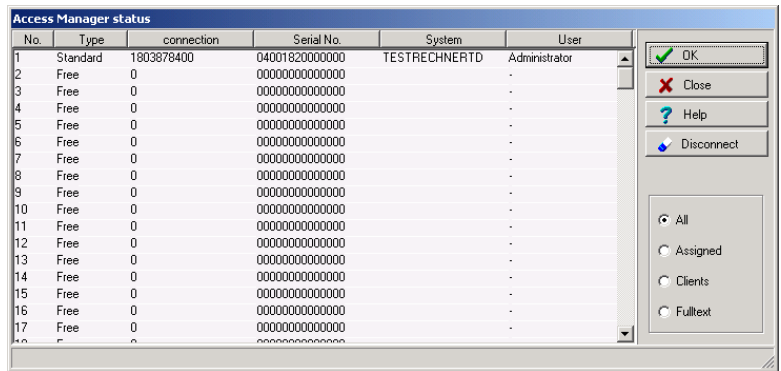


Fig. Displaying Access Manager status



This dialog shows information about users logged into the ELO system. From this dialog box, you can log the selected user out of the ELO system, if you are authorized to do so.

## Server status

View Report...  
Task Reminder/Mailbox report  
System info  
System Diagnosis  
Access Manager Diagnosis  
**Server status**

Select the menu entry for the server diagnosis.

From this dialog box, you can query the status of individual servers: Replication, Fulltext and Backup servers.

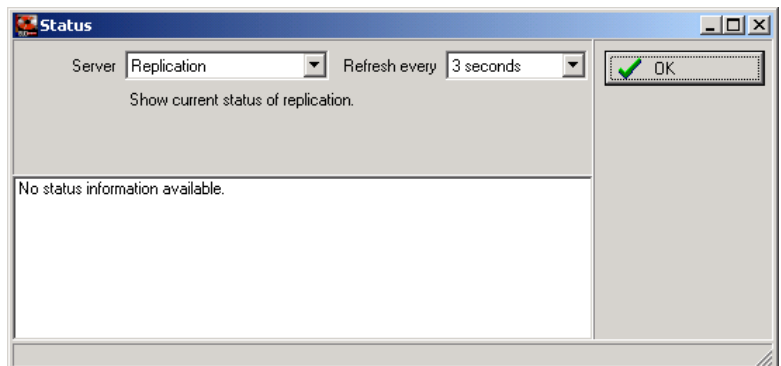


Fig. Requesting server status

The results of the status query are displayed in a window in the lower portion of the dialog box.

---

# Navigating within the archive

## Next level

Using the *Next level* option from the *Archive* menu you can navigate between levels in the current archive.

To use this function, you must first select (or have opened) an entry in the archive.

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	▶
Next level	Enter
Previous level	Esc
Deleted entries	▶
Set archive key	▶
Run database test	▶
ELOpessional MOBILE...	▶
Close	

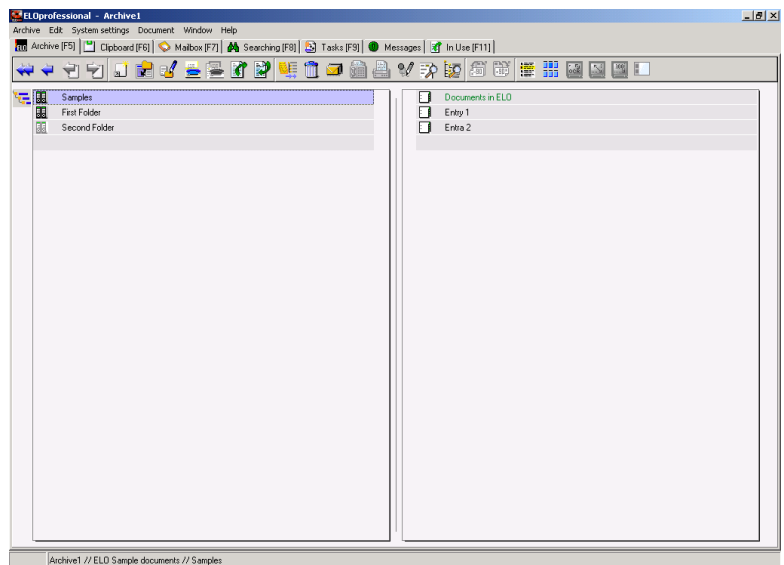


Fig. Navigation in the archive



Use the shortcut ENTER to navigate quickly between levels in your archive.

## Previous level

Using the command Archive, *Previous level* you can switch levels in your archive. Selecting *Previous level* switches to the previous (higher) level.

To use this function, you must first select (or have opened) an entry in the archive.

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	▶
Next level	Enter
Previous level	Esc
Deleted entries	▶
Set archive key	▶
Run database test	▶
ELOpessional MOBILE...	▶
Close	



Use the *ESC* shortcut too to move quickly to higher levels in your archive.

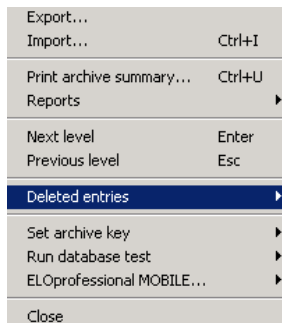


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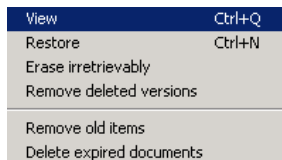
# Deleting and restoring entries

## View

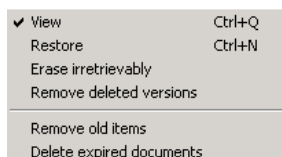
There is a range of administration functions available so that you can remove documents or ELO objects you no longer need from your archive.



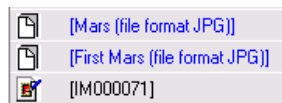
1. In the *Archive* menu, point to the *Deleted entries* submenu.



2. Select *View* from the submenu. The next time you open the submenu, you will see that there is a tick next to *View*.



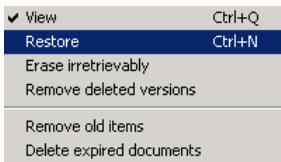
When you check the *View* option, all the documents and ELO objects deleted - or marked for deletion - in the archive hitherto are shown again.



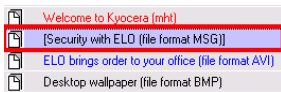
The deleted ELO objects are denoted by square brackets and gray icons. Whenever you check the *View* option, **ELO** switches to the top level of the archive.

## Restore

Using the *Restore* function you can restore entries that had been deleted then made visible by checking the *View* option, or remove their deletion marker.

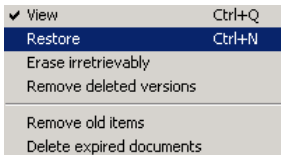


Documents previously removed from the archive using the *Delete* function are, in the first instance, only hidden. As such, they can easily be restored.

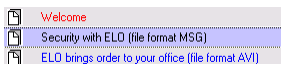


1. In the *Archive* menu, point to the *Deleted entries* sub-menu.

2. In the archive, select the ELO object you want to restore. In the adjacent screenshot, the deleted folder is *Administration and Organization*.



3. In the *Archive* menu, point to the *Deleted entries, Restore* submenu.



4. The brackets are removed and the object is again available in its original location in the archive.

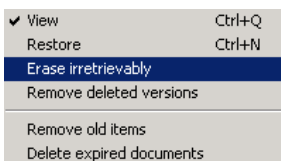
5. The ELO object and everything it contains have been restored and are present in the archive.



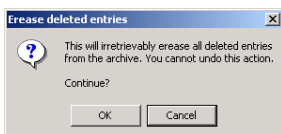
Please note that there is no overall summary of the objects deleted in ELO. That means that you have to know roughly where your deleted object is located to be able to restore it.

## Erase irretrievably

The *Erase irretrievably* function allows you to delete documents once and for all.



1. In the *Archive* menu, point to the *Deleted entries, Erase irretrievably* submenu. The warning dialog *Erase deleted entries* appears to alert you to the fact that objects deleted using this function cannot be restored.

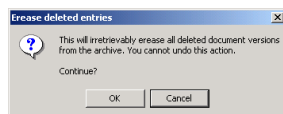
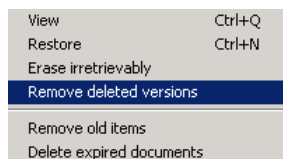


Confirm with *OK*.



NB: This function permanently erases all deleted objects in the current archive. It is not possible to restore them. Therefore, we recommend making a full backup before using the function *Erase irretrievably*.

## Remove deleted versions



Using this menu the deleted versions in the version-controlled documents can be removed from version management.

Select *Remove deleted versions*. A confirmation dialog opens.

Click on *OK* if you want to delete all versions.

## Remove old items

Another aspect of good archive management and administration is that you have to remove old or superfluous documents from the archive. Many documents that are redundant after a backup has been made have to be removed from the archive because they may be available outside the local **ELO** archive – e.g. on a backup medium (e.g. CD-ROM).

The *Remove old items* function lets you remove old documents - where their *life span* has expired - so that they are no longer directly accessible in the archive. You can automatically delete documents from an entire path.



Please note that the logical ELO document (physical copy) is not deleted, only any scanned or OLE files associated with it. The ELO document can still be searched and can be restored from the backup if necessary.

1. Click on *Remove old items* from the Archive menu. The *Delete document files* dialog appears. Here, you can enter all necessary settings regarding the *Filing path*, the *Delete older than* date and *Backup control* and start a test of the deletion process if necessary.

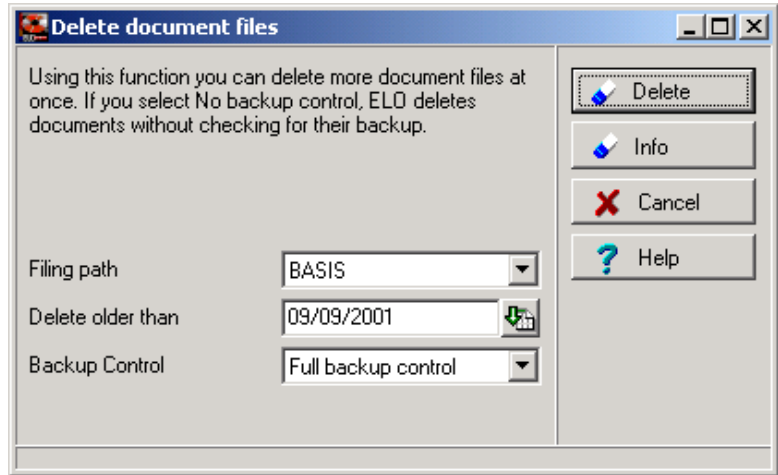
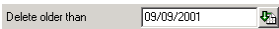


Fig. Deleting document files

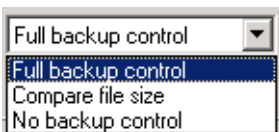
2. Select the filing path from which to remove items. Open the list box by clicking on the arrow icon. All paths are displayed. Click on the path from which you want to remove documents.



3. Enter the *Delete older than* date. Documents are only deleted from the selected filing path if they are older than the date specified. The date refers to the document filing date.



4. Clicking on the calendar icon opens the calendar function. It is an easy way to enter the *Delete older than* date.



5. Before you start deleting documents, you should set up deletion control. There are three ways to do this.

## Full backup control

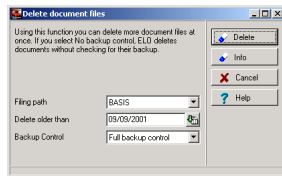
The *Full backup control* setting checks whether the document is present in the backup by comparing the document contents, file name and file size. They are only deleted if a match is found.

## Compare file size

The *Compare file size* checks whether the backup contains a file with the same document name and same file size. The content of the file is not checked.

## No backup control

Using this setting, neither the content of the document nor the file name or size are compared with the backup. You will delete all the entries from the filing path without checking whether they are present in the backup location.



Use this setting with care. If you do not have access to the backup or want to delete documents that have not been backed up, you can initiate an unverified delete command.

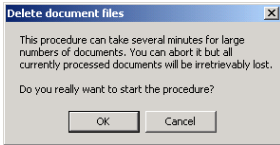
If you have selected the setting *No backup control* you should ensure that you really are only deleting the documents you want to delete. Using this option incorrectly may lead to loss of data!



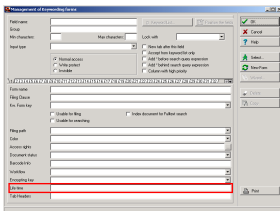
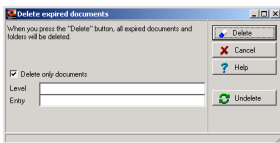
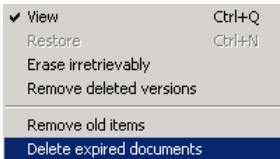
5. After you have selected your options, you can perform a test by clicking on *Info*. A dialog box appears. Bear in mind the size of the documents to be deleted.

This test run is identical to the deletion procedure, but no documents are removed. Only the verification procedure is carried out and a status report is displayed on completion. It includes:

- the number of documents marked for deletion,
- the amount of free disk space,
- the number of documents not backed up and
- the number of corrupted entries.



## Delete expired documents



6. You can start the actual deletion process by clicking on *Delete*. A status report is also generated on completion.

7. Clicking on *OK* in the status report concludes the process.

You can enter an expiry date for every ELO object. It is a good idea to select this option for documents if they have a limited retention period.

In the *Archive* menu, point to *Deleted entries*, *Delete expired documents*.

The *Delete expired documents* dialog appears. Make all the necessary changes.

You can set an expiry date for an ELO object on the *Options* tab of the keywording form in the *Expires on* field.

The expiry date corresponds to the settings in the keywording form for the ELO object in the *Lifetime* field. Make the necessary changes.

Basic	Memo	Options
Object type	tif	
Filed by	Administrator	
Key		
Color	Green	
Document status	Version controlled	
Filing path	BASIS	
Expires on		
	<input type="checkbox"/> Include in Fulltext Database	
Encrypting key	no encryption	
Object ID	7 [00000004->00000007:00000058:00000000]	
File name	Scanned article (multi-paged, file format TIF)_Archiv1_7.TIF	

Fig. Entering the expiry date in the keywording dialog

The *Expiry date* can be entered individually for each document. But the lifetime for a document can also be managed centrally using the keywording form, entering it in the *Life-time* field.



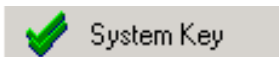
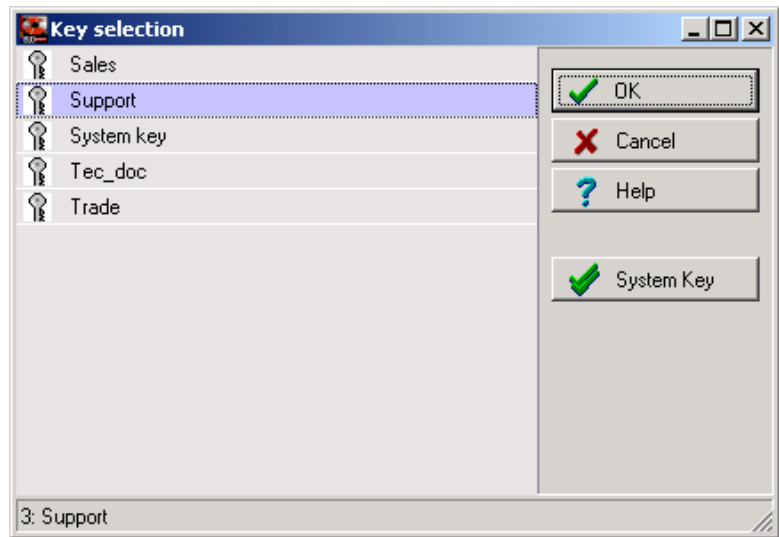
Please bear in mind that the documents will be permanently removed from the archive.

---

# Set archive key

Export...	
Import...	Ctrl+I
Print archive summary...	Ctrl+U
Reports	▶
Next level	Enter
Previous level	Esc
Deleted entries	▶
Set archive key	▶
Run database test	▶
ELOpessional MOBILE...	▶
Close	

1. In the *Archive* menu, click on *Set archive key*. The *Key selection* window appears. Select the archive key from those displayed. Any user wishing to open the archive must possess the key chosen to be the *System key*.



2. After selecting a key, click *OK* or *System key* to confirm. You have successfully defined the selected key as the *System key* for your current archive.

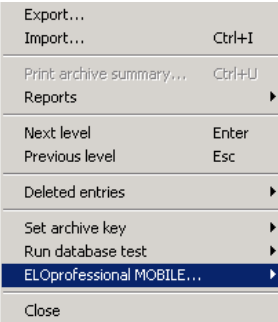




Remember: If you have not assigned a system key to the user, the user does not have the right to log in to **ELO**. The system key is not restricted to one archive, but applies to all archives.

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# ELOprofessional MOBILE



From the **ELOprofessional MOBILE** command in the menu you can manage **ELOprofessional MOBILE** activities. These options are only available if the replication module or **ELOprofessional MOBILE** are installed.

## Full reconciliation

Replicate all the archives linked with the CLIENT.

Import and export the relevant documents and data.

## MOBILE actions

Start all MOBILE activities. You can find more information in the **ELOprofessional REPLICATION** manual.

## Replication service status

From here you can query the status of the replication service. If the replication service is not installed, you will see the following message.

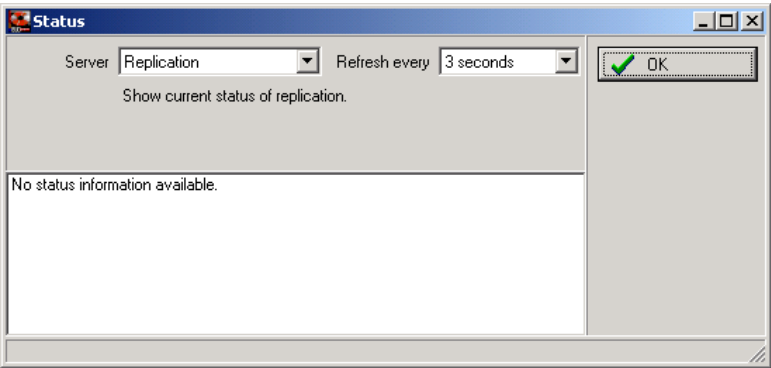
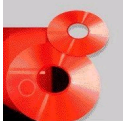


Fig. Status display when replication service not installed

## **Setting a replication marker**

Here, you can define a replication marker. That means putting a personal marker in the database that separates changes made to the archive up to that point from those made afterwards. If a branch receives one of these markers, a message is created so that they can be sure that all the changes created before the message have been adopted.



# Chapter 11

---

## The Edit menu

This chapter presents the commands in the *Edit* menu. Below, we will outline how to organize your data in the archive, how you can copy and insert data and find out about the structure of your archive.

This chapter includes information about the following topics:

- Keywording
- Select all
- Copy to clipboard
- Set access rights
- Delete
- New
- Select color
- Remind item
- Insert and Copy
- Logical copies
- Create link, and
- View related items

# Keywording

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

1. Select a document or any other ELO object in the archive.

2. In the menu bar, select the entry *Edit, Keywording*. The keywording form for the current ELO object appears in the *Document edit* dialog box.

The screenshot shows the 'Tif Edit' dialog box with the 'Basic' tab selected. The left sidebar lists various document types, with 'Invoice' highlighted. The main area contains the following fields:

- Name: Scanned invoice (file format TIF)
- Date: 07/08/2001
- Filing date: 07/27/2004
- Invoice No.: 501827
- Name: Keats, Sam
- Supplier: Shelley Inc.
- Article: (empty)
- Index 1: (empty)

On the right side, there are buttons for OK, Apply, Cancel, Help, Fill (F3), OCR, Open, Save, and Versions. The status bar at the bottom shows 'No access rights', 'Green', '07/27/2004', 'TIF', and 'Text'.

Fig. Keywording form dialog for a document

## Keywording documents

Before you can file documents in the archive, they have to be keyworded. Keywording forms containing the appropriate input fields are used for this purpose.

Keywording - assigning information to each of the documents or ELO objects - is particularly important, allowing you to find a document with the search function. The date is also an important search criterion.

Keywording a filing cabinet, folder or index is advisable if you want to apply specific criteria to the objects filed in it.

You can, for example, create a keywording form called *Customer invoices* with field *Customer number*. If you now have information about customers in different folders or indexes (invoices, meetings, tasks etc.), then using the search function to search for the keywording attribute *Customer number*, you can search for or view all the documents relating to the *Customer*.

Fig. Keywording form

Editing keywording data for cabinets, folders, levels or documents occurs in a dialog box. It opens automatically when filing an object by dragging and dropping in the archive, when double-clicking on the object entry or using a shortcut.



In the list on the left, select the keywording form. Its fields are then displayed on the *Basic* index card.

Author	
Category	
Themes	

In addition to the title (*Name*) and the fields you have created, you can also add keywords or text to a document on the *Memo* index card. Entries in *Name*, in the fields (including additional items) and the *Memo* are displayed in the QuickInfo field as soon as you point to the object entry.



This icon next to the field shows that a keyword list is available.



If you have to keyword documents with frequently recurring terms, ELO allows you to set up a keyword list with several subgroups. This list is available when keywording in the fields or via a context menu (right mouse button) if you have configured the field to use it in Management of keywording forms.

## The Options index card

Keywording also includes defining document attributes and behavior. These settings are entered on the *Options* index card, if they have not already been entered in the keywording form or if the document differs from these defaults. You have different options depending on whether you are keywording a document, cabinet, level, folder or index.

## General options

The following options are available for all ELO objects (filing cabinet, folder, level, index, document) on the *Options* index card:

Fig. 'Options' - document settings

## Object type

Using this option, you can specify an object type for the element. The document icon will be displayed in list view in the archive as per the settings entered here.

## Filed by

This is where you enter the user who filed or keyworded the object or document.

## Key

If you assign a key to the document, it is only visible for those users with the same key. Other users cannot see it.

## Color

Select a color for the object entry to improve the visual clarity of your archive structure.

## Document status

Select the editing status of the ELO object individually.

You can choose from the following options: *Freely editable*, *Read-only* and *Version-controlled*.

## Filing path

Select a filing path for the object. (Only possible if *Freely editable* was selected when creating the keywording form.)



<b>Expires on</b>	Set the expiry date for the ELO object.
<b>Include in fulltext database</b>	Check this box to include the document in the fulltext database. Every word is indexed and can be searched.
<b>Object ID</b>	This option displays the internal ELO object number. This entry is primarily for information purposes and cannot be changed. The object ID is needed to verify the checksum for multiple documents.
<b>Document options</b>	There are the following additional options when keywording a document:
<b>Document status</b>	Select the type of version control here.
<b>Encrypting key</b>	Assign a particular encrypting key to the ELO object or choose "no encryption".
<b>File name</b>	The file name for the document is displayed here, as it is named in the file system.

**Options for cabinets, folders, levels and indexes.**

The screenshot shows a dialog box titled 'Optionen' with three tabs: 'Basic', 'Memo', and 'Options'. The 'Options' tab is active. It contains several configuration fields for an index card structure element:

- Object type:** A dropdown menu set to 'Index'.
- Filed by:** A text field containing 'Administrator'.
- Key:** An empty text field with a browse button (three dots) to its right.
- Color:** A dropdown menu set to 'Green'.
- Sorting:** A dropdown menu set to 'Manual'.
- Filing path:** A dropdown menu set to 'BASIS'.
- Expires on:** An empty date field with a calendar icon to its right.
- Object ID:** A text field containing the value '4 [00000003->00000004:00000000:00000000]'.

Fig. 'Optionen' index card - structure element settings

When keywording a filing cabinet, folder, level or an index the options *Document status*, *include in fulltext* and *Encryption* are not available.

## Sorting

Here, you can set how you want to sort the content of objects, e.g. the folders in a cabinet. You have seven options:

- Manual
- Alphabetic ascending: Items are sorted from A-Z.
- Alphabetic descending: Items are sorted from Z-A.
- Filing date: The entry with the most recent filing date is at the bottom.
- By filing date descending: The latest date is at the top.
- Document date: The latest date is at the bottom.
- Document date: The most recent date is at the top.



Use this multitude of options to keyword ELO objects. This will make working in the archive (especially searching and retrieving files) significantly easier and more convenient.

# Select all

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+X
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

The function *Select all* can only be used in the mailbox. Switch to the *Mailbox* index card and then select the command *Select all* from the *Edit* menu.

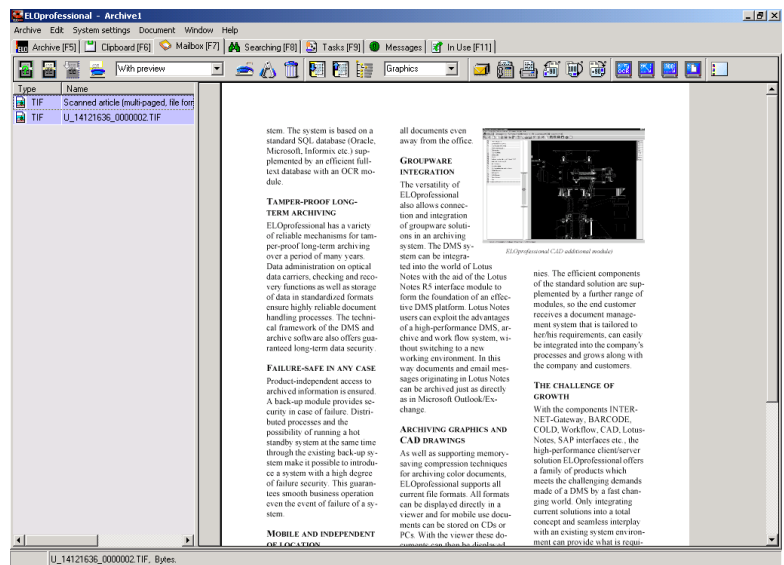


Fig. Selecting list entries in the mailbox

Every document in the mailbox is selected. You can, for example, file all documents simultaneously in a particular folder by dragging and dropping.



---

# Copy to clipboard

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

The clipboard is a sort of temporary holding area. Every ELO object, from a single document to an entire filing cabinet can be copied to the clipboard and pasted back to another location in your archive. That allows you to move objects to the new location or to make logical copies of them (shortcuts). Refer to the Chapter *The Clipboard* for more information on the clipboard.

1. The *Copy to Clipboard* command can only be used in the archive. Select the *Archive* index card and select an ELO object.
2. In the main menu, select the entry *Edit, Copy to clipboard*.

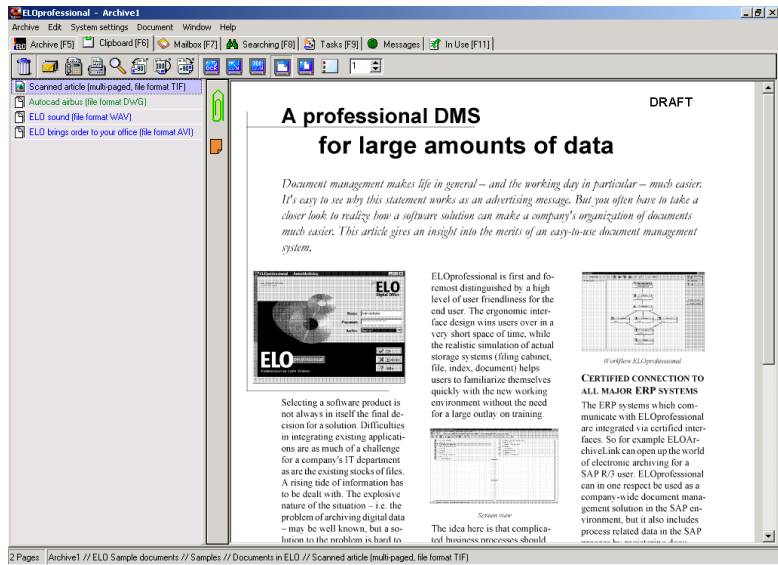


Fig. Copying documents to the clipboard

3. The ELO object is now on the clipboard to be edited further.

---

# Set access rights

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

Using the *Set access rights* option, you can assign rights to each ELO object (cabinets, folders, levels, documents etc.) independently.

1. Select an ELO object in the archive.
2. From the menu bar, select *Edit, Set access rights*.
3. An *Edit access rights* dialog box opens.

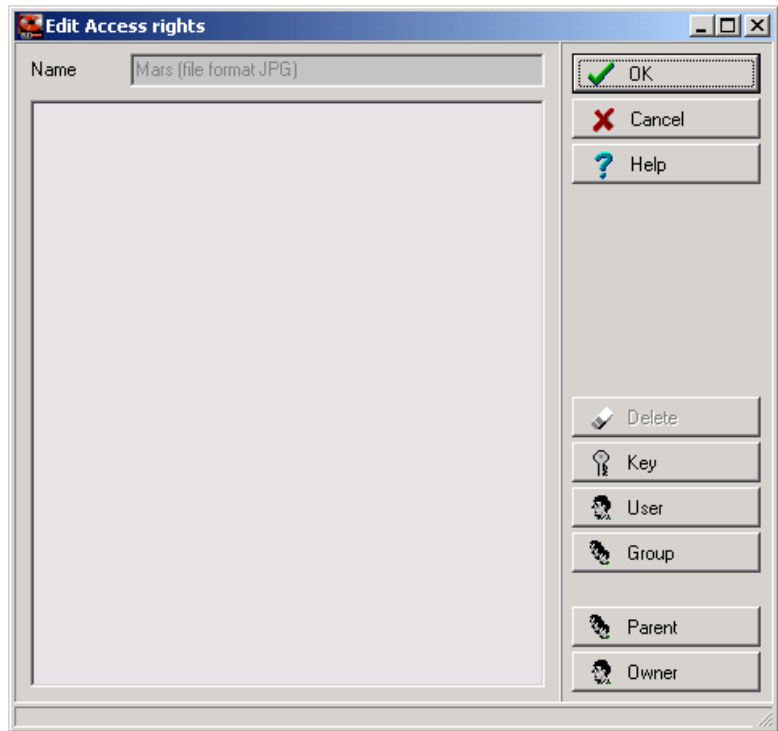


Fig. 'Edit access rights' dialog

4. Using the *Key*, *User* and *Group* buttons, you can assign rights to the ELO object.

5. Click on *Key*. The *Key selection* dialog box opens. Assign a key to the object if required.



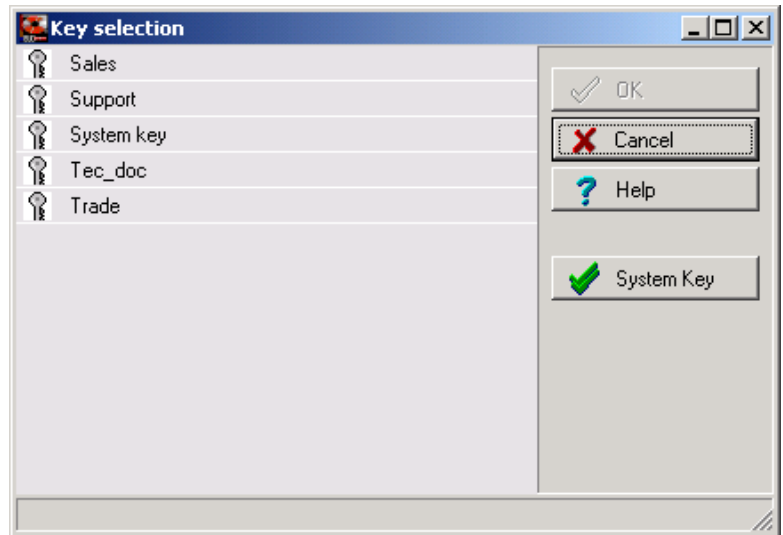


Fig. Selecting a key

6. The *User* button lets you define which user(s) have access rights for the object.

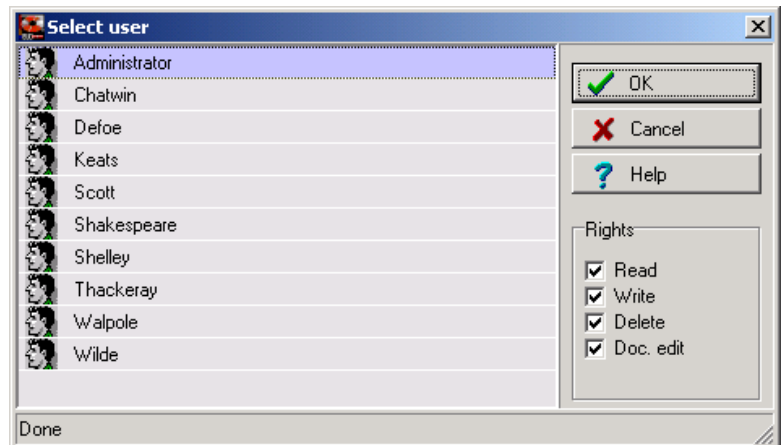
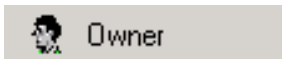
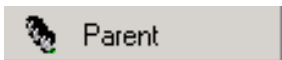


Fig. Selecting a user and assigning an object



7. If you want to 'bequeath' access rights to another user, use the *Parent* and *Owner* buttons.

8. The entry *Clone rights from the parent entry* appears in the *Edit access rights* dialog box. Make the necessary changes.

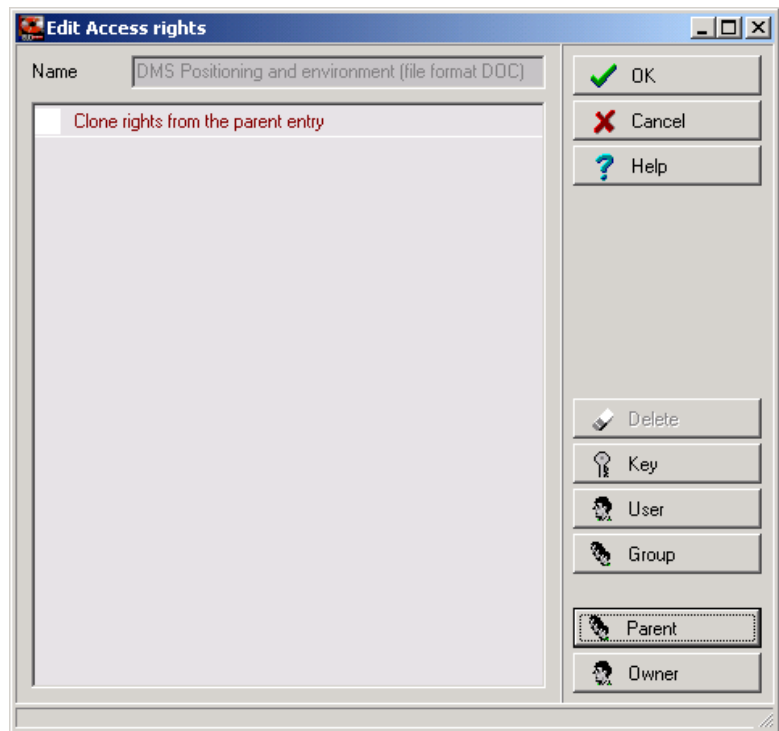


Fig. Editing access rights

9. Then confirm with *OK*. The ELO object is now assigned all the rights you have set up.

# Search view

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

Using the *Move the list to the search area* command, you can move the current list view from the *Archive* work area to the *Search* view. This is particularly advisable if you want to carry out the same type of procedure with several ELO objects, since you can select multiple ELO objects in the *Searching* area.

1. Switch to the archive area and select the option *Move the list to the search area* from the *Edit* menu.

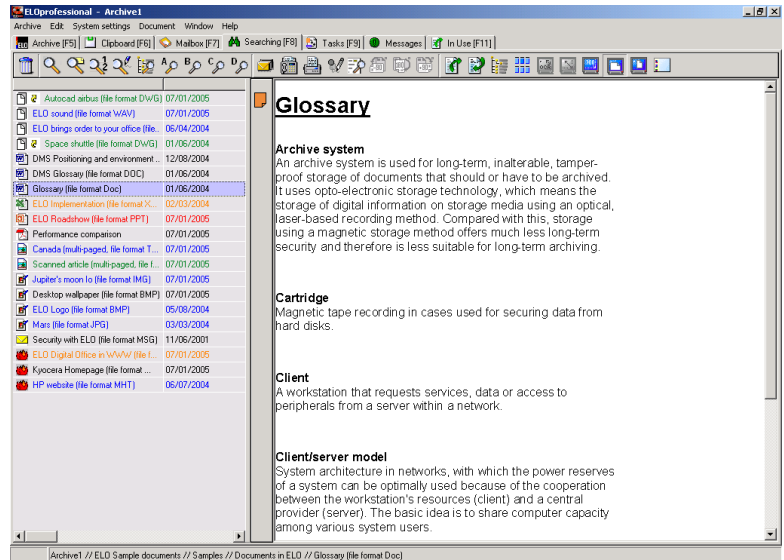


Fig. List view in the 'Archive' function area

## Search view

2. Once you have selected the option *Move the list to the search area*, **ELO** automatically switches to the *Searching* area. The list is automatically moved from the archive area to the *Searching* area. Here, you can only carry out activities suited to multiple selections, e.g. deleting several documents from the archive simultaneously.

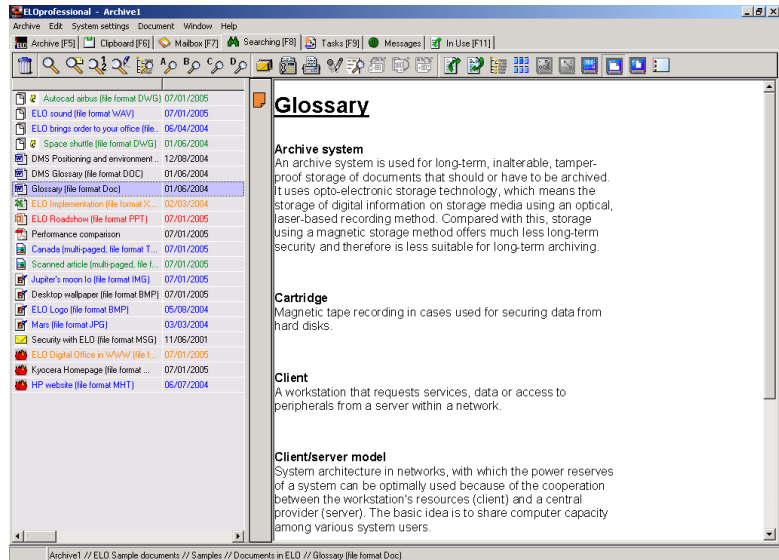
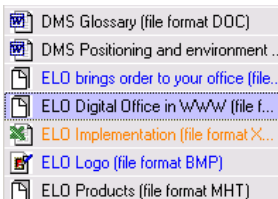


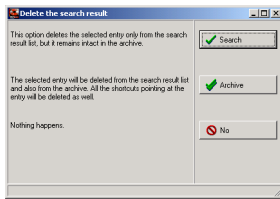
Fig. List in the search area

3. Select individual entries from the list in the search area by holding down the Ctrl key and clicking on individual entries to select them.



4. If you want to delete the selected entries, you have to click on the icon in the toolbar to delete the documents and ELO objects.

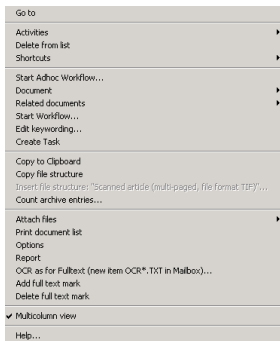
5. Click on the *Remove from the hit list* icon.



6. You have three options. You can either
- delete the selected entry from the hit list,
  - delete the selected entries from the hit list and from the archive, or
  - do nothing.

7. Click on the relevant button. The *Searching* area list view is then refreshed.

All the usual methods are available from the context menu.



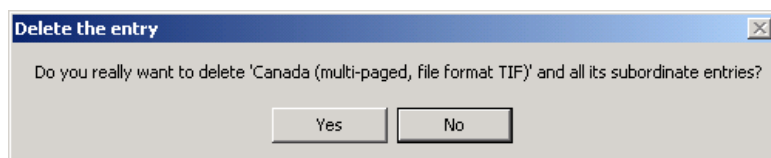
---

# Delete

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
<b>Delete</b>	<b>Shift+Del</b>
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

You can delete any object in ELO (filing cabinets, levels, folders, indexes and documents).

1. Right-click on the object entry you want to delete then left-click on *Delete* in the context menu. A confirmation dialog opens.



2. If you wish to delete the document or the structure element, confirm by clicking on *Yes*. If you are not certain you want to proceed or you have selected the wrong document, click *No*.



The *Delete* command does not delete objects physically from the archive, just the shortcut to them. So you can also restore objects. For more information, read the topic *Deleted items*.

---

# New

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

Using the *New* option you can create new objects in the current archive. This option is only available in the archive.

---

# Select color

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

All archive entries can be color-coded. That allows you to distinguish sections of your archive, e.g. coloring an invoice folder red or an inventory folder green. Or you can assign a color to certain documents only so that you can differentiate between them in an index, e.g. text files in blue and video files in yellow.

It is a simple process: set the color either when creating a new document (assigning the color in the keywording form) or later, for existing documents, on the *Options* index card of the keywording dialog.

## Assigning a color

For objects you are creating, proceed as described below: In this example we are editing a structure element. The steps are somewhat different for documents.



1. Click on the icon *Create structure element on the left side*. The window *Edit level 2 [New entry]* appears. The dialog varies, depending on your current position in the archive. Select a keywording form from the list view and keyword the folder using the *Basic* and *Memo* index cards.



Fig. Assigning a color via the keywording dialog

2. Click on the *Options* index card. The color you set is displayed in the *Color* field. Click the arrow to open the drop-down box. Select a color.

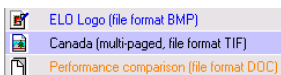


Which colors are displayed, and hence available for selection, and how many, depends on settings in *System settings, Colors*. You can find more information in the chapter *System settings* under *Color*.

3. Confirm with *OK*. The ELO object is displayed in the color selected.

### Assigning a color to existing objects

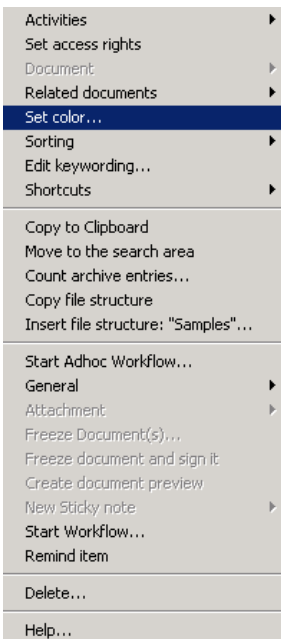
For existing objects (objects that are keyworded and archived in **ELO**), there are two ways to assign a color to the object entry.



1. Double-click on the object entry on the left-hand side, e.g. on the cabinet *Manufacturing*. The *Edit cabinet* window opens. Click on the *Options* index card. In the *Color* field, select a color.

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

2. In the menu bar, click on *Edit*, *Select color* or click on the command in the context menu.



3. Right-click on the entry to which you want to assign a color. The context menu opens. Click on *Select color*.

4. The *Select color* dialog appears.

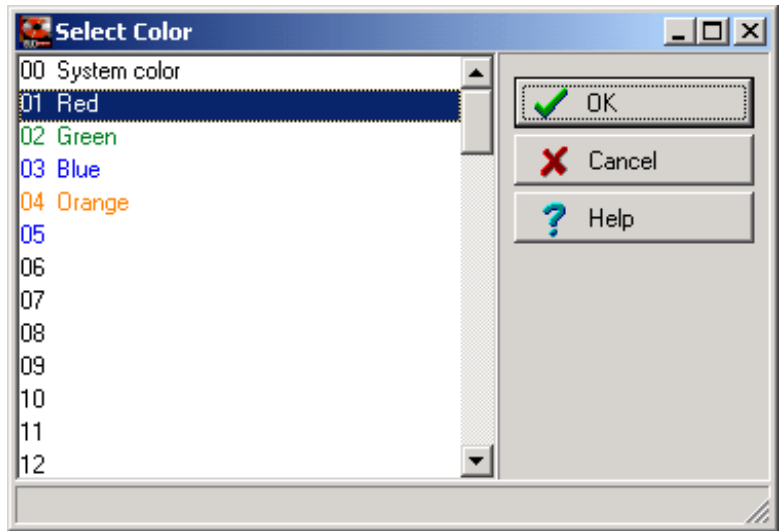


Fig. Assigning a color to a structure element

5. Select a color and confirm by clicking *OK*.



The same is true for the *Color management* dialog: which colors are displayed, and hence available for selection, and how many, depends on settings in *System settings, Colors*.

### Assigning a color to a document

To highlight document entries in a color, there are three options. For existing documents, the process is the same as that described above, the third alternative is for newly created documents.

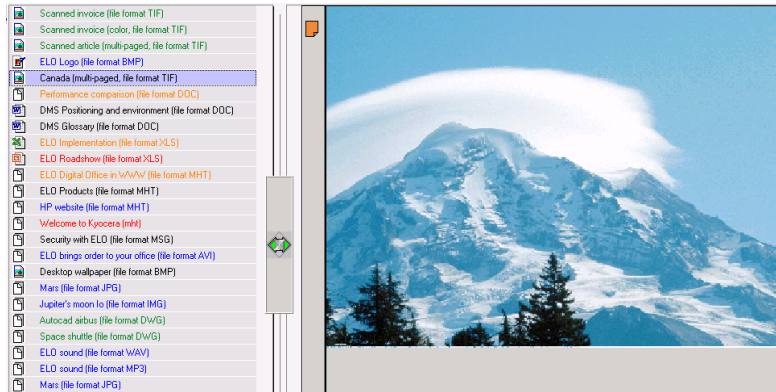


Fig. Assigning a color to a document

1. Right-click on the entry to which you want to assign a color. The document entry must be on the left in folder view.

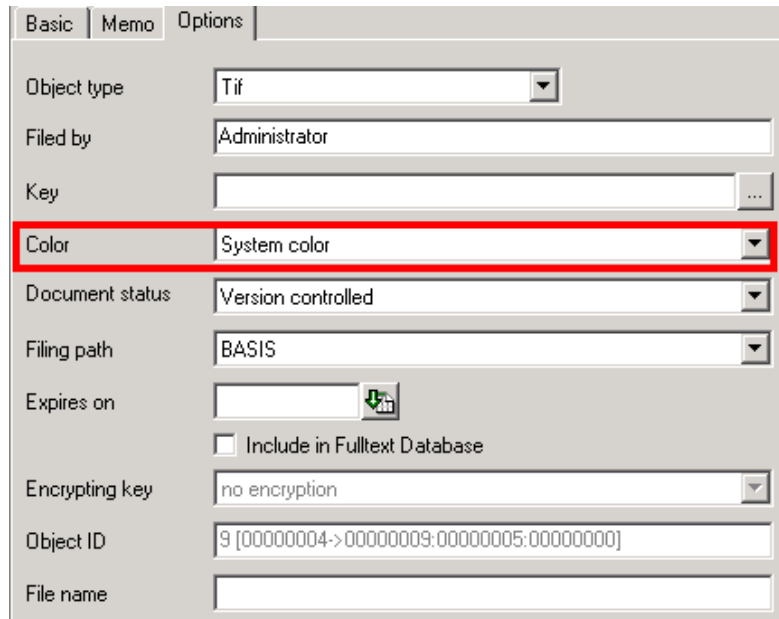


Fig. Assigning a color via the keywording dialog

2. The *Edit document* window (the keywording form assigned to the document) is opened. Click on the *Options* index card and select the color in the *Color* field.

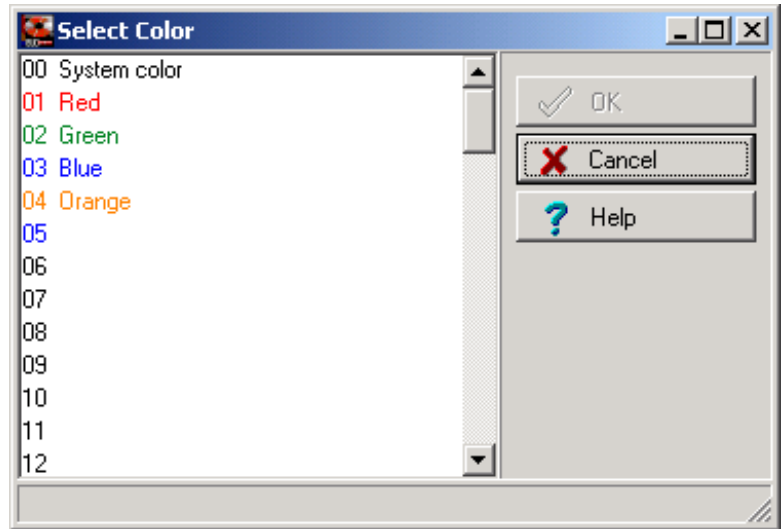


Fig. Assigning a color to an object

3. Right-click on the document entry to which you want to assign a color. The context menu opens. Click on *Select color*. The *Select color* dialog appears. Select a color and confirm by clicking *OK*.

The screenshot shows the 'Management of Keywording forms' window. The 'Form name' is 'Invoice'. The 'Group' is 'INV'. The 'Min characters' is 0 and 'Max characters' is 0. The 'Input type' is 'Date'. The 'Normal access' radio button is selected. The 'Lock with' dropdown is set to 'System key'. The 'Usable for filing' and 'Usable for searching' checkboxes are checked. The 'Filing path' is 'No default path'. The 'Color' dropdown is open, showing 'Blue' as the selected option. The 'Access rights' dropdown is set to 'Freely editable / Manual sorting'. The 'Barcode Info' dropdown is set to 'Workflow'. The 'Encrypting key' dropdown is set to 'no encryption'. The 'Life time' dropdown is set to 'no encryption'. The 'Tab Headers' dropdown is set to 'no encryption'. The 'Keyword List' button is visible. The 'Position the fields' button is visible. The 'OK', 'Cancel', and 'Help' buttons are visible. The 'Select...', 'New Form', and 'Wizard...' buttons are visible. The 'Delete' and 'Copy' buttons are visible. The 'Print' button is visible. The 'Invoice' form is selected in the list at the bottom.

Fig. Assigning a color to a keywording form

4. You can also highlight a type of document, e.g. *Invoices* in a color. To do that, call up the relevant keywording form (*System settings, Keywording forms, Select*) and choose the color you want in the *Color* field. This setting is the default. That means that any document filed using that keywording form is given the preset color. However you can also assign a different color to individual documents, by selecting another color from the *Color* field on the *Options* index card or as described above.

---

# Remind item

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

1. Select an ELO object in the archive. Using the *Remind item* function, you open the *Create/Edit task in task reminder*.

Fig. Switching to task reminder

2. Here you can add comments to your ELO objects, documents, etc or send tasks to other users for editing. For more detailed information, refer to the section on **Tasks** and **Task reminders**.

3. Enter your messages or information in the *Memo* field.

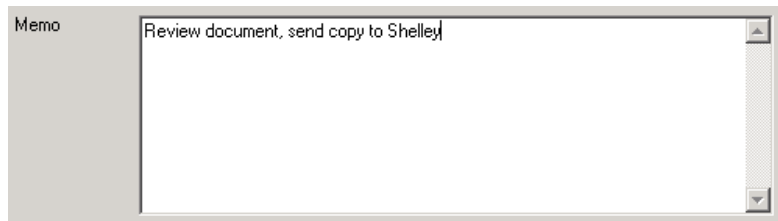


Fig. Memo field for entering messages

4. Confirm by clicking *OK*.



# Inserting and copying

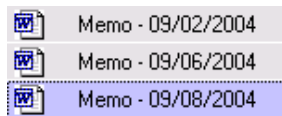
Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

1. Select an ELO object in the archive.

2. From the *Edit* menu, select *Copy*.

3. Navigate to the position in the archive where you want to paste the copy.

4. From the *Edit* menu, select *Insert*.



5. A logical copy of the document or ELO object you selected is pasted into the position in the archive of your choosing. You can identify a logical copy by its gray icon, in this case *Memo*.

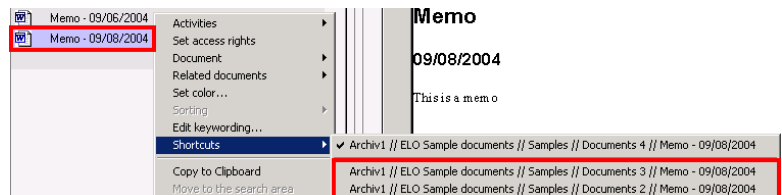


Fig. Logical copy - displaying shortcuts

6. You can display the list of shortcuts or logical copies via the context menu for any ELO object. Read the following section for more information on logical copies.

---

# Logical copies

The first time you file a document in an index in **ELO** it is physically present on the server hard drive at the filing path where it was saved. Usually, only system administrators can access the server.

## Shortcut

If a user copies a document to another index (or copies another object), he creates a *logical copy* of the original, a link to the original document, known as a *shortcut*. Physically, the document is still only present once. So if you send a group e-mail to fifty colleagues that they all file in their archive, they only have a logical copy of the document. There are not fifty physical copies of the document, just 50 shortcuts.

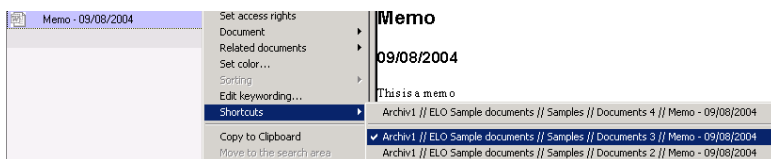
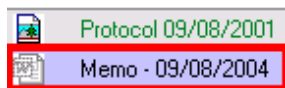


Fig. Displaying shortcuts

Whether there are shortcuts to an object (e.g. a document), and where they are, is displayed if you right-click on the document in the archive to bring up the context menu. Shortcuts to the original document are shown under the *Shortcuts* menu.



## The advantages of logical copies

The principle of logical copies has two considerable advantages: the archive is not unnecessarily bloated with physical copies and changes to documents are automatically reflected in *all* logical copies.



Say you want to distribute ISO 9000 regulations. To update these regulations, you just have to make the changes once to the original document. All logical copies of the document are then automatically updated.

---

# Linking documents

**ELO professional** allows you to link any documents or structure elements together. In doing so, you do not need to consider filing hierarchies or document type dependencies. You can link anything together.

## Link, creating

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

1. It is easy to link documents. To create a link, first switch to the first document of the group you want to link.
2. Select the first document. From the menu, choose *Create link*.

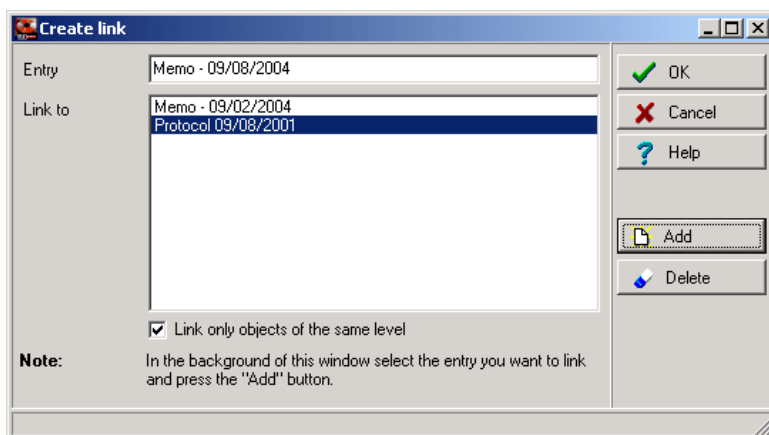


Fig. Linking documents

3. A dialog box will then appear with a list of all linked entries - if some have already been created. Otherwise the *Link to* box is empty. Now leave this dialog open while selecting further documents in the *Archive* work area and adding them to the list by clicking *Add* or *Create link* (Ctrl+L).



If you have entered mistakenly enter a document, you can select it in the list and delete it using the *Delete* button.

4. Once you have completed the list, you can close the dialog by clicking *OK*. **ELO** will now group all the selected elements.

### Link only objects of the same level

If you check the *Link only objects of the same level* checkbox, only objects on the same level are linked. If you link document A with documents B and C without checking this option, then for documents B and C you will only see document A listed in the summary of linked documents.

### Show links

1. If you want to see the documents linked to an entry in archive or search views, then click on the *Related documents* command in the context menu.

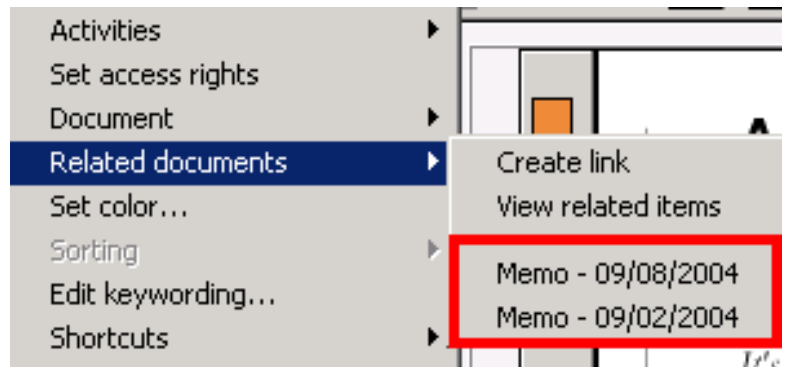


Fig. Showing related documents

2. In this submenu, you can choose from two functions: *Create link* and *View related items*. You will then see all entries linked with the document. If you click on one of these commands, you are taken directly to the document in archive view.

3. Clicking on the command *View related items* brings up a list of all related items in search view. You can now remove individual documents from the list or delete the entire group. To do this, select the desired entries and click on *Delete*.

---

# The documentation folder

## Sending documents

The *Send documents* and *Receive documents* functions are only available as an option. Using the documentation folder, you can send documents or files to other ELO users and other recipients outside of **ELO**.

Keywording	F4
Select all	Ctrl+A
Copy to Clipboard	Ctrl+K
Set access rights	
Move the list to the search area	Ctrl+S
Delete	Shift+Del
New	Ctrl+F4
Select Color...	Shift+Ctrl+F9
Remind item	Ctrl+W
Insert	Ctrl+V
Copy	Ctrl+C
Create link	Ctrl+L
View related items	Ctrl+Z
Send documents	
Receive documents	

1. In the *Edit* menu, click on *Send documents*.
2. The *Send files* window opens.

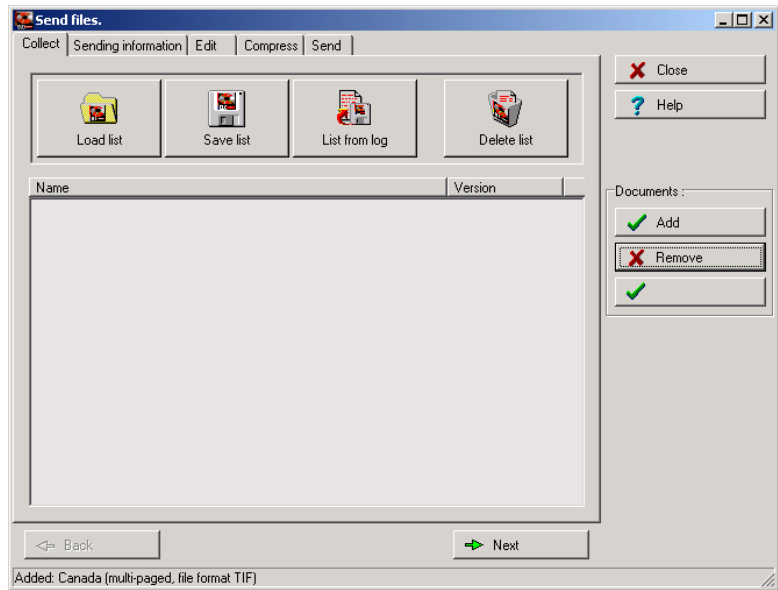
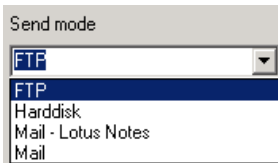


Fig. Send folder - sending files

3. Put the documents you want to send in the documentation folder or open a list containing the data you want to send.



## Receiving documents

4. On the following index card, select the send mode and the recipient. If necessary, edit the data and information to send and choose to save the files in a Zip archive if you so wish. Then send.

1. In the *Edit* menu, click on *Receive documents*.

2. The *Receive files* window opens.



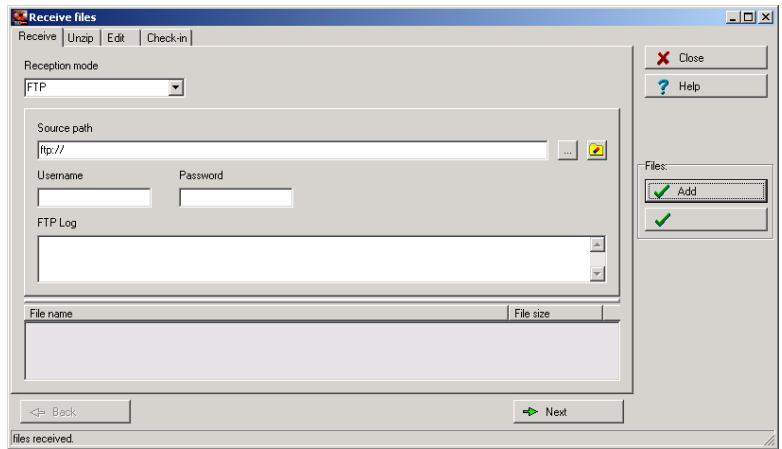
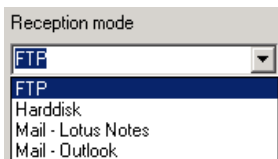


Fig. Send folder - receiving files

3. The summary shows the files that **ELO** is preparing to receive. You can specify the **ELO** send and receive folders in *System settings, Options, Send/Receive*.

4. Choose the relevant files from the list and highlight them.



5. The selected documents and files are then unpacked to the following index cards. They may first be edited and then be checked (back) into the archive.



# Chapter 12

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## The System settings menu

This chapter presents the commands within the *System settings* menu. We will then show you how to manage and organize your system, how to enter settings and change the configuration of your archive - depending on your access rights.

This chapter contains information about the following topics:

- Options
- Selecting a scanner
- Selecting a scanner profile
- User and user rights
- Keywording forms
- Index fields and input types in keywording forms
- Document paths
- Color
- Report settings
- Key
- Password
- Script
- Keyword lists

- Templates
- Substitution management
- Script manager
- Document templates
- Workflow
- Encrypting keys

---

# Options

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

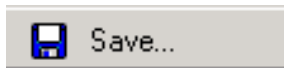
This section presents the *options* for configuring **ELO** available as index cards under the *System settings, Options* menu.

## Default options

The default settings for the *Options* area are set by the administrator. The *Load* and *Save* buttons in the *Options* dialog are only available when the administrator starts **ELO**. Here all valid default settings are entered and saved to the database using the *Save* button. The standard (default) settings can be called up using the *Load* button in order to specify or modify the settings for all users in the archive.



1. Click on *Load*. The default settings for *Options* are loaded. Now the settings in the *Options* area can be modified, and options and settings activated and deactivated.



2. Click on *Save* to store the settings. Then all the settings entered by you (as administrator) are saved and are valid for all users.



**Please note:** The settings for individual users are loaded automatically when **ELO** is started, without these buttons. Changes to the options for individual users are automatically saved according to appropriate user ID and are available to the respective user.



# The General index card

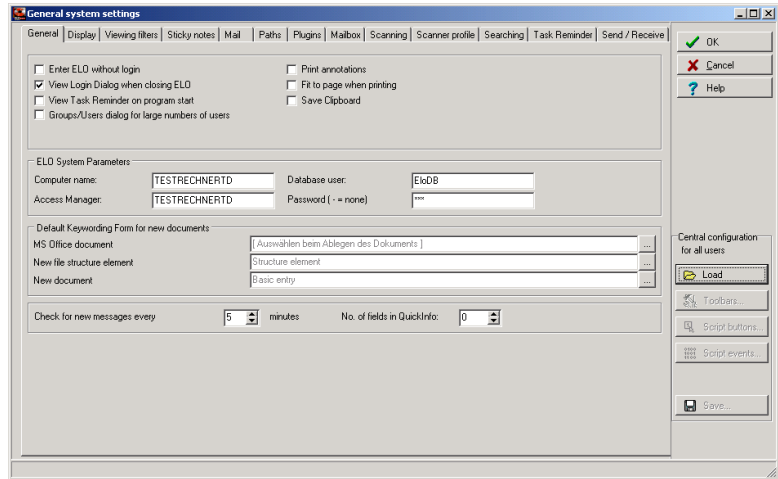


Fig. Options - 'General' index card



Global settings are highlighted in color in the *Options* area.

## Enter ELO without login

Lets you start ELO without logging in and entering your password. **ELO** starts automatically using your Windows operating system login name. This option has to be enabled in the access manager configuration.

## View login dialog when closing ELO

If you check this option, the login dialog appears when the last archive window is closed. You can now switch to the archive and continue working.

## View task reminder on program start

If there are active task reminders in Tasks view, **ELO** displays these automatically when the program is launched.

<b>Group and user dialog for large number of users</b>	With this option you can activate a dialog box for users and groups in which users are assigned respective groups. Please use this dialog if there is a large number of users.
<b>Print annotations</b>	When you check out TIFF documents to edit, you can paste stamps, markers or additional text into the document using either the Wang or Kodak viewer. These annotations (remarks) can be printed automatically along with the original.
<b>Fit to page when printing</b>	Documents are normally saved in original size. When printing, <b>ELO</b> uses these settings. For some scanners or image documents from external sources, these details will not be stored correctly. The printout will be the wrong size or distorted. Using the <i>Fit to page when printing</i> option, <b>ELO</b> ignores these values and tries to best fit the document to the printed page.
<b>Save clipboard</b>	If you enable this option, the content of the clipboard is retained even when the program is restarted.
<b>System parameters</b>	The System parameter area contains user, account and access information for the individual program areas.
<b>Computer name</b>	This should be used to enter a clear and meaningful name for the workstation. This field is usually completed with the name of the current computer.
<b>Access Manager</b>	Name of computer on which the ELO Access Manager is running. This is usually the central archive server.
<b>Database user</b>	Your login name, with which the client signs on to the SQL database.
<b>Password</b>	Used by the administrator to enter the password for the database user mentioned above. If there is no password, please enter a minus sign. Otherwise, ELO will continue to ask for a password every time the program is launched.
<b>Default keywording form for new documents</b>	Here you can specify the keywording forms that are always used by default, e.g. to create ELO objects.

<b>MS Office document</b>	This field lets you set the document type for MS Office files transferred into ELO using the Office macro.
<b>New file structure element</b>	Document type of a new filing cabinet, folder or index. This type is suggested as a default type when you create the entry, but you can change it at any time.
<b>New document</b>	Type for a new document that was created right in the archive window. This entry is also just a default that you can change individually for each document.
<b>Check for new messages every x minutes</b>	ELO regularly checks whether there are new messages for you in the archive database. You can use this entry to specify the query interval.
<b>No. of fields in QuickInfo</b>	If you have turned on QuickInfo automatic keywording display in archive view, database access is noticeably slower. With folders or indexes that are very large, the delay can be very inconvenient. Using this option, you can set QuickInfo to be displayed only for the newest entries so that the feature no longer slows down the program.



# The Display index card

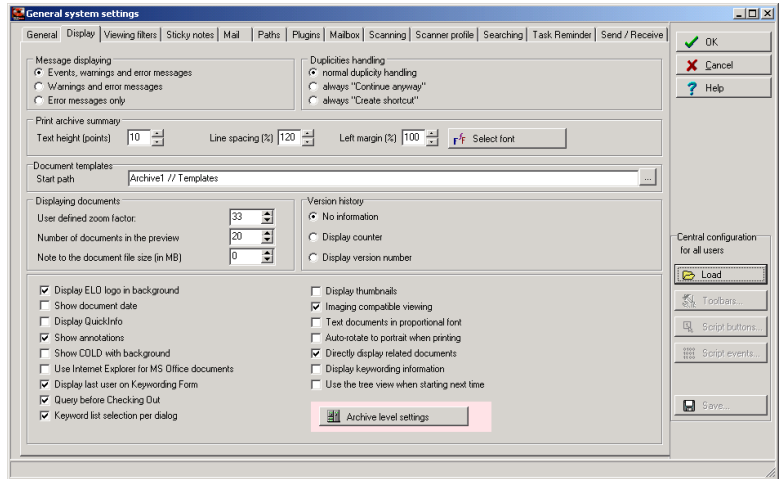


Fig. Options - 'Display' index card

## Info display

If you need to carry out a large number of actions at the same time (e.g. when keywording and filing from the mailbox) it would be time-consuming if you had to acknowledge every single dialog box. **ELO** collects these messages and then displays them in the Info display at the end of the whole transaction. Using this option, you can set whether you want the info display to be shown in every case (Events, warnings and error messages) or only for serious messages (Warnings and error messages or even just Error messages only).

## Duplicate handling

When filing, the system checks whether the document already exists in the archive.

### Normal duplicate handling

The system checks whether the document to be filed exists in the archive; if so, a message is displayed asking the user either to confirm or cancel the archiving process.

**Always "Continue anyway"**

If this option is enabled, the document will always be filed, even if it already exists in the archive.

**Always "Create shortcut"**

If this option is selected, a shortcut will be created to point to the original document where it already exists in the archive.



**Please note:** Duplicate handling is only active if in Access Manager the *Checksum in* option is set to *True*.

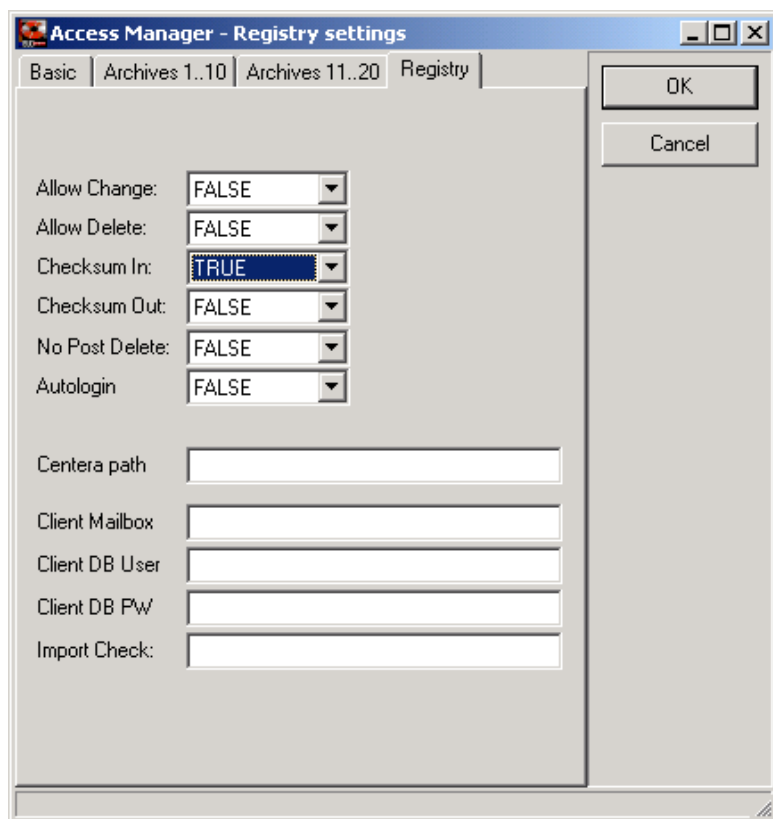


Fig. Duplicate check: set 'Checksum In' to 'True'

**Print archive summary**

Here you can set defaults for printing pages in the Info center.

## Displaying documents

**User-defined zoom factor:** **ELO** provides a range of preset zoom settings and the option of fitting the page to the window. If you want to insert a user-defined value, you may do so here. For the button to be visible in **ELO**, you have to activate it using the configuration dialog box.

**Number of documents in the preview:** Here you can determine the number of documents to be displayed in the preview.

**Warning on the document size (in MB):** If the document activated in the archive exceeds the size specified here, a warning is displayed so that the user can decide whether the document should be "fetched" from the server, even though this would require a significant amount of time.

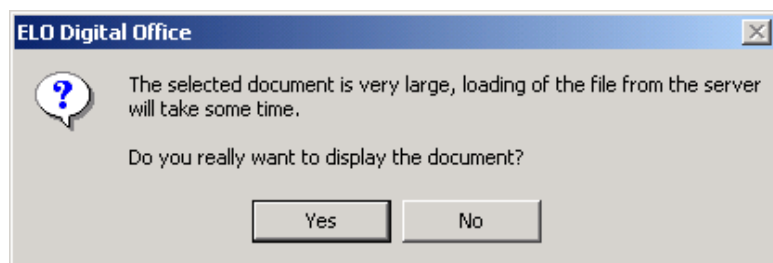


Fig. Warning on document size

## Display version history

When displaying the version history in the archive window, you can choose whether you want to see the internal **ELO** counter (the number of document versions that are checked in) or the manually entered version number.

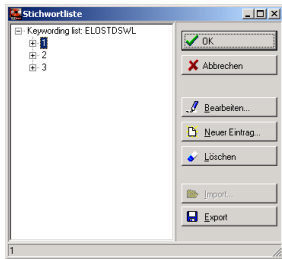
**No information:** The usual data (name and possibly date) is displayed in the archive list view. No information is displayed regarding the version history.

**Display counter:** The internal **ELO** document version counter is displayed.

**Display version number:** The manually entered version information is shown in the list view.

<b>ELO logo, displaying in background</b>	Displays the ELO logo as a background image in the archive. If you have display problems (some graphics cards can cause display errors), disable this option.
<b>Show document date</b>	In archive view, the document date is also displayed in addition to the name.
<b>Display Quickinfo</b>	Shows <b>ELO</b> QuickInfo for every entry listed in archive view. This includes keywording information with all fields and dates.
<b>Show annotations</b>	Annotations created in the Wang or Kodak viewer can also be displayed right in <b>ELO</b> . If you only want to see the original document, you should disable this option.
<b>Show COLD with background</b>	For COLD documents, the background forms can be shown or hidden. Disable this option if you have very large background forms (e.g. full color scans) or if you have to use a slow client workstation.
<b>Use Internet Explorer for MS Office documents</b>	Usually, ELO displays external formats using the OLE Preview in Windows. However, this method does not allow you to scroll through the pages of a document. In addition, some image components are not displayed. Using this option, you can switch to using Internet Explorer (version 5.0 and above) to display these files. You can then scroll through the documents and see all sections of forms. However, Explorer does have certain drawbacks as far as editing is concerned (because it permanently locks the files), so this option should only be enabled on research workstations.
<b>Display last user on 1st page of keywording form</b>	If you check this option, <b>ELO</b> shows the last person to edit the file in the document keywording dialog.
<b>Query before checking out</b>	When opening a file to view it or when checking it out to edit it, <b>ELO</b> asks whether you want to launch the application used to create the file. If you wish, you can turn this function off and turn it on again here.

## Keyword list selection per dialog



If you activate the option *Keyword list selection per dialog* in *System settings, Options, Display* index card, the keyword list will not be shown as a context menu.

The *Keyword list* dialog box opens, from which you can select the appropriate entries.

**Please note:** If you wish to accept your existing keyword lists, you can import them into an empty keyword list using the *Import* button. The *Import* option is only available if you have not yet made an entry in the keyword list.

## Display thumbnails

If, for example, you are looking at a multipage TIFF document in **ELO**, turning on this option will show thumbnails of each page at the side of the screen. This function makes it easier to navigate through multipage TIFF documents.

## Imaging-compatible viewing

Image documents that are displayed are converted to Wang Imaging format because, otherwise, some TIFF files may display the image inverted.

## Text documents in proportional font

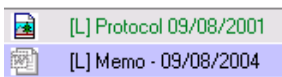
When checked, uses a proportional font when displaying text documents and e-mails rather than a Courier font. This lets you display a great deal more text on your screen.

## Print: Auto-rotate to portrait when printing

This option applies to multipage TIFF files. If a joined TIFF file contains a mix of pages in portrait and landscape orientations, this option ensures that any landscape pages in the document are correctly printed in portrait orientation.

## Directly display related documents

This option lets you display related information directly in the list view.



Documents linked with others in the archive are denoted by an [L] before the name in the list view in the archive. Using the context menu (*Related items*, *View related items*), you can view a list of the related documents in the *Searching* work area.

## Display keywording information

If you turn this option on, the keywording information is displayed above the document in the viewing pane.

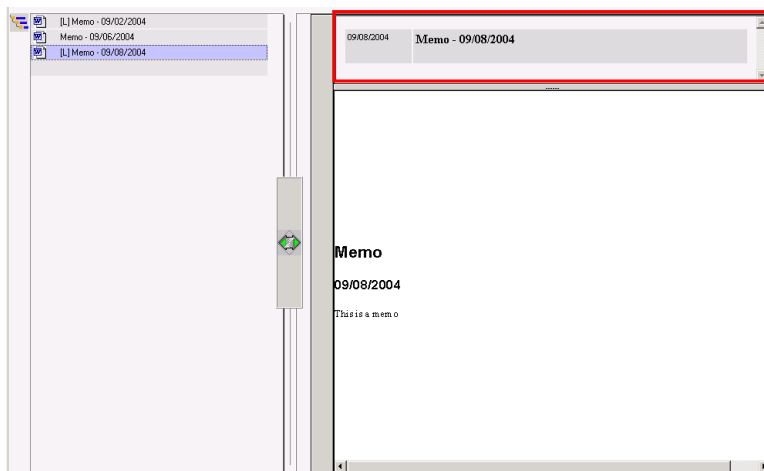
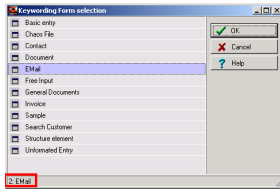


Fig. Direct keywording display

If the *Display keywording information* option is on, **ELO** looks for the file `templ_default.htm` in the mailbox directory, which is used to display the keywording information above the document. A separate HTML file can be created for each keywording form, which displays the required information. Graphics, links etc. can also be included in these HTML files. The file names for the keywording-form-specific HTML files refer back to the Form ID in the keywording form, e.g. the file `templ_6.htm` is available to display direct keywording information for documents archived with the ID 6 keywording form.



You can find out the form ID by clicking the *Select* button from the *System settings* menu, *Keywording forms*.

## Archive level settings

This button allows you to define individual icons and names for the individual archive levels and document types. For each level, you need two icons 24x24 pixels in size and three icons 16x16 pixels in size for the statuses *Enabled*, *Disabled*, *Empty* and *Reminder/Workflow*.

# The Viewing filters index card

**ELO** can use different *viewing filters* to determine what documents are displayed. These are created in the *Viewing filters* index card.

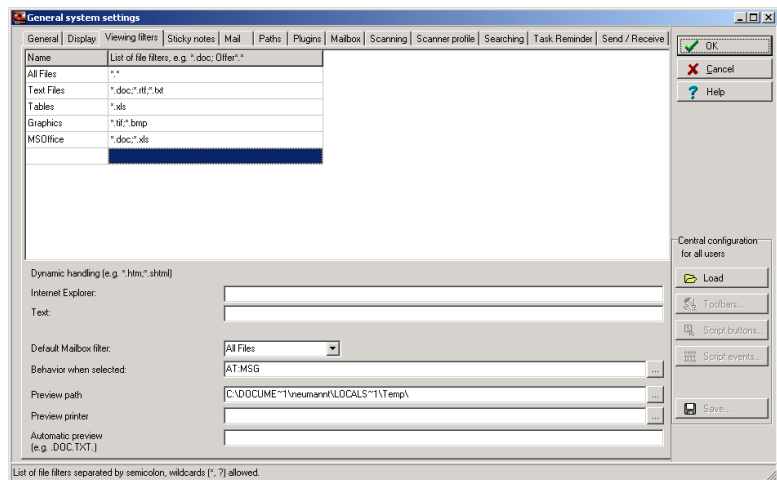


Fig. Options - 'Viewing filters' index card

In the *Name* column, you can set up to six filters. In the second column, you can set which file types to display when using this filter. All other files are hidden while the filter is on. Default Mailbox filter: Enter the filter you want to use as the default when the program starts. This field is normally set to *All files* so that all files are visible. If you enter a filter here as the default, it may make users think that entries have vanished from their mailbox.



## Dynamic handling

Using the *Dynamic handling* option, files with the file extension entered (e.g. \*.pl) are displayed in Internet Explorer or in **ELO**. Enter \*.pl in the input field if you wish to display a Perl file (\*.pl) as a text file in the archive. The individual entries are separated by a semicolon.

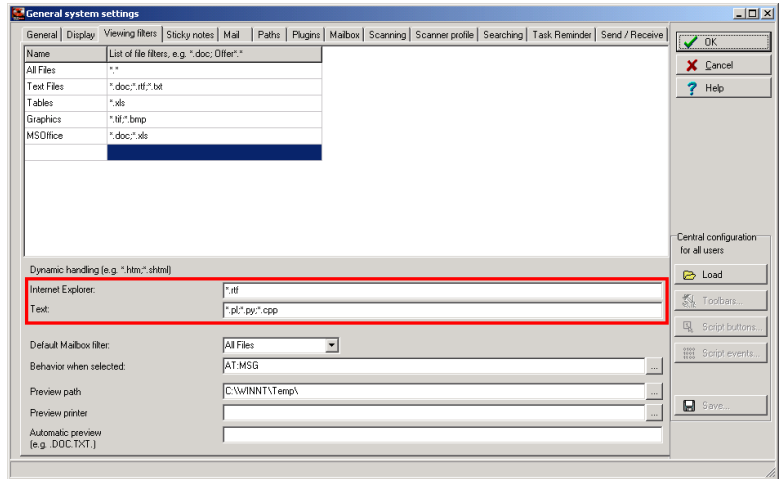


Fig. Assigning file extensions

## Default Mailbox filter

Here you can select which file filter to use to filter documents in the Mailbox. Select *All files* if you wish to display all files in the Mailbox.



Fig. Setting file filter for mailbox

## Behavior when selected

When you click on the button to the right of this field, you reach a configuration dialog box which allows you to set how **ELO** reacts to a document being selected.

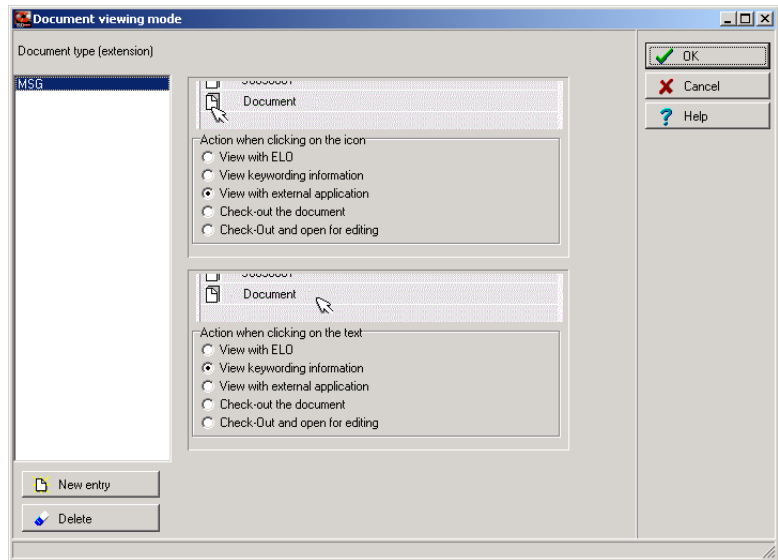


Fig. Display mode for documents

**ELO** makes a distinction between two methods of selecting: either clicking on the name in list view or clicking on the document icon. You can set how you want **ELO** to behave for each file type individually.

**ELO** normally displays the document in preview mode. If you have a slow network connection or are working with unusually large documents, it may be sensible not to display a preview immediately and just to display keywording information in the first instance. In this case, set the *Action when clicking on the text* option to *View keywording information* and the *Action when clicking on the icon* option to *View with ELO*.

To do this, first click on *New entry*. In the subsequent dialog box, enter the file extension for which you want to change ELO's behavior. If you enter an asterisk here "\*", the setting is used for all file types. Then select behavior for the two selection methods in *Action when clicking on the icon* and *Action when clicking on the text*.

Preview path

The path for the preview of documents is entered here. You can only use this path as the default printer path. The preview data is created when the document is filed in the archive.



**Please note:** The preview path and printer path should be the same.

New window	
Close window	
✓ Arrange freely	
Tile vertically	F3
Tile horizontally	Shift+F3
Zoom	▶
Thumbnails view	F10
Rotate	▶
Use TIFF preview	Ctrl+T
Full screen	Ctrl+F
Window	▶
Previous page	PgUp
Next page	PgDn
First page	Shift+PgUp
Last page	Shift+PgDn
Refresh	Ctrl+F9
✓ Smooth B/W documents	Shift+F11
Sorting order	▶
Configure toolbars	
Annotations...	

To use the preview, you must select the *Use TIFF preview* option in the *Display* menu.

Printer preview

Select the printer for the preview. It may be useful to select a printer other than the default TIFF printer if, for example, you wish to set another, lower resolution for the preview files.

File types for auto-  
matic preview

Here the file types are entered for which the automatic pre-  
view is to be used. For this file types the TIFF preview is  
displayed instead of the original document in the archive,  
etc.

Automatic preview (e.g. .DOC.TXT.)	RTF.TXT.DOC
---------------------------------------	-------------

Fig. Determining file types for automatic preview

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# The Sticky notes index card

In the *Sticky notes* index card, you can set the color, size and text format for *Public notes*, *Private notes* and *Stamps*.

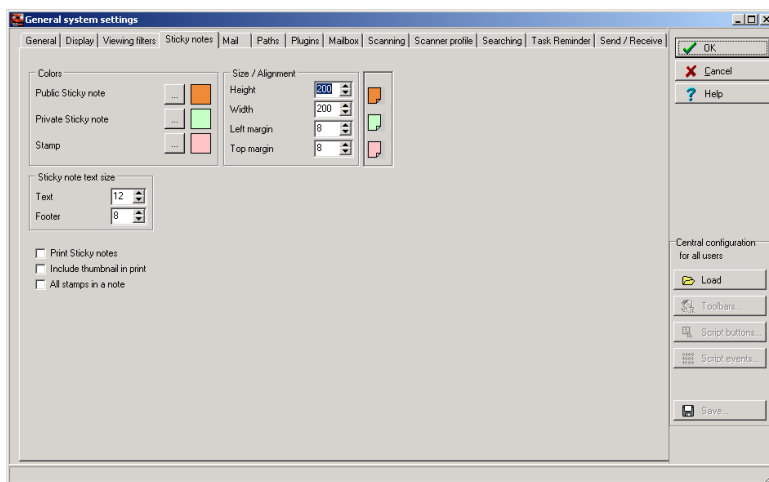


Fig. Options - 'Sticky notes' index card

You can check the layout of the sticky notes by moving the mouse pointer over the Sticky note icon on the right next to the *Size/Alignment* options for sticky notes.

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# The Mail index card

If you have set up an e-mail connection for the **ELO** client using the MAPI interface (the Windows default), you can leave the fields *SMTP server* through *Encoding* unchanged or empty. These entries will be ignored.



**Please note:** The settings in the Mail index card only related to the filing of mails in ELO by linking indexes. Archiving of e-mails using macros reverts to the settings you have entered when configuring the macros and if necessary may differ considerably from the settings entered here. Synchronize the settings if required.

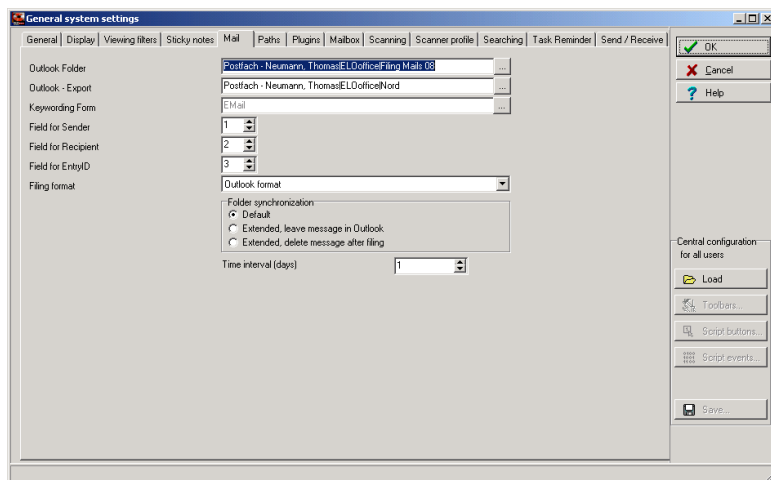


Fig. Options - 'Mail' index card

## Outlook folder

In this field, enter the path for the Outlook folder for the index link. You should also create a dedicated folder for your e-mails in Outlook (e.g. *ELO*). In this folder, **ELO** then creates the folders for the index link.

## Outlook export

As above, except that this path is used to transfer ELO documents to Outlook.



Please note that these two paths (folder and export) must be different, otherwise **ELO** will immediately retrieve all the documents transferred to Outlook.

## Keywording form

This keywording form is used as the default document type for new e-mail documents imported using the Outlook macro. To use the extended e-mail import facility, the `ELO-Mail` form should be set up with one field for EntryID (group name ELOOUTL3) and entered under e-mail options.

## Field for sender

If this field contains a value greater than 0, the Outlook macro will insert the sender's name in this field.

## Field for recipient

If this field contains a value greater than 0, the Outlook macro will insert the recipient's name in this field.

## Field for EntryID

If this field contains a value greater than 0, the **ELO** Outlook macro will insert the Exchange server's unique e-mail number.

## Filing format

Different formats are available for filing e-mails in **ELO**.

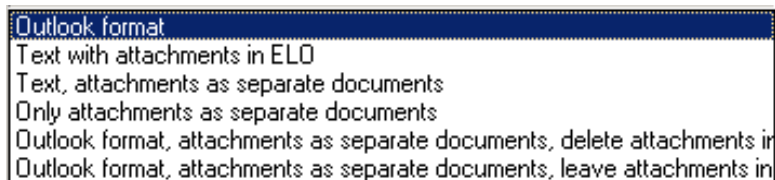


Fig. Filing format for e-mails

## Outlook format

**ELO** copies the e-mail in the original Outlook message format. The archived e-mail retains its status as a mail document. You can open it and edit it again later in **ELO**.

### Text with attachments in ELO

**ELO** copies the body of the e-mail text as a text document. The attachments are appended to the document as file attachments. Please note that the keywording form for e-mails must first be set to *Version controlled*. If there is more than one attachment, the extra attachments can be found in the attachment version history.

### Text and attachments as separate documents

The body of the e-mail text is converted to a text file. In addition, a new ELO document is created from each attached file.

### Only attachments as separate documents

For each attachment, a document is created from the attached file. The body of the e-mail text is not archived.

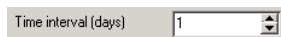
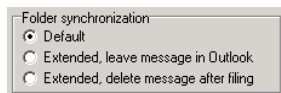
### Outlook format, attachments as separate documents, delete attachments in Outlook

The e-mail is archived in MSG format, the attachments as separate documents. Furthermore, the e-mail is left in Outlook and the attachments deleted from the MSG file in order to relieve the e-mail system.

### Outlook format, attachments as separate documents, leave attachments in Outlook

The e-mail is archived in MSG format, the attachments as separate documents. The e-mail and the attachments are left in Outlook.

## Index link



Here the user can set the index link.

The options with the extended index link differ in the automated creation of an archiving structure matching the directory structure in Outlook, which has been integrated for filing e-mails within **ELO**.

Here you can specify from what point e-mails are automatically copied into the archive.

## Example

To create the following situation for copying e-mails: "Copy all e-mails from the structure, then delete the e-mails in Outlook when they are more than 7 days old", enable the setting *Folder synchronization Extended, delete message after filing* and set *Time interval (days)* to 7.





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# The Paths index card

The *Paths* index card is used to specify the storage locations for all documents, backups etc.

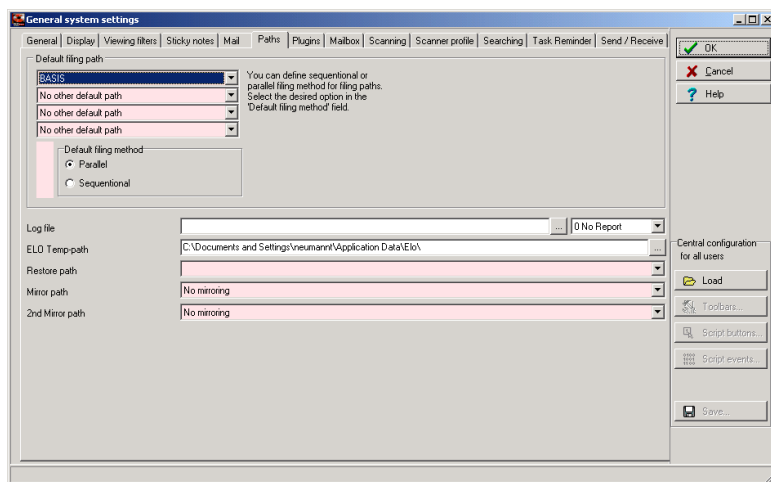


Fig. Options - 'Paths' index card

## Default filing paths

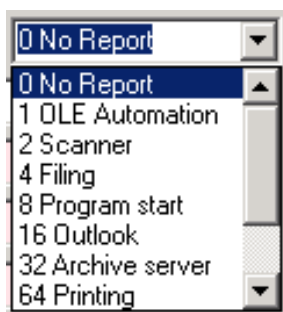
You can preset up to four filing paths as destinations for new documents. Usually, however, there is just one entry to choose from here - the BASIS path.

## Default filing method

If you have defined several filing paths, you can use this option to specify the order in which they should be used. If you select *Parallel*, all paths will be used for filing documents. With *Sequential* the first path is completely filled, then the second.

## Log file (client report)

If you enter a filing path here, **ELO** creates a report file for certain processes detailing the commands carried out.



The content of this file is determined by the digit in the adjacent field. Entering 1 logs the OLE Automation interface, 2 logs the TWAIN commands, 4 logs stages and errors when filing documents etc. You can also use any combination of these values. Entering "255 all" logs all transactions in the client.

### **ELO Temp path**

Here you can specify the path for filing temporary files. Take account of the user rights for the directory selected.

### **Restore path**

You only need this field if you are working with mirror paths. If you leave this field blank, documents are copied back from the mirror location to the default path. Alternatively, you can set up a separate backup location for these documents.

### **Mirror path**

When filing every document, you can copy them to another medium. Enter the path in the Mirror path field. But you first have to set up this path under *Document paths*.

### **2. Mirror path**

If the storage capacity of the mirror path is used up, this reserve path is used to mirror new documents. In this case, the entry appears in the *Mirror path* field with the text *Copied to mirror path*.

# The Plugins index card

**ELO** *professional* directly supports over 30 file formats as standard. Unsupported formats (e.g. CAD or multimedia files) can be integrated into **ELO** later using the Plugin interface.

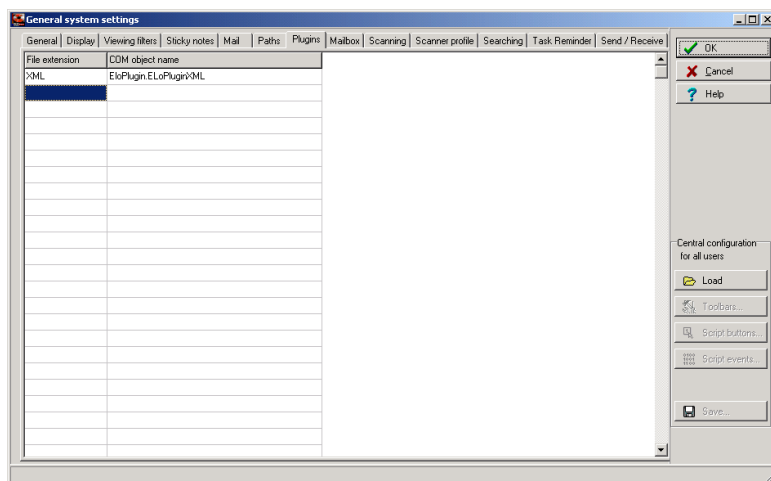


Fig. Options - 'Plugins' index card

An ActiveX Control must be registered for this and used to enter the file ID into **ELO**. If you want to make such modifications, please contact your ELO partner. You can also find information in the *Plugins* folder on your ELO installation CD.

# The Mailbox index card

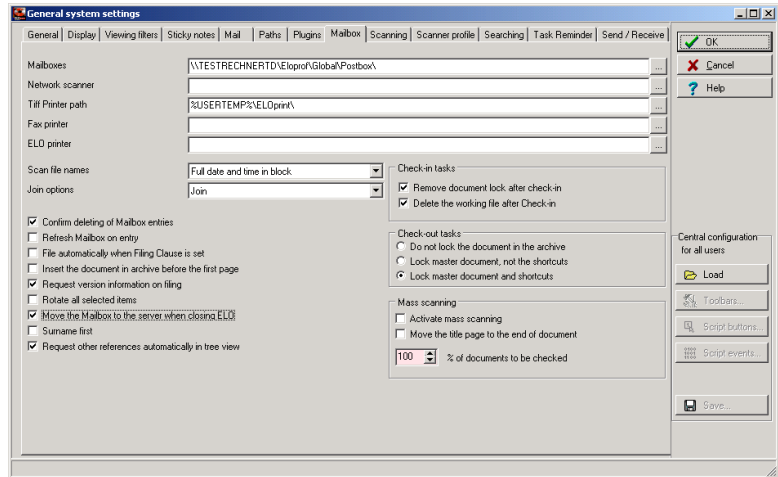


Fig. Options - 'Mailbox' index card

## Mailboxes

During the setup process, the path to the user mailboxes is entered here. You should not alter this setting.

## Network scanner

ELO supports network scanners. These devices are standalone scanners at central locations that can be selected by the user via a menu. When scanning, the files generated are then saved to a particular folder. This is the path that you have to enter in the Network scanner field in the ELO Client. If you are not using a Hewlett-Packard device, you also have to enter the file type the scanner creates. These will usually be TIFF files, so after the path, and separated by a semicolon, enter the identifier ".tif".

## TIFF printer path

The ELO printer is a standalone program that stores the images created in a shared folder. This folder is created during the setup procedure and, in normal circumstances, should not be modified.

## Fax printer

Alongside the normal print button (which uses the Windows default printer), ELO offers another configurable way of printing. If you want to enter a printer here, you should first set it as the Windows default printer. Now, if you click on the button marked "..." at the end of the field in ELO, it sets this printer as the Fax printer. Then you can select your default printer again in Windows.

## ELO printer

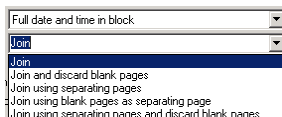
Select the ELO printer, if it was not entered as part of the standard installation.

## Scan file names

When scanning new documents into the mailbox, these are automatically given unique file names. Using this setting, you can set the template according to which the names are generated. By default, the file name is composed of the current system time and the date. In the mailbox, this format automatically sorts the entries by age.

## Staple options

Enter here how **ELO** should join the TIFF files you have selected.



The highlighted documents will be stapled as per your selection.

## Confirm deletion of mailbox entries

If you enable this option, a confirmation dialog will be displayed before documents in the mailbox are deleted. For security reasons, you should always leave this option turned on. If you have to delete a large number of entries and confirming every one would be time-consuming, you can select several documents at once and delete them. The confirmation dialog is only displayed once if you confirm by clicking on *Delete all*.

## Refresh Mailbox on entry

If you select this option, ELO automatically checks for new documents when you open the Mailbox index card. Otherwise, the program only checks if you click on the *Refresh mailbox entries* icon. The program will only always check for new entries the first time you go to the mailbox after launching the software.

**File automatically when filing clause is set**

Enabling this option causes the system to check that there is sufficient information to file the document when saving the keywording in the Mailbox. If there is, the document is automatically filed in the archive. If you have disabled this option, you can create the same effect by selecting all the documents and running *File to archive using filing clause* from the context menu.

**Insert the document in the archive before the first page**

Normally, a new page is added to the document as the last page at the end of the document. If you turn on this function, each new page inserted will be the first page (and therefore a cover sheet).

**Request version information on filing**

If this check box is ticked, the version dialog is turned on again when filing version-controlled documents if you had previously turned it off.

**Rotate all selected items**

If this option is enabled, documents in the Mailbox can all be rotated together.

**Copy Mailbox contents to server on exit**

If this option is enabled, then when **ELO** is closed down, the contents of the locally stored mailbox of the previously logged in user are transferred to the server. This may result in substantial data transfer volumes.



Please note that the Mailbox is only a temporary inbox for your documents. It should not be used as interim storage for your documents. Please ensure that the documents received here are processed as quickly as possible. Documents remaining in the Mailbox have to be copied between the client PC and the server. With extensive data volumes, this may cause unwanted data transfer quantities.

**Move surname to front**

This option causes people's surnames to be moved to the front in the user selection dialog, to allow alphabetic sorting by surname in the List view.

**Request other automatically in tree view**

If this option is selected, you can request other shortcuts to the filed document when filing documents from the Mailbox via the selection dialog box, after the document is filed.

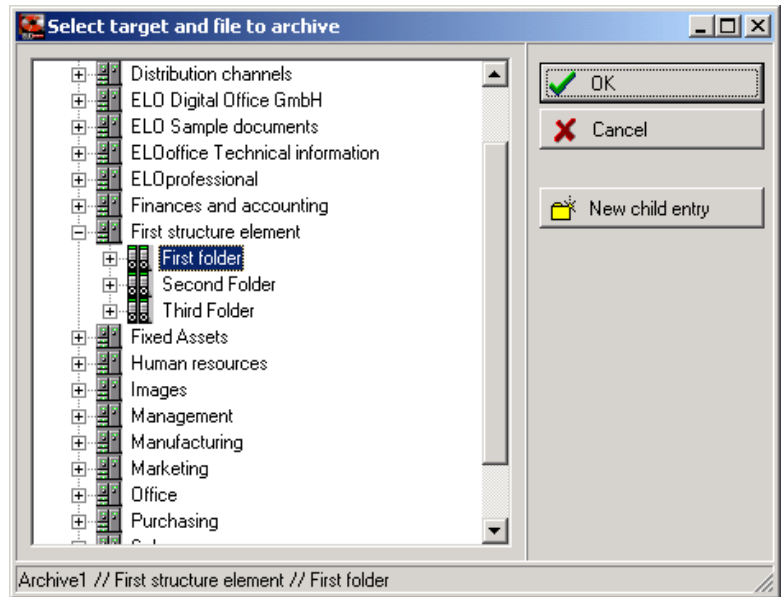
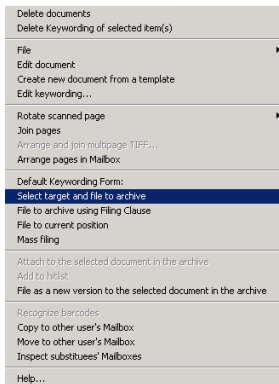


Fig. Creating shortcuts when filing using selection dialog



**Please note:** If you file several documents at the same time, all documents are filed in the structure element which was selected for the first document. When creating shortcuts when filing using the select target and file feature, the shortcuts are also created in the first structure element selected. The options defined (filing location, shortcuts) for the first document to be filed also apply for all other documents when filing several documents simultaneously.

## Check-in tasks

### Document lock

Here, you can turn on options for check-in tasks if required.

*Remove document lock after check-in:* This option removes the document lock after check-in.

### Delete the working file

*Delete the working file after check-in:* Turning this option on means that working versions, which are stored in a temporary folder during editing, are ultimately deleted.

## Check-out tasks

Set the options for check-out tasks here.

**Do not lock** *Do not lock the document in the archive:* During check-out - i.e. while you are editing documents - they are not locked in the archive.

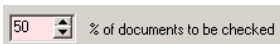
**Lock** *Lock master document, not the shortcuts:* If this option is enabled, the master document is locked, but not the shortcuts to it.

*Lock master document and shortcuts:* Documents and shortcuts are both locked and are not available for editing by other users.

**Mass scanning** With mass scanning (digital signature), several documents are scanned in one after the other and filed in the mailbox. With substantial volumes of scanned material, signing all the documents individually would be rather time-consuming.

**Activate** *Activate mass scanning:* Use this function to activate mass scanning for digital signing of documents.

**Move cover sheet** *Move cover sheet to the back when filing:* Enable this option if you want to move the cover sheet used for scanning to the back when filing in the archive.



*x % of documents to be checked:* Here you can set the percentage of documents that must be viewed (and checked) in the mailbox for "approval" to be given to sign the whole "stack" of documents. If approval is given, the red center bar changes color to green.



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# The Scanning index card

The *Scanning* index card is used to enter the settings for scanning within **ELO**. The individual settings for scanning different documents are entered on the *Scanner profile* index card.

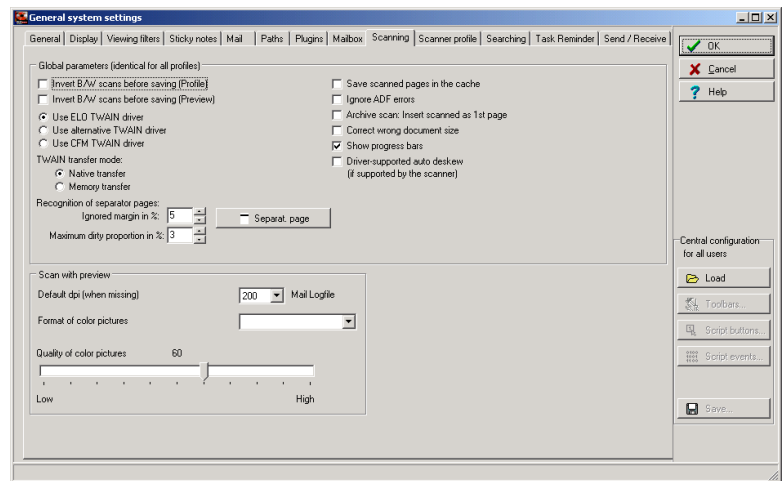


Fig. Options - 'Scanner profile' index card

## Global parameters

This is used to enter the settings that are the same for all scanners. The main emphasis is on compensating for the various errors from different TWAIN drivers. Exceptionally, therefore, you may have to try out different combinations. But these settings only need to be changed if your scanner is not functioning correctly.

<b>Invert B/W scans before saving (profiles)</b>	Not all scanners adhere to the default standard of how to display black and white pixels. In the event of a hardware conflict, you may see black pages with white lettering. Using this option, you can correct errors, if the scanner driver does not cater for individual adjustment. This setting only affects full screen mode.
<b>Invert B/W scans before saving (preview)</b>	Not all scanners adhere to the default standard of how to display black and white pixels. In the event of a hardware conflict, you may see black pages with white lettering. Using this option, you can correct errors, if the scanner driver does not cater for individual adjustment. This options applies to scanning with preview.
<b>Use ELO TWAIN driver</b>	This is a third option for the scanner driver if the previous options do not work.
<b>Use alternative TWAIN driver</b>	If the scanner produces protection errors or malfunctions, you can use an alternative TWAIN driver.
<b>Use CFM TWAIN driver</b>	This provides a further TWAIN connection. If necessary, carry out a test to see with which options your scanner works best.
<b>Save scanned pages in the cache</b>	Some scanner drivers cause protection faults if file operations are carried out during scanning. If this is the case, <b>ELO</b> can initially save all pages in the cache and then save them once scanning has been completed. Remember that this procedure is not recommended for batch scans with a lot of pages. You should split a large scan job into smaller units.
<b>Ignore TWAIN ADF errors</b>	Some scanners report incorrectly to the application that there are still pages in the automatic feed tray. Scanning is then ended prematurely. If you enable this option, after scanning is completed <b>ELO</b> will check whether the ADF is empty and, if necessary, continue scanning.

<b>In the archive insert as new page</b>	This option determines how to add new pages to an existing archive document. By default, they are added after the last page of the existing document. This option, however, also allows you to insert the new pages at the beginning of the document.
<b>Correct wrong document size</b>	Sometimes, scanners can only produce the largest document format, regardless of the crop setting selected. Checking this option, however, allows ELO to crop the scanned pages according to your settings. If the TWAIN driver does not produce the requested document size, ELO will automatically correct the document format if this option is selected.
<b>Show progress bars</b>	During scanning, a progress bar is displayed so that you can monitor the process and know, roughly, the time to completion. With some scanners, an additional dialog with progress bar is displayed on top of the scanner software, so that you have to confirm scanning several times. This dialog will only ever appear if you have checked this box.
<b>Driver-supported auto deskew</b>	If supported by the driver, scanned images will be automatically deskewed.
<b>TWAIN transfer mode</b>	<i>Native transfer</i> or <i>Memory transfer</i> – different TWAIN drivers support one or the other of the data transfer modes. The memory transfer mode is less memory-intensive.
<b>Scan with preview</b>	If you do not want to scan into the archive using predefined profiles, select <i>Scan with preview</i> . Although you can always make corrections during scanning, you can enter a few default settings here.
<b>Default dpi (when missing)</b>	To display and print documents, <b>ELO</b> needs information about the original document size. Some scanners report either no value or one that is plainly wrong. If this occurs, you can override the setting and force <b>ELO</b> to use the value entered here.
<b>Format of color pictures</b>	Here you can enter the format in which you want <b>ELO</b> to file color pictures when you Scan with preview. Black and white images are always saved in Fax G4 format.

**Quality of color pictures**

If you chose to save in JPEG format, you can set the quality level here. A higher value will give very high resolution but also large file sizes. A lower value may, in certain circumstances, cause errors in the image, although files will be smaller. In practice you should find a compromise value to best meet your needs.

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# Scanner profile index card

You can define up to 8 preset scanner profiles. First go to the *Scanner profile* index card and select the number of the profile from the index tabs 1 to 8 at the bottom of the window (named profiles display the name not a number). You can then set the profile properties.

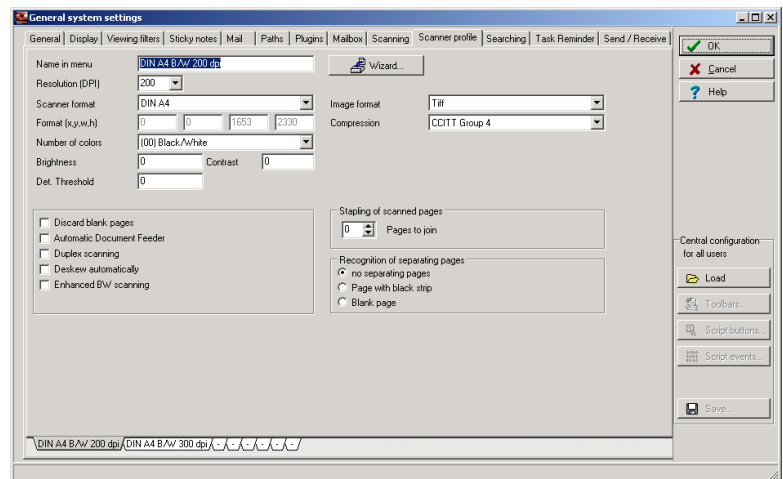


Fig. Options - 'Scanner profile' index card

## Name in menu

Enter the scanner profile name here. The profile will be listed in the menu under this name later.

## Resolution (DPI)

Here, you can set the resolution to use. Please remember that not all scanners support custom resolutions. Normally, you should select a resolution of *300 dpi*. This is a good compromise between high quality and acceptable file sizes.

## Scanner format

Here, you can set the size of the area to scan. Alongside some default sizes, you can also enter custom sizes using the option *User defined*.

<b>Format</b>	If you selected <i>User defined</i> , you can define the scan area here.
<b>Number of colors</b>	You can set the color resolution here. You should make a sensible decision between black and white only pages and photo quality with 24-bit color. The intermediate settings are not usually recommended, because they are increased to 24-bit color by JPEG compression anyway. What is more, the grayscale formats are not supported by every printer driver.
<b>Brightness, Contrast, Detail detection threshold</b>	These settings are not supported by all scanners. Moreover, there are very different ranges for the values. The default value 0 means that the scanner's default setting is used. Normal ranges are between 1 to 8, 1 to 100, -127 to 127 or -1000 to 1000.
<b>Discard blank pages</b>	<b>ELO professional</b> has the intelligence to recognize blank pages. You can use this to remove blank pages from scanned documents automatically.
<b>Automatic Document Feeder</b>	This option switches from flatbed scanning to ADF (multiple document feed). Only enable this option if your scanner really has an ADF. If this is not the case, scanner results may be impaired.
<b>Duplex scanning</b>	If you have a scanner that is capable of scanning front and back at the same time, you can enable this feature by checking the box.
<b>Deskew automatically</b>	Documents that have been scanned at an angle are automatically aligned to the margins.
<b>Enhanced B/W scanning</b>	Black and white scans are optimized automatically.
<b>Wizard</b>	You can define the profile for scanning documents using the Scanner profile Wizard. Click on <i>Wizard</i> . The <i>Scanner profile Wizard</i> dialog box appears.

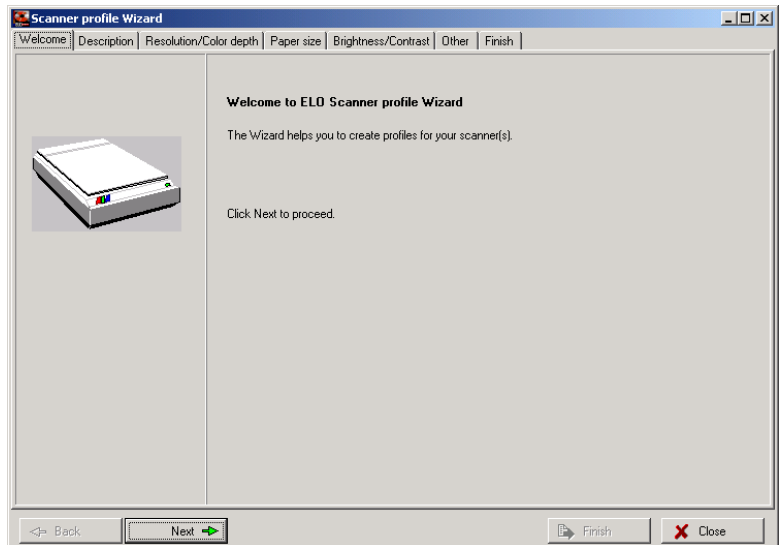


Fig. Wizard for configuring the scanner profile

## Image format

Here you can set the file format for the scanned files.

## Compression

Here you can set the compression level for the scanned files.

## Stapling of scanned pages

*Pages to join:* If you scan documents with a fixed number of pages (e.g. always 3 pages long), you can initiate automatic document separation with this function. Set the number of pages to the right amount and scan the whole batch in the *Stapling of scanned pages* mode. **ELO** always starts a new document after the requisite number of pages.

## Recognition of separator pages

Document separation can also be performed using dedicated separator pages. Usually, special pages with a horizontal strip are used for this purpose. Alternatively, you can also use blank pages as separator pages. Please note that you cannot use this option and the *Discard blank pages* option at the same time.

## Separator pages

This dialog allows you to print separator pages and also to test that they are recognized correctly.

Click on *Separator pages*. The *Separator pages* dialog opens.

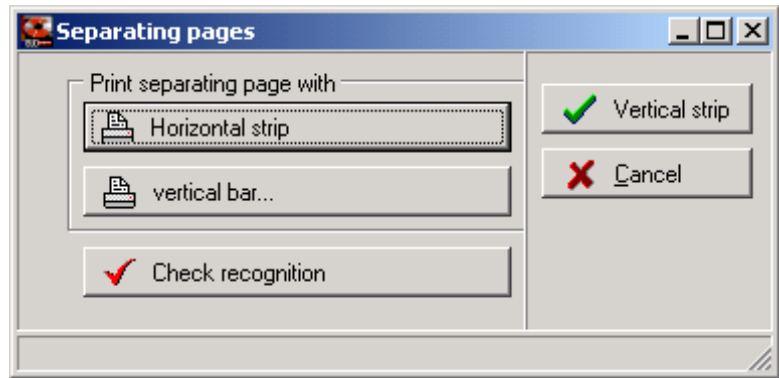


Fig. Printing and testing separator pages

Using the buttons *Print separator page with* either *horizontal strip* or *vertical strip*, you can produce different separator page formats. With the *Check recognition* button, separator pages already created can be tested for effectiveness. The *Close* button closes the dialog.



---

# The Searching index card

The *Searching* index card is used to enter the setting for searching documents. Remember that settings in the *Search mode* area have a direct effect on the search results in the *Searching* area.

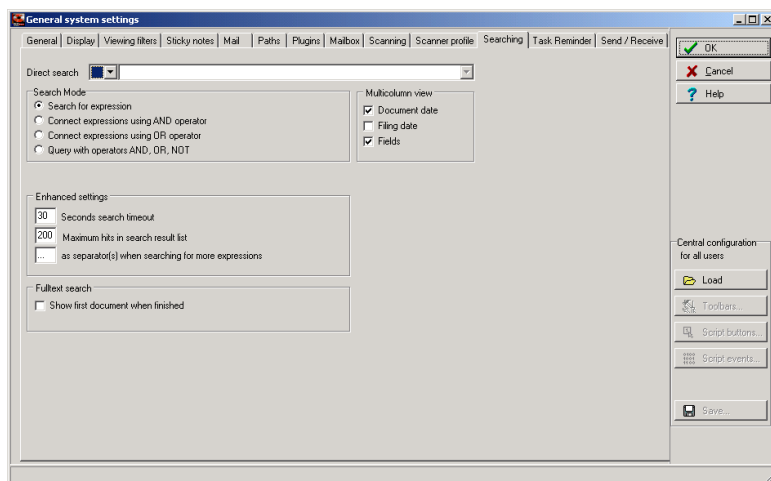


Fig. Options - 'Searching' index card

## Direct search

Here, you can link the four user-defined icons from the Search window with preset document types. If you want to assign icon 1 to the invoice search, first select 1 from the list on the left then the document type *Invoice*.

## Search mode

This option only applies to the Name and Memo text.

### Search for expression

If you search for the text **ELO Digital**, then **ELO** will display all documents containing this exact term. But a document containing the text **ELO-Digital** will not be returned as a match.

<b>Connect expression using AND operator</b>	Returns those documents containing all the words in the list. This list then includes the document with "ELO-Digital" as well as one with <i>ELO... digital television...</i>
<b>Connect expression using OR operator</b>	Displays all documents containing any one of the words in the list. In our example, it would be sufficient for the terms <i>ELO</i> or <i>Digital</i> to appear somewhere.
<b>Query with operators AND, OR or NOT</b>	Here, you can combine individual queries. The individual expressions have to be explicitly linked with the operators and/or/not. Example: <b>ELO and DMS and not ARCHIV</b> .
<b>Multicolumn view</b>	In the search window, <b>ELO</b> features a multicolumn view. Here, you can set which columns you want displayed. The <i>Fields</i> option should always be enabled, otherwise there is no real point using multicolumn view.
<b>Exhanced</b>	Here are some additional options for searching.
<b>Seconds search timeout</b>	For very complex search queries in large archives (over 1 million documents), the search may be extremely lengthy. So that the user does not begin to think their computer has crashed, the search is terminated after the specified period of time.
<b>Maximum hits in search results list</b>	A very general search (e.g. all documents with an E in the name) can generate a very long list of matches that may overload the server. So that single clients do not disrupt operation for all users, the size of the hit list is also limited.
<b>Separator for range search</b>	As well as searching fields for individual expressions, you can also search for ranges. To run this range search, the start and end of the range must be entered, separated by a specified symbol. Example: 2000...4000. The separator symbol may be any character string. The default value is three dots.
<b>Fulltext search</b>	Here you can configure the parameters for fulltext search.

**Show first document when finished**

When performing a fulltext search, this option allows you to switch to the first page of a matching document on completion of the search. For certain document types, the matching expressions can also be highlighted in color on the pages.

**OCR settings**

The OCR settings can only be configured using the OCR.ini file. Enter the settings for the OCR settings if necessary.

Select the languages you require for fulltext.

This completes the settings for the *Searching* area. Check the settings by trying out the various options.

# Reminders and tasks

On the *Task reminder* index card, enter the settings for reminders and the *Tasks* area. There are then the options for workflow behavior and synchronization between **ELO** and MS Outlook.

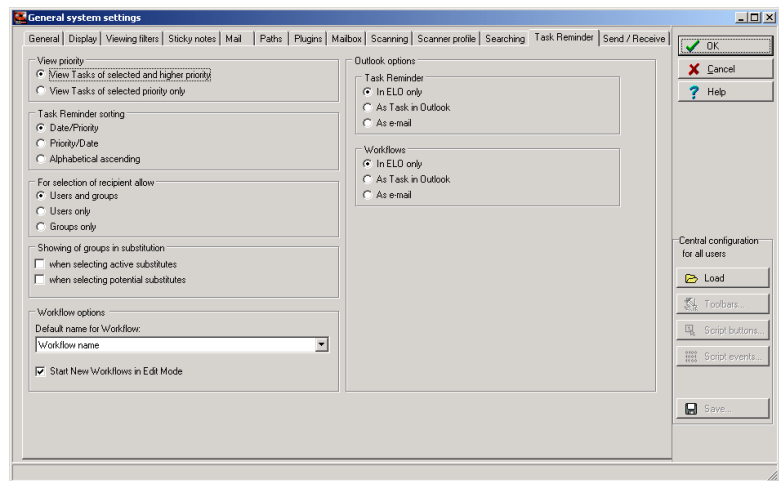


Fig. Options - 'Reminders/Tasks'

## View priority

This option lets you set whether you want to display documents with the selected priority level only or all higher-priority documents also.

## Task reminder sorting

Here, you can set the order for displaying the documents in the Tasks list.

## Selection of recipients for task reminder

You can normally set task reminders for users or groups. However, the administrator can restrict this to allow only users or only groups to be addressed.

**Showing of groups in substitution**

Substitutes can be granted only to users, not to groups. If you display groups in the selection, they will be automatically expanded into the corresponding list of users.

**When selecting active substitutes**

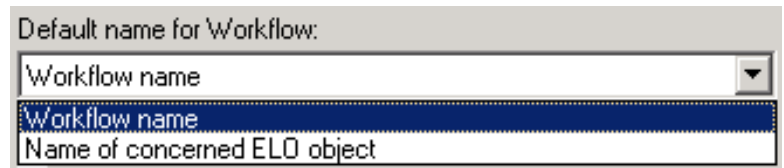
The list of possible active substitutes also displays groups. These are converted into the corresponding lists of users after selection.

**When selecting potential substitutes**

The list of substitution approvals also displays groups. These are converted into the corresponding lists of users after selection.

**Workflow options, specification of active workflows**

You can choose between two settings. Either the *Workflow* or the *Name of concerned ELO object* will be displayed.



Default name for Workflow:

Workflow name

Workflow name

Name of concerned ELO object

**Outlook options**

Select the options for interaction between Outlook and ELO.

**Task reminders**

Use the checkboxes to enter how ELO and Outlook should behave with regard to task reminders.

**Workflows**

Select the option that defines the display format of workflows in Outlook.

---

# Sending and receiving

Use the *Send/Receive* index card to enter the settings and configuration for the documentation folder.

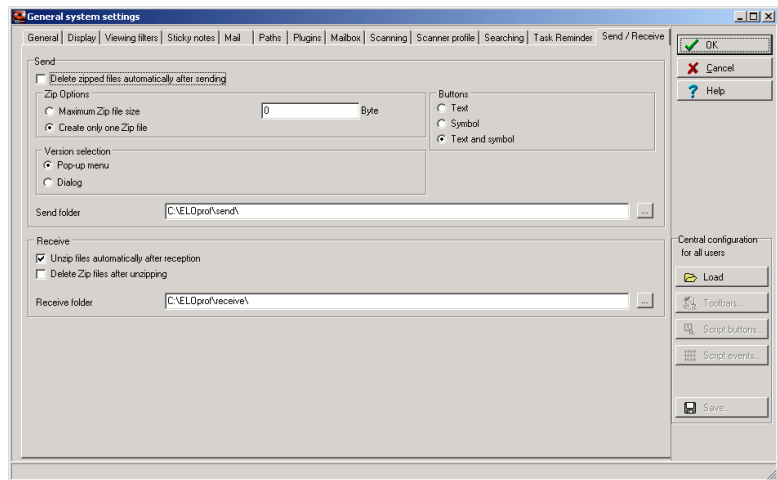


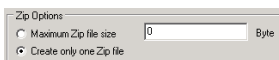
Fig. Options - 'Send/Receive'

## Send

In order to send documents from **ELO**, you need to enter these settings.

### Delete zipped files automatically after sending

If this option is enabled, Zip files are deleted from the local computer after sending.



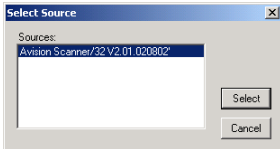
### Zip options

When the files to be sent are to be broken down into individual Zip files, you must either select *Maximum Zip file size* (and enter a size) or click on *Create only one Zip file*.

<b>Version selection</b>	Please choose between display as a popup menu or as a dialog box.
<b>Buttons</b>	Select whether to display the button with text, as an icon or both.
<b>Send folder</b>	Enter the local directory holding the send files.
<b>Receive</b>	In order to receive documents in <b>ELO</b> , you need to enter these settings.
<b>Unzip files automatically on receipt</b>	If you have enabled this option, all Zip files received will be unzipped automatically.
<b>Delete Zip files after unzipping</b>	If this option is enabled, the Zip files will be deleted after unzipping.
<b>Receive folder</b>	Enter the directory to be used to store files that you receive via <i>Receive files</i> .

---

## Selecting a scanner



If you have several scanners connected to one computer, you can switch between the different devices using the *Select scanner* menu option.



---

## Selecting a scanner profile

In order to scan documents in **ELO**, a scanner profile must be selected. Always select a profile matching the quality of the document.

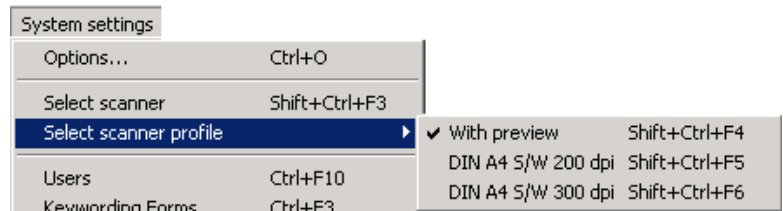


Fig. Selecting a scanner profile

This menu offers you a choice of predefined scanner profiles. The entry selected here will be used by all scanning processes in the archive or in the mailbox. If none of the available profiles is suitable for a particular document, you can switch to *Preview* and enter all parameters and settings individually. However, this should only be necessary for very hard-to-read documents.

---

# User

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
<b>Users</b>	<b>Ctrl+F10</b>
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

The administrator and those appointed by him/her are responsible for user management. Most ELO users do not have the right to access User management, for security reasons.

User management means:

- Entering new users in **ELO** and assigning specific rights and keys.
- Assigning different rights or keys to existing users.
- Deleting users from **ELO**.

## Registering a new user

1. In the *System settings* menu, click on *Users*. The *User management* screen appears.

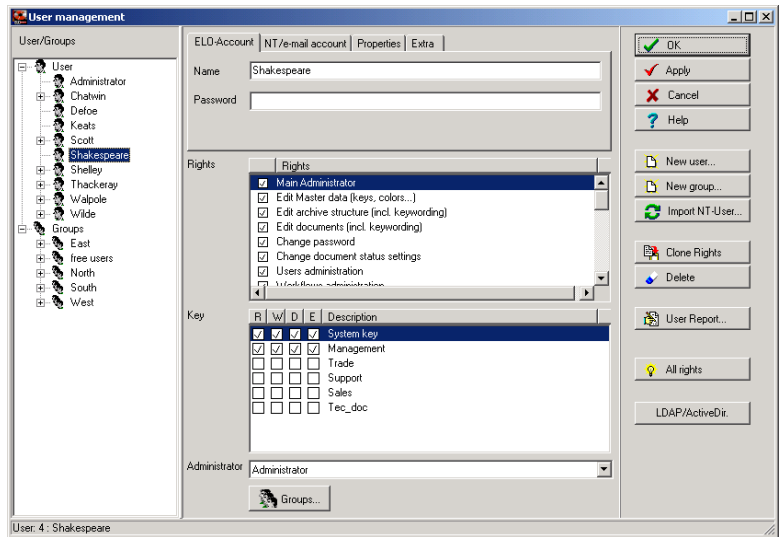
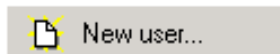


Fig. User management



2. Click on *New user*. The *New user/group* dialog appears.

**Name(s):** Enter the new user's name. Separate multiple users' names with semicolons.

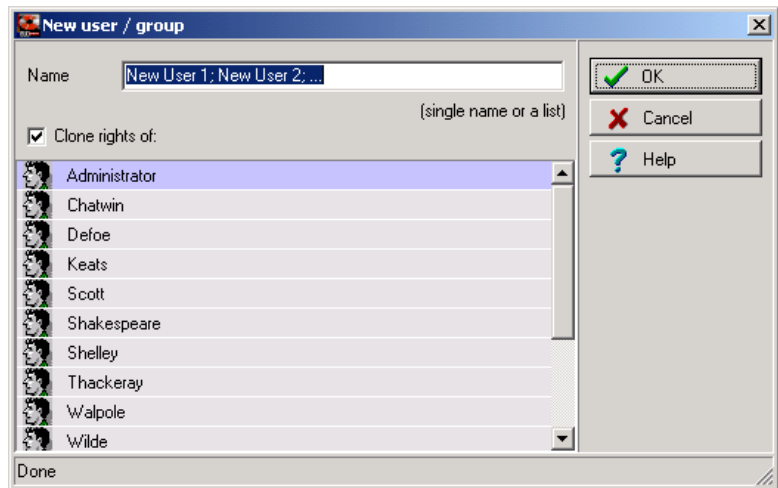


Fig. Creating a user



*Clone rights:* Checking this feature means the new user is assigned the same rights as the user selected in the list below.

## Notes on registering new users

If you want to set up several users with the same rights in User management, you should register a number of fictional users, each provided with a particular authorization scheme. This applies to all users that you do not want to (or cannot) assign to a group.

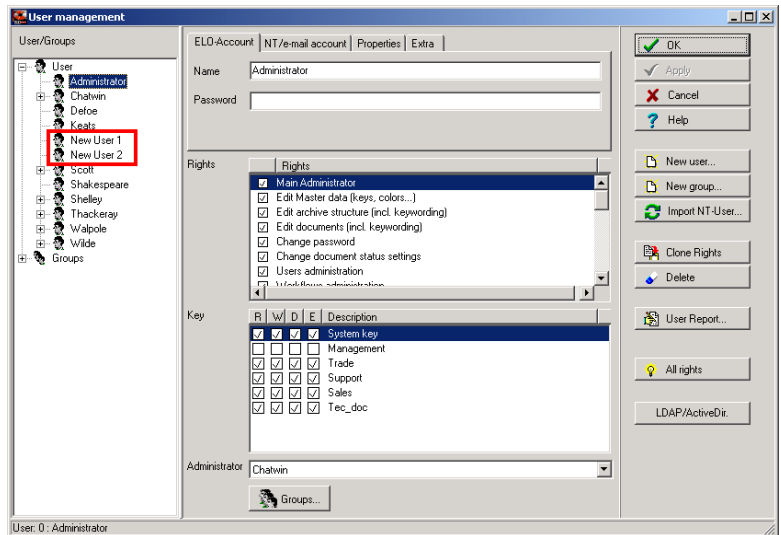


Fig. User management - fictitious user

With the *Clone rights* button, you can assign the appropriate rights after registering the user.

3. Confirm by clicking on *OK*.

The *User management* dialog reappears. The new user is already entered in the *Users/groups* list field and on the *ELO account* index card under *Name*. The other index cards in this area – *NT/Outlook account* and *Properties* – will be explained later.

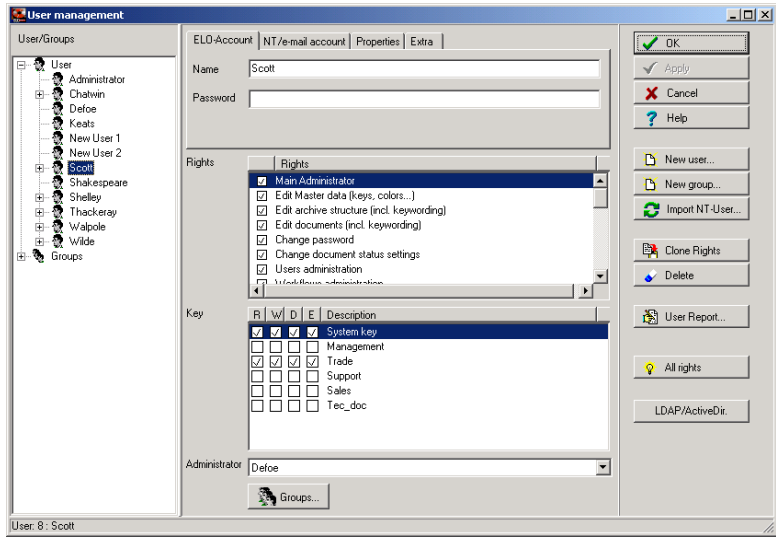


Fig. User management - new user

Name	Scott
Password	

**Password:** Every ELO user has to log in to the system using a password. Specify the password here on the *ELO account* index card. Note that the password is case-sensitive.

In the *Rights* area, you can assign the rights for every user individually as regards administering and editing the archive and the archive data. For this you need *User administration* rights.

## User rights

Call up User management from the *System settings, Users* menu.

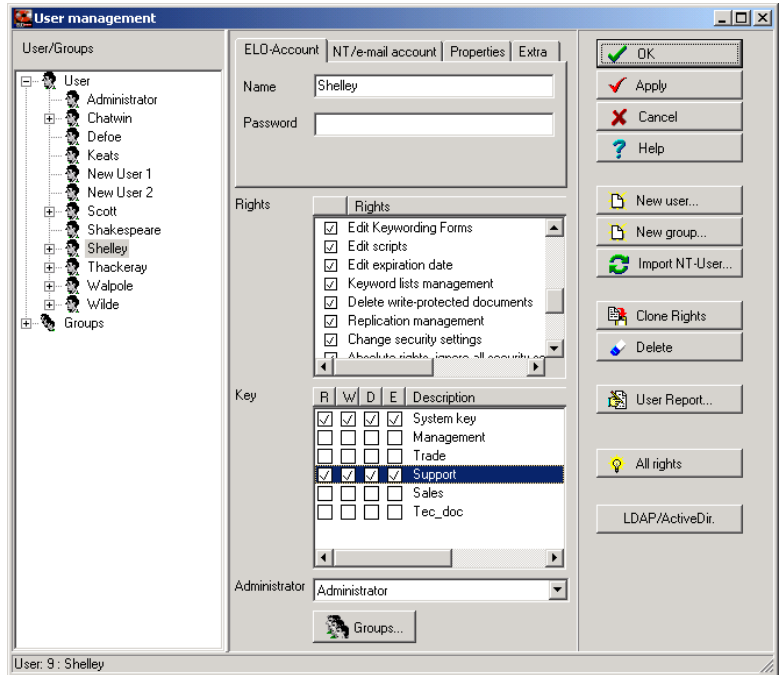


Fig. User management - determining rights

Specify access rights for each individual user.

## LDAP and Active Directory

To simplify the transfer of user information, the *LDAP/Active Directory* dialog in User management can be used to retrieve the settings for user rights from an LDAP or Active Directory server and import them into **ELO**. This saves manually entering users and their rights into the active ELO system. The LDAP server manages the users.

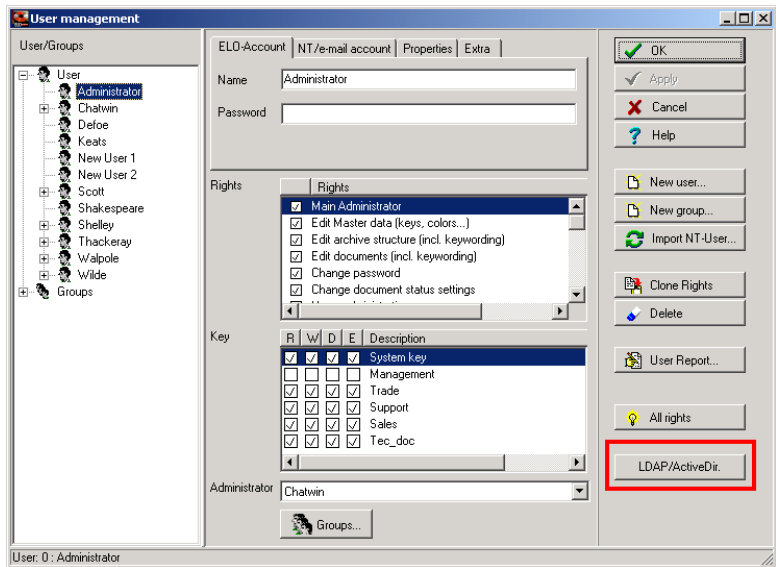


Fig. Starting LDAP/Active Directory configuration

LDAP/ActiveDir.

1. Click on *LDAP/ActiveDir.* The *LDAP/ActiveDirectory* dialog box opens.

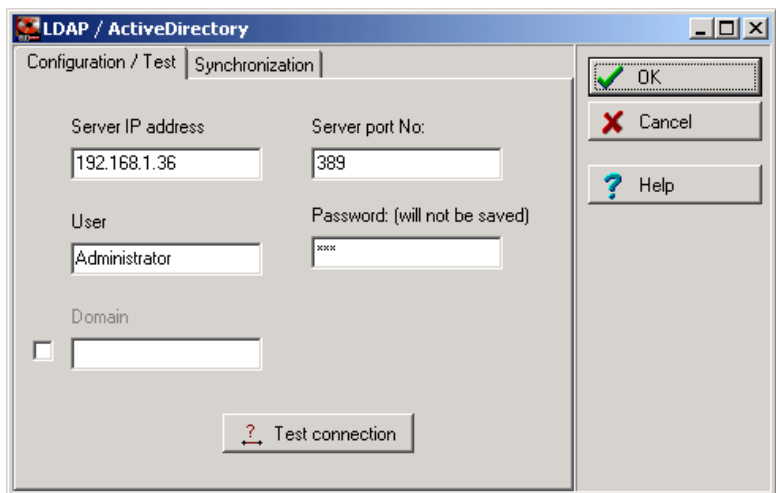
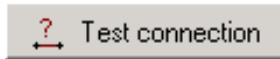


Fig. Entering configuration for LDAP server



In the *Configuration/Test* index card, enter the IP address, server port no. and access data for the server in the input fields. If necessary, ask your administrator for this information.



Then test the connection to the LDAP server. If the test is successful, it is possible to read the user data. Switch to the *Synchronization* index card.

## Synchronization

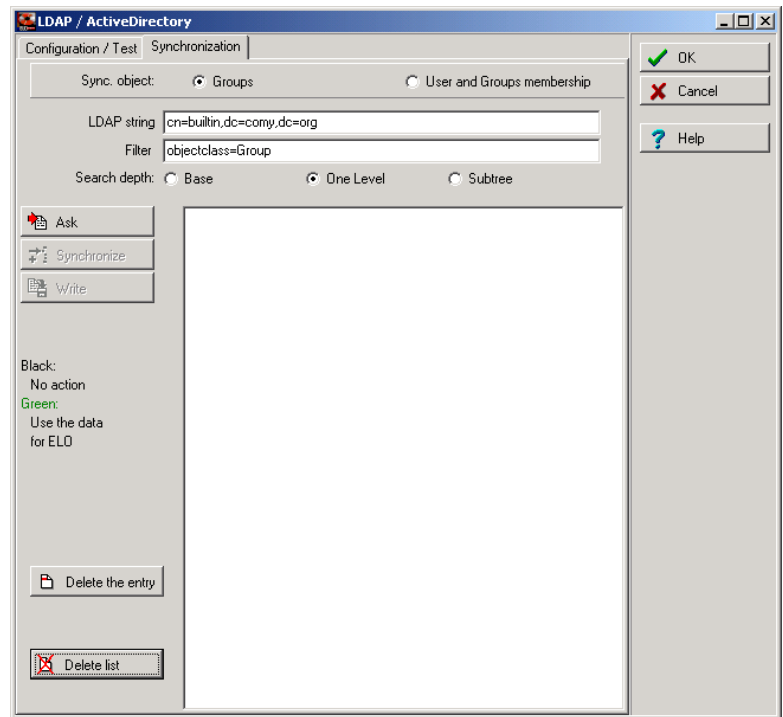


Fig. Synchronization with the LDAP server

You can obtain user data from the LDAP server via the *Ask* button. The information is shown in the current dialog window.

## Synchronize

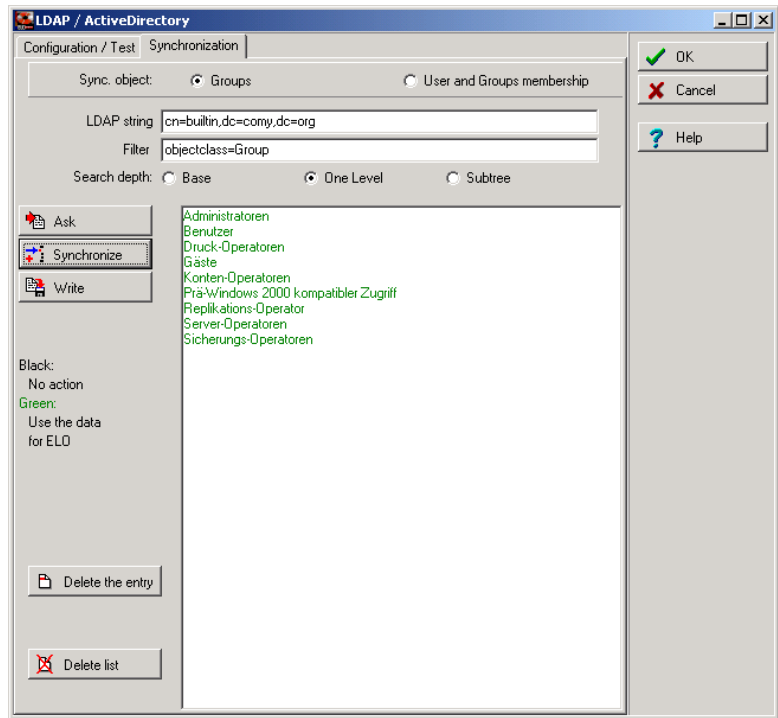


Fig. Synchronizing user data

By clicking on *Synchronize*, the user settings for the LDAP server will be synchronized with the ELO user information. The results of the synchronization are shown in the current dialog box. The relevant results are highlighted in color.

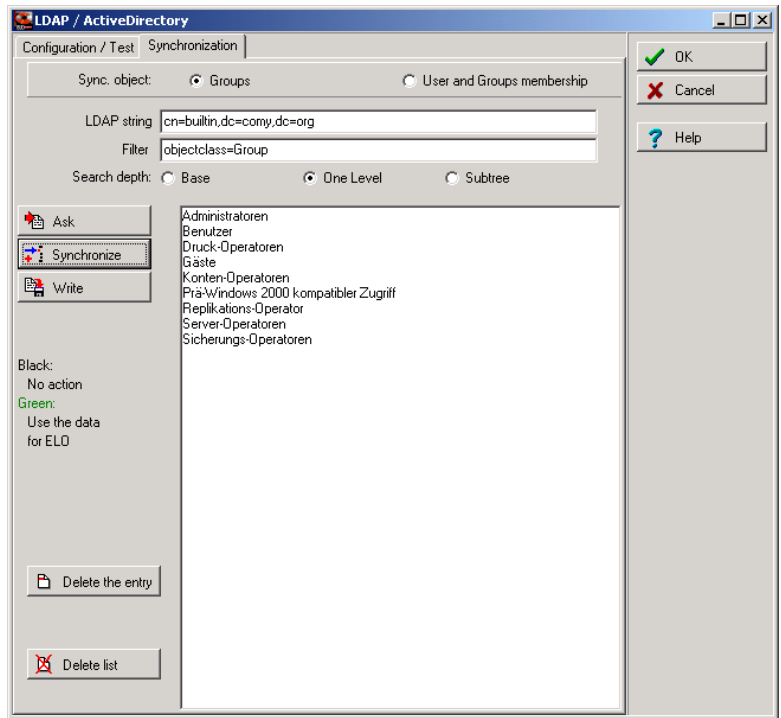


Fig. Results from synchronizing user information

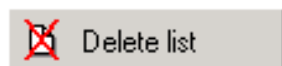
**Black:** The Write button does not trigger any action.

**Green:** The data shown will be copied to ELO User administration.

**Red:** The data shown will be copied to ELO User administration.



If you select one entry in the display area, you can remove the entry from the list by clicking on *Delete the entry*.



Clicking the *Delete list* button will remove the data from the entire display area.



Click on the *Write* button to accept the data. The data shown will be copied to ELO User administration.



---

# User rights

You can assign the following user rights:



Main administrator: Rights and key assignments for all users can be changed, and users can be created and deleted. This right should be reserved for use by the system administrator. Remember that *Absolute rights, ignore all security settings* may clash with other rights. Consider carefully who should have this right assigned to them.

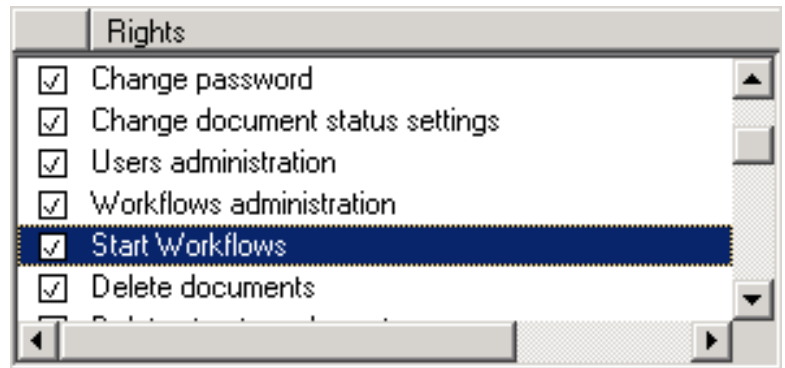
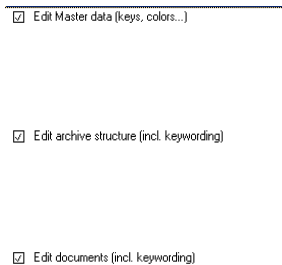


Fig. Assigning rights



Edit master data: The user can carry out all necessary maintenance in the archive (e.g. key management, creating users).

Edit archive structure: This right allows the user to edit the file structure (cabinets, folders etc.) or create new elements. It does not include the right to create new archives.

Edit documents: The user can edit documents or create new ones.

☒ Change password

Change password: The user is authorized to change his/her own password via the *System settings, Password* menu.

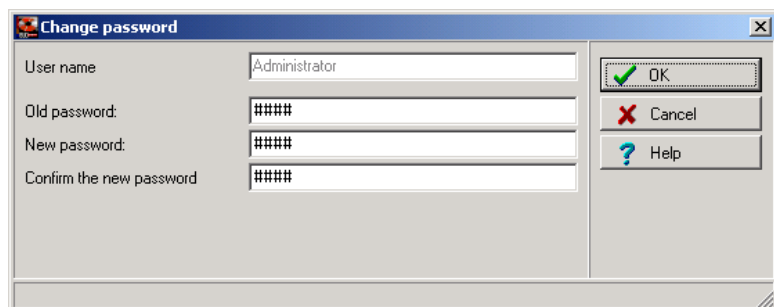


Fig. Changing the password

☒ Change document status settings

Change document status settings: The user can change the status of objects (no version control, version-controlled, read-only).

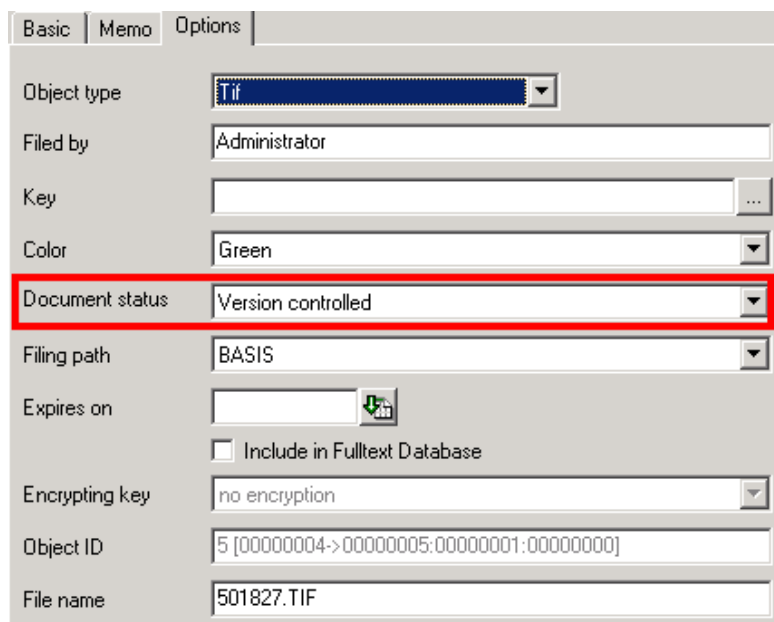


Fig. Changing the document status

☒ Users administration

Users administration: This option allows the user to create and administer other users. However, new users can only be created with the same (or fewer) rights than the owner of this right.

☒ Workflows administration

Workflow administration: The user is able to create and administer workflows.

☒ Start Workflows

Start workflows: The user can start workflows.

☒ Delete documents

Delete documents: The user can delete documents.

☒ Delete structure elements

Delete structure elements: The user can delete structure elements (cabinet, folder, index).

☒ SAP-Administrator

SAP administrator: This right is used to link **ELO** to SAP using the **ELOprofessional** ArchiveLink module. This right allows you to administer the index form relating to the SAP interface. The index form for SAP-administered documents is visible to all, but can only be edited by the user with this right. For questions on this topic, contact your system administrator.

☒ Importing

Importing: The user is authorized to import export datasets into the current archive. All data in the dataset will be imported. This includes data to which the user with the import rights has no access rights within the archive. This data will then not be visible to him/her.

☒ Exporting

Exporting: The user is authorized to export ELO objects and documents to which he/she has access rights within the archive. The user cannot export any objects to which he/she does not have access rights.

☒ Edit Keywording Forms

Edit keywording forms: The user can create, edit and modify keywording forms. Please consider the consequences when keywording forms in an archive have to be modified later.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

Edit scripts: You have the right to call up script management from the *System settings*, *Scripts* menu and administer all processes required to organize, assign and create scripts.

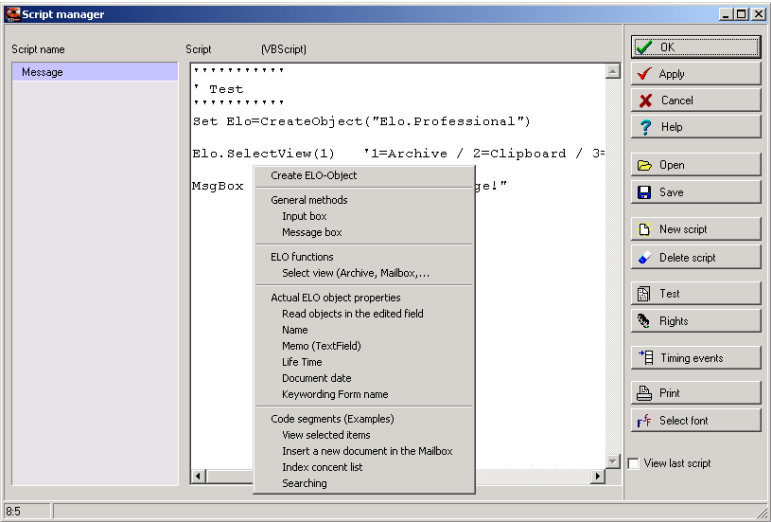


Fig. Script management

☒ Edit expiration date

*Edit expiry date*: The user can edit and set the expiry date for documents. This only allows access to the *Expires on* field in the keywording dialog on the *Options* index card. The date can be changed with the aid of the calendar.



Options

Object type: Tif

Filed by: Administrator

Key:

Color: Green

Document status: Version controlled

Filing path: BASIS

Expires on: 09/16/2005

☐ Include in Full

Encrypting key: no encryption

Object ID: 5 [00000004->00000000]

File name: 501827.TIF

Calendar: September 2005

	Su	Mo	Tu	We	Th	Fr	Sa
35					1	2	3
36	4	5	6	7	8	9	10
37	11	12	13	14	15	16	17
38	18	19	20	21	22	23	24
	25	26	27	28	29	30	

Today X

Fig. Editing the expiry date



This right does not give the user access to set the expiry date via the Management of keywording forms dialog. This requires the right to *Edit keywording forms*.

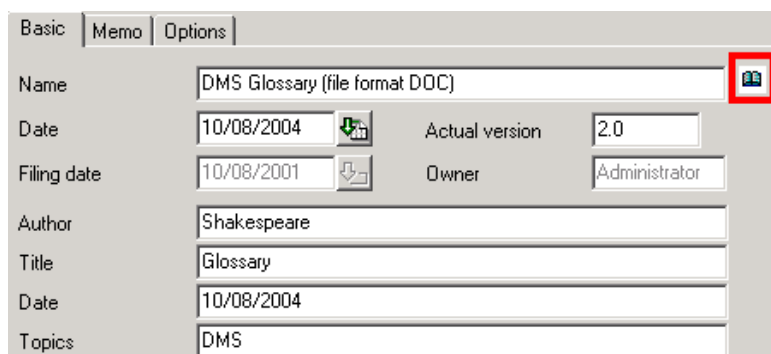
Rights

- ☒ Importing
- ☒ Exporting
- ☒ Edit Keywording Forms
- ☒ Edit scripts
- ☒ Edit expiration date
- ☒ Keyword lists management

Fig. User rights - editing keywording forms

**Keyword lists management:** If you have this right, you can edit the various keyword lists (via the *System settings*, *Keyword lists* menu). These include the context-sensitive keyword lists for index fields, the global keyword list and keyword lists for version number and comments.

Even in the keywording dialogs, you can only edit keyword lists if you have this right.



The screenshot shows a dialog box with tabs 'Basic', 'Memo', and 'Options'. The 'Basic' tab is active. It contains the following fields:

- Name: DMS Glossary (file format DOC)
- Date: 10/08/2004
- Filing date: 10/08/2001
- Author: Shakespeare
- Title: Glossary
- Date: 10/08/2004
- Topics: DMS

Additional fields on the right include 'Actual version' (2.0) and 'Owner' (Administrator). A red box highlights a small icon in the top right corner of the dialog.

Fig. User rights - editing keyword lists

**Delete write-protected documents:** With the right to *Delete write-protected documents*, the user can remove documents filed as "read-only" from the archive.



Be careful when assigning this right.

**Replication management:** This right relates to the use of the **ELO***professional* REPLICATION module. To assign specific documents or structure elements to information groups - so-called replication groups - that are to be exchanged with other archives and users, the various objects - and where applicable, their subordinate entries - are assigned to individual replication groups via the context menu within the archive.

☒ Change security settings

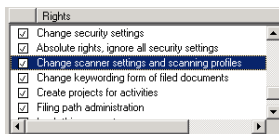
Change security settings: A user has to have this right in order to change administration settings in the *System settings*, *Users* area.

☒ Absolute rights, ignore all security settings

Absolute rights, ignore all security settings: This right should be exclusive to the main administrator.



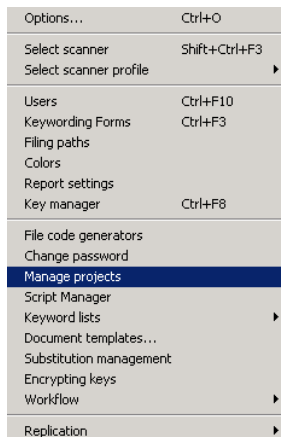
Please note that this right overrides all other settings. You have full rights to all ELO objects, and are authorized to carry out all activities within the archive.



Change scanner settings and profiles: Turning on this function means that in *System settings*, *Options*, the user can change the settings on the *Scanning* and *Scanner profile* index cards.

☒ Change keywording form of filed documents

Change keywording form of filed documents: The user can assign a different keywording form to a document once it has already been filed. Remember that doing this may mean keywording information is lost.



Create projects for activities: In *System settings*, *Manage projects*, the user can open the *Activities - prepare projects* window. Here, the user can create a project for activities.

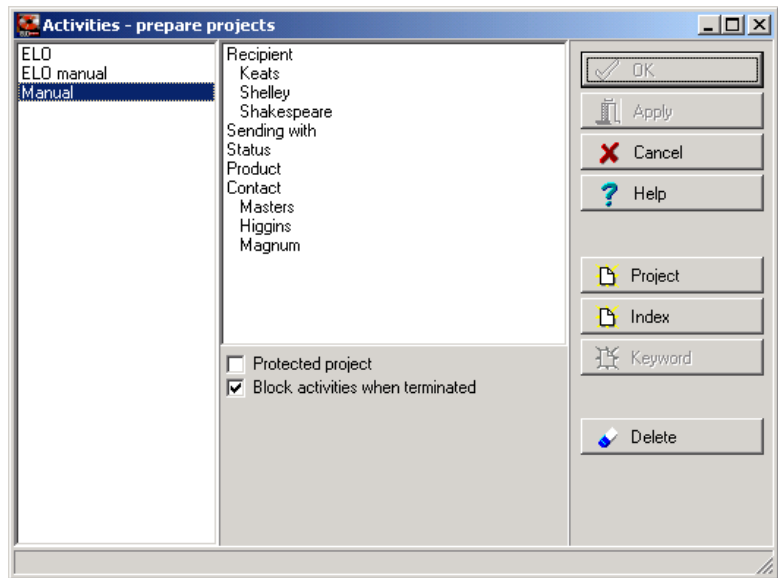
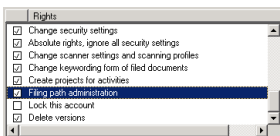
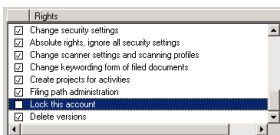


Fig. Managing projects

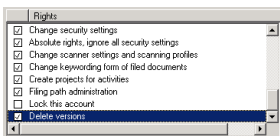
You can find more on this in the chapter on **Activities, Tasks and Reminders**.



Filing path administration: With this right, you can modify the filing path settings in *System settings, Options, Paths* index card.



Lock this account: If the *Lock this account* right is assigned to a user, they can no longer log in, despite being registered as an **ELO** user.



Delete versions: With this right, the user can delete the versions of a version-controlled document.



On the subject of *User rights* please refer also to the notes in the section on **Cloning user rights**.

## Key

In the *Key* area, you can specify what keys and key security rights the user should have. Just enable the relevant option.

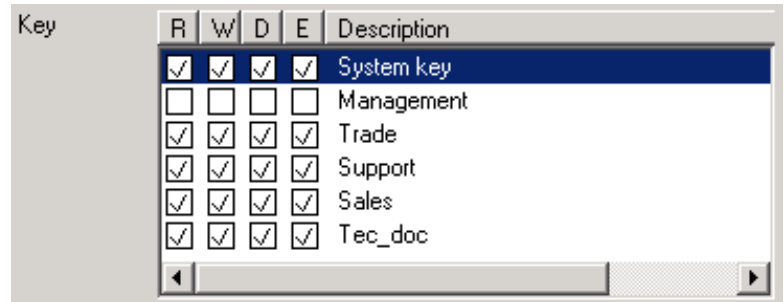


Fig. Assigning a key



Please refer also to the notes in the section on **Key management** in this chapter.



For an overview of all rights available to an ELO user, click on the *All rights* button. The *Effective rights* window opens. This lists all individual and group rights as well as all keys that a given user possesses.

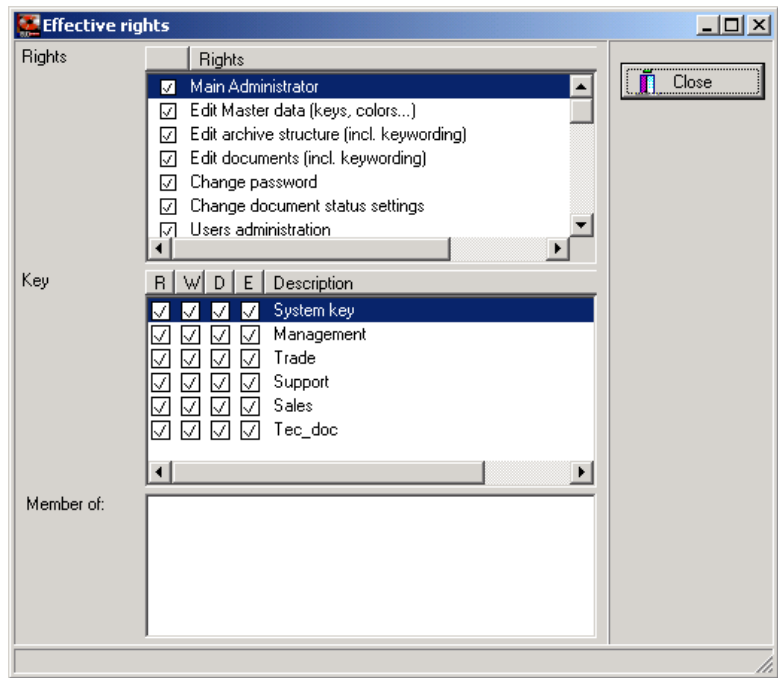
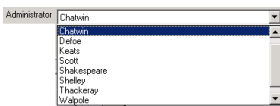
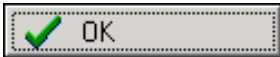


Fig. Overview of user rights

It also displays which groups the user is assigned to.



**Administrator.** This field is only available to users with main administrator rights. It displays all users who are authorized to edit user data or who themselves have main administrator rights. Here, the system administrator can assign the right of sub-administrator to a new or existing user. This sub-administrator can take over user / system support within the limits of his/her own rights.



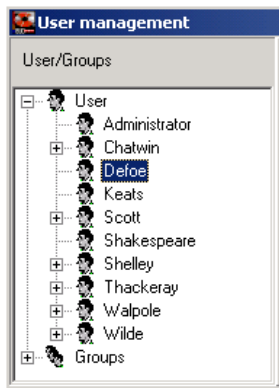
4. When you have entered all the settings, confirm with **OK**. The new user is created.

## Editing user data

In **ELO** it is very simple to *edit* existing user data. For example, you can grant other rights or keys, assign the user to a group or remove the user from the system or from a group.

1. In the *System settings* menu, click on *Users*.

2. In the left-hand list field, select the user whose details you want to edit.



3. In the *User management* window, all the rights and keys assigned to the user are displayed.

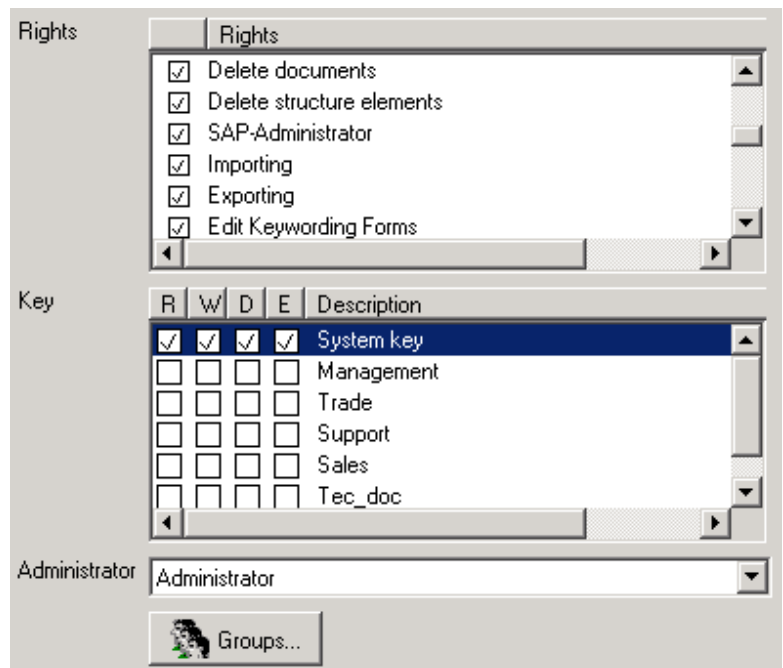


Fig. User rights and keys

Make your changes to the keys and rights.



4. Confirm with *OK*.

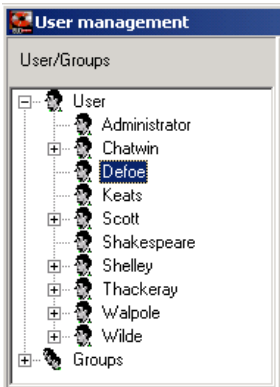
## Cloning user rights

In day-to-day practice, many users will have the same rights and keys - e.g. the employees in a department or a team.

If you want to assign to a user the same rights and keys that another already has, you can simply "clone" these rights and transfer them to the new user.

1. In the *System settings* menu, click on *Users*.

2. In the list view, select the user to whom you want to assign other rights, or whose rights you want to apply to another user.

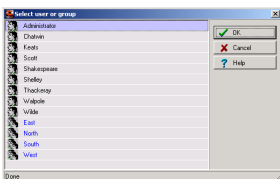


The user's existing rights and keys are displayed.



3. Click on *Clone rights*.

The *Select user or group* dialog appears. All existing users and groups are displayed.



4. Select the user whose rights you want to copy to the new user.





5. Confirm with *OK*.



When creating new users, you also have the option to *Clone rights* directly in the *New user* field.

## ELO groups

Where you have larger numbers of users to manage, administration in **ELO** would be very time-consuming if you had to set up every user with rights and keys individually. But in **ELO<sup>professional</sup>**, this is quite simple, because there are *user groups*.

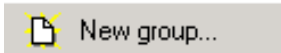
### Creating groups in ELO

A user can be a member of multiple groups. His rights will then be the *sum of all his group rights plus his individual rights*. For example, you can create an *Accounting* group, and assign it all the necessary keys. Each member of the *Accounting* group will then automatically possess the right keys.



These assignments are retained even after changes to the group.

### Set up group



1. Open User management via *System settings, Users* (Ctrl+F10).

2. Click on *New group*. The *New user/group* dialog appears.

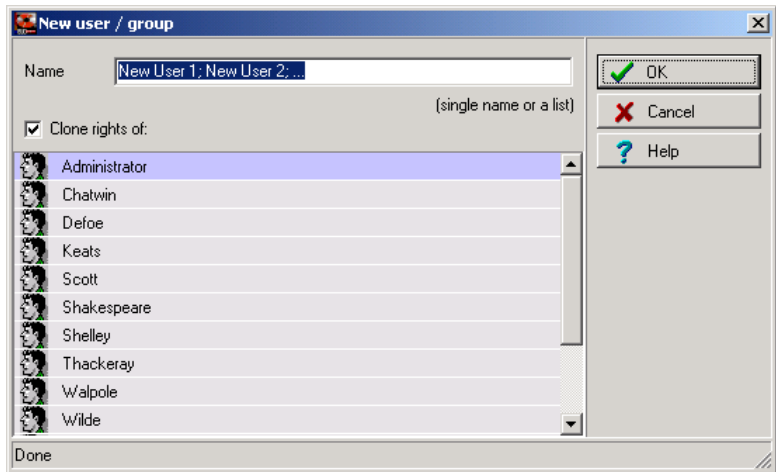


Fig. Groups are highlighted in blue

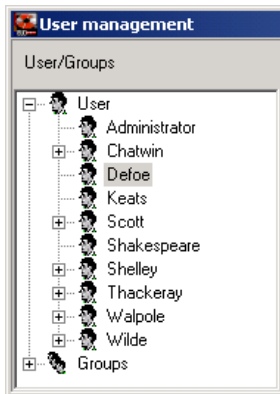
*Name(s):* Enter the new group. Separate multiple new groups with semicolons.

*Clone rights:* If you enable this function, the new group will receive the same rights as the selected user (or group). Or you can grant the rights from scratch, as described for the creation of new users.

3. Confirm by clicking on *OK*.

### Add user to a group

Managing groups in **ELO** is very simple. With one click, you can add or remove users.



1. Open User management (*System settings, Users*) and select the group to which you want to add a new user.



2. Click on *Members*. The *Add user to group* dialog appears.

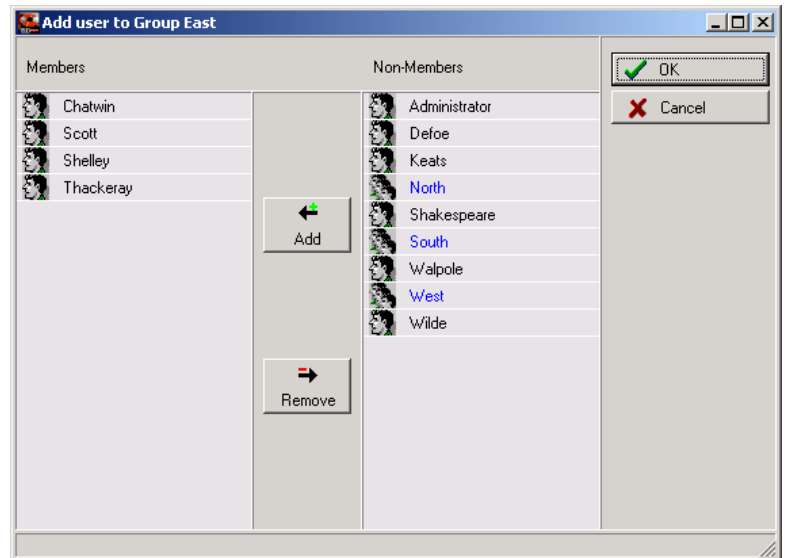


Fig. Adding a user to a group



3. Under *Members* (on the left), you will see all ELO users who are already members of this group. Under *Non-members* (on the right) are all other ELO users. Select the user on the right and click on *Add*. The user will now appear as a member on the left-hand side.



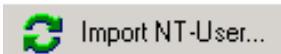
To remove a user from the group, do the reverse. Select the group member on the left and then click on *Delete*. The user will now be displayed on the right as a non-member.

## Import NT user

NT user details can be integrated directly into **ELO***professional*. The ability to import NT user data saves a lot of work, especially with a large number of users. When importing NT user names, you can assign these users an ELO user profile or group profile. Users integrated into **ELO***professional* then receive a predefined rights and keys profile.



User rights take precedence over group rights; this is especially crucial for individual key assignment.



1. Open User management and click on *Import NT user*. The *Apply Windows NT users/group* dialog appears. On the left side of the dialog box, select the NT user.

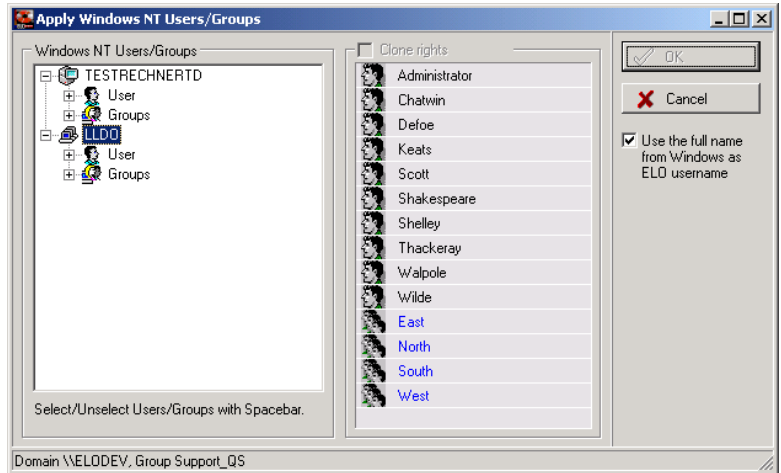
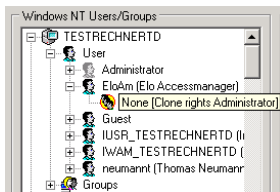


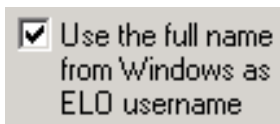
Fig. Applying users and groups



2. Select the NT user or group from the list (with the space bar). Click *Clone rights*, where you want to assign the NT user the rights of a ELO user or group.



Select this user from the list. You can also explicitly assign new rights (as described for *New users*). To select *All NT users*, check only *users* (or *groups*) with the space bar.



3. Where applicable, click the checkbox to transfer the whole NT name as the ELO user name.

## ELO/NT name

4. Confirm with *OK*.

If you are using **ELO***professional* with NT security – which should normally be the case – the ELO name must be identical to the NT login name when you log in to the program.

However, this may not always be the case, e.g. because you use numeric login names (e.g. V34633) in NT and "meaningful" names (e.g. Charles Miller) in ELO.

To resolve this problem, there is a distinction between the ELO name (in User management under *ELO account*) and the NT name for this ELO user (under NT/Outlook account).

This means that you can enter **Charles Miller** as an ELO name and **V34633** under *NT account (NT name)*. The user can then log in to ELO either as *Charles Miller* or as *V34633* (converted to *Charles Miller*). The AccessManager releases the documents for *V34633* and **ELO** can display them via the NT profile.

## ELO/Outlook name

This also applies to the Outlook name. So if the Outlook name for a user also differs from the ELO name, it must be stored in User management if you want to enable the option *Transfer task reminders to Outlook*.

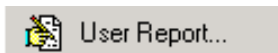
You should therefore enter the Outlook name under *NT/Outlook account (Outlook name)* in User management.

In User management, as well as the *ELO account* and *NT/Outlook account* index cards, there is also the *Properties* index card. Here you can enter your own data if required, which you may want for a script, for example.

## User report

**ELO professional** provides a facility to display a report on the mailbox and the task reminders of every user you have created, including your own.

1. Open User management as described.
2. Click on *User report*.



The *Overview mailbox/task reminder* window appears. All users are displayed.

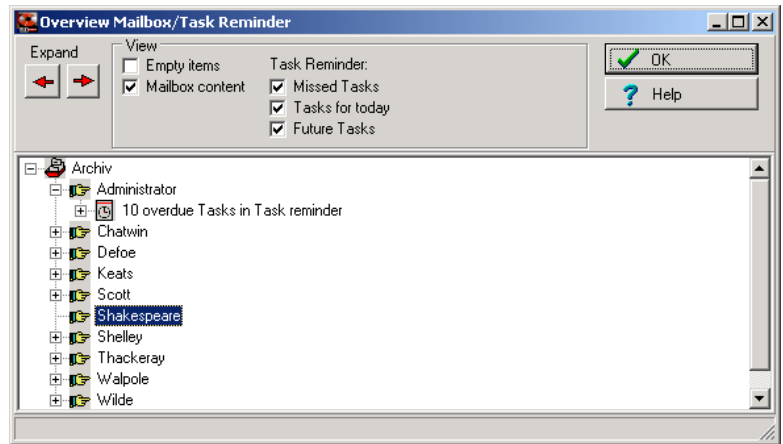


Fig. Displaying the user report



If not, click on the + symbol before the archive name.



3. Clicking on the + symbol opens the next level.



Using the *Expand* arrow icons, you can open the next level for **all** users.

4. In the *View* area, select the options you want to see displayed or remove the check marks to restrict the search.

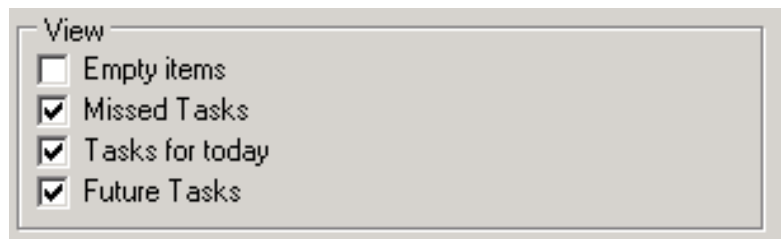


Fig. Display options for user reports

If, for example, you uncheck the *Mailbox content* box, it is no longer displayed.

## Deleting users

1. Open User management as described.
2. Select the user to be deleted.

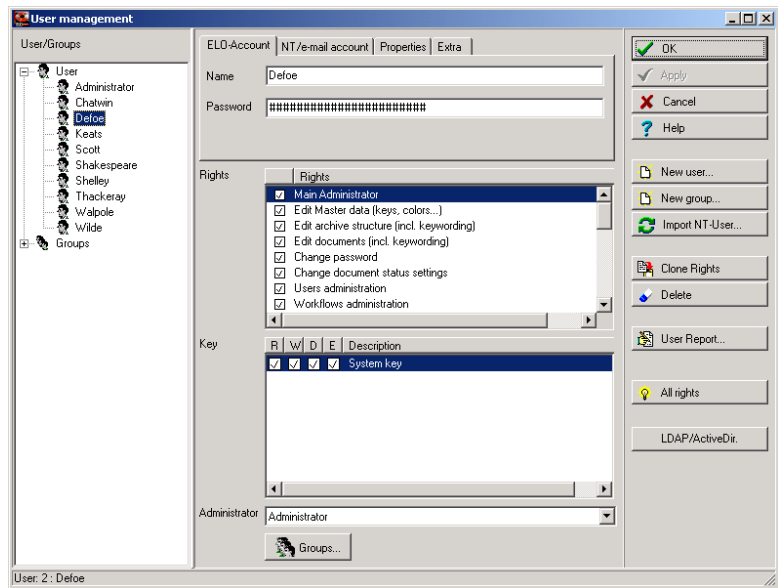
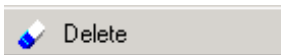


Fig. Deleting users



3. Click on *Delete*. The user is removed from **ELO***professional*.



If you try to delete a user who has created other users, the following warning appears.



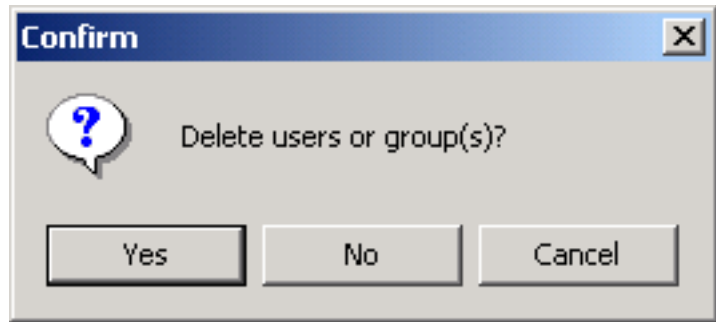


Fig. Warning when deleting a user

Clicking on *Yes* will delete these users as well. If you do not want to delete them, click on *No*. You then become the administrator for these users. You can change this assignment in User management at any time using the *Administrator* dialog box.

## Transferring rights

If there are already objects in the archive mapped to the rights of the user to be deleted, a further dialog appears indicating that the rights of this user will be transferred.

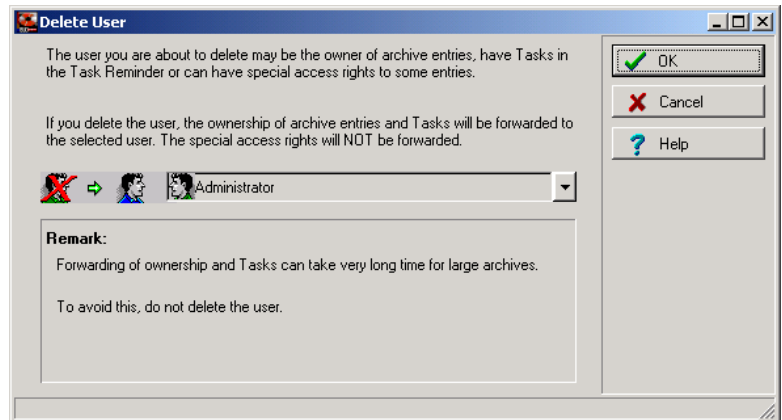


Fig. Transferring rights after deleting a user

In the dialog box, you can select a user - in this case the administrator – to assume the rights of the user being deleted from the system. The rights are then applied within the database. With large archives, this may take a long time.

# Keywording forms

The quality of an archive is largely dependent on how easy it is to file and retrieve documents. Keywording forms allow you to organize documents in a standardized way using index fields (input fields) and to file them quickly in the archive. The same document types, e.g. invoices, are always organized and archived using the same keywording form. This form includes specific settings for the document type as defined by the administrator. These include e.g. the *document key*, the *filing path* or the *index key* (target definition) with which **ELO** can file the document automatically.

In Management of keywording forms, you can create new keywording forms, edit existing forms or remove unwanted keywording forms from the system.

The screenshot shows a software window titled 'TIF Edit'. On the left is a vertical list of document types: Basic entry, Chaos File, Contact, Document, EMail, Free Input, General Documents, Invoice (highlighted), Sample, Structure element, and Unformatted Entry. The main area is divided into three tabs: Basic, Memo, and Options. The 'Basic' tab is active, displaying several input fields: Name (Invoice 4258 - 09/10/2004), Date (09/10/2004), Filing date (07/27/2004), Invoice Date (09/10/2004), Name (Shakespeare), Supplier (HP), Article (Printer, Scanner), and Invoice No. (4258). There are also fields for 'Actual version' and 'Owner' (Administrator). On the right side of the window are buttons for OK, Apply, Cancel, Help, Fill (F3), OCR, Open, Save, and Versions. At the bottom, a status bar shows 'No access rights', 'Green', '07/27/2004', 'TIF', and 'Document name'.

Fig. 'Invoice' keywording form

The left side of the *Edit scanned document [New entry]* dialog displays an overview of the available keywording forms. In the center part are the index cards on which the keywording attributes can be entered in the index fields.



Keywording forms are a very complex yet vital topic. For this reason, the creation of keywording forms is generally left to the system administrator. We will therefore only cover the essential features and principles, so you can create simple forms yourself if necessary. But there is also a form wizard and a form editor on hand to help with creating forms. Please refer to the sections on **The form wizard** and **The form editor**.

## Keywording form editor



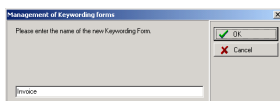
The **ELO** keywording form editor makes it quite simple to create your own keywording forms.

You can only create keywording forms if you have administrator rights.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

1. Open the *System settings* menu and click on *Keywording forms* [Ctrl+F3]. The *Management of keywording forms* screen (the keywording form editor) opens.

Fig. Management of keywording forms



## The structure of the form editor

2. Click on *New form*. Enter a name for the new form (e.g. **Test**) in the input dialog that appears and click on **OK**.

Some input fields in the form editor are already completed using default settings - the *Form name* field contains the name you entered.

We will start by explaining the structure of the keywording form editor. Read these explanations carefully and compare the notes and screenshots with your screen display. We will then show you how to create your first keywording form. Follow all the steps on your PC as described.



At first glance, creating a keywording form will seem complicated. But do not let yourself get discouraged. The reason it appears complicated is the wealth of information. On the following pages, we will take you through the process step by step.

The keywording form editor is in two parts:

- The upper part shows 50 overlapping index cards with which you can determine a keywording form with for example, up to 50 index fields, or create a form-specific keyword list.
- The lower half allows you to enter settings that apply to the keywording form and thus to all documents filed using this form.



You can see the tabs at the bottom edge of each of the 50 index cards, numbered 1 to 50. Each number then stands for an index card with which you can define an index field (input field for keywording). A maximum of 50 index fields can therefore be defined for each keywording form.



The first fields of a new keywording form are *Name*, followed by *Date*, then *Filing date* (cf. the screenshot of the **Invoice** keywording form below). This is a default setting that cannot be changed. That means the first input field you create for a keywording form is always the fourth field of a newly created form.

Fig. 'Invoice' keywording form

The index fields that you create for a keywording form are then displayed on the *Basic* index card (see screenshot). You can therefore use the form editor to create keywording forms for every conceivable document type, e.g.

- Letters,
- Expense reports,
- Testing logs,
- Visiting cards,
- Offers, and
- Corporate brochures.



The input fields in a keywording form make it considerably easier for you to catalog, file and retrieve your documents.



For the sake of clarity, the 50 possible index fields on an index form are not all displayed on the *Basic* index card, but split across additional index cards (e.g. *Index1* and *Index2*).

The *Basic* index form includes the three default fields *Name*, *Date* and *Filing date* in addition to user-defined fields.

The index cards *Index1* etc. then contain the following index fields (input fields = keywording attributes), up to a maximum of 50.

## New index card

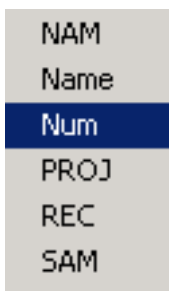
A new index card will always be displayed / generated by the program if you have switched on the option *New tab after this field*.

You can enable this option for every index field. There may be up to four index cards with the index attributes.

## The functions of the keywording form editor

Field name:

Group:



In this section, we will explain the individual input fields and options in the keywording form editor.

**Field name:** If you enter e.g. **Invoice number** here, you will generate the *Invoice number* input field in the keywording form, which you can then use to capture the invoice number when keywording a document.

**Group:** This is where you enter the group name (max. 10 characters) for a universal search, e.g. **RNR**.

Right-clicking on the empty group field opens the context menu that displays all the available group names. Select one of them in order to use the universal search. Then, later, you can search for documents filed using different keywording forms but the same group. If you search later for e.g. an *Invoice number*, the universal search will not search the whole archive but only documents with the group name *RNR*.

On the other hand, if you right-click on a filled-in group field (already containing a group), all forms for the same group will be displayed. This allows for efficient administration of large archives. Refer to the chapter on **Searching** for more information.

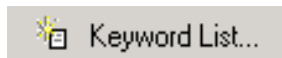
Min characters:  Max characters:

**Min/max characters:** Defines the minimum/maximum number of characters that must be entered in the current input field (e.g. customer) on the keywording form in order to file the document.



This setting is particularly useful in the *Invoice number* field. If the invoice numbers are e.g. always 5 digits, enter a 5 against both **min/max**. That will help to avoid data entry errors. Even if the numbers are not the same length, an entry under **min** will still ensure that an invoice number is always entered. **If you do not want to impose a limit, leave the field blank.**





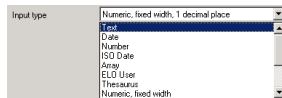
**Keyword list:** A keyword list is used to keyword documents with standard terms. Here you can create a keyword list for every index field, e.g. a specific keyword list for the *Supplier* field. When keywording a document, this keyword list then appears only for this input field (see also: *Accept from keyword list only*). Do the same for each input field, i.e. create an individual keyword list for each index field in a keywording form to ensure consistent keywording and avoid typing errors on input, e.g. of a customer number.



You can also create a **global keyword list**, to be used where no index field-specific keyword list has been entered. For more information, see the section on **Keyword lists**.



**Position the fields:** This button launches the form editor, which lets you position the index fields independently on the keywording form. You can find more information in the section **The Form editor**.



**Input type:** In the list box, set the entry type **ELO** should expect in the index field. When you fill in the input field (when keywording with this keywording form), **ELO** will then only accept the specified formats, i.e. for a

- **Text:** letters only
- **Date:** date only
- **Number:** figures only
- **ISO date:** YY.MM.DD only
- **Array:** entry from a list only
- **ELO user:** select user name from a list
- **Thesaurus:** select terms from a hierarchical list only
- **Reference number:** accept reference number from reference number generator

## Input type Thesaurus

We will now discuss the *Thesaurus* input type for index fields, available to the user in Management of keywording forms. It can be assigned as an input type to any index field.

With the *Thesaurus*, word groups are suggested in an index field that the user can select from a dialog box. The dialog box can also be called up from the context menu.

1. In the *System settings* menu, select *Keywording forms*.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

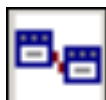
Fig. Keywording form with 'Thesaurus' index field

2. Select a keywording form and the relevant index card for the field.

3. In the *Input type* field, select *Thesaurus*.

4. Confirm the input and click on **OK**. The settings for the keywording form are saved.

1. Call up the keywording for a document. Assign the document to the keywording form that contains the index field with input type *Thesaurus* allocated above.



Index fields of the type *Thesaurus* are denoted by a small icon at the end of the index field.

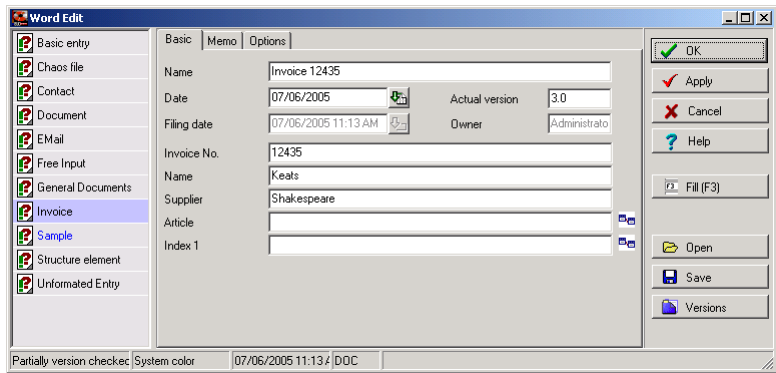


Fig. Keywording form with two 'Thesaurus' index fields

2. To open a *Thesaurus* for an index field, **right-click** in the index field. Then the *Thesaurus* dialog box opens.

3. No entries are available as yet in the Thesaurus. Click on *New group*. A dialog box opens. Enter the name for the new group. Click on *OK*.

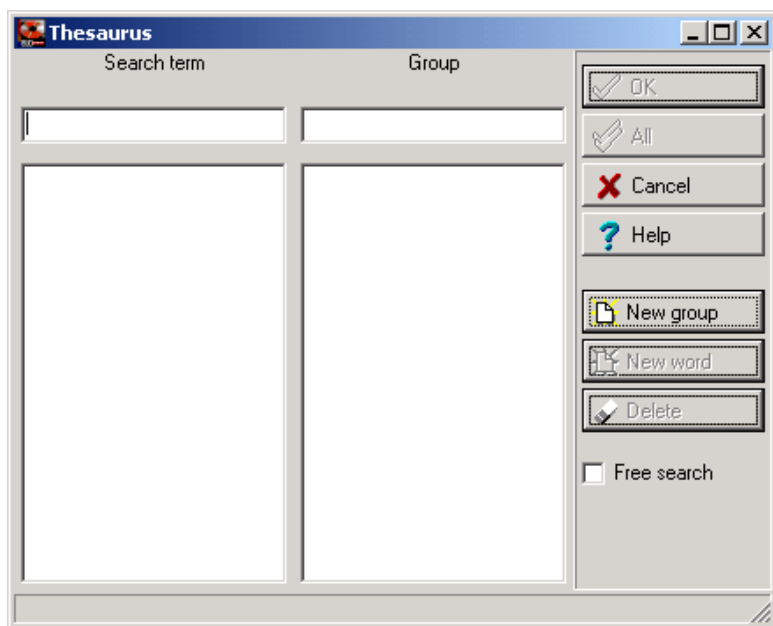


Fig. 'Thesaurus' dialog

You can create as many groups as you wish here, and you can assign different terms to each as synonyms.

### Creating a group

1. To add terms (synonyms) to the active group, click on *New word*. An input dialog appears.



2. A new group is created. In the lower right dialog box, you will see the active group highlighted in color.

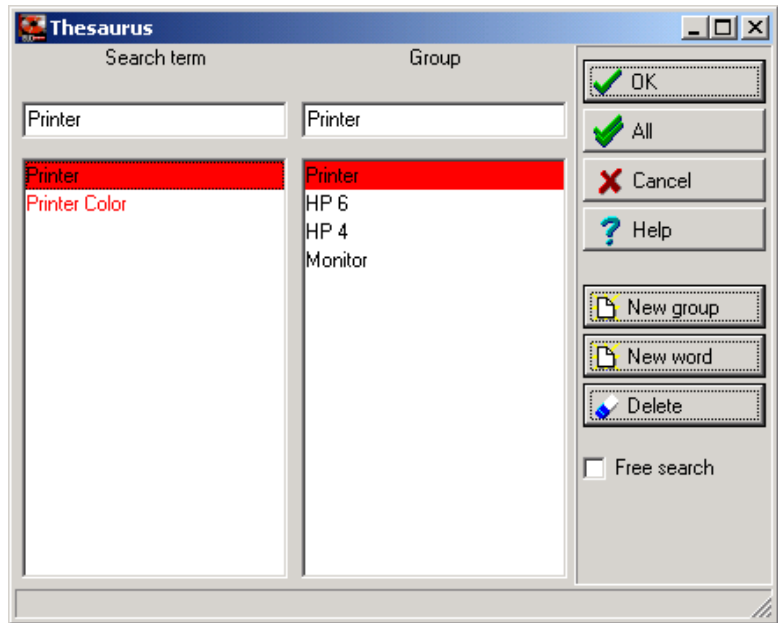


Fig. Thesaurus - entering data

**Add terms to the group.**



2. Enter the new word that you want to add to the group into the dialog box.

Confirm with **OK**.

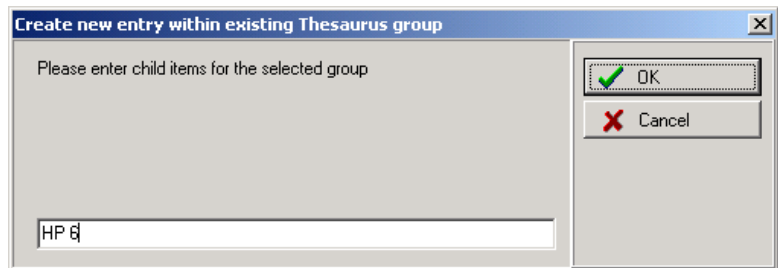


Fig. Adding a new entry in the Thesaurus

3. The entry will be added to the group as a subordinate entry.

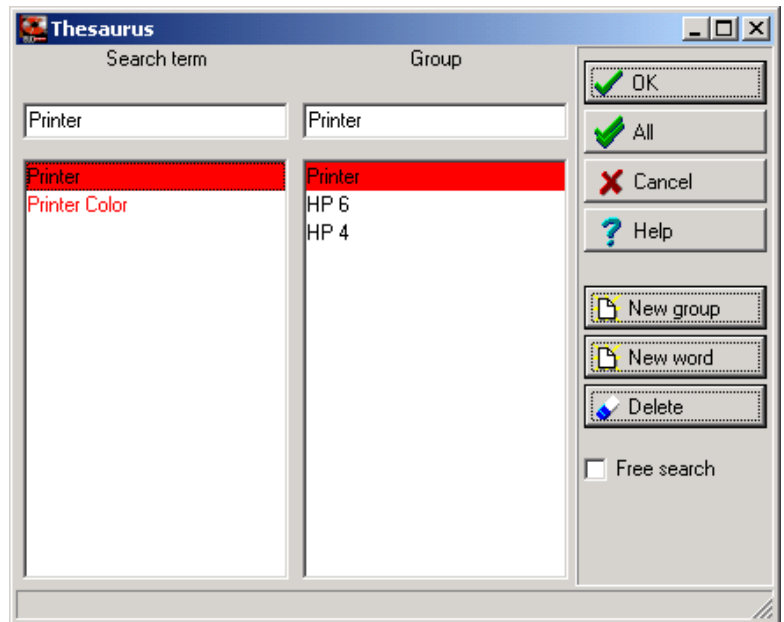


Fig. Subordinate entries in the 'Thesaurus'

In the Thesaurus, there is a head-word for every group. Any number of synonyms can be assigned to each term.

## Structure of the Thesaurus

To use the terms in the index fields, you have to search for them in the Thesaurus.

In the *Search term* field enter the initial letters of the term you are searching for. The list below will display all terms beginning with the same letters.

## Search term

Remember: The entries highlighted in color are group entries. In the results window, you will see group names and synonyms displayed. You can then switch easily between similar terms.

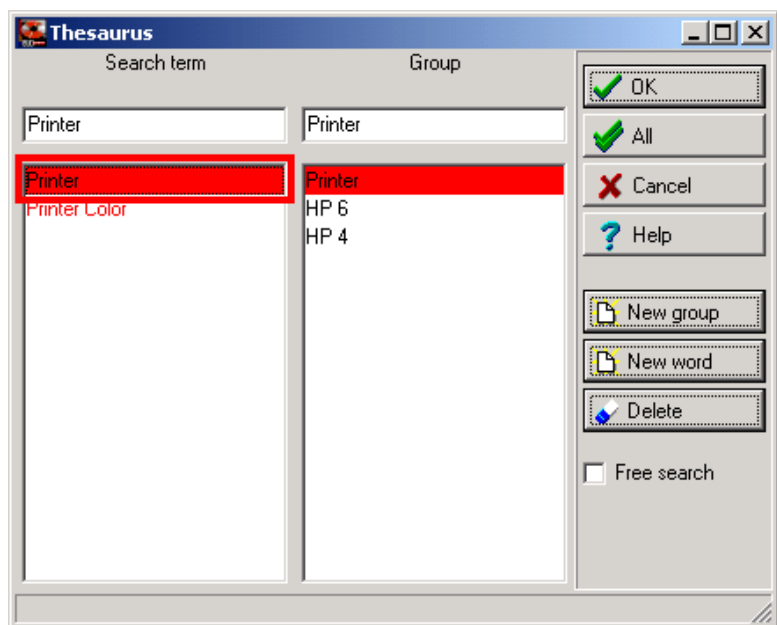


Fig. Thesaurus - searching for terms

## Basic entry search

If you click the checkbox *Basic entry search* when searching for terms, you will also find similar terms, e.g. words beginning with *K* or *C*.



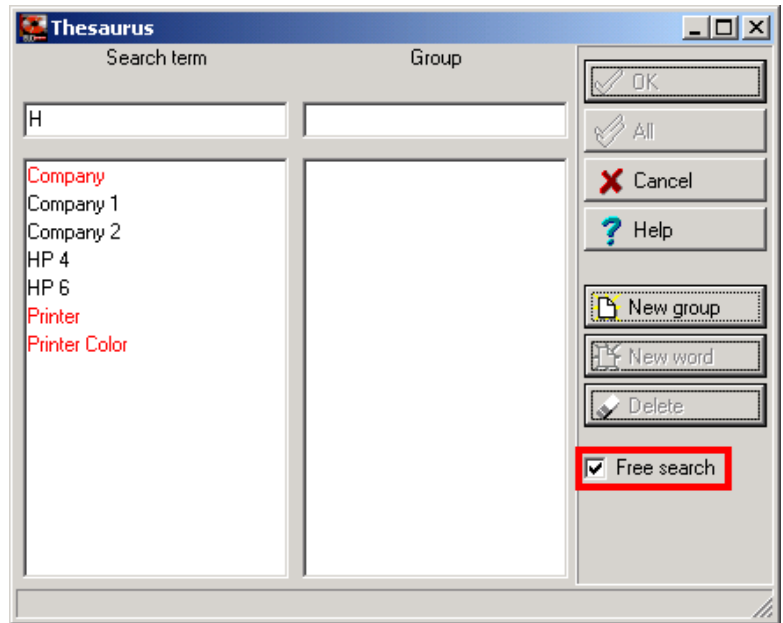


Fig. Thesaurus - basic entry search

## Transfer of terms to the index field

Lock with

☒ Normal access  
☐ Write protect  
☐ Invisible

☒ New tab after this field  
☐ Accept from keyword list only  
☐ Add \* before search query expression  
☐ Add \* behind search query expression  
☐ Column with high priority

When you have selected the right term, click on **OK**. The term is copied into the index field.

**Locking** the index field: With this option, you can provide each individual index field with a key, and so control access to the field. Users who do not have the key will not be able to edit the index field, and it will not be visible to them.

**Status and access protection for index fields:** Here you can change the status of the index field and choose between the options *Normal access* (default setting), *Write protect* and *Invisible*. Invisible index fields can only be filled in and read by scripts.

**New tab after this field:** If you enable this option for a particular index field, all subsequent index fields will be placed on a new index card. The index fields can be spread across up to four index cards.

- ☐ New tab after this field
- ☒ Accept from keyword list only
- ☐ Add \* before search query expression
- ☐ Add \* behind search query expression
- ☐ Column with high priority

- ☐ New tab after this field
- ☐ Accept from keyword list only
- ☒ Add \* before search query expression
- ☐ Add \* behind search query expression
- ☐ Column with high priority

- ☐ New tab after this field
- ☐ Accept from keyword list only
- ☐ Add \* before search query expression
- ☒ Add \* behind search query expression
- ☐ Column with high priority



**Accept from keyword list only:** Turning this function on means you can only use terms from an index field-dependent keyword list to keyword the document. This allows you to have optimal control over keywording and avoids data entry errors.

**Add \* before search query expression:** Adds the placeholder \* before the query text for an **ELO** search using this form. You are defining the search as "ending with". **Example:** If you enter the query **en** in this index form, all documents are found whose entry in this index field ends in "en" (ELO searches for \*en).

**Add \* after search query expression** adds the placeholder \* after the query text for an **ELO** search using this form. You are defining the search as "beginning with". **Example:** If you enter the query **15** in this index form, all documents are found whose entry in this index field starts with "15" (15\* is searched for).

With these options, you should bear in mind that a search using a placeholder (wildcard) may produce a large number of hits that you cannot easily take in. A \* entered via the keywording form is not recognized when searching and so may produce unwanted search results. This automatic extension should therefore not be switched on as a general principle, but only in those places where it is actually useful.

Article Invoice ... 6 7 8

By clicking on tab 2, you can now create the next index field on your keywording form, where applicable. The name entered for the first index field is now shown on the first tab. This makes it easy to edit the individual index fields on a keywording form later. When you have defined all the index fields, continue with the settings that apply to the keywording form as a whole.

# General settings

Form name	Invoice
Filing Clause	L2+L2+L1
Kw. Form key	System key
	<input checked="" type="checkbox"/> Usable for filing <input type="checkbox"/> Index document for Fulltext search
	<input checked="" type="checkbox"/> Usable for searching
Filing path	No default path
Color	System color
Access rights	
Document status	Freely editable / Manual sorting
Barcode Info	
Workflow	[kein Ablauf]
Encrypting key	no encryption
Life time	
Tab Headers	

Fig. Keywording forms - General settings

The lower half of the keywording form editor allows you to enter settings that apply to the whole keywording form and thus to all documents filed using this form. Here you can define whether a document should be automatically filed, what color should be used to identify the document entry in the archive, whether it should be automatically encrypted, and much more.

Form name	Invoice
-----------	---------

**Form name:** Input field for the form name This should provide a suitable description of the document type, e.g. *Invoice*. To change the name, simply overwrite the entry.

Filing Clause	
---------------	--

**Filing clause:** Only enter something here if the form is used to file documents to the correct index straight from the mailbox. Please refer to the notes on **File to archive using filing clause**.

Kw. Form key	Support
	System key
	Management

**Keywording form key:** You can lock forms, to restrict access to certain users only. Click on the arrow and select a key (cf. **Key manager**).



Whether any keys are available (and which are available) depends on the system administrator. He/she manages all key rights and will assist you in case of queries.

<input checked="" type="checkbox"/>	Usable for filing
<input checked="" type="checkbox"/>	Usable for searching

If you check the *Usable for filing* option, the new form is available for document filing.

If you check the *Usable for searching* option, you can also use this form for the **ELO** search function.



You should generally enable both options.

<input type="checkbox"/>	Index document for Fulltext search
--------------------------	------------------------------------

Checking the *Index document for Fulltext search* means that the (text) content of all documents that were filed using this form is indexed. The document content is then available for fulltext searches in the archive.



For fulltext search, the **ELO***professional* Fulltext module is required.

Filing path	<div>No default path</div> <div>No default path</div> <div>BASIS</div>
-------------	--

**Document path:** Using the drop-down menu, select the path to which you want to physically save documents with this form. The default setting is *No default path*. If this is selected, the documents are filed in the default path. The filing path that is set is displayed in the *Filing path* field on the *Options* index card on the keywording form. But you can also manually enter a different path for every document when keywording if required.



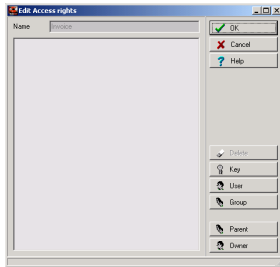
Only the system administrator can manage document paths. The subject of **Document paths** is therefore only touched on in the client manual. For questions on document paths, please contact your system administrator.

Color	<div>System color</div> <div>System color</div> <div>Red</div> <div>Green</div>
-------	---

**Color:** If you want to mark your documents with a color, e.g. all invoices red, you can set the color here. The default is *System color*, i.e. your document entry is in black type. To change the color, select a color from the drop-down menu.



If the color you want is not available in the list, you can set additional colors in *System settings, Colors*.



**Document keys:** Here, you can assign a key to the documents you file using this form. The *Object rights* dialog box opens. As such, the archived documents are only accessible (and visible) to those users with the key.



Note the difference between **Locking documents** – as here – and **Encrypting documents**. Locked documents are only visible to users who have the same key. Encrypted documents are visible to all, but can only be accessed with the system password / by the members of a common key group.

A keywording form and the documents archived using it can be assigned different keys (when filing the document). Then, users can, for example, use this form for their own archiving activities without being able to access documents you have archived.

**Document status:** Documents are always being modified, added to or updated. Prime examples of these are ISO 9000 documents, or documents relating to product liability. **ELO** is able to track these changes so that they can be tracked and logged.

Freely editable / Manual sorting  
Version controlled / Alphabetical order  
Read only / Sort by document date

There are three settings:

- Freely editable: You can modify your document without retaining the previous version.
- Version control: When any changes are made to a document, the previous version is saved.
- Read-only: If this option is selected, the document can no longer be modified. This is particularly important e.g. for invoices or tax assessments.

The other settings relate to structure elements and are not intended for configuring documents. The settings control the sort sequence of documents archived in the structure elements.

Barcode Info

**Barcode info**: This field displays the parameters for the optional Barcode module. You can access the settings by launching the form wizard from the *Wizard* button.

The screenshot shows the 'Keywording Form creation Wizard' dialog box, specifically the 'Barcode 1' tab. The dialog has a title bar with 'Keywording Form creation Wizard' and standard window controls. Below the title bar is a tabbed interface with tabs: 'Welcome', 'Description', 'Key', 'Filing', 'Form Fields', 'Filing Clause', 'Barcode 1', 'Barcode 2', and 'Finish'. The 'Barcode 1' tab is active.

Inside the 'Barcode 1' tab, there is a large text area on the left showing a preview of a scanned document with a barcode. To the right of this area, there are several input fields and checkboxes:

- Highlight the area where you want ELO to search for Barcode.** This section includes a small diagram of a rectangle and input fields for 'Scanned area in promise:' (Left, Top, Width, Height) and 'For A4 paper format:' (0.0mm 0.0mm, 210.0mm 297.0mm).
- To filter incorrectly recognized barcodes, you can set minimum and maximum length.** This section includes input fields for 'Min. Length (Chars)' and 'Max. Length (Chars)'.
- Barcode types** section with a list of checkboxes: 'Codabar', 'Code 128', 'Code 39', 'I 2 of 5', 'Ean 13', 'Ean 8', 'UPCA', and 'UPCE'. There are 'All' buttons next to the 'Codabar' and 'Code 39' checkboxes.
- Reading direction** section with checkboxes: 'Left to right', 'Right to left', 'Bottom to top', and 'Top to bottom'.
- At the bottom of the dialog, there are three buttons: 'Back', 'Next', and 'Finish'. There is also a 'Close' button with a red 'X' icon.

Fig. Wizard for creating barcode definition

The Barcode info field is automatically set to the correct values from the settings in the form wizard. Notes on the use of barcodes can be found in the **ELO***professional* BAR-CODE manual.



To use this function, you need the **ELO***professional* Barcode module.



**Default workflow:** Use the drop-down menu to select the default workflow, which will start automatically when you keyword a document with this keywording form.

**Encrypting key:** In **ELO**, you can create up to 16 encrypting keys to archive document files securely. Here, you can set whether you want to file documents unencrypted (i.e. as an original file) or whether to assign an encrypting key to them. This setting is only for a new document. As long as it has not yet been transferred to the archive, you can still make changes. Once a document has been transferred from the mailbox to the archive, this entry can no longer be changed.

**Lifetime:** Here, you can assign a lifetime to a document type. You can specify this in days, weeks, months or years. You can also enter an absolute date. If you want to define a period, first enter "+". Then enter the duration. Example: "+5Y" enters a period of five years. You can use the abbreviations D for days, W for weeks, M for months and Y for years to specify the period .

**Tab headers:** Using the *Tab headers* option, you can define individual headings for the index cards in the keywording dialog box. Entries in the input field are separated from each other by a "|" (pipe) symbol.



Fig. Tab headers in keywording dialog

The settings entered in Management of keywording forms also affect the labeling of the index cards in the keywording dialog.

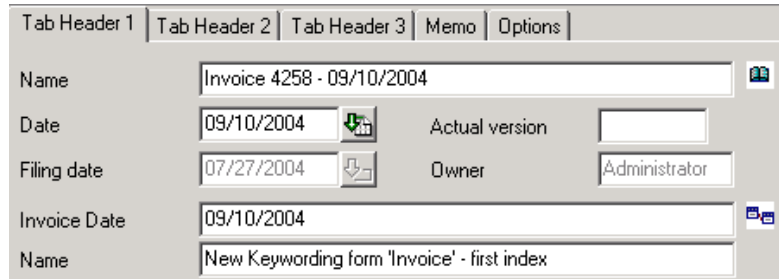


Fig. Index cards for keywording dialog

## Print



For an overview of the settings for a keywording form, you can print them out as a summary.

Click on *Print* to produce a summary.



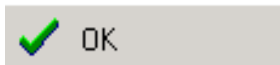
## Invoice

Form name: Invoice  
 Filing Clause: L2+L2+L1  
 Kw. Form key: System key  
 Usable for filing: Yes  
 Usable for searching: Yes  
 Index document for Fulltext search: No  
 Filing path: No default path  
 Color: System color  
 Access rights:  
 Document status: Freely editable / Manual sorting  
 Barcode Info:  
 Workflow: Delivery Note  
 Encrypting key: no encryption  
 Life time:  
 Tab Headers: Tab Header 1|Tab Header 2|Tab Header 3

No.	Field name:	Group	Min	Max	Type	Connection	mLocked	Tab	Keyword	* before	* after
1	Invoice Date	INV	0	0	Thes	Standard			Syste		
2	Name	NAM	0	0	Txt	Standard			Syste		
3	Supplier	SUP	0	0	Txt	Standard			Syste		
4	Article	ART	0	0	Thes	Standard			Syste		
5	Invoice No.	Num	0	0	Txt	Standard			Syste		

Fig. Overview of 'Invoice' keywording form

**ELO** will print out a summary of the current keywording form. You can use this to reproduce the settings for the keywording form again and again.



When you have entered everything in the Management of keywording forms window, click on **OK**. The form is now available in the archive for keywording documents.

---

# Automated simultaneous filing in several indexes

## Problem

You have two filing structures. The first index is, for example, sorted by Contact name, the second by Company name. If you file a document, you want it to be filed in the Contact name index and Company name index.

Create a keywording form *Multiple filing* that refers to different target indexes:

1. From the *System settings* menu, *Keywording forms* select *New form*. Create a keywording form called *Multiple filing*.

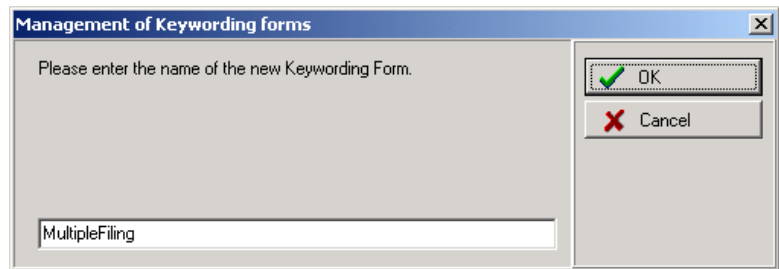


Fig. Creating a keywording form

2. In the *Field name* index field, enter *Contact name* and enter *Per* in the *Group* field.

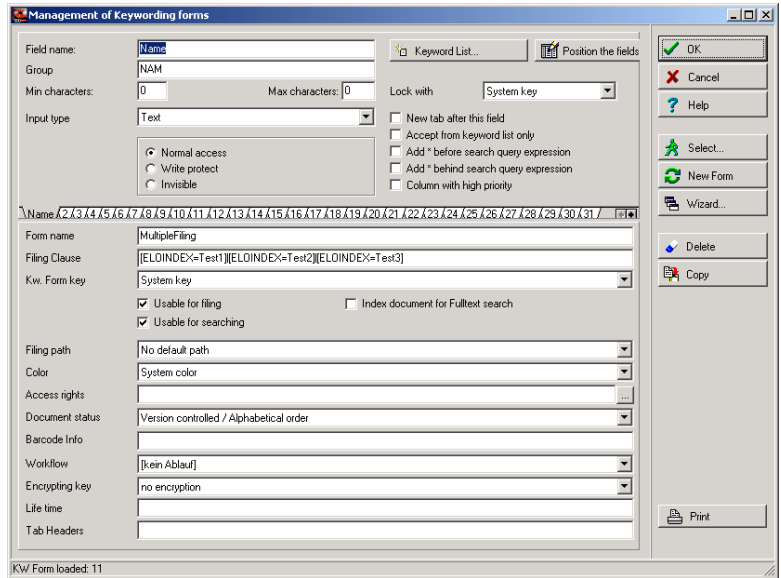


Fig. Creating a 'MultipleFiling' keywording form

### 3. Enter the following text in Filing clause:

```
[ELOINDEX=Test1] | [ELOINDEX=Test2] |
[ELOINDEX=Test3]
```



The pipe symbol | can be entered by pressing the AltGr key and the key shown.

Our example assumes three different target indexes with the index identifier ELOINDEX for entries in the *Filing clause* field which have to be assigned the variable values Test1, Test2 and Test3. In the newly defined keywording form, reference is made to three different indexes, whereby a logical copy is made of the original document in the first and subsequent indexes.



**Please note:** The first filing target must be permanently available, or errors will occur. All further filing targets are optional and will be ignored if they are not available, without displaying an error message.

4. Create three indexes as a filing location where you want to archive the document and two logical copies. For the purposes of the tutorial, create a filing cabinet called *Document files* with the folder *Multiple filing* and the indexes Skakespeare, Shelley and Scott.

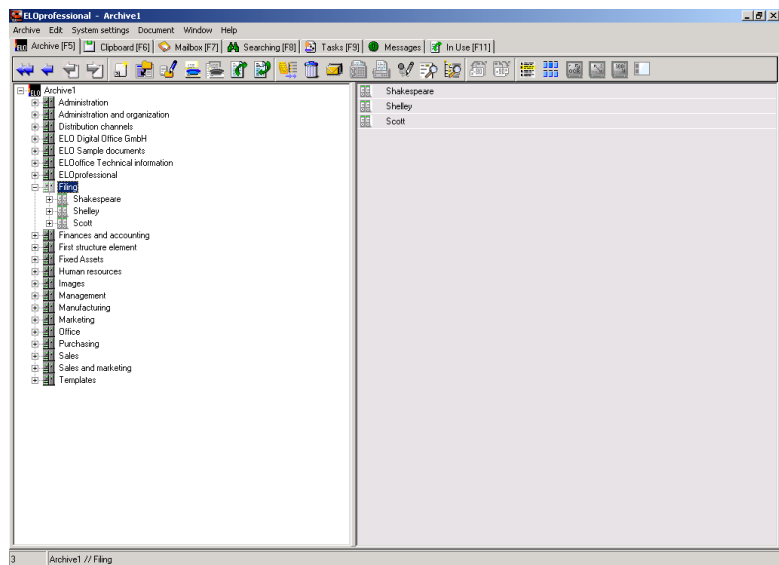


Fig. Defining a filing index

5. An index is created where the document (that is still to be keyworded) will later be filed. In our example, the index *Shakespeare* is linked. Two additional indexes – Shelley and Scott – are also created. Click on the *Structure element* keywording form. In the field *ELOINDEX*, enter *Test 1*. *Test1* is the term that will be used to allocate the document to different indexes during archiving.

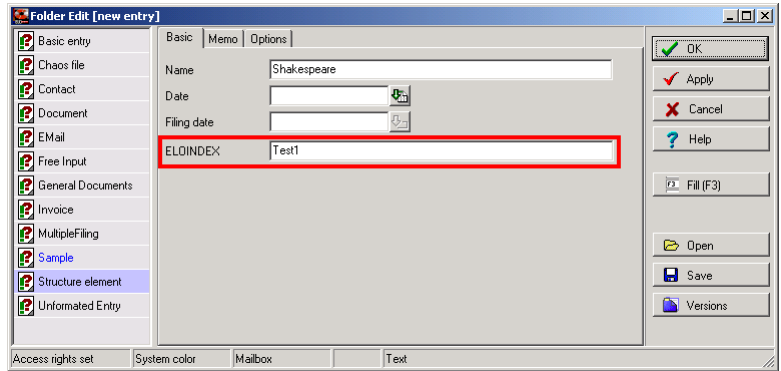


Fig. Creating an index with target definition

6. For the indexes *Shelley* and *Scott*, the filing clause *Test2* and *Test3* respectively will be entered in the field *ELOINDEX*. In the mailbox, a document or image file is keyworded using the *Multiple filing* keywording form.

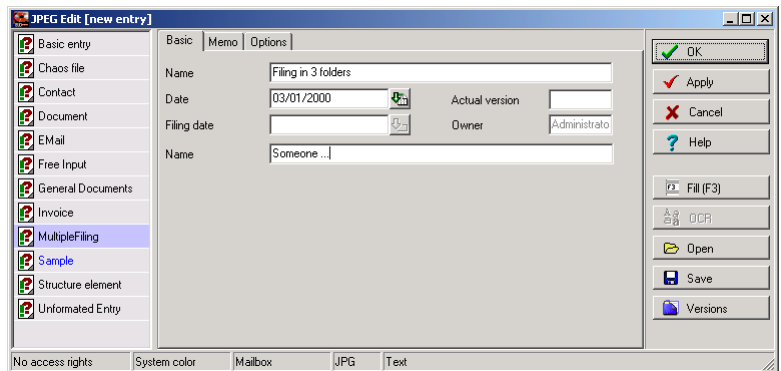


Fig. Keywording a document with the 'Multiple filing' keywording form

The fields and index names are now found in the input form.

## Simultaneous filing in different indexes.

7. Documents in the *mailbox* are assigned to the *Multiple filing* keywording form and the required information is appended to them.

8. Click **OK** and the document is automatically filed in the indexes *Shakespeare*, *Shelley* and *Scott*. **ELO** only archives the document once. Two of the indexes just contain logical copies of the original document.

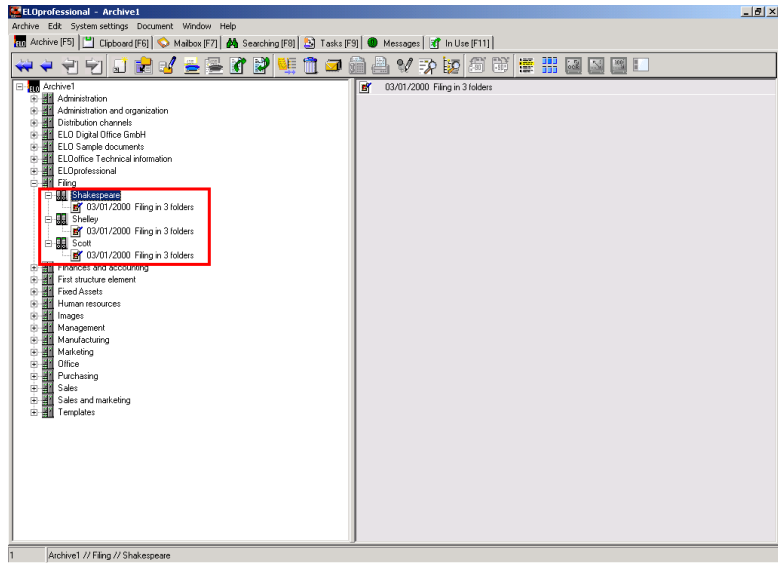


Fig. Filing in several indexes

9. You can view the logical copies of the document from the context menu of the filed document. Right-click on the menu entry for one of your filed documents. You will find links to the document's logical copies under *Shortcuts*.

## Example

The filed document can be located in all three indexes. This is particularly useful if you administer different filing systems, such as an alphabetical and a chronological system, or one index that files visiting cards by *Name* and another that files the same cards by *Company*.

The advantages are obvious: you will find the document require every time, regardless of which index you choose during searching.

# The form editor

The form editor gives you great freedom to create custom keywording forms. It lets you design keywording dialogs for filing and keywording documents.

## Starting the editor

1. To customize a keywording form, select it in Management of keywording forms which you call up from the menu System settings, Keywording forms. The Management of keywording forms dialog opens.

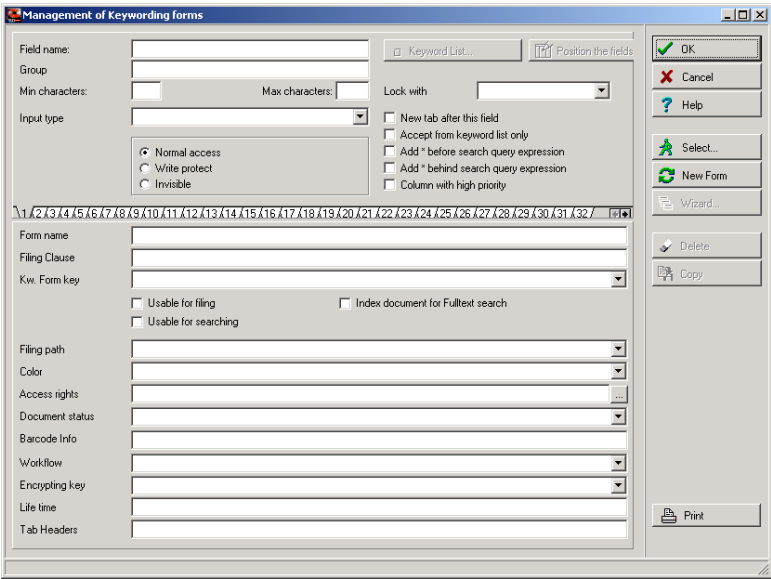
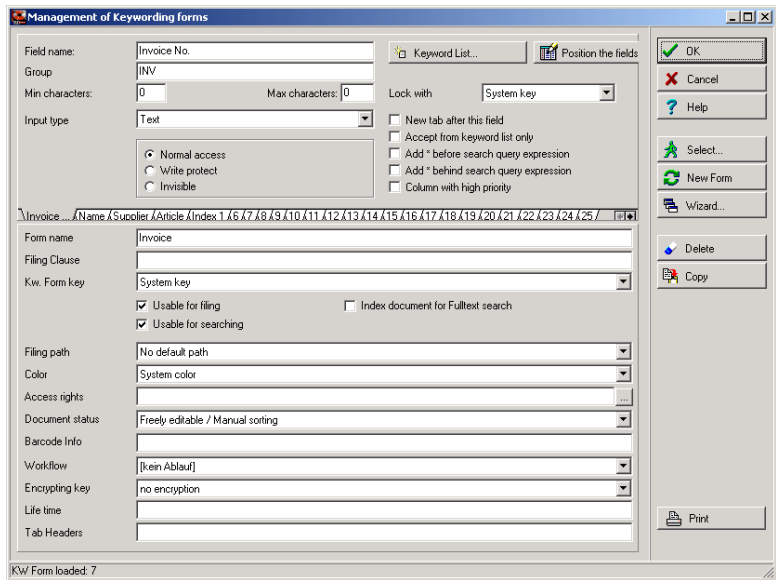


Fig. Management of keywording forms

2. Then select the keywording form you want to customize by clicking *Select*, highlighting the form and clicking on *OK*. In Management of keywording forms, the data set for the form is displayed. In our example, it is the form *Invoice*.



**Management of Keywording forms**

Field name: Invoice No.    Keyword List...    Position the fields

Group: INV

Min characters: 0    Max characters: 0    Lock with: System key

Input type: Text

☒ Normal access  
☐ Write protect  
☐ Invisible

☐ New tab after this field  
☐ Accept from keyword list only  
☐ Add \* before search query expression  
☐ Add \* behind search query expression  
☐ Column with high priority

Invoice... \Name\Supplier\Article\Index.1\6\7\8\9\10\11\12\13\14\15\16\17\18\19\20\21\22\23\24\25/

Form name: Invoice

Filing Clause:

Kw. Form key: System key

☒ Usable for filing    ☐ Index document for Fulltext search  
☒ Usable for searching

Filing path: No default path

Color: System color

Access rights:

Document status: Freely editable / Manual sorting

Barcode Info:

Workflow: [kein Ablauf]

Encrypting key: no encryption

Life time:

Tab Headers:

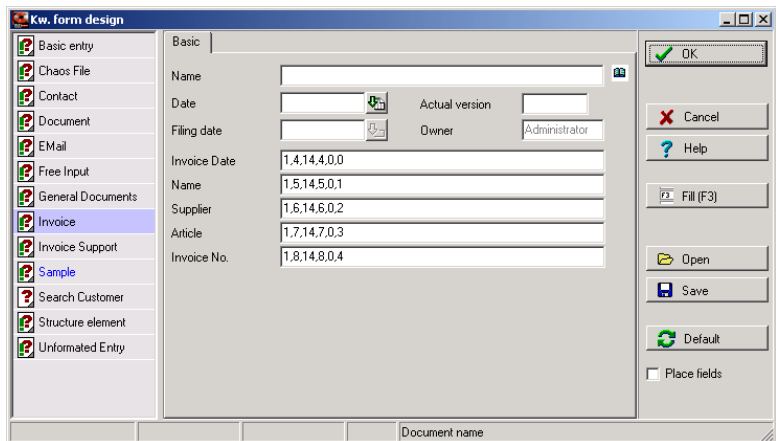
OK    Cancel    Help    Select...    New Form    Wizard...    Delete    Copy    Print

KW Form loaded: 7

Fig. Editing the 'Invoice' keywording form



3. Click on the *Position the fields* button. The *Keywording form design* dialog box opens.



**Kw. form design**

Basic

Name:    Actual version:    Owner: Administrator

Date:    Filing date:    Invoice Date: 1.4.14.4.0.0

Name: 1.5.14.5.0.1

Supplier: 1.6.14.6.0.2

Article: 1.7.14.7.0.3

Invoice No.: 1.8.14.8.0.4

OK    Cancel    Help    Fill (F3)    Open    Save    Default    Place fields

Document name

Fig. Editing keywording forms



4. By default, the index fields are arranged one below the other.

The screenshot shows the 'Tif Edit' window with the 'Invoice' entry selected in the left sidebar. The main area displays the 'Tab Header 1' tab with the following fields:

Name	Invoice 4258 - 09/10/2004		
Date	09/10/2004	Actual version	
Filing date	07/27/2004	Owner	Administrator
Invoice Date			
Name			
Supplier			
Article			
Invoice No.			

On the right side, there are buttons for OK, Apply, Cancel, Help, Fill (F3), OCP, Open, Save, and Versions. The status bar at the bottom shows 'No access rights', 'Green', '07/27/2004', and 'TIF'.

Fig. Default form arrangement

## Positioning the input fields

5. To position the fields and field names on the keywording form, hold down the Ctrl key and click and drag the field or field name to its new position. When the field is correctly positioned, release the mouse button. The index fields and field names are now in their new positions.

The screenshot shows the 'Kw. form design' window with the 'Basic' tab selected. The left sidebar lists various entry types, with 'Invoice' selected. The main area displays the form design for the 'Invoice' entry, showing the following fields and their values:

Name			
Date		Actual version	
Filing date		Owner	Administrator
Invoice Date	1,4,14,4,9,0	Invoice No.	26,4,34,4,18,4
Name	1,5,14,5,38,1		
Supplier	1,6,14,6,13,2		
Article	1,7,14,7,38,3		

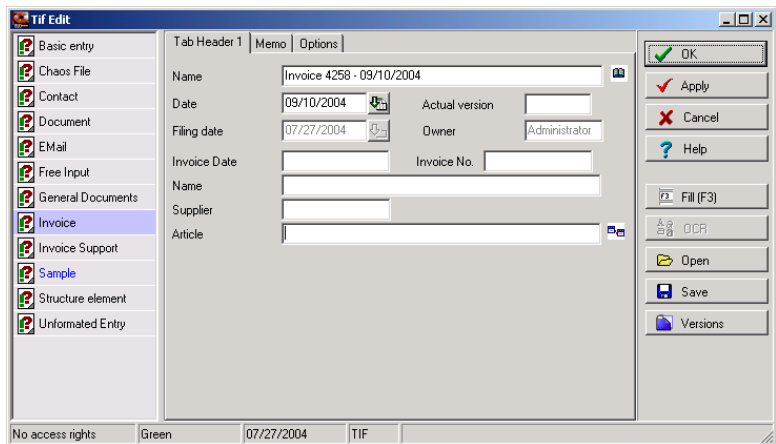
On the right side, there are buttons for OK, Cancel, Help, Fill (F3), Open, Save, Default, and a checkbox for 'Place fields'. The status bar at the bottom shows 'Text'.

Fig. Moving fields and field names info.tifinfo.tif

6. To save these settings, quit the *Keywording form design* dialog and click *OK*. Then quit the Management of keywording forms window by clicking *OK*, otherwise the new form layout settings will not be saved together with the keywording form data.

## Keywording a document

To check the form you have just redesigned, keyword a document - an *Invoice* in our example - using the new-look keywording form.



The screenshot shows the 'Tif Edit' window with a sidebar on the left containing a list of document types: Basic entry, Chaos File, Contact, Document, EMail, Free Input, General Documents, Invoice (highlighted), Invoice Support, Sample, Structure element, and Unformatted Entry. The main area has tabs for 'Tab Header 1', 'Memo', and 'Options'. The 'Tab Header 1' tab is active, displaying a form with the following fields: Name (Invoice 4258 - 09/10/2004), Date (09/10/2004), Filing date (07/27/2004), Invoice Date, Name, Supplier, Article, Actual version, Owner (Administrator), and Invoice No. On the right side of the window, there are buttons for OK, Apply, Cancel, Help, Fill (F3), OCR, Open, Save, and Versions. The status bar at the bottom shows 'No access rights', 'Green', '07/27/2004', and 'TIF'.

The advantages of custom keywording form design are immediately apparent: the form is clearer and takes up less space. Customizing keywording forms means you can fit a great deal more information on an index card, because you can arrange the index fields side by side.

---

# Automatic filing of documents

To work efficiently with **ELO**, automatic filing of documents is essential.

Form name	
Filing Clause	
Kw. Form key	

When creating a keywording form, you can enter a condition in the *filing clause* field for filing a document in a particular index. From this index definition, **ELO** recognizes where to archive the file (filing cabinet, level, folder, index).

There are two types of filing clause:

- with target definition
- without target definition (according to file structure)

Using simple examples, we will now explain the differences and options for automated filing of documents.

## Filing with target definition - simple version



First create an index called *Visiting cards* in a folder.



Click on the icon *Create structure element on the right side* and give the new ELO object the name *Visiting cards*. Where applicable, select the object type from the Options index card for the new structure element, to display the "correct" icon. The *Edit index (new entry)* window opens.

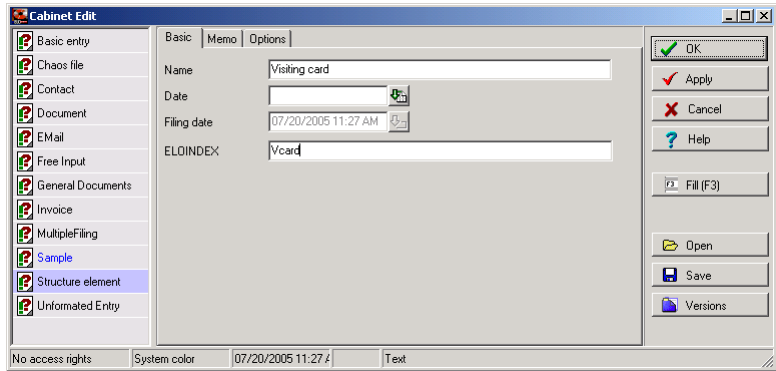


Fig. Creating the 'Visiting cards' index

ELOINDEX

In Name, enter **Visiting cards**. In the field *ELOINDEX*, enter **Visiting cards** as the target field. This target definition enables **ELO** to assign the document to the target directory in the index form (by matching against the filing clause).

 New Form

1. After creating the index, go to Management of keywording forms and click on *New form*.

Field name:   
Group:

2. Give your keywording form a suitable name *Visiting cards*.

3. Create index fields for surname and company. You can of course choose other names. Under *Group*, enter e.g. *CARD*.

Filing Clause

For each new index field, click on the next index card tab.

4. Under *Filing clause*, enter `[ELOINDEX=Bcards]`.



The square brackets are essential for the keywording form filing clause. You can enter square brackets using the keyboard.

You can copy all other settings (key, version control etc.) or adapt them to suit.

☒ Usable for filing  
☒ Usable for searching



But ensure that the two check boxes *Usable for filing* and *Usable for searching* are selected (ticked).

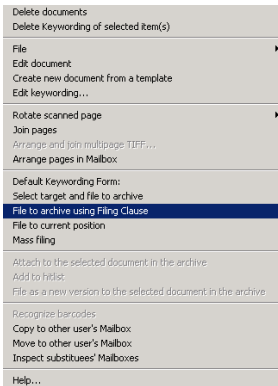
5. Close Management of keywording forms by clicking *OK*. The *Visiting cards* keywording form you have just created looks like this:

Fig. 'Visiting cards' keywording form

With these input fields, you can quickly capture all the important details from a visiting card.

## Use in practice

1. Scan visiting card. It is best to create a custom scanner profile for this.
2. In the mailbox, the scanned visiting card is keyworded using the *Visiting cards* keywording form. (You do not need to complete all input fields).



3. Then document is then highlighted in the mailbox. Right-click to open the context menu then click on *File to archive using filing clause*. **ELO** now files the document in the *Visiting cards* index, regardless of where the index is located.

You can file many other types of documents, e.g. *invoices* or *insurance documents* in the same way. The process is always the same.

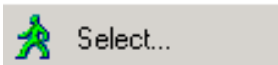
## Filing with target definition - complex version



For all ELO objects that are not documents, the *Structure element* keywording form should be used. The *Structure element* keywording form always contains the index field **ELOINDEX**, which is required for automatic filing of documents.

You have already created a folder per supplier for your invoices with an annual index. In each of the 12 indexes, the **ELOINDEX** field contains the supplier name and the month in the format **Supplier name/01** to **Supplier name/12**. For supplier *Menzies*, the *January* index then reads **Menzies/01**, the *February* index reads **Menzies/02**, the *March* index reads **Menzies/03** etc.

## Creating keyword-forms



Open Management of keywording forms and create a new keywording form as required.

For the purposes of this tutorial, open the **Invoice** form by clicking on the *Select* button then selecting *Invoice* in the *Select document form* window.

The **Invoice** keywording form opens within Management of keywording forms.

## Filing clause

The following rules apply for the filing clause:

- Everything you enter in square brackets [...] is copied as per the original, several input fields can be joined together with a + sign: **[ELOINDEX=]+L2+[/] +L3**.
- You can "copy" the content of individual cells (keywording form input fields) using the references LK, LD, LA (= default input fields *Name*, *Date* and *Filing date*) and L1 to L24 (up to the total number of input fields).
- Sections of a cell, (e.g. the invoice date) can be copied like this: **L3(x,y)** where (L3 = third input field, x = first character to copy, y = total number of characters to copy).

The screenshot below illustrates this more clearly.

The screenshot shows the 'TIF Edit [new entry]' window. On the left is a sidebar with icons and labels for various entry types: Basic entry, Chaos File, Contact, Document, EMail, Free Input, General Documents, Invoice (highlighted), Invoice Support, Sample, Structure element, Unformatted Entry, and Visiting card. The main area has tabs for 'Tab Header 1', 'Memo', and 'Options'. The 'Tab Header 1' tab is active, displaying a form with the following fields: Name (with a dropdown showing 'Name (LK)'), Date (with a dropdown showing 'LD'), Filing date (with a dropdown showing 'LA'), Invoice No (with a dropdown showing 'L1'), Supplier (with a dropdown showing 'L2'), Invoice date (with a dropdown showing 'L3'), and Article (with a dropdown showing 'L4'). To the right of the Date and Filing date fields are 'Actual version' and 'Owner' (showing 'Administrator'). On the far right is a vertical toolbar with buttons: OK, Apply, Cancel, Help, Fill (F3), OCR, Open, Save, and Versions. At the bottom of the window is a status bar with the text: 'No access rights', 'System color', '09/16/2004', 'TIF', and 'Document name'.

Fig. 'Invoice' keywording form

In the *Filing clause* field in the form editor, enter **[ELOINDEX=]+L2+[/] +L3(4,2)**. This means that

So using the keywording form filing clause, **ELO** extracts the supplier name from the entire cell 2 (L2) = Menzies, and the month from the third cell (L3) (4,2 = beginning with the fourth character, two characters) = **03**. They are joined with a slash [/] to give: **Menzies/03**.

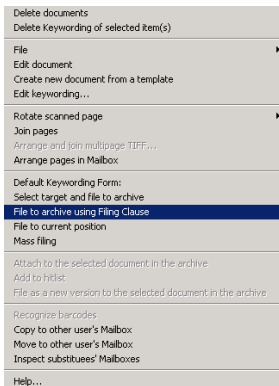


Remember: The date is made up of 10 characters - full stop separators are included.

When keywording with this form, the Invoice is filed in the index whose entry under *ELOINDEX* matches the target definition, i.e. where the *ELOINDEX* field contains the string *Menzies/03*.

## Use in practice

1. Scan the invoice.
2. In the mailbox, the scanned invoice is keyworded using the *Invoice* keywording form. Enter the supplier, e.g. *Menzies* in the *Supplier* field and in *Invoice date*, enter the invoice date in the form DD.MM.YYYY (08.03.2001), or select it using the calendar function.
3. Right-click to open the context menu then click on *File to archive using filing clause*.



The invoice will be archived, provided there is an index with the *ELOINDEX* field set to *Menzies/03*.



## Filing without target definition - filing clause according to filing structure.

The possible filing clauses we have seen up to now have required a target field entered in the index. Using Filing clause according to the filing structure, you can also file in an existing index with no target field.

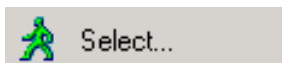
The filing clause for this is, in general:

```
[¶Filing cabinet¶Folder¶]+Lx(v,y)+...
```



The critical "¶" sign for filing clause according to filing structure can be entered using the key combination **ALT+0182**.

## Example



Say you want to file invoices from your suppliers automatically in an alphabetical index. You have created a filing structure: Filing cabinet *Sales*, *Customers*, folder, default index *A-Z*.

Open Management of keywording forms and create a new keywording form as required. For the purposes of this tutorial, open the *Invoice* keywording form by clicking on the *Select* button then selecting *Invoice* in the *Select document form* window.

## Filing clause

Enter the following filing clause:

```
[¶Sales¶Customers¶]+L2(1,1)
```

**ELO** will then retrieve the first letter (1,1 = one character starting from 1) from the second input field on the index form (L2) *Supplier*.

## Use in practice

1. Scan the invoice.
2. In the mailbox, the invoice is keyworded using the *Invoice* keywording form. Under *Supplier*, enter e.g. **Black**.
3. Right-click to open the context menu then click on *File to archive using filing clause*. **ELO** then files the document in the *Sales* filing cabinet, *Customers* folder, index *B*.

Default Keywording Form:  
Select target and file to archive  
**File to archive using Filing Clause**  
File to current position  
Mass filing

Example 2

The filing clause according to filing structure is very flexible. That means you can also define the filing folder using a variable. For example, You have created a folder for each customer in the *Sales* filing cabinet. Every folder contains manually created indexes, e.g. Invoices, Offers, Delivery notes etc.

Using an appropriate keywording form, *Customer*, which would have, for example, the *Customer name* as Input field 1 and *Index* as Input field 2, you can file your documents quickly and securely.

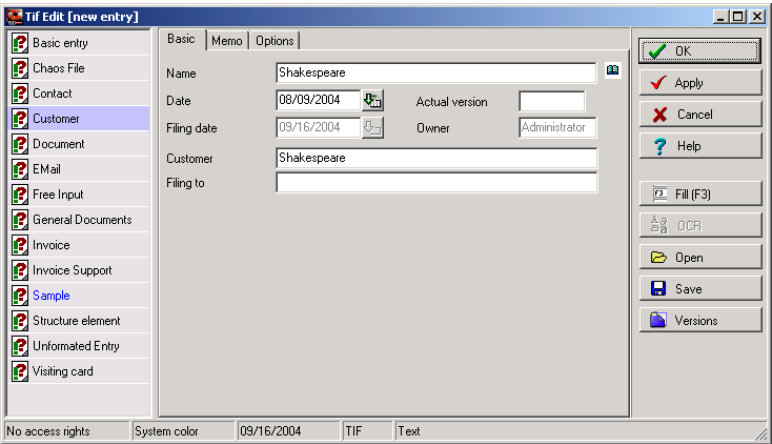


Fig. Creating a document

When creating the keywording form, enter the following filing clause in Management of keywording forms:

Form name	Customer
Filing Clause	<b>[¶Sales¶]+L1+[¶]+L2</b>
Kw. Form key	System key

**[¶Sales¶]+L1+[¶]+L2**

Filing clause in the form editor

The document will now be archived using the *Customers* keywording form in the *Sales* filing cabinet. It will be entered in the very folder that you entered in the *Customer name* input field (L1) when keywording and in the index you entered in the input field *Index* (L2).

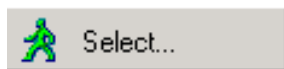


When completing the keywording form, try to use the entries in the keyword list (available by right-clicking) where possible. Enter the customer and index in a keyword list; then keywording and automatic filing will be straightforward.

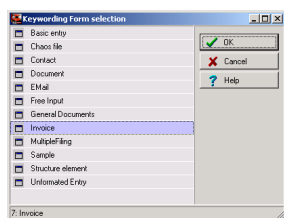
## Modifying keywording forms

Existing keywording forms can be changed at any time, adapted to new requirements or changed.

1. In the *System settings* menu, select *Keywording forms* [Ctrl+F3]. The Management of keywording forms dialog opens.



2. Click on *Select*. The *Select document form* selection dialog box opens.



3. Select the form to be changed and confirm by clicking on *OK*. The selected keywording form opens within Management of keywording forms.



You are now free to change the keywording form to meet your requirements.

## Switching keywording forms

4. Confirm the changes with *OK*. The modified keywording form is available with immediate effect.

If you want to change a keywording form that has already been keyworded, double-click on the document entry to open the input window *Edit scanned document*. The name of the dialog box that now opens is dependent on the *object type* of the document (index card *Options*, *Object type*).

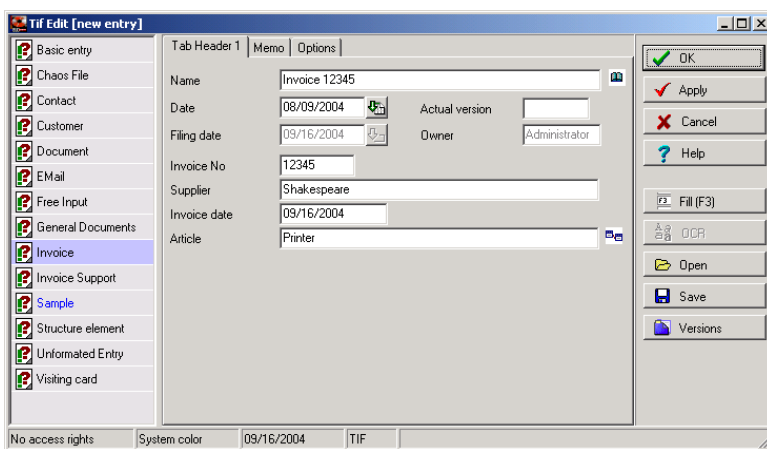
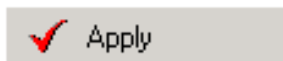


Fig. Switching keywording forms



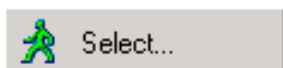
## Deleting keywording forms

Select a keywording form from the list on the left and change the keywording if necessary.

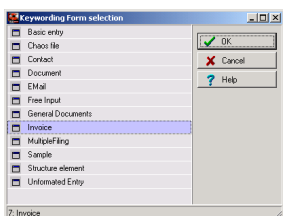
Then click on *Apply* (window remains open for further input) or *OK* (dialog window closes).

It is easy to delete a keywording form. But you can only delete a keywording form if it has not been used to archive documents.

1. In the *System settings* menu, select *Keywording forms* [Ctrl+F3]. The Management of keywording forms dialog opens.

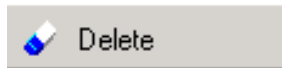


2. Click on *Select*. The *Document form* selection dialog box opens.



3. Select the keywording form you want to delete and confirm by clicking on *OK*.

The selected keywording form is displayed.



4. Click on *Delete*. The keywording form is deleted without requiring confirmation.



If the form has already been used to archive documents, it is displayed in the info window. You can then delete all entries precisely.

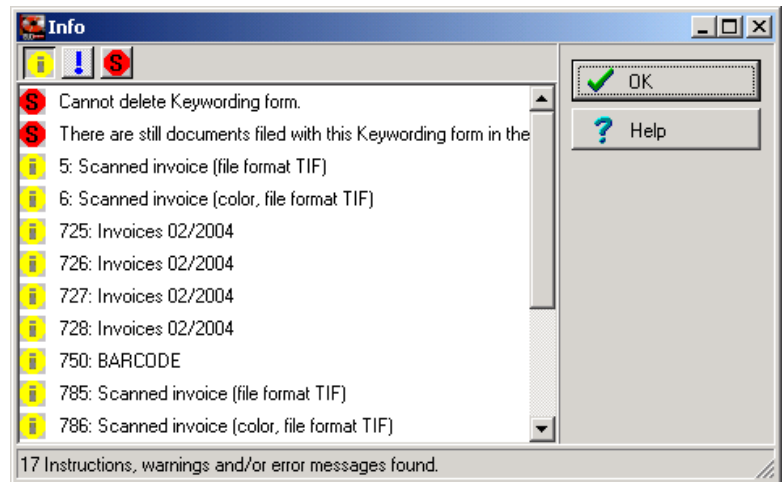
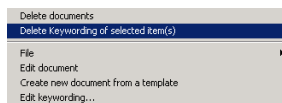


Fig. Notes on deleting keywording forms



If you do not want to delete the documents, first copy them to the Mailbox and delete the keywording using the context menu. Then delete the documents in the archive. Now you can delete the keywording form and keyword the documents again in the Mailbox.

---

# Filing clause by longest match

Say you want to file invoices from your suppliers using a keywording form directly into an alphabetical index containing *S*, *Sch* and *St*. That means you can file suppliers such as *Segemüller*, *Schwarz* and *Steinmann* separately.

1. Click on the filing cabinet *Purchasing* then on the *Suppliers* folder.

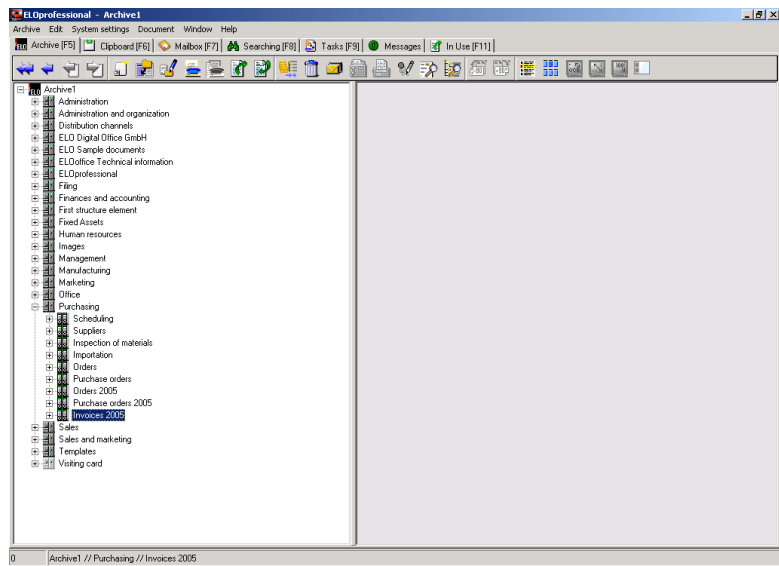


Fig. Filing structure in ELO

2. Create a *Default index A-Z (German)*.

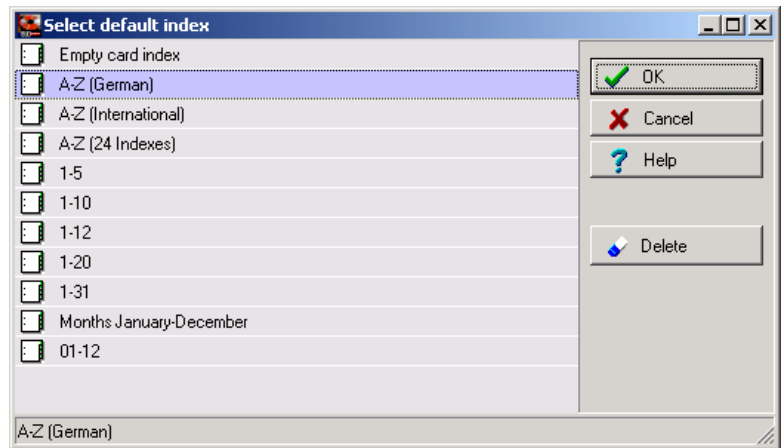


Fig. Selecting a default index

The added index is available for filing.

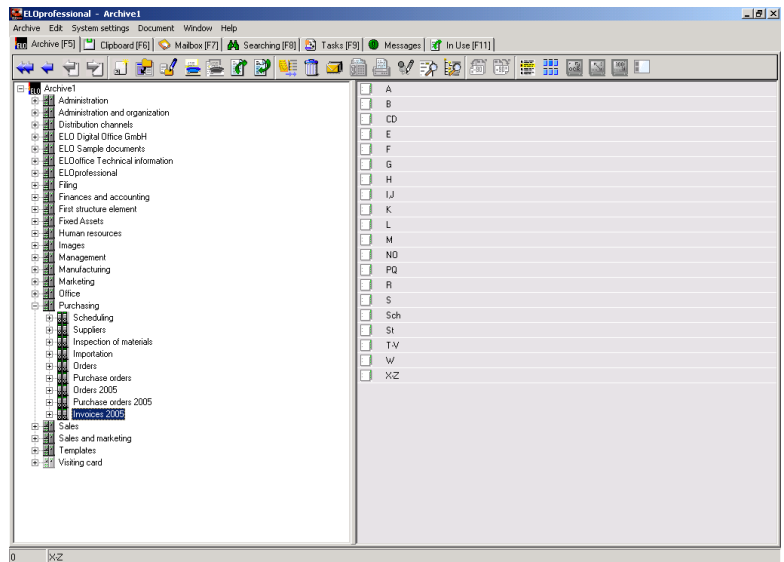


Fig. 'Suppliers' folder with index

3. Open the structure element (index) *S* by double-clicking; the *Edit index* window appears. Click on the *Structure element* keywording form if it has not yet been assigned to the index. In the field *ELOINDEX*, enter *S*. Click on *Apply*.

Fig. Keywording form with target definition

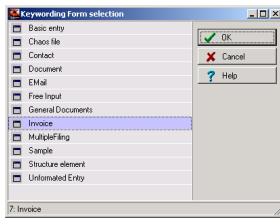
The *S index* is edited and saved. Proceed in the same way for all other indexes. In the *Sch* index, enter the string *Sch* in the field *ELOINDEX*. Click on *Apply*. Repeat the process for the index *St*.

*ELOINDEX* is a variable. You can, for example, also use the field name *Customer*, *Name* or *Supplier*. If you want to use multiple default indexes A-Z (German) in different folders, then the variable *ELOINDEX* or the variable value must be changed, to *Supplier S* and *Customer S* for example.

Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8

Open the Management of keywording forms from *System settings, Keywording forms*.





For the purposes of the tutorial, open the *Invoice* keywording form (using the *Select* button).

For a *Longest match filing clause*, it is the longest string matching the target field and found using the keywording variables (LK, LA, LD, L1-50) that is used for filing.

With the following filing clause, **ELO** will distinguish between S, *Sch* and *St*:

[Identifier=]+Lx(v,y)+[%]+Lx(v,y) (the % sign is crucial)

In the *Keywording forms* window, enter the following filing clause in the *Filing clause* field in the *Invoice* keywording form:

[ELOINDEX=]+L2(1,1)+[%]+L2(2,2)

Fig. 'Invoice' keywording form management

Filing Clause [ELOINDEX=+L2(1,1)+%]+L2(2,2)

From the second index field, Supplier (L2), **ELO** retrieves the first letter (1,1) and the second and third letters (2,2; from the second character, two in total).

Fig. 'Invoice' keywording form

Now scan a few sample documents into the mailbox. Select a document. Double-click to open the *Edit scanned document* window. Then select an appropriate keywording form, in this case *Invoice*. Keyword the document in Name and enter a supplier name, e.g. Schwarz. Then click on *OK*.

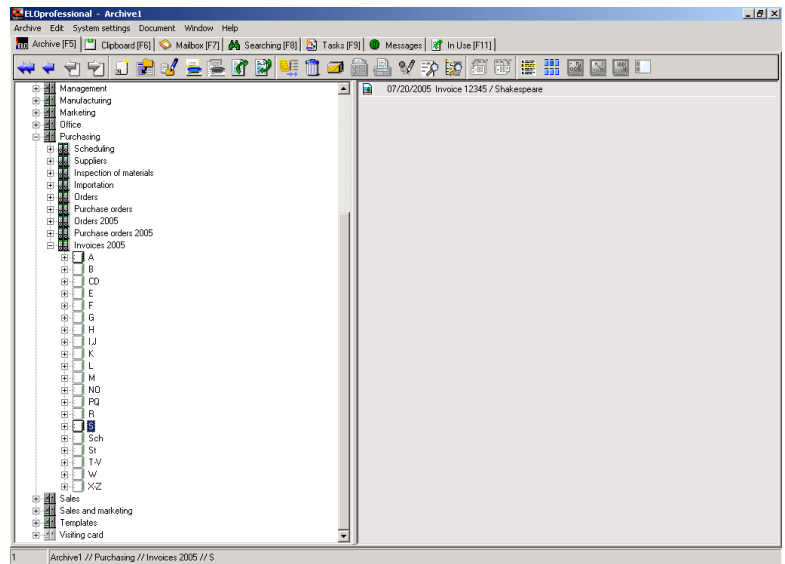


Fig. Entering data in the keywording form

Select the document and in the mailbox context menu, select *File to archive using filing clause*. The document is filed in the *Sch* index.

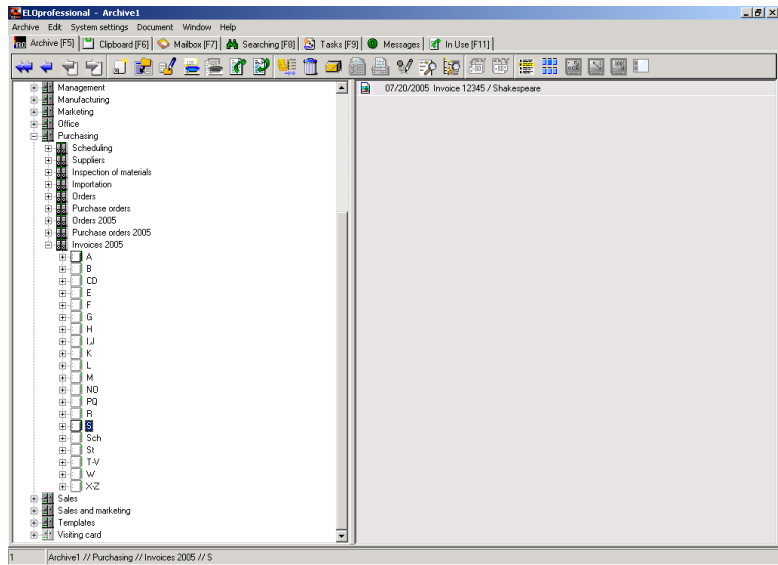


Fig. Filing according to 'Longest Match'

## How it works

The document is filed in the index whose target field matches the longest character string. That means Segemüller is filed in *S*, because only the first letter is a match *S* (There is no *Se* index), Steinmann in *St*, because two letters match, and Schwarz in *Sch*, because three characters match the index.

---

# The Keywording Form Wizard

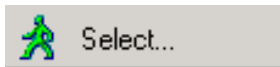
With the form wizard, you can quickly create your own keywording forms, including all options, e.g the filing clause. Be sure to read the preceding steps also, because there are entries you must make in the folders or indexes if you want to use *File to archive using filing clause*.

The form wizard is available in Management of keywording forms by clicking *Wizard* once you select a new or existing keywording form.

1. In the *System settings* menu, click on *Keywording forms*.

2. In *Management of keywording forms*, click on the *New form* button, enter a name and confirm by clicking on *OK*.

Then click on the *Wizard* button. The form wizard opens.



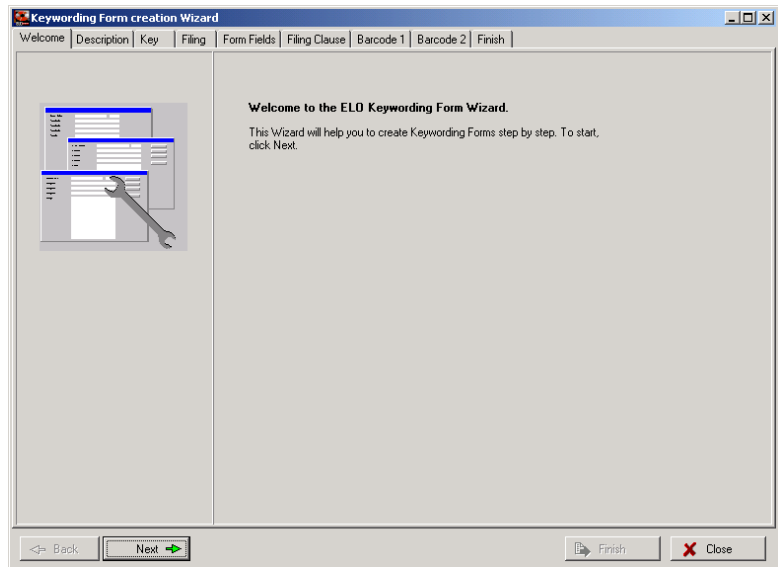


Fig. The keywording form wizard

The form wizard contains various index cards for you to enter your settings one after the other. Each index card contains detailed instructions to make it easy to create a form.



### Index cards in the form wizard

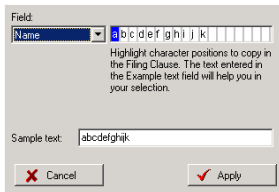
3. To move to the next index card, click either on the relevant tab or on the *Next* button.

In general, creating keywording forms with the form wizard should not present any problems. We would however draw your attention to some features of particular index cards.

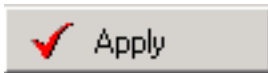
**Index card description:** The *Index document for Fulltext search* function will only be enabled if you have installed the optional **ELOprofessional Fulltext** module.



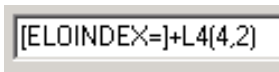
**Index card, filing clause:** You can enter values in six combo boxes. In the first (in the filing clause with target definition), you should usually enter the identifier **ELOINDEX**. In the Sample text field, your filing clause entry is immediately previewed: **[ELOINDEX=]**. In all other fields, you can open a selection window by clicking on the black arrow.



Under *Field*, all the input fields you have defined (form fields) for this form are displayed. Select one. Under *Column*, by dragging with the mouse, you can select individual characters from the selected input field and assign an index field to an area.



In a Date field, select the month, for example, i.e. the fourth and fifth columns. Click on *Apply*.



In the Sample text field, your filing clause entry is previewed: e.g. **+L4(4,2)**. That means that in the fourth input field (keywording attribute, e.g. Date), two characters beginning with the fourth character will be used for the filing clause.

**Index cards Barcode 1 and Barcode 2:** This index card is only effective if you have installed the **ELO BARCODE** module. The settings for these two indexes are used as the values in the *BarcodeInfo* field when generating a keywording form. (You will find more information on this in the **BARCODE** manual.)

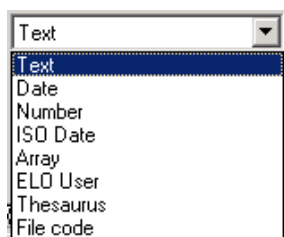


4. When you have entered all your settings, click on *Finish*.

---

# Index field types in keywording forms

Every keywording form consists of index fields. Within the keywording form, index fields can take on different functions. Below, you will find descriptions of the different types of index fields.



## Text

There are different types of index fields. Every index field in a keywording form is assigned a particular field type. The different index field types assist the user with data entry in the index field.

There are no restrictions in the *Text* index field type. You can enter any character.

## Date

In the *Date* index field type, ELO provides a handy option to the right of the cell for easier data entry.



Select the corresponding date from the calendar field. You can of course enter the date manually as well. Remember that the date format will have been preset. If you have not entered the date in the correct format, keywording cannot be completed.

## Number

Index fields of the type *Number* can only accept digits and appropriate digit separators. If you enter other characters in this field, you will be shown a warning message. If you see this message, correct your entry.



ISO date

A standardized date format must be entered here as well. You can use the calendar function. Incomplete entries are auto-completed by **ELO** to constitute a valid date. The difference between this type and simple date is that the date is entered in the database in the format YYYYMMDD. In other words, this field type allows you to carry out an area search or a standardized query. When displayed in the keywording form, the date is displayed in simple date format DD.MM.YYYY.

Array

For index fields in the format *Array*, you can add a hierarchical list in a text file, from which entries can be taken for keywording. In the keywording form, you right-click to do this if the corresponding field is the focus of entries. You can assign a text file to an input field using the name of the file, which must also be used as the file name. The file is created with the extension *TXT* in the **ELO** mailbox and is structured as follows:

```
Line 1: Control statement
Line 2...n: List entries in the form:
1;1 ; A
2;1.1. ; Create archive
...
Column 1=Hierarchy level
Column 2=Numbering
Column3=Text
```

Line 1 can contain the following control statements (multiple control statements should be separated by semi-colons):

CONCAT	Parent entries entered together in the results string, separator (see entry "DELIM=")
DROPNUM	Remove numbering
KEEPTOTAL	Copy numbering from the selected entry
DELIM=	Separator for concatenated string (see CONCAT control)

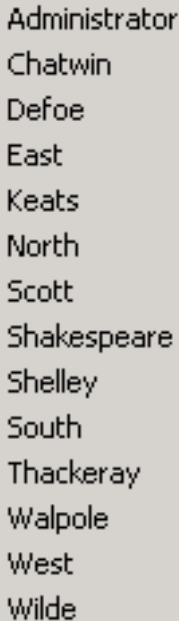
**Example**     Sample TXT file:

```
KEEPTOTAL;DROPNUM
1;1 ; A
2;1.1. ; Create archive
2;1.2. ; Delete archive
1;2. ; B
2;2.1. ; Bar code recognition
2;2.2. ; Authorization scheme
```

## ELO User

In an index field of type *ELO User*, you can right-click to call up a menu of all active users in **ELO**.

Select the relevant user.



Administrator  
Chatwin  
Defoe  
East  
Keats  
North  
Scott  
Shakespeare  
Shelley  
South  
Thackeray  
Walpole  
West  
Wilde

## Thesaurus

With the *Thesaurus*, word groups are suggested in an index field that the user can select from a dialog box. The dialog box can also be called up from the context menu.



Index fields of the type *Thesaurus* are denoted by a small icon at the end of the index field.

To open a *Thesaurus* for an index field, right-click in the index field. Then the *Thesaurus* dialog box opens.

3. No entries are available as yet in the Thesaurus. Click on *New group*. A dialog box opens. Enter the name for the new group. Click on *OK*.

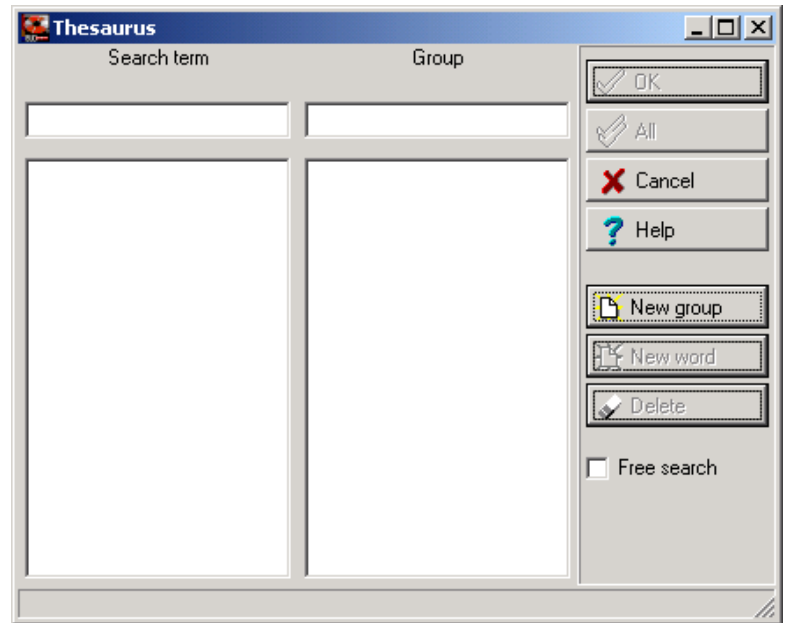


Fig. 'Thesaurus' dialog

You can create as many groups as you wish here, and you can assign different terms to each as synonyms.

# Display keywording information

In **ELO** you have the choice of making the metadata entered in the keywording dialog visible when viewing the document as well. If you use this feature, the keywording information is displayed above the document in the viewing pane in **ELO**.

## Displaying keywording information

You can turn on the *Display keywording information* feature in the *System settings* menu, *Options*, on the *Display* index form.

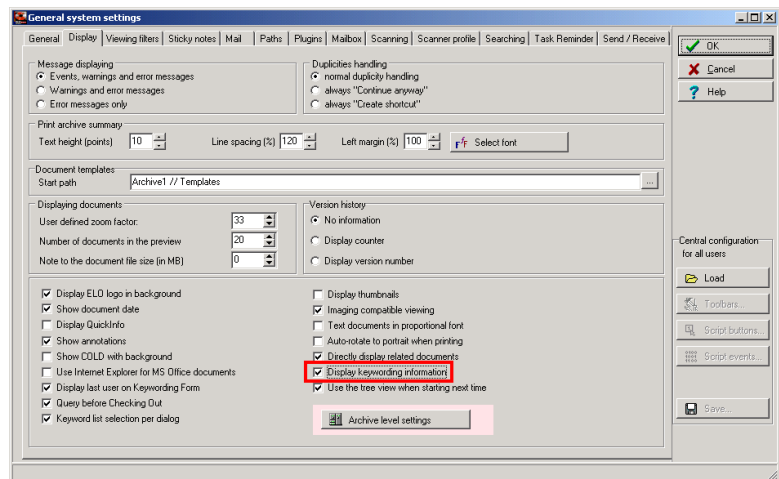


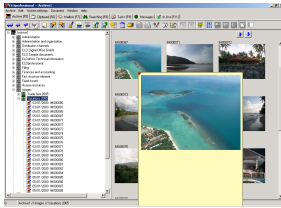
Fig. Displaying keywording information

In the *Display* index card, turn on the *Display keywording information* option by clicking the check box.

If the *Display keywording information* option is on, **ELO** looks for the file `templ_default.htm` in the mailbox directory, which is used to display the keywording information above the document. A separate HTML file can be created for each keywording form, which displays the required information. Graphics, links etc. can also be included in these HTML files.



The file names for the keywording-form-specific HTML files refer back to the Form ID in the keywording form, e.g. the file `templ_6.htm` is available to display direct keywording information for documents archived with the ID 6 keywording form.



## Customizing the keywording display

You can find out the form ID by clicking the *Select* button from the *System settings* menu, *Keywording forms*.

A direct keywording display is to be set up for the *Invoice* keywording form.

Field	Value
Name	Invoice 501827
Date	07/08/2001
Filing date	07/27/2004
Invoice No	501827
Supplier	Shakespeare Inc.
Invoice date	09/06/2004
Article	Printer HP 6

Fig. 'Invoice' keywording form

The index form ID for the *Invoice* keywording form is "12" for this archive. If the standard setting for direct keywording display `templ_default.htm` is used, all the information is displayed.

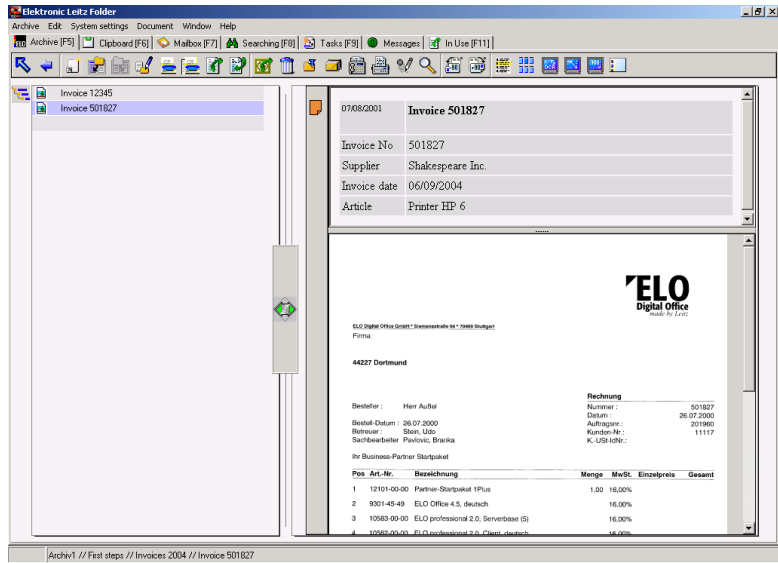


Fig. Displaying keywording information

The display can be modified by creating then modifying the file `templ_12.htm`. The file is in the Mailbox.

## Creating an HTML file

If there is no special HTML file for a keywording form ID, ELO reverts back to the default file `templ_default.htm`.

To create an HTML file which displays the two index fields, brief information and the filing date, create an HTML file in an HTML or TXT editor. Keywords will also be displayed in other fonts with a different background.

## Example

Here is a sample file, that you can modify. You can include graphics, etc. or change the font using the HTML command `<font>` used for the invoice number. Use the HTML commands to customize the files to your requirements.

e.g. the file `templ_12.htm`:

```
<html>
<head>
<title>ELOprofessional Invoice form</title>
</head>
<body bgcolor="#f0f0f0">
<h4>Configure form type "Invoice" - Form ID: #12 </h4>
<table cellpadding=3 border=0 width=100%>
<tr><td width="80" bgcolor="#e0ffff" valign="top"><h2>
<!--ELO_T_D-->
</h2></td><td bgcolor="#ffffe0" valign="top"><h1>
<!--ELO_T_K-->
</h1></td></tr>

<!--ELO_B_1-->
<tr><td width="80" bgcolor="#f0ffff">
<font size="4" face="Arial Black" color="#333399"><b>
<!--ELO_N_1-->
</b></font>
</td>
<td bgcolor="#fffff0">
<!--ELO_T_1-->
</td>
</tr>
<!--ELO_E_1-->

<!--ELO_B_2--><tr>
<td width="80" bgcolor="#f0ffff"><!--ELO_N_2--></td>
<td bgcolor="#fffff0"><!--ELO_T_2--></td>
</tr><!--ELO_E_2-->

<!--ELO_B_3--><tr>
<td width="80" bgcolor="#f0ffff"><!--ELO_N_3--></td>
<td bgcolor="#fffff0"><!--ELO_T_3--></td>
</tr><!--ELO_E_3-->

</table>
</body>
</html>
```

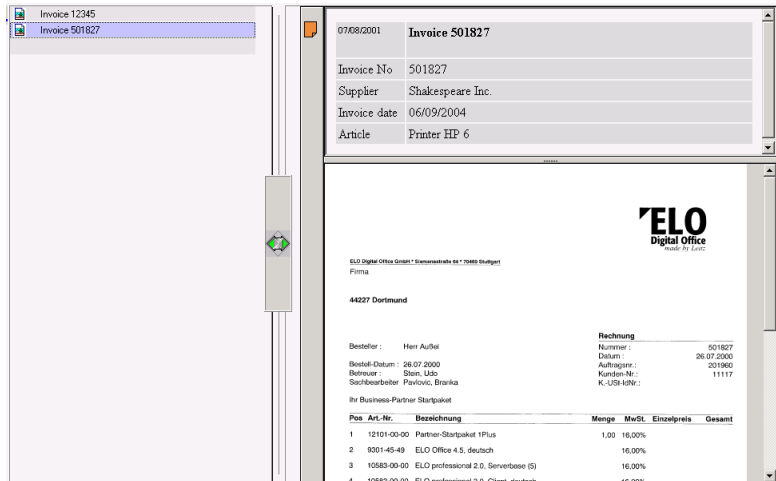


Fig. Displaying keywording information

The file `templ_12.htm` is copied to the mailbox. Using these settings, for every document for which *Display keywording information* is active, the keywording is displayed above the document.

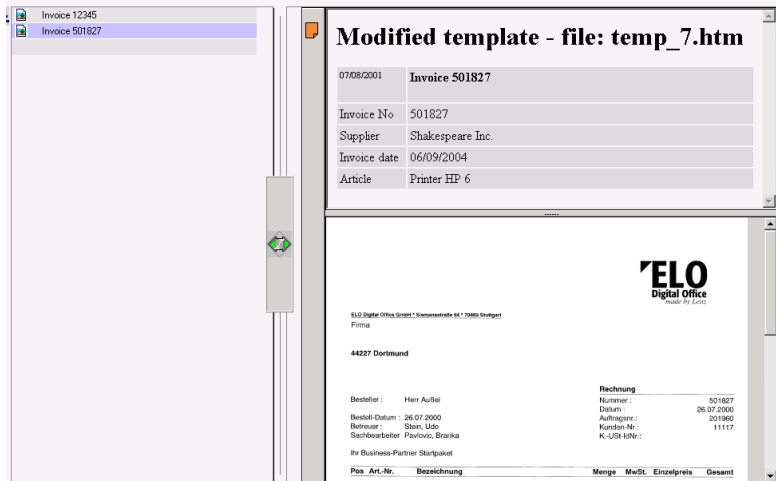


Fig. Displaying keywording information with suitable HTML file



The variables included in the HMTL file are replaced with the corresponding data from keywording when displayed in **ELO**. If you want to turn off keyword display, deselect the option on the *Display* index card in the *System settings, Options* menu.

---

# The thumbnails view

By means of a new function for displaying pictures and graphics - dot graphics or raster graphics - you can have an overview of large image libraries in individual structure elements (folders, indexes etc.). **ELO** offers a thumbnail view of the image files contained in the current folder.



Select the structure element containing the image files. Then click on the *Thumbnails* view icon on the toolbar.

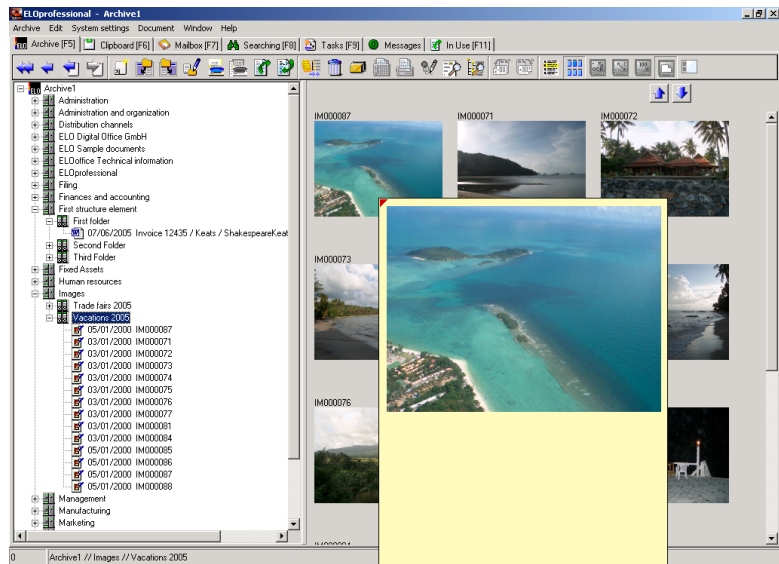


Fig. Thumbnails view of current folder



Click on *Thumbnails* view again to return to the previous view.



**Please note:** Be sure to organize your images, by always filing them in a dedicated folder. Remember that you should never file too many images in one folder to ensure you know what images it contains.

---

# Document paths



The **Filing paths** function in the System settings menu was purposely not explained in detail in the client manual. This function requires a great degree of technical knowledge and is therefore only relevant to and accessible by the administrator.

---

# Color



To set the color, refer to the section in the chapter called **The Edit menu**.

---

# Report settings



**The report settings** function will only be explained briefly in the client manual. This function requires a great degree of technical knowledge and is therefore only relevant to and accessible by the administrator. You can find some more detailed information in the chapter **The Archive menu**.

# Key

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

The administrator can define up to 255 access keys and assign them to users. In the archive, users only see what they have a key for.



For **key**-related queries, contact your system administrator. This is the only person able to clarify whether you will be permitted to manage keys.

## Defining keys

1. In the System settings menu, click on *Key manager*. The *Key management* window opens.

## Entering new keys

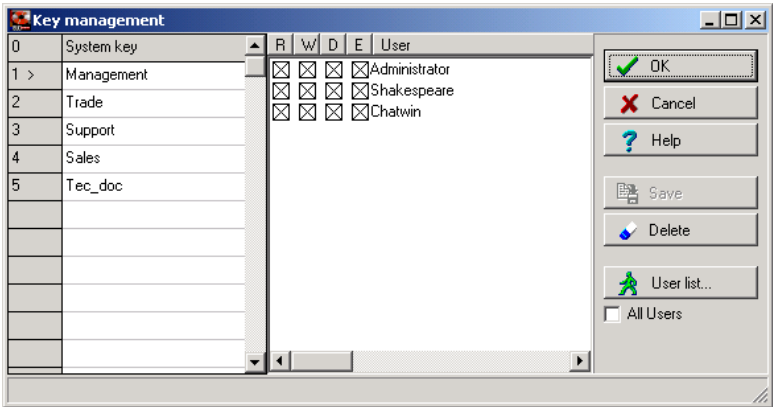


Fig. Entering new keys

2. In the next free line in the left pane, enter the key name, e.g. **Sales**. Confirm the new key with *OK*.



The new key can be used in the keywording forms immediately to lock objects.

## Assigning keys

Encrypted objects can only be viewed by those users in possession of the key used to encrypt them. It is usually the administrator who decides who should possess which key, but some users are also granted permission to assign keys.

1. In the *System settings* menu, click on *Key manager*.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

The *Key management* window opens.



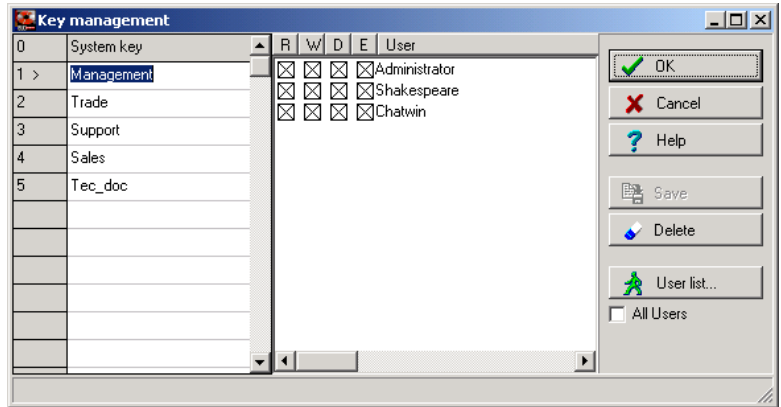


Fig. Key management



2. Select the key you want to assign. On the right, you can see the ELO users who already have the key.

3. Click on *All users* to display all ELO users or select a user from the *User list*.

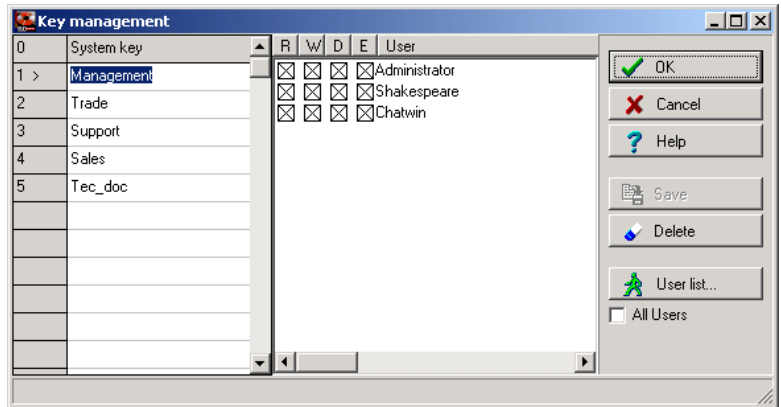


Fig. Rights in key management

For each key, you can assign four user rights to a colleague:

- **R:** Read, i.e. can read logical ELO objects encrypted with a key and their keywording information (documents, structure elements).
- **W:** Write, i.e. can edit or modify logical ELO objects encrypted with a key and their keywording information.
- **D:** Delete, i.e. can delete logical ELO objects encrypted with a key and their keywording information.
- **E:** Edit, i.e. the user can only edit logical ELO objects encrypted using this key - and only the document files. Users with this right cannot access keywording information. That means you can assign a user the right to edit documents without them being able to change keywording information.

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Shakespeare
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chatwin

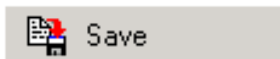
4. Turn on the user rights you want to assign by clicking on the box opposite the user name.

### Example

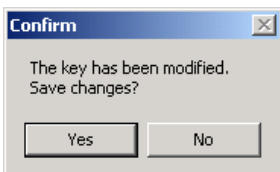
Say you want the user Chatwin to be able to read and delete documents. You do not want him to be able to edit documents.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chatwin
-------------------------------------	--------------------------	-------------------------------------	--------------------------	---------

To set this up, check the user rights **R** (Read) and **D** (Delete).



5. Click on **Save** to assign further keys, or on **OK**, if you are finished assigning keys.



If you select another key without saving, a dialog box appears. Click on **Yes** to save the changes.



To assign a key, **one** permission is sufficient. It is possible, therefore, that users have the same key but different rights.

There is a further way of assigning keys in User management. In the *System settings* menu, select *Users*. In the list on the left, select a user; you can then enter or edit the keys.

Key	R	W	D	E	Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System key
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Management
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Trade
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Support
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Tec_doc

In the section *Key* you can also assign or withdraw the **system key**. The system key is required for creating filing cabinets, folders, levels, indexes (structure elements) and documents. This means that if you withdraw the system key from a user, they cannot create objects in the archive and therefore can no longer access the archive. Assigning the system key to a user who only has *Read* (R) permissions means while they can see all the objects using this default key, they cannot make any changes within **ELO**. They therefore have the most basic rights and most features of the program are not available to this user.

## Withdrawing a key

You may need to withdraw a key or a permission from a user.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

1. In the *System settings* menu, select *Key manager*. The *Key management* window opens.

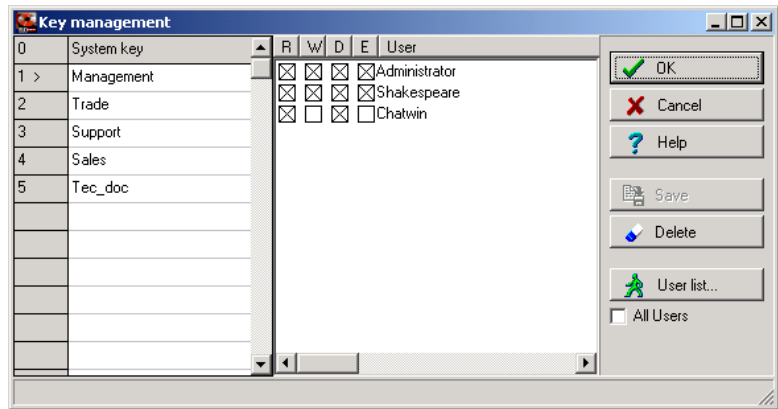
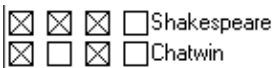
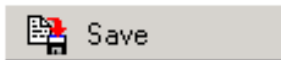


Fig. Key management

2. Select the key you want to withdraw from a user. Users with this key are shown on the right.



3. Click on the boxes marked with a **x** to withdraw the particular right from the relevant user.



4. Click on **Save** to withdraw more keys or on **OK** to close the dialog box.

Henceforth, the user no longer has access to documents encrypted using the key that has been rescinded.



You can also withdraw keys or user rights in **User management**.

## Deleting keys

In the *Key management* window, select the key you want to delete.



Click on *Delete*.

---

# Password

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

For security reasons, every ELO user can be issued with their own password, used to log in to the system. The administrator (or those duly authorized) can issue passwords from *User management* in the *System settings* menu under *Users*.

1. In the *System settings* menu, click on *Users*. The Management of keywording forms dialog opens.

# Creating and issuing passwords

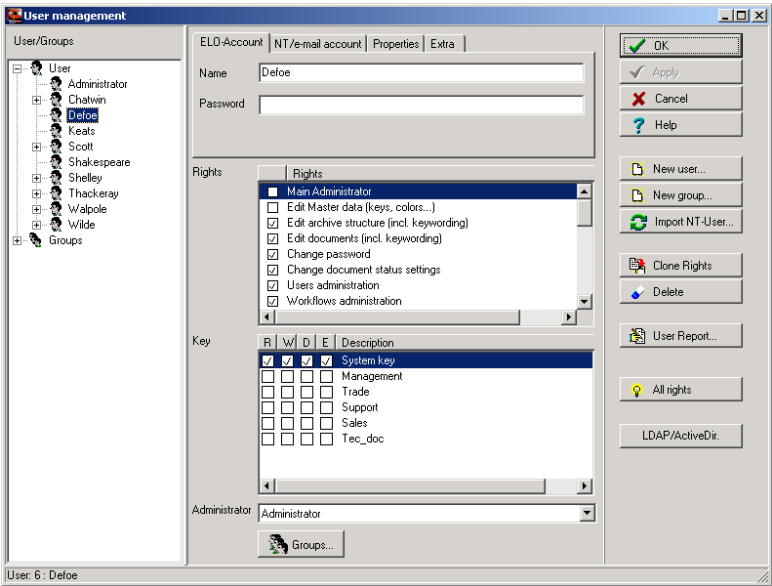
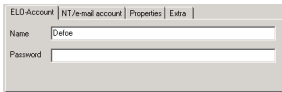


Fig. User management

2. Select the user to whom you want to issue a password.
3. In the *Password* field, enter the password.



The password is shown encrypted. You should therefore write down all passwords and keep them in a safe place.

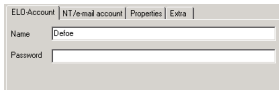
4. Confirm that you want to issue a password by clicking *OK*.

## Changing a password

All passwords can be changed. For security reasons, it is recommended that you change your password at least every three months. There are two ways to change passwords:

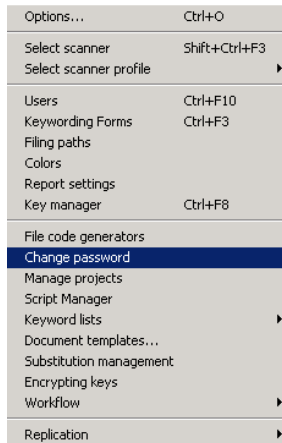
- The administrator can change passwords in *System settings, Users*.
- The user, if authorized, can change his/her password from the *Password* command in the *System settings* menu.

## Changing a password in User management



1. In the *System settings* menu, click on *Users*.
2. Select the user whose password you want to change.
3. In the *Password* field, enter a new password. Confirm with *OK*. The user's password has now been changed.

## Changing your user password yourself



1. In the *System settings* menu, click on *Change password*.

The *Change password* dialog appears.

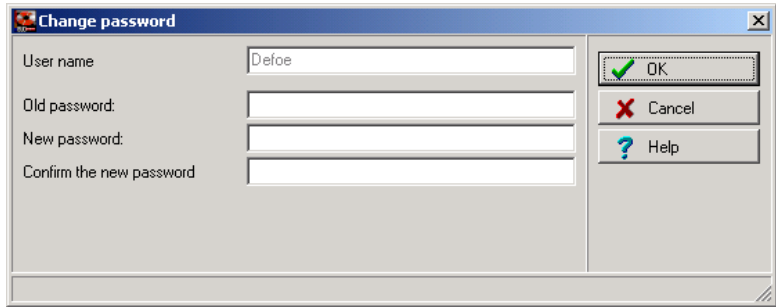


Fig. Changing the user password

## 2. Complete the fields.



Don't forget to make a note of your new password and to keep it in a safe place.

**User name:** This field contains the name of the user who wants to change his/her password.

**Old password:** Enter your existing password here. For security reasons, this is essential. It ensures that passwords cannot be changed without authorization or by mistake.

**New password:** Enter your new password.

**Confirm the new password:** Re-enter the new password to confirm.

## 3. Confirm the settings with *OK*.

Error in the old password

If your entry in the *Old password* field does not match the existing field, the status bar of the *Change password* window displays an error message. Enter the correct password.





An electronic archiving system requires strict security provisions. This does not imply any lack of trust in individual employees. Quite the reverse. It helps ensure their security as well. After all, you can never completely avoid errors - even unintentional mistakes. That is why user rights allow you to restrict access to varying degrees for individual users. They allow every user to have confidence that they will not damage important sections of the archive by mistake. For queries related to **Security** and **User rights**, please contact your system administrator.

The **Filing paths** and **Report options** functions in the System settings menu will not be explained in further detail in the client manual. This function requires a great degree of technical knowledge and is therefore only relevant to and accessible by the administrator.

---

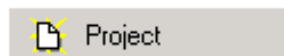
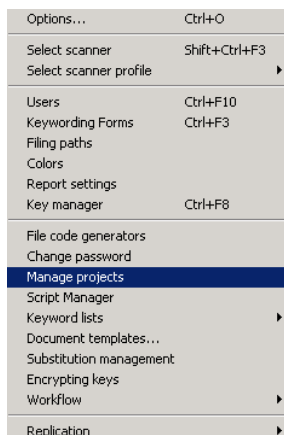
# Managing projects

This section contains information about managing projects. Projects organize groups of documents, all of which are assigned to a process (a project). See also the section about **Activities** and projects.

## New project

You manage new projects in the *Activities – manage projects* area. You can open this dialog from *System settings, Manage projects*.

The *Activities - prepare projects* dialog opens.



Click on *Project*. In the field *Value*, enter the name for the new project.

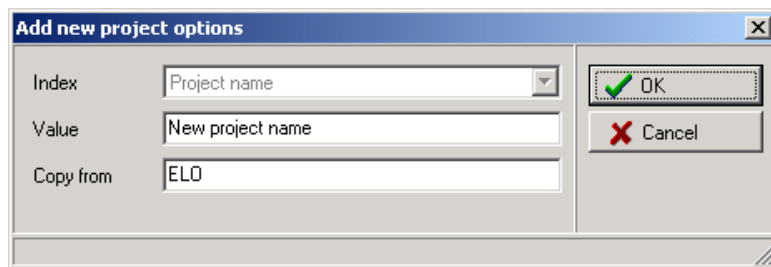


Fig. Creating a new project

Settings from existing projects can be copied so that you can use them again. In the *Copy from* field, enter the project name. Then click on *OK*.

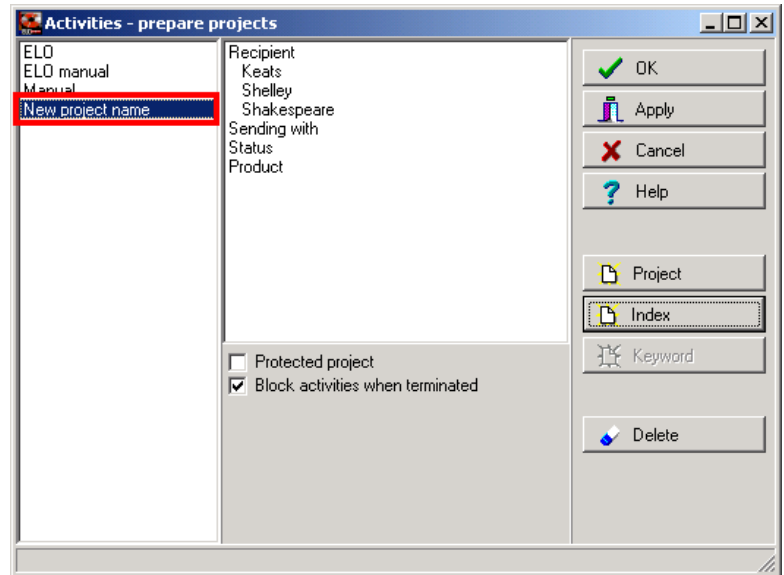


Fig. Configuring a project

The new project is displayed in the *Activities - prepare projects* area. You can now assign activities, etc. to the project.



**Please note:** For all other settings that apply to Projects, please refer to the section on **Activities**.

---

# ELO Script manager

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

A series of commands that are always performed in the same order can be saved as a script. Whenever you call up a script, all the commands it contains are performed automatically. That means you can use scripts to control **ELO** and other OLE-enabled applications and access their data. Using this function you can also automate and simplify a wide range of tasks.

**ELO** comes with some scripts. But you can also add some of your own. **ELO** supports the VBScript® scripting language.

## Using scripts

The scripts included in **ELO***professional* can be called up in two ways:

Access to ACCESS database
Add new document to the Mailbox
Addition date+number of days
Checking in a CD-ROM
Create Task in Task Reminder
Creating HTML pages
Delegate Tasks
ELOVBAPP (Visual Basic Mask)
Email
Evaluate Dialog Box
MakeOpenOfficeViewerFile
Messages
Spellchecking with WinWord
Transfer search result to Excel

**Running from the context menu:** Right-click in any ELO window (*Archive*, **Clipboard**, *Mailbox*, *Searching*, *Tasks* and *In Use*) on the toolbar. A menu appears showing all scripts. The script is run when you click on it.

1 2 3 4

**Running from the User button:** Every ELO window has freely customizable icons to which you can assign an ELO script. (cf. *Windows, Configure toolbars* menu). The current mapping is shown in the QuickInfo field, displayed when your mouse is over the icon. Clicking on the icon runs the script.

### Assigning a script to an icon

Point to the icon you want to assign a script to. Call up the script menu (right-click) and **hold down the Ctrl key while clicking** on a menu item (script name).

The script is now associated with an icon.

### Removing an ELO script from an icon

If you want to remove a script from an icon, click on it while holding down the Ctrl key.

The association between the script and the icon is removed.



You can set which icons are displayed on a toolbar. In the *Window* menu, click on *Configure toolbar*. To make the script icons visible, check the box(es) **User script 1** through **User script 8 or 16** as required. Scripts can also be assigned to an ELO function or a menu command. You will find more information on this in the documentation about the **ELO** OLE interface.

### Creating and administering ELO scripts

You can create and administer scripts to automate tasks in **ELO** using a dialog box.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

In the System settings menu, click on *Script Manager*. The *Script Manager* dialog box opens.

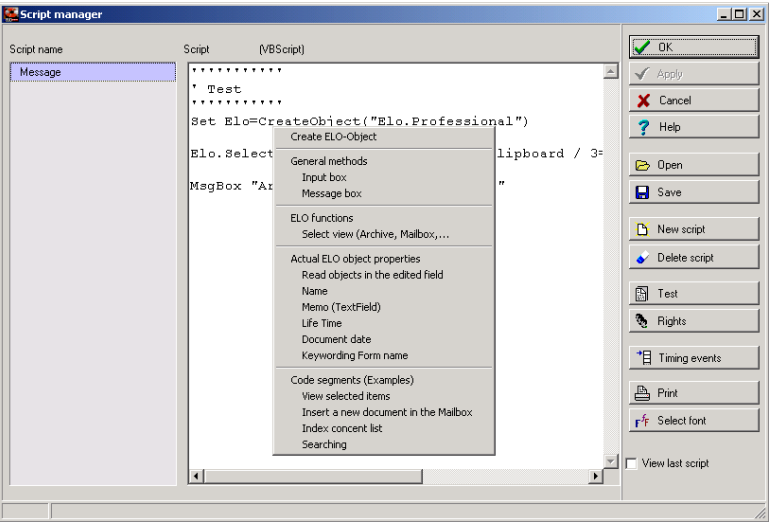
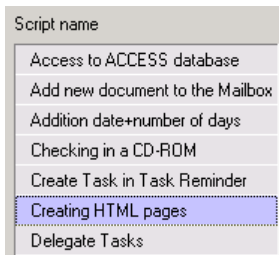
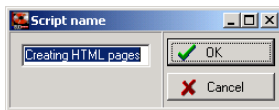


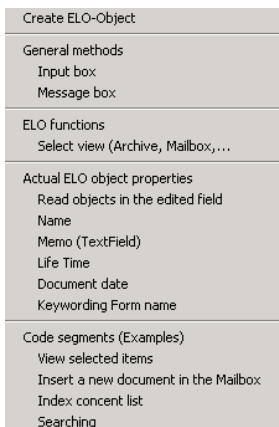
Fig. Script manager



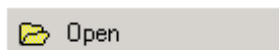
**Script name:** This column shows all the available scripts. Clicking on a script opens the code in the *Script* field. Every existing script is prefixed with a description of what the script does and what it is used for.



If you want to change the name of the script, double-click on the relevant entry. In the *Script name* window, you can enter a new name for the script.



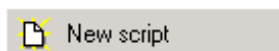
**Script (VB Script):** In the *Script* field, enter the script code. You need to be familiar with VB scripting language to do this. To help you create scripts, you can insert standard commands from the context menu (open by right-clicking).



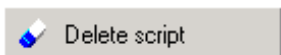
**Open:** Using this button, you can import an external script in file form into the list of available scripts.



**Save:** This button lets you save the currently selected script as a file. You can also use this to easily create a copy on disk to use with another install.



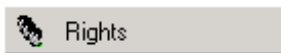
**New script:** This button lets you create a new script. First, you are asked for a name for the new script. Then you can enter the code for your new script in the *Script* field.



**Delete script (VB Script):** Clicking on this button deletes the selected script after you have confirmed deletion.



**Test:** This button runs the current script and allows you to test the code.



**Rights:** You can assign rights to scripts individually. Users can only select and run a script if they have the corresponding permission. If a user wants to edit a script, he/she also requires write permissions.

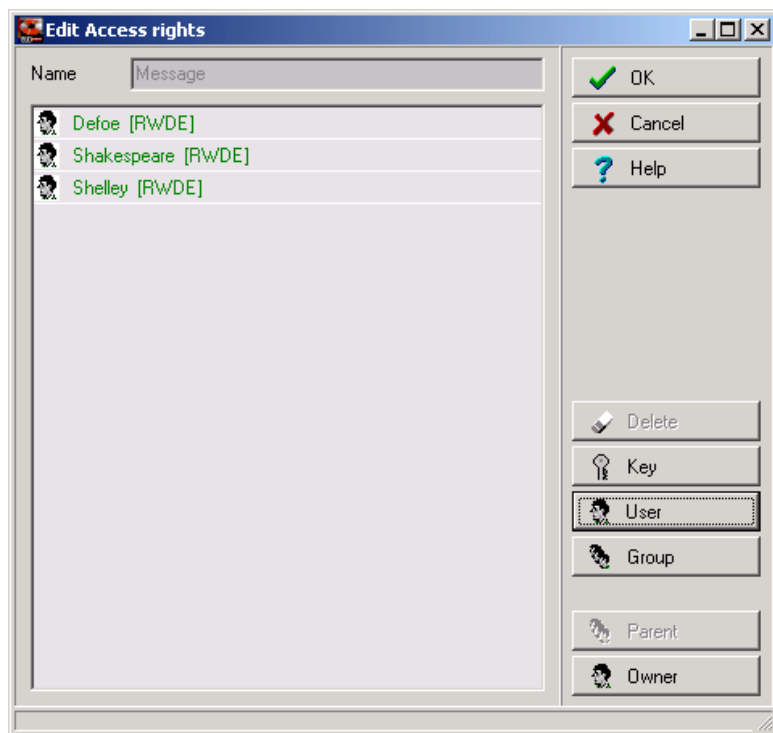
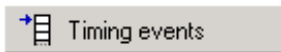
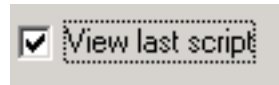
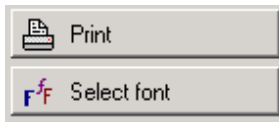


Fig. Assigning rights to a script



**Timing events:** At specified stages in the program (e.g. after barcode recognition, before/after tasks are updated etc.), certain scripts can be run automatically. This button opens a dialog box where you can link scripts to events.





**Print, Select font:** The current script is sent to the printer. Here, you can select the font to use to print the script.

**View last script:** If you check this box, when you open the dialog box, it will automatically display the script you were last looking at. This is very useful when creating a new script or when troubleshooting, when you need to return to the same entry repeatedly.

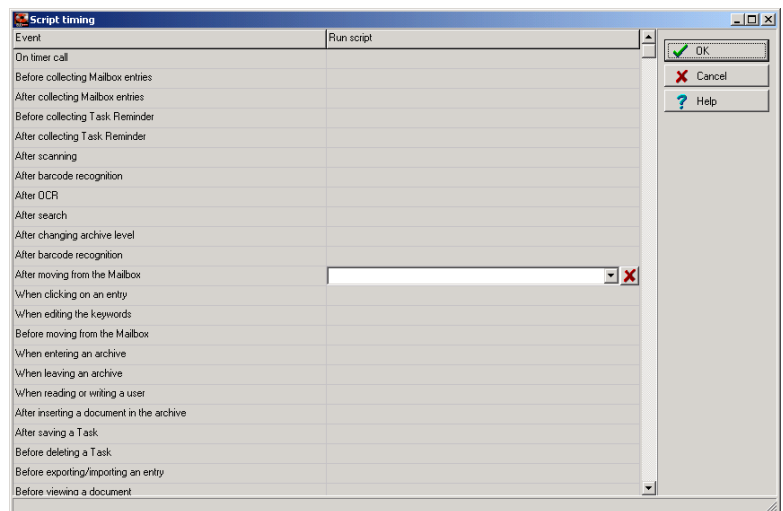
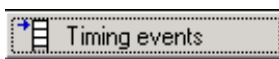


Fig. Setting script timing

## Timing events

Certain events within **ELO** can be linked with scripts so they are run automatically. An event occurs when the defined stage is reached in an **ELO** workflow. At this point, the script is run. That allows you to go into **ELO** workflows and to extend **ELO** functionality by adding your own features.



In Script Manager, click on the *Timing events* button to open a window of the same name.

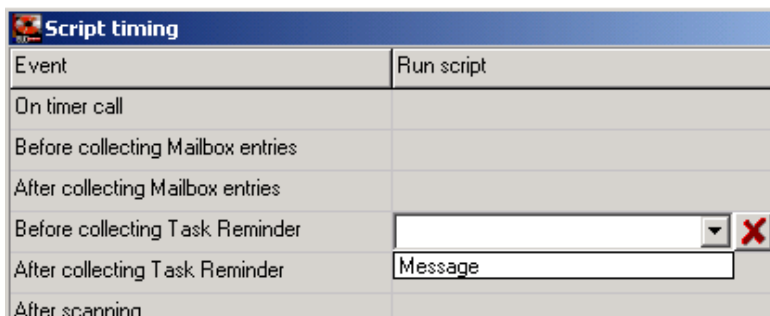


Fig. Scripts are assigned an event

In the left column *Event*, the ELO events are shown in a list. To associate a script to an event, click on the event. A combo box then appears in the right column, *Run script*, that displays all scripts. The script is assigned to the event as soon as you click on it.



To delete the association, simply click on the Delete button.

## Two examples

*Example 1:* To edit scanned pages immediately using image manipulation software, for example, write a script and link it to the event *After scanning*.

*Example 2:* After a barcode has been recognized, you can export the barcode information to another program by associating a script with the *After barcode recognition* event.

---

# Keyword lists

If you have to keyword documents using terms that recur frequently (e.g. customer names), it is a good idea to be able to select these from a list: you save time, coordinate your filing better with other users (by using the same terms) and avoid typing errors.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

So **ELO** allows you to create a universal keyword list with subgroups. The list is available when filing documents in the *Edit document* window via the context menu (right mouse button).

There are four different types of keyword lists:

1. *General keyword lists (ELOSTD SWL)*: This type of keyword list is available in every field in the keywording form. Call up the list from the context menu by right-clicking when the mouse pointer is over the field.

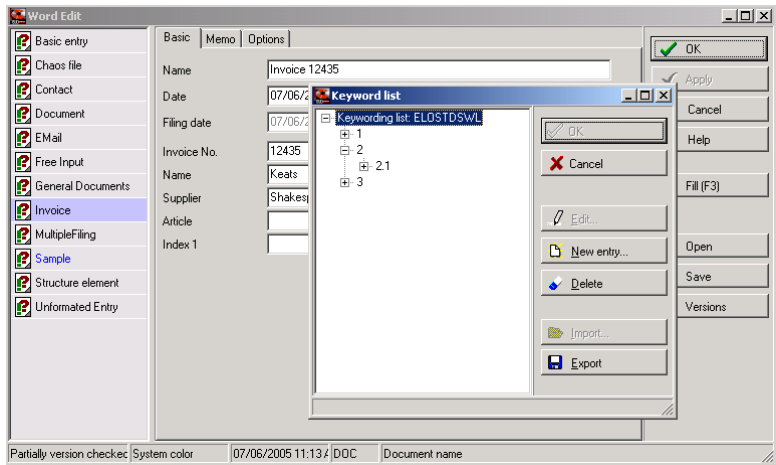
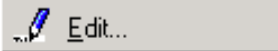


Fig. Displaying global keyword lists



You can edit the keyword list in this dialog box, which can be called up via the context menu of the field. Click on *Edit* after you have highlighted the entry you wish to change. Make your changes.

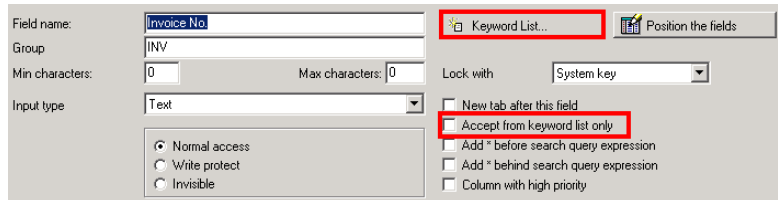


Fig. Index field-dependent keyword lists

Keywords  
Version numbers  
Comment...  
Workflow...

**2. Field-specific keyword list.** This type of list is only available in the relevant field. You can either edit the list using Management of keywording forms or using the context menu in the index forms.



**Please note:** The keyword lists for the fields are joined via group names. This means that fields with the same group ID can be accessed from the same keyword list. If every field is to have a keyword list, the different group names must be entered for the fields respectively.

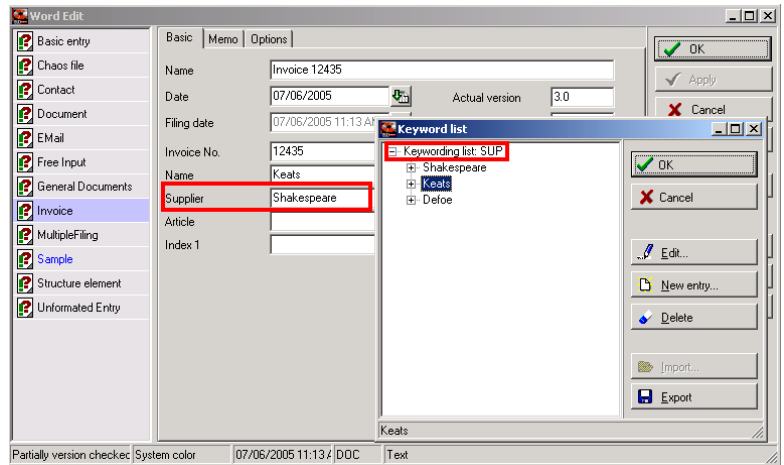


Fig. Opening keyword lists

The field-specific keyword lists can be edited via the context menu.

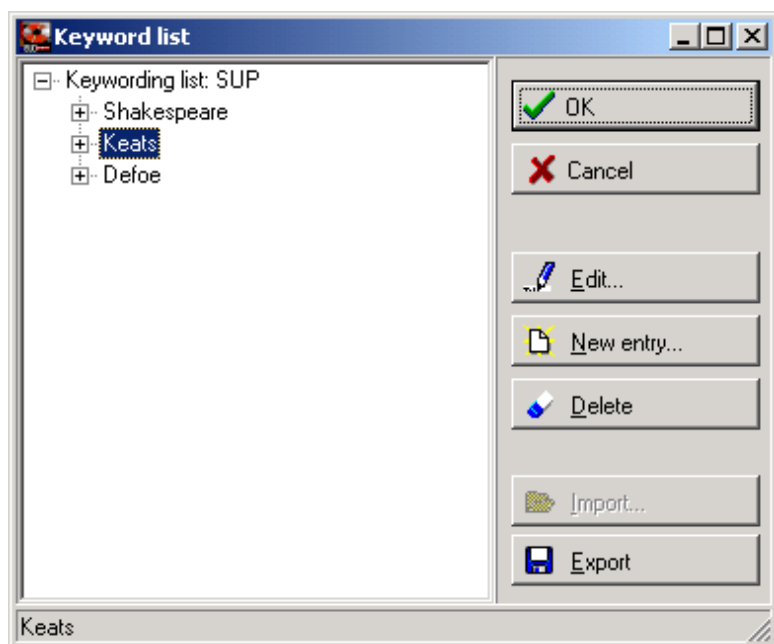


Fig. Editing keyword lists

**Please note:** The keyword lists have to be created for individual fields in Management of keywording forms.

3. *Keyword list for version numbers:* You can edit the keywording list for version numbers from *System settings, Keyword lists, Version numbers*. It is available to you when filing version-controlled documents and contains the version numbers to assign.

Keywords  
Version numbers  
Comment...  
Workflow...

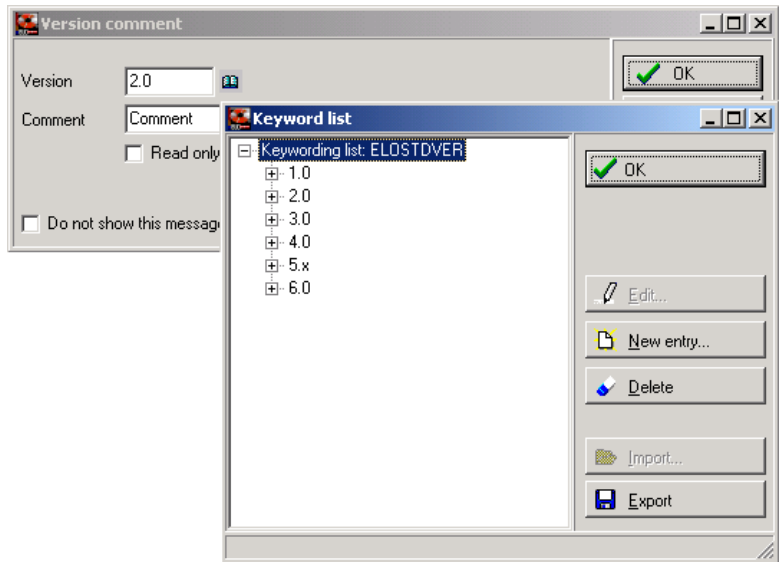
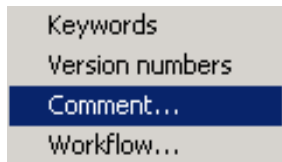


Fig. Adding version numbers using keyword lists

The list of version numbers can be called up as a context menu after filing by right-clicking in the *Version* field in the *Version comments* dialog. Select a value from the list. The version number is transferred to the *Version* field.



**4. Keyword list for comments for version-controlled documents:** The keyword list in version comments can be called up in a context menu in the *Comments* field by right-clicking.

Select the comment you want to transfer to the *Comment* field. Select the comment by left-clicking.

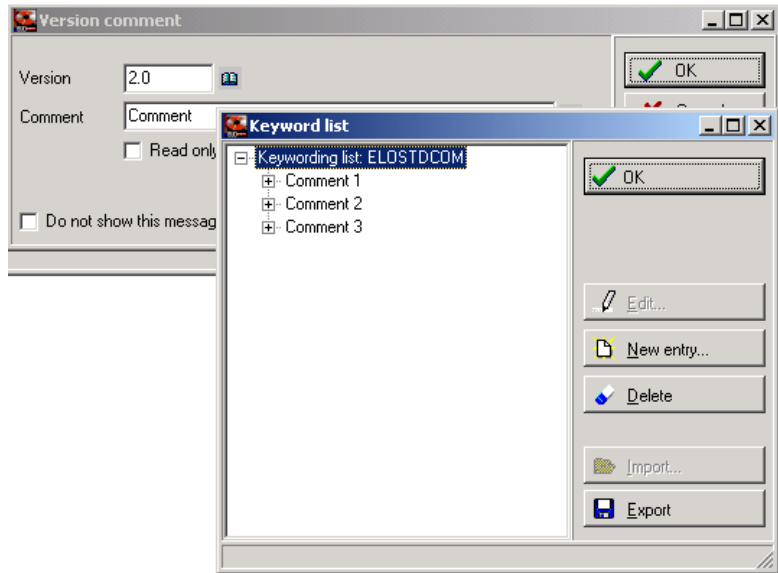


Fig. Requesting keyword lists with version comments

Keywords  
Version numbers  
Comment...  
Workflow...

*5. Keyword list for version numbers:* With the keyword list for the workflow, you can call lists for standardized transfer of job instructions amongst persons, collection and distribution nodes.



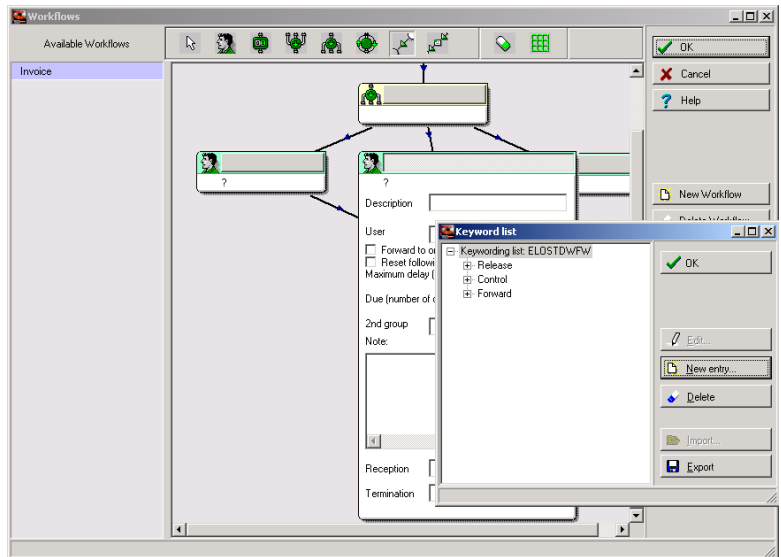


Fig. Using keyword lists in the workflow



All keyword lists can be created, edited and deleted in the same way.

## Defining, editing and deleting keywords

In the *System settings* menu, click on *Keywording forms*. The *Management of keywording forms* dialog appears. Select a filing location. Then select the appropriate field whose keyword list you wish to edit. Click on *Keyword list*. The standard keyword list (global keyword list) and the keyword lists for version comments, version numbers and the workflow can be edited under *System settings, Keyword lists*.

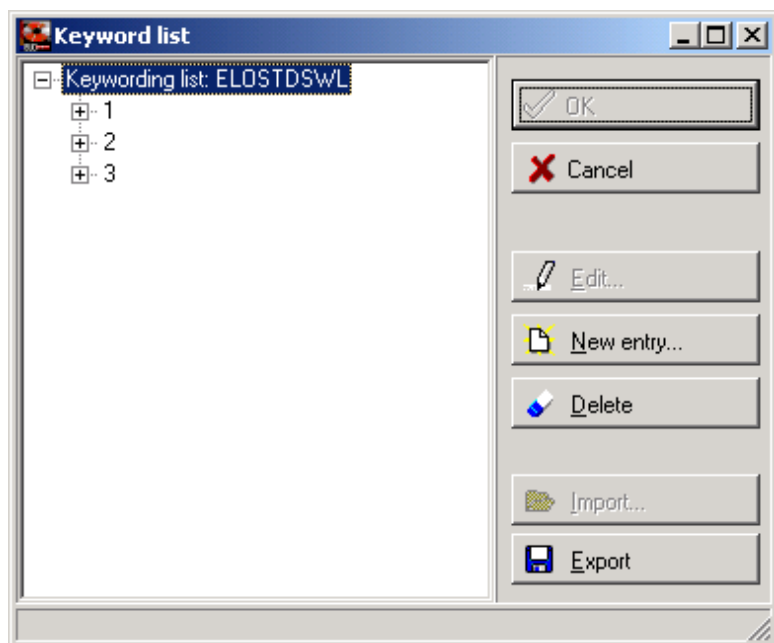
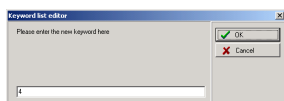


Fig. Editing keyword lists

All keywords are displayed as folders. Subfolders allow you to structure a large number of keywords in the best possible way and to administer them using a simple graphical interface.

Click on *Edit* to edit an existing entry in the keyword list.



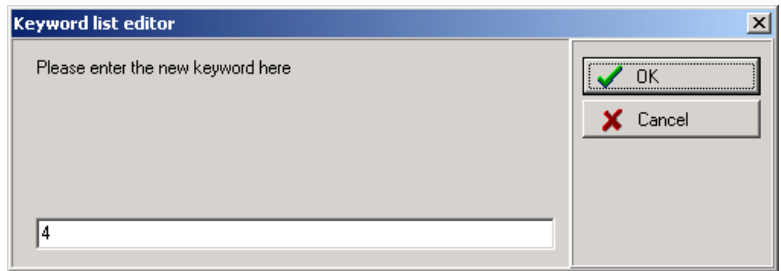


Fig. Editing an entry in the keyword list

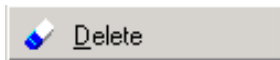
Confirm the transfer of an entry into the keyword list by clicking on *OK*.



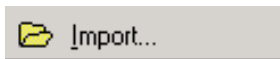
You can create several keywords at once by separating the words with a freely definable separator.



You can add a new entry to the keyword list using *New entry*.



You can remove an existing entry from the keyword list by clicking on *Delete*.



You can import an existing \*.SWL file into the keyword list dialog using the Import button.

## Using keyword lists

In **ELO**, whenever you want to archive a document or edit its keywording, the keywording form you chose to assign appears. The keyword list is a useful tool in the keywording form. Moreover, if you use keyword lists, you can be sure of keywording that is standardized and error-free, especially for critical fields such as customer numbers. This increases the quality of the archive and guarantees consistent search results.

Right-click either on the *Description* field, in any other field or in the text box on the *Memo* index card depending on where you want to insert your keyword. Your keyword list appears. Scroll through the list until the keyword you want is highlighted then click on it. Your keyword is inserted immediately.

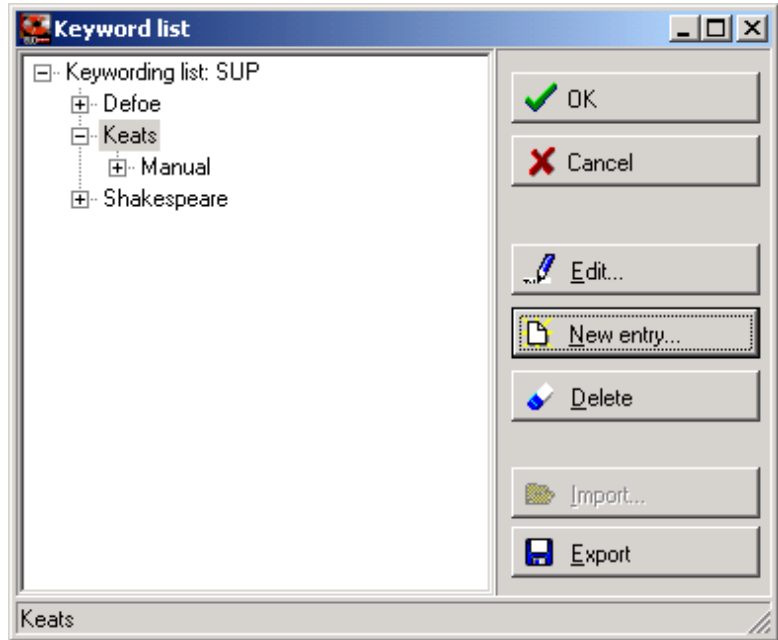


Fig. Keyword lists with group - subgroup - keyword

In our screenshot, the *Supplier* keyword group is selected. The subgroups available are displayed (denoted by the arrow next to the word *Supplier*). In this case, the keyword *Manual* was entered by right-clicking.

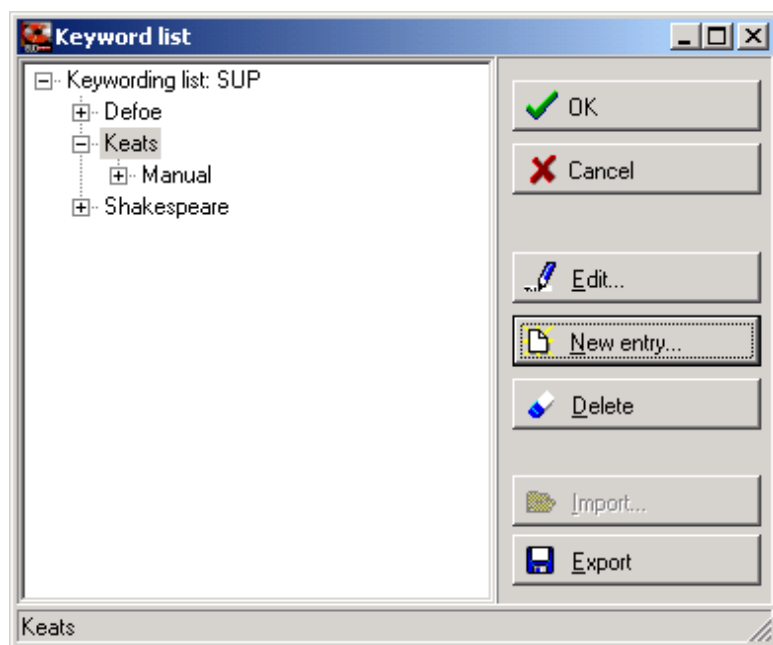


Keyword lists with subgroups serve as category bookmarks. You can only insert keywords in keywording forms that do not have any subgroups. So plan your keyword list carefully. You should also read the following information.

## Making best use of a keyword list

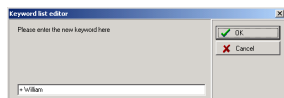
**ELO** can link keyword subgroups with the parent group. This allows you to optimize the way your keyword list is used.

The keyword from the last subgroup is usually entered in the keywording fields of your keywording form. Your keyword list may have the structure shown in the screenshot.



You can choose from either *Keats* or *Defoe*. But what if you have several customers called *Keats*? You would then have to enter new subgroups with all their first names.

## The + link

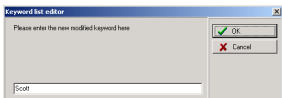


It is easier if you use the + link.

When creating the keyword group *Keats*, enter a + sign before the name: **+Keats**.



Then create new subgroups with the first names. Select the group *Keats* you just created and then click on *New entry*.



Groups and subgroups are linked without spaces when entered in the keywording field.

So in the *Description* field in the *Edit keywording* form enter a space in front of the individual first names.

Now, while you have created more subgroups, the amount you have had to enter has been reduced and, what is more, *+Keats* is linked with a subgroup.

## Link +

**Once again:** Because of the + link in front of *Keats*, the character string **Keats John** is entered from the keyword list.

## Example

The + link is similarly practical for structured customer and invoice numbers or identifiers, because such digit combinations often contain a "Key". For example, the number *1801272* is composed of company number *180*, area *12* and department number *72*.

So the company's identifier code will begin with *180* and change according to the area and department. Using + link, you can structure this combination logically in a keyword list while still entering the entire number in the keywording form.

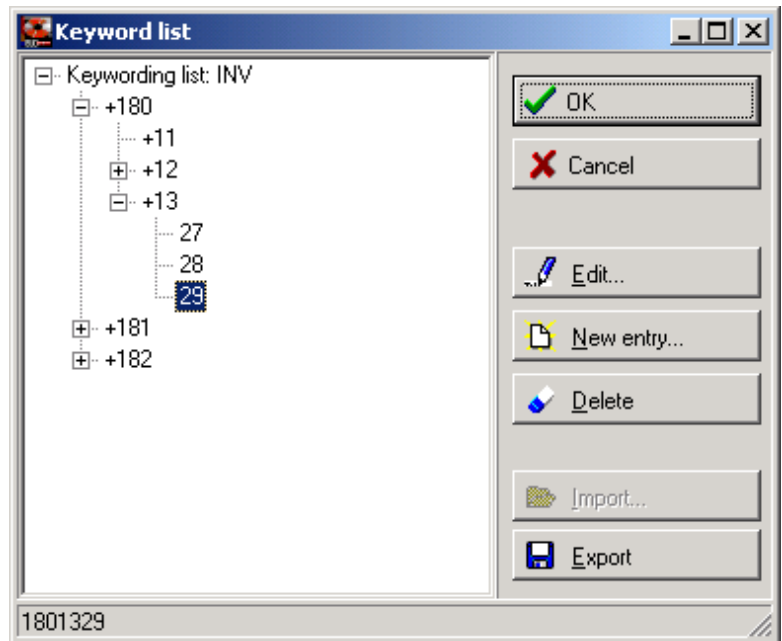


Fig. Creating an invoice number with keyword lists: company ID - area - department

Enter, for example, a group with the company identifier **180**. Enter a + sign before the number. Then create a subgroup containing all the area numbers. Once again, enter a + sign in front of every number. Then, for every area number, create a subgroup containing the department identifiers.

You now have every area and department number available in an organized menu. In our example (pictured), the number 1801328 would be entered in the keywording field.



When entering the numbers in the keyword list, do not enter spaces, because the digits make up a single number.

The + link lets you structure your keyword list logically and avoid typing errors, such as transposing numbers, because you have fewer numbers (or letters) to enter.





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# Templates

**ELO** contains two document templates, with which you can create documents directly in **ELO**:

- Global templates are for use by **all users**.
- Personal document templates, which are only for use by **one user** which has created them.



**Please note:** The principle of personal and global document templates was adhered to here. You can, of course, adapt the use of document templates to your own needs.

## Assigning rights to document templates

There is sometimes a need only to make global templates available to a limited number of people. So, in **ELO**, you can assign rights to global document templates.

In the *System settings* menu, click on *Document templates*. The archive area defined under *System settings*, *Options*, *Display* index card, *Document templates*, *Start path* is opened in the *Archive*.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

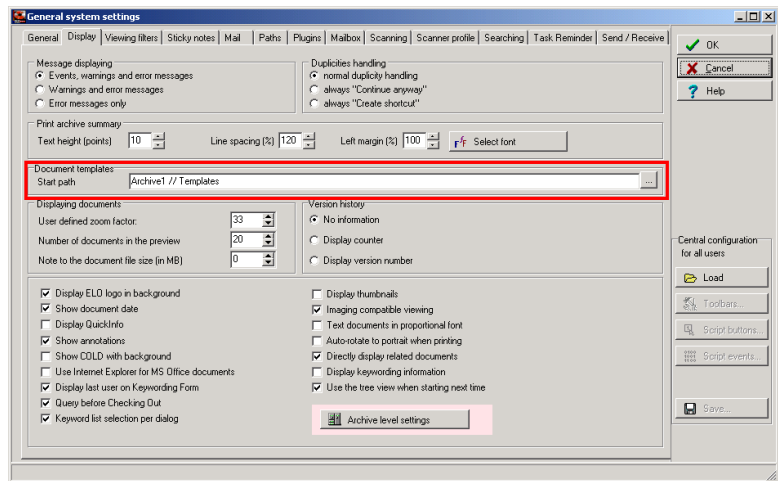


Fig. Setting a start path

## Templates

If you select *Document templates* in the System settings menu, the archive area opens in which the document templates were filed.

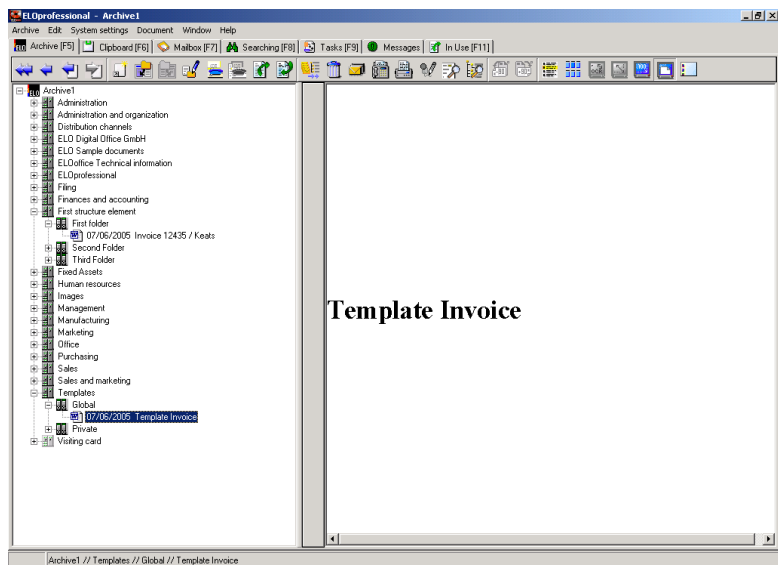


Fig. Assigning rights for document templates

Select the template if necessary and click on *Set access rights* in the context menu. Assign a key to the document template. The template can only be used by those people with the relevant key.

---

# Substitution management

In **ELO***professional* you can set substitution rules for task and workflow deadlines. As such, a user can either actively appoint one or more substitutes or create a release list of possible proxies and the substitute will then stand in if necessary. Since a large number of combinations are possible, substitution management is very flexible and powerful.

Alongside their own deadlines in Tasks, the substitute will also be able to toggle (on and off) the deadlines for the person for whom they are substituting. This guarantees that a user does not miss any important deadlines because of illness or holiday.



If a substitute takes over a workflow deadline, the original owner receives a message to notify them.

## Substitution management

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

In the *System settings* menu, click on *Substitution management*.

The *Substitution settings for. [user]* dialog appears.

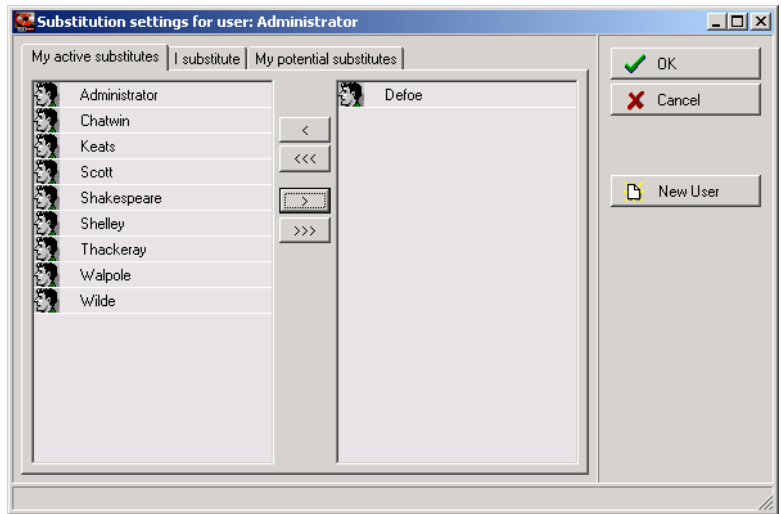


Fig. Substitution management - index cards and users

You will see three index cards on the left:

## Substitution management

- **My active substitutes**
- **I substitute**
- **Potential substitutes**



The list on the right displays ELO users and groups.

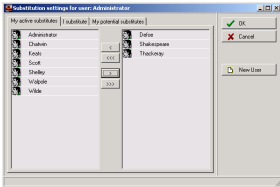
Groups are only displayed if you have checked *Active substitute, display groups* in *System settings, Options*, on the *Task reminder* index card.

## Set up active substitute

Active substitutes are the users (or groups) who will take over your workflow and task reminders. Your task reminders will therefore be sent to this user's Tasks area.



Say you had to be at a trade fair for three days, you would set your active substitute before you left. To do this, select the user (or group) in the list on the right and click on *Add* button.



The selected user - now your active substitute - is displayed in the list on the left on the *Active substitute* index card, and your workflow and task deadlines are sent to his/her Tasks area immediately.

That means that from entries in this list you can see immediately which user is currently your active substitute.



If you select a group as a substitute, the group is expanded when you enter it in the list. That lets you see all the members of a group. The advantage is that you can now remove individual group members from the list of active substitutes.



To enter all users into the *Active substitute* index card, use the Add all button. This only transfers users, not groups.

This feature is helpful if you want to nominate "almost all" users as active substitutes. Once you have entered all users in the *Active substitute* list, you only have to remove those few you do not need.

## Removing active substitutes

Once you have returned from the trade fair, don't forget to relieve your active substitutes of their additional duties. This is easy to do.

In the *System settings* menu, click on *Substitution management*. The *Substitution settings for: [user]* dialog appears.

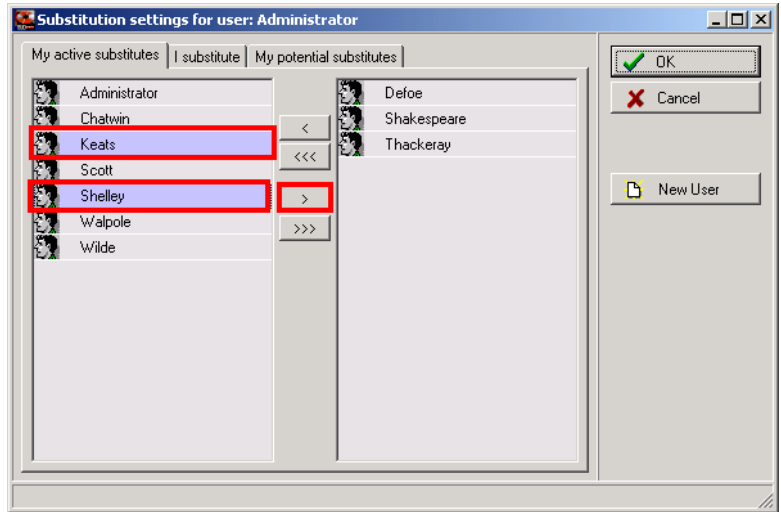


Fig. Removing active substitutes

In list view on the *Active substitutes* index card, select all the substitutes you want to delete.

Then click on the Remove button.



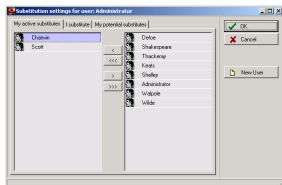
Or use the "Remove all" button.



## Potential substitutes

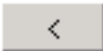
From the *Substitution rights* index card, you can set which users can name themselves as your substitute independently.

This is very important if one day, for example, you are unexpectedly ill. You will not be able to set active substitutes.

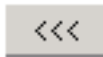


The *Potential substitute function* is very useful here. Any user in your potential substitutes list can appoint himself your substitute if necessary, or appoint another user on his behalf.

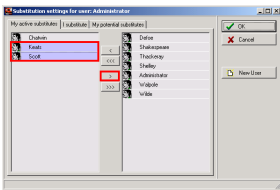
The process for issuing substitution rights is identical to that used to create active substitutes. From the list on the right, select the user and groups you want to add to the potential substitutes list.



Then click on the Add button to add the selected users to the potential substitutes index card.



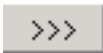
To enter all users into the *Substitution rights* index card, use the "Add all" button.



To retract these, reverse the process: On the *My potential substitutes* index card, highlight the relevant users.



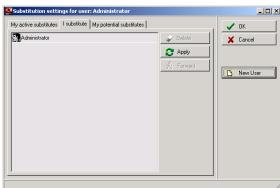
Then click on the Remove button.



Or use the "Remove all" button to retract all substitution rights.

## Set substitutions

If, for example, a colleague is suddenly taken ill and therefore is clearly unable to set an active substitute, you can appoint yourself as the substitute for the user. Use the */ substitute* index card for this.



First switch to the *I substitute* index card. In this case, the list is still empty.



Now click on the *Get* button. The *Select substitute* window appears.



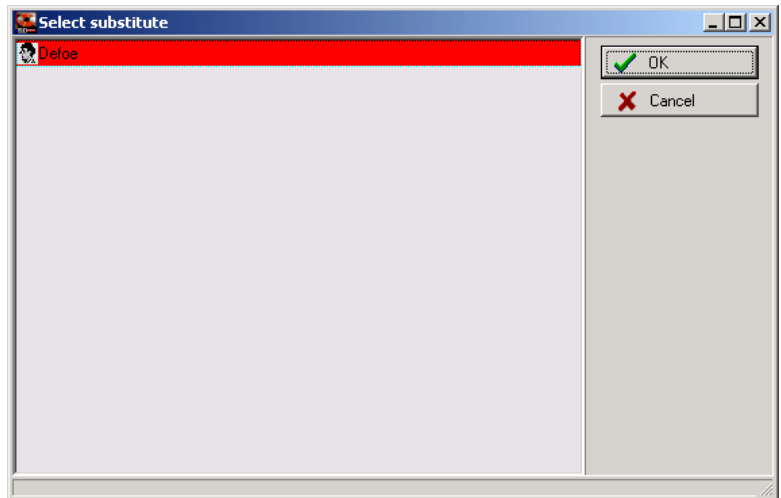
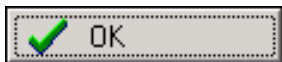
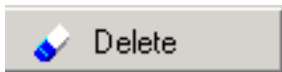


Fig. Selecting substitutes

All ELO users are displayed that you have allowed to act as a substitute.



Select the user you want to substitute for and confirm by clicking on *OK*. The user is now displayed in the list in the *I substitute* index card.



If you want to delete a substitution, select it and click on *Delete*.

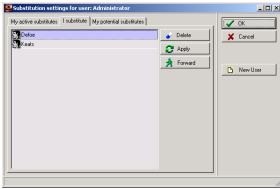


The entries in the *I substitute* index card show you which users you are currently substituting for.

## Forwarding a substitution

Imagine you have been substituting for a colleague who has been ill. Now, you suddenly have to go away for three days on a business trip and cannot substitute for them.

Another user has to take over the substitution, but they do not have *substitution rights*. You have to forward this right.



The *Forward* feature exists for just such a case and similar ones besides. You can forward a substitution on to another user.

To do this, select the user you have been substituting for on the *I substitute* index card.



Then click on *Forward*. The *Select user* dialog appears. Select the user you want to send it to and click on *OK*. You have now transferred the substitution to the other user.

### The *New user* button



If you possess the necessary user rights, you can set up substitution rights and substitutions for others.

Use the *New user* button in Substitution management to do this.

Clicking on this opens the *Select user* window. Select a user and confirm by clicking on *OK*. You are now in substitution management for the user you selected. From here, you can grant them substitution rights or copy substitutions.



In this way, **ELO** ensures that there is always a way of creating or taking on substitutions so that every important task can be completed on time.

---

# Encrypting keys

**ELO** lets you protect your archived document files using 128 bit encryption. You can use up to 16 encrypting keys to do so. Each key has its own password; you are free to choose the name.

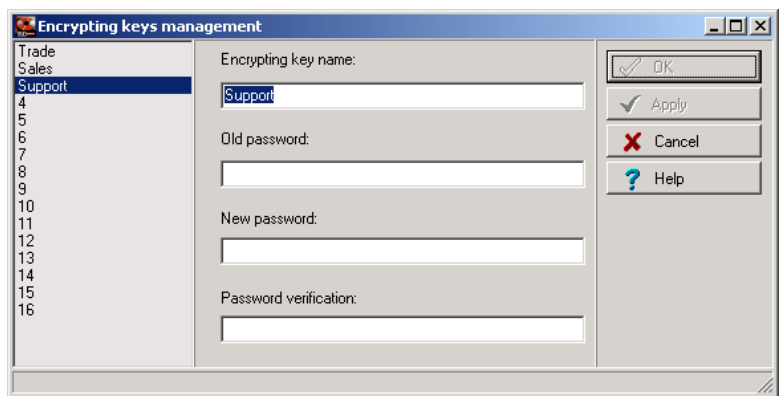


Fig. Encrypting keys management

Remember that you have to decide when creating the document which encrypting key you want to assign to it. For security reasons, this cannot be changed later. Because the fulltext database cannot be encrypted, you cannot add encrypted documents to the fulltext database.

As soon as a new archive is created, all 16 encrypting keys are already present. These are called 1 to 16 and all have the default password **e1o**. You can change this default password at any time by selecting the relevant encrypting key and then entering the old password once and the new password twice.

---

# Workflow

Options...	Ctrl+O	
Select scanner	Shift+Ctrl+F3	
Select scanner profile		▶
Users	Ctrl+F10	
Keywording Forms	Ctrl+F3	
Filing paths		
Colors		
Report settings		
Key manager	Ctrl+F8	
File code generators		
Change password		
Manage projects		
Script Manager		
Keyword lists		▶
Document templates...		
Substitution management		
Encrypting keys		
Workflow		▶
Replication		▶

Using the *Workflow* function, you can forward ELO documents or processes in a predefined way between colleagues.

There are two types of workflow in **ELO***professional*: *Default workflows* and *Adhoc workflows*.

- The *Default workflow* is ideal for complex and frequently recurring business processes. Such business processes (e.g. a salary review for several employees) can be created with the help of a graphic modelling editor.

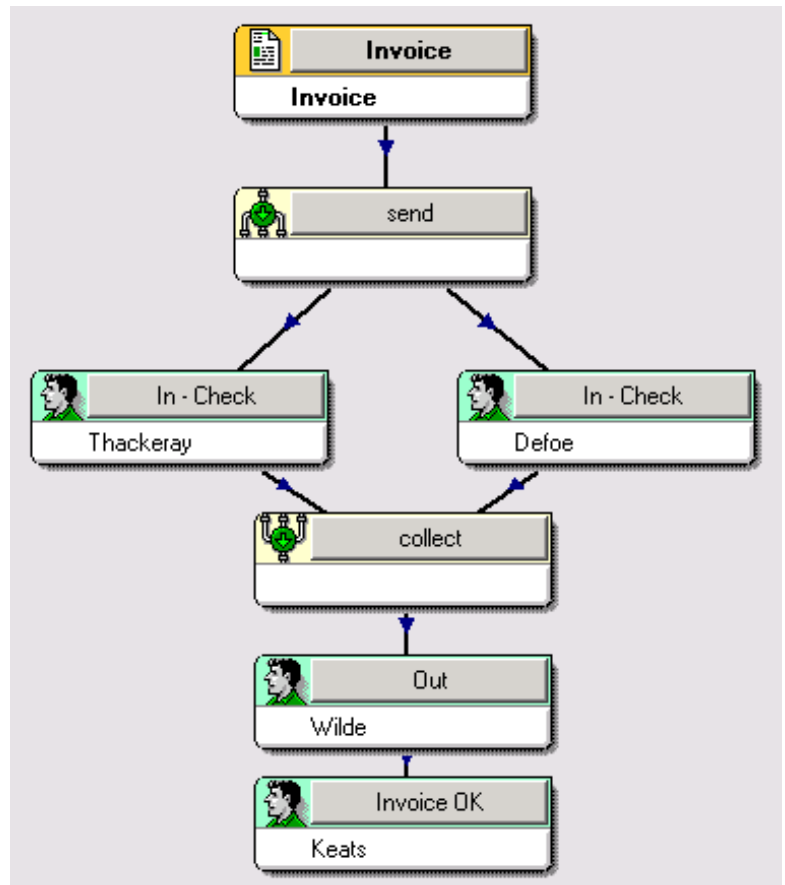


Fig. 'Invoice check' workflow

- The *Adhoc workflow* is better suited for simple sequential or parallel business processes, e.g. to quickly and easily share certain documents among several employees. You can make all the necessary settings (e.g. selecting the employees or workflow type) in one, convenient dialog box.

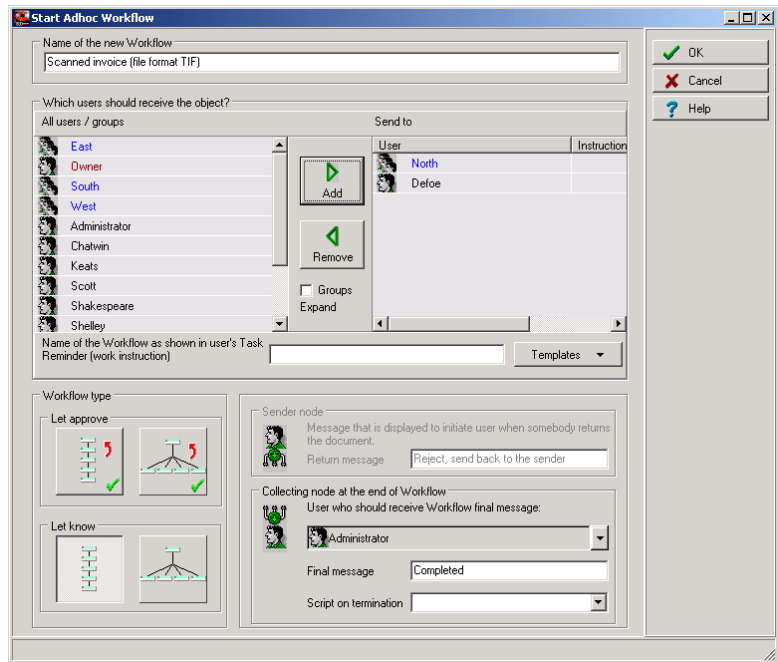
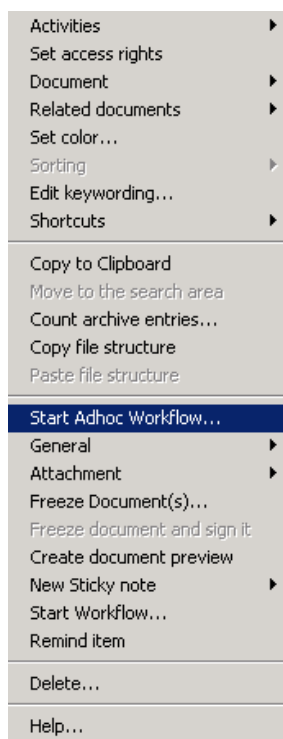


Fig. Starting Adhoc workflow



The Adhoc workflow can be started from the context menu in the *Archive* and *Searching* areas.

---

# The default workflow

Because the flow of documents is often identical in day-to-day work, it is possible to define standardized workflows in advance. Documents are assigned to such a workflow using the Archive context menu. That way, they will *travel* according to predefined rules. You can also define a workflow for each document.

Documents in a workflow are available for the relevant employee in the *Tasks* work area. There you will find the *Complete/continue workflow* function, used to forward the object after editing.

## Defining a workflow

Create a workflow for documents that always follow the same route through the company.

- 1. In the *System settings* menu, point to *Workflow* then click on *Define workflow*.

Options...	Ctrl+O
Select scanner	Shift+Ctrl+F3
Select scanner profile	▶
Users	Ctrl+F10
Keywording Forms	Ctrl+F3
Filing paths	
Colors	
Report settings	
Key manager	Ctrl+F8
File code generators	
Change password	
Manage projects	
Script Manager	
Keyword lists	▶
Document templates...	
Substitution management	
Encrypting keys	
Workflow	▶
Replication	▶

Active Workflows	Ctrl+F5
Expired time limits	Ctrl+F7
Workflow Reports	Ctrl+F6
Create new Workflow	

The *Workflow modeling editor* appears.



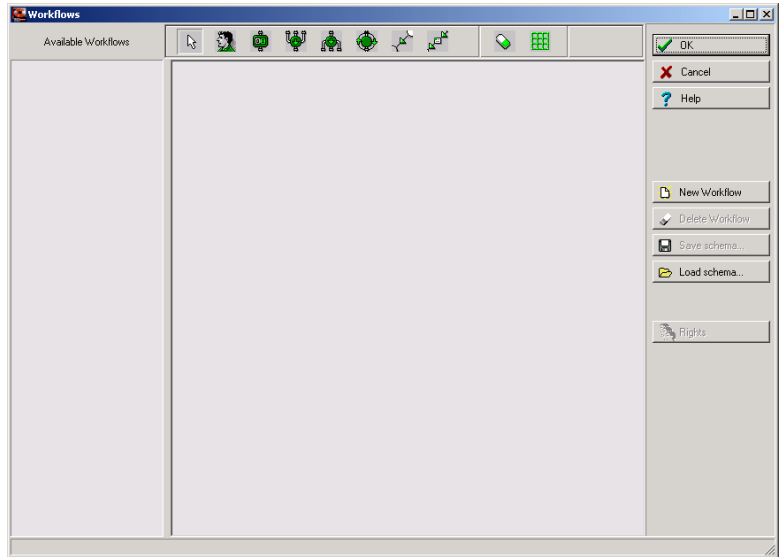


Fig. Workflow editor

You can create default workflows in this modeling editor. The modeling editor includes two areas - you can change the width of these individually using the split bar.



In the left area, under *Workflows*, all available workflows are listed. Clicking on an entry displays the workflow as a diagram. In the right-hand (symbol) area, the workflows are defined graphically using icons when you set the nodes (i.e. stages the object should pass through) and its connections.

You can choose from the following nodes and connections:



**Person:** The document is delivered to the relevant person and appears in their Tasks area.



**Decision nodes (If → Then):** Here a condition is defined that influences the document route. Using this node, you can systematically check fields from document keywording information against specific values (e.g. an invoice amount) so that the document is sent to the competent person.



**Collection nodes:** These nodes *wait* until all previous nodes have been completed or only x responses are outstanding before sending the document on its way.



**Distribution nodes:** Used to send a document to several users simultaneously, i.e. the object is moved to the Tasks area of all these users.



**Cycle nodes:** These new nodes enable frequently reoccurring procedures to be repeated. The following example shows the procedure for release of an invoice.

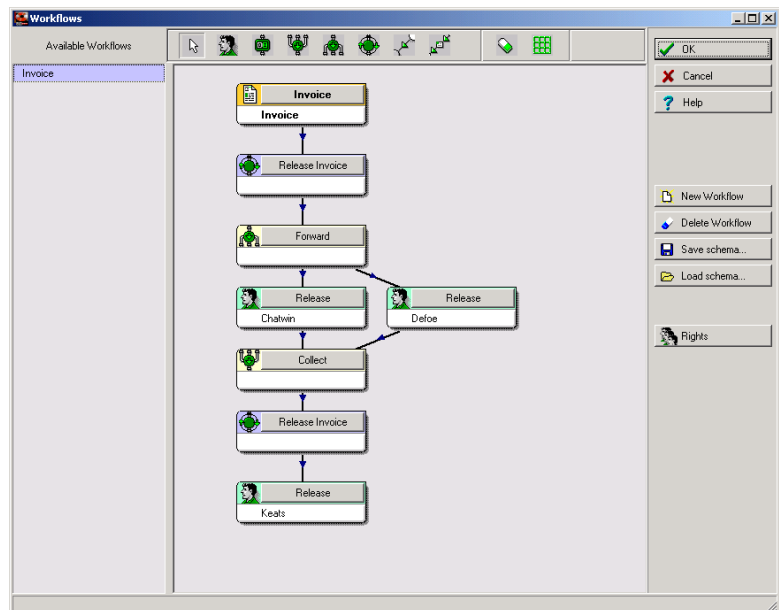


Fig. 'Invoice' workflow with cycle nodes

If release is not issued by both editors for the release of the invoice, the workflow runs through the same release cycle again.

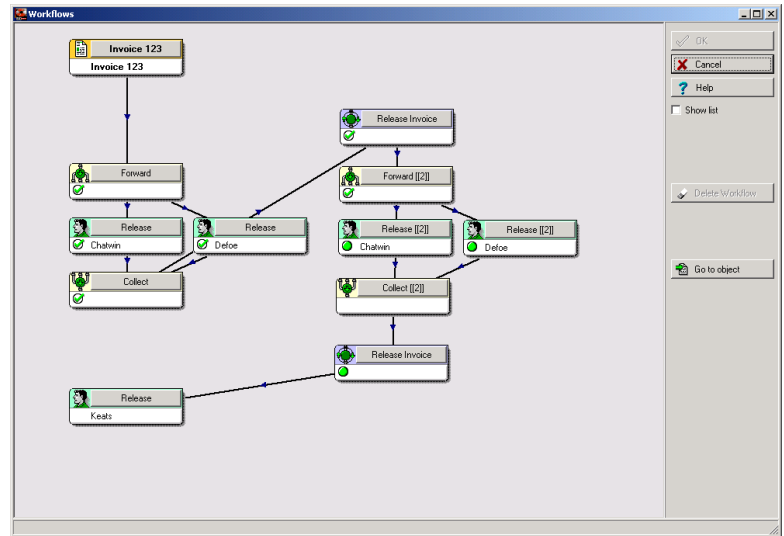


Fig. Cycle nodes running through for second time

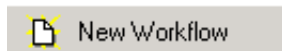
The cycle node is duplicated after the second run-through of the workflow. Note that the cycle nodes comprise of an open and a closed node which must both have the same name. You can also determine the number of run-throughs. In the closing node define a start script in which, for example, you can request the results of the release in order to start a second run-through of the workflow if necessary.



**Single connection:** Establishes a link between two nodes.



**Multiple connection:** Links several nodes one after the other.



2. Click on *New workflow*. The *Workflow name* window opens.

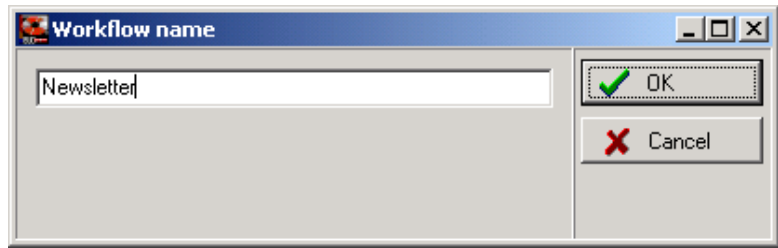


Fig. Defining the name of the workflow

Give your new workflow diagram a name, e.g. **Newsletter** and confirm by clicking on *OK*.



Your start node **Newsletter** is now visible in the *Workflow* window. As with any node, you are free to drag it.

3. Click on the gray field *Newsletter*. The start node opens. Enter the details.

**Description:** One line of text to describe the node. Here, for example, you might enter brief job instructions or a comment (e.g. invitation).

**Report expired time limit to user:** From the drop-down menu choose the user who will receive notification when time limits are not met. The time limit for this workflow is entered in the

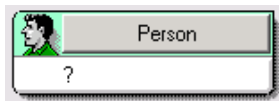
**Maximum workflow duration (days)** field. If the workflow has not been completed by this time, it appears in the "Time limit exceeded" list and the user you entered above is notified. If you do not enter anything in this field, compliance with time limits is not checked.

**Notes:** Text that can be edited when forwarding. Here you can, for example, enter information for the next person to edit the document.

**Start script:** The start script is run as soon as the workflow is started.



## Adding a node



4. Once you have entered everything, click on the gray field again (or press **Enter**). Your start node button now bears the description that was entered and the name of the workflow is shown in the white field.

5. Add your first node. The simplest scenario is a sequential workflow, where a document is sent from person to person.

Select *Person* as the node type by clicking on the *Person* node icon.

Move the mouse to the drawing board. The node icon is "attached" to your mouse pointer. Click again in the drawing board to create the first person node. You can create additional person nodes by clicking in another area of the drawing board (you can add people at any time).

6. Click on the *arrow icon*. You can now arrange the individual person nodes if necessary, according to the scheduled flow.

7. Click on the gray field for the first person node. Enter the additional information.

**Description:** Here you could, for example, enter instructions or a comment. The object is displayed under this heading (together with the diagram name) in the user's Tasks area.

**User:** From the drop-down menu, select the user (group) you want to receive the document.

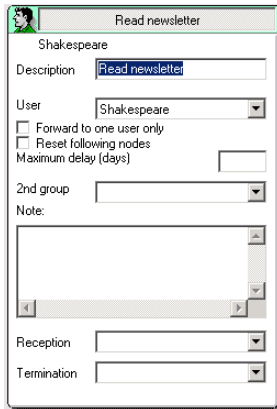
**Forward to one user only:** Check this option if you only want to send the workflow to one user. If this option is enabled, the dialog changes when a workflow is forwarded. Instead of checkboxes, one or more of the following nodes, in this case radio buttons, will be shown so that only one of the following nodes can be selected.

**Reset following nodes:** It may be necessary to enable this option if a branch of the workflow runs through a loop several times. This has the effect of resetting the "complete" status of all the following nodes, e.g. these notes have the same status as on the first run-through. This option has become more or less redundant since it has since become possible to design real cycles. Remember: All loop designs in workflows should be set up using the new cycle nodes.

**Maximum delay (days):** Enter how long the user can hold the ELO object before it appears in the "Time limit exceeded" list. If you do not enter anything in this field, compliance with time limits is not checked.

**2nd group:** This option is used if a user must belong to the 2nd group in order to receive workflow nodes. All node users are entered as the first group.

**Start/end script:** When the node is first displayed in Tasks the start script is run - i.e. as soon as the node first becomes visible to the recipient. The end script starts when the workflow is continued (forwarded).



**Notes:** Multiple lines of text that can be edited when forwarding. Here you can, for example, enter information for the next person to edit the document.



Each node can also be moved freely once it has been positioned to make sure the diagram remains clear. To do this, simply drag a node by holding down the left mouse button.



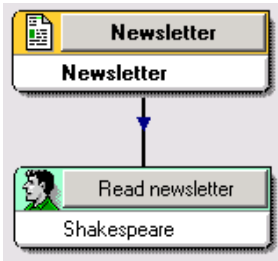
If the gridlines icon is on, all nodes are auto-arranged.

## Linking nodes

8. Now to link the individual nodes together. There are two ways to do this.



**Single connection:** Click on the *connection* icon then on the start node and, finally, on the first person node.



They are both now linked with a straight line. You link additional nodes as follows: Link from one node to another by clicking once on each of the **two** nodes (Start-Stop).



**Multiple connections:** Click on the *link consecutively* icon then on your start node and then on each node in turn in the order you want the document to flow.



If, when you are defining a linear workflow, you put the nodes in the order of the workflow and press the Ctrl key, the newly placed node is linked to the previous one.



9. Once you have linked all the person nodes in the right order, click on *OK*. The new default workflow is now in the Archive context menu under *Start default workflow*.

## Special cases

When creating a connection between the individual nodes there are the following special arguments:

### Start nodes

Start nodes can only have **one** connection to the next.



If you want to send the document to several people as soon as you start the workflow, you have to insert a distribution node. Click on the *distribution node icon* then in the drawing board.



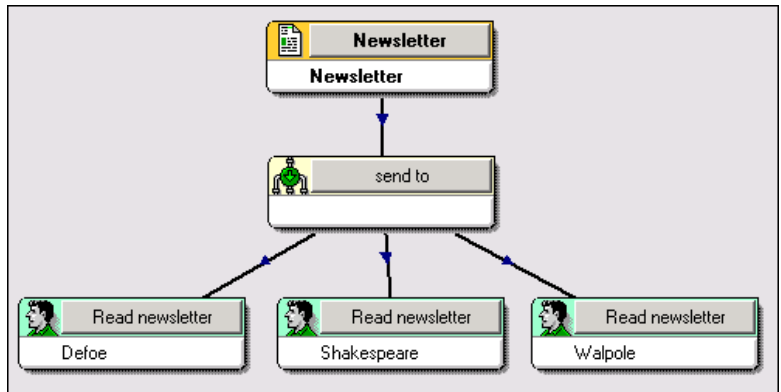
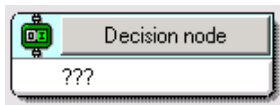


Fig. Distributing the document: Start nodes - Distribution modes - Person nodes

Then create the necessary person nodes and link them together as described.

## Decision nodes



A decision node is used to verify a particular keywording value which may affect the progress of the workflow.

**Example:** The user Chatwin can transfer invoices to a particular value himself. If the invoice is for a higher amount, the Head of Division must first check the invoice and authorize it. Using decision nodes, it's easy to automate this process.

1. Create the start node (*System settings, Workflow, Define workflow*), e.g. for a workflow diagram called *Invoice*.



2. Now position the decision nodes by first clicking on the *Decision node* icon in the workflow editor and then clicking in the drawing board.

3. Click on the gray button. The decision node opens.

**Description:** Give the node a name.

**Form field:** Enter the name of the form field containing the value you want to check (e.g. an invoice amount).

**Condition:** In the selection box, select the comparison operator (equal to, greater than, less than etc.).

**Value:** Enter the comparison value here.

Depending on the result of the comparison operation, the document is passed either to the left **or** right. That means a decision node must have exactly **two onward** connections to other nodes. The **first** connection will be used when the result of the operation is **TRUE**. You can recognize this connection by the green triangle within the line. The second connection has a red triangle and is used as the route if the result is **FALSE**.

In our example, we set up the following: Check the ELO object's *Amount* field. If the value is less than 1200 euros, the result is **TRUE**, if greater than **FALSE**.



4. Now position **two** person nodes.



5. Link the decision nodes with the person nodes. Simply click once on the *Link* icon. Then click on the decision node and **next** on the left-hand person node. Because it is to him that the invoice should be sent if the result of the comparison is **TRUE**, i.e. if the amount is less than 1200 euro. You can tell this from the green triangle that denotes the link. Then click on the decision node again and then on another person node. The connection is marked with a red triangle (shows the route if the result is **FALSE**).

6. Now create another link between the first and second person node. Then once the object has been verified and authorized, it is forwarded to the right-hand person mode who can then close the process.

The sample workflow would look like this:

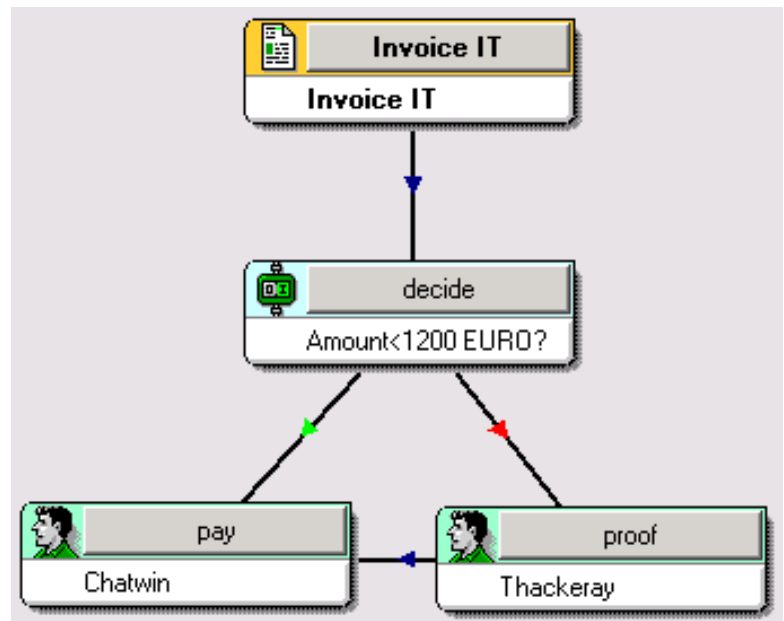
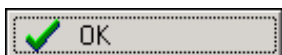


Fig. Forwarding documents



7. Click on *Next* to end the process.



A workflow can end at a distribution node. So you can also create arguments such as: "If the amount is EUR 1200, send to a competent person, otherwise end the workflow here" by putting a distribution node with no subsequent nodes on the *empty* node branch.

The value of the field at the time of the query is automatically entered in the description field. Any description you may have entered is overwritten.

## Collection nodes

The collection nodes *wait* until all previous nodes have been completed or only x responses are outstanding before sending the document on its way.

**Example:** An employee has developed a new project, a new idea. But before presenting it to the boss, it is usual to get an opinion from three other colleagues first. The collection nodes ensure that the boss receives all the opinions at once and that they do not arrive individually. This improves efficiency because all the documents arrive together and there is no waiting around. (You can also configure the collection node so that it forwards the document when it has collected 4 or 5 responses.)

1. Create the start node (*System settings, Workflow, Define workflow*), e.g. for a workflow diagram called *Opinion*.



2. Create the distribution node by clicking on the *Distribution icon* then on the drawing board.



3. Put in the person nodes you need. Click on the *person node* icon then in the drawing board. Enter the required information for each node.



4. Position the *collection nodes*. Click on the *collection node* icon then in the drawing board.



5. First create another person node. This is the final stage - i.e. the object is sent to it once all nodes prior to the collection nodes have completed the relevant tasks.

The sample workflow would look like this:

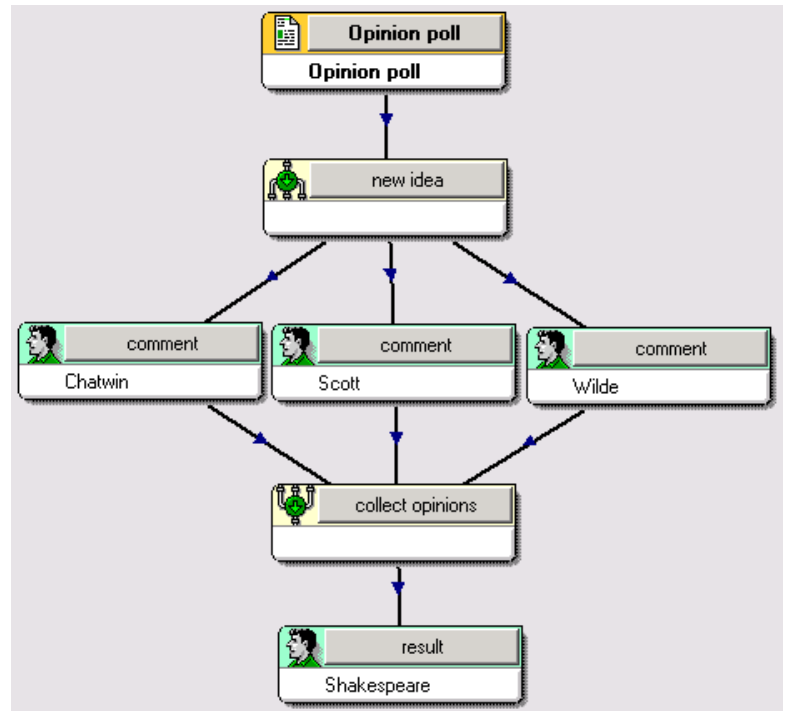


Fig. 'Opinion' workflow

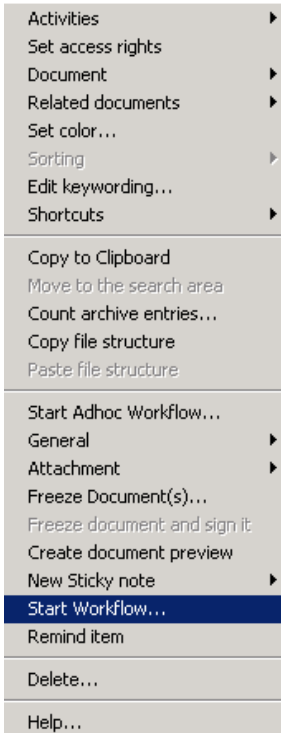
This means that the administrator receives the document as soon as three colleagues (Chatwin, Scott and Wilde) have assessed and forwarded the object.

### Create a workflow for a single document

You can define a complete, individual workflow for each document without having to resort to a previously defined workflow. This function is necessary if you only want a document to take a particular route through the company **once**.

1. In the archive, select the document that you want to create a workflow for.

Then open the context menu and click on *Start default workflow*. The *Start workflow* dialog appears. It shows all the workflow diagrams.



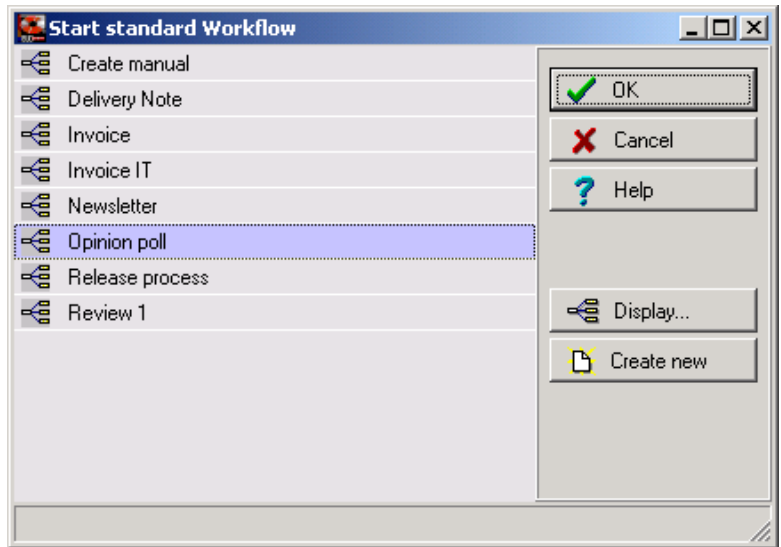
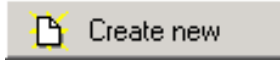


Fig. Starting the workflow



## Starting default workflow

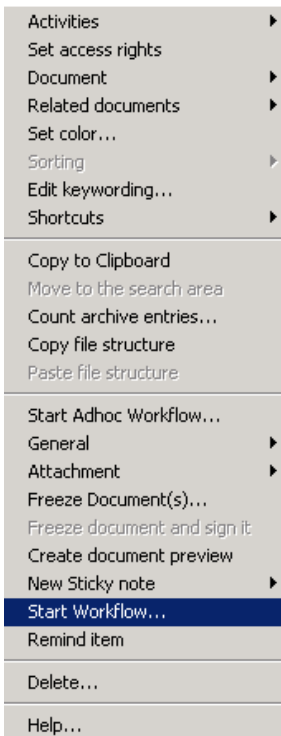
2. Click on *Create new*. The *Workflow name* window opens. The name of the selected document has already been entered. But you can also enter a different name.

3. Confirm with *OK*. The *Workflow* window appears. It already includes the start nodes with the name of the document. Now create the planned workflow for the document, as described in the section **Defining a workflow**.

4. When you have defined a workflow, click on *OK*. Closing the *Workflow* window starts the workflow, i.e. the document is already on its predefined way.

The workflow is not saved.

1. In the archive, select the document that you want to start a workflow for.



2. Then open the context menu and click on *Start default workflow*. The *Start workflow* dialog appears. It displays all workflows.

You have two choices:

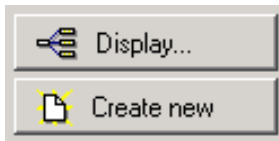
**Select a predefined workflow:** Select the relevant entry and click on *OK*.

The *New workflow diagram name* window appears. The name of the selected workflow is already entered. Confirm by clicking *OK* and the workflow starts.



If you checked the *Start new workflow in edit mode* window in *System settings, Options*, on the *Task reminder* index card, the workflow diagram is displayed again and you can make changes before the workflow starts. If this option is not checked, you can display (but not change) the workflow diagram using the *Display* button.





**Defining a new workflow:** After clicking on *Create new*, you can define a completely new workflow for the document. This workflow is only available once. Create a workflow and click on *OK*.

3. Once the workflow is started, the document is moved to the relevant user's Tasks area for further editing.



You can easily see which workflows are currently active in a list. Find it at *System settings, Workflow, Active workflows*.

## Edit default workflow

Active Workflows	Ctrl+F5
Expired time limits	Ctrl+F7
Workflow Reports	Ctrl+F6
Create new Workflow	

Every workflow can be subsequently edited. You can add, move or delete nodes.

If you checked the *Start new workflow in edit mode* window in *System settings, Options*, on the *Task reminder* index card, the workflow diagram is displayed again and you can make changes before the workflow starts.

1. Open workflow management from *System settings, Workflow, Create workflow*. In *Workflow diagrams*, all workflows are listed.

2. Click on the workflow you want to edit and it is immediately displayed in the drawing board.

## Linking nodes

To move nodes at a later date, click on the *arrow icon* in the toolbar.



Then click on the node you want to move and drag it to the right position. Existing connections stay in place and can also be deleted or modified if necessary.



If the gridlines are on, all nodes are auto-arranged.

## Deleting nodes and connections

Click on the eraser icon to switch to delete mode (the cursor changes to an eraser when you point to an object that can be deleted).



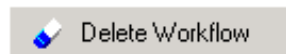
Clicking on a node deletes it and all connections. You are not asked for confirmation. The start node cannot be deleted. If you want to do this, you have to delete the entire workflow. If you just want to delete one connection, click it near the direction triangle.

## Renaming a workflow

Double-clicking on an entry in the *Workflow diagram* area opens a dialog box where you can enter a new name for the selected workflow.

## Deleting a workflow

Select the workflow you want to delete in the *Workflow diagram* area and click on *Delete workflow*.



The workflow is deleted after you confirm.

## Active workflows

A workflow is active as soon as it is started. It will remain so until all users in the workflow have completed their tasks and have forwarded the document.

Active Workflows	Ctrl+F5
Expired time limits	Ctrl+F7
Workflow Reports	Ctrl+F6
Create new Workflow	

**ELO** lets you see the active workflows. In the *System settings* menu, point to *Workflow* then click on *Display active workflows*. All workflows are listed in the *Workflow* window under *Workflow diagrams*. Clicking on a diagram name displays it.

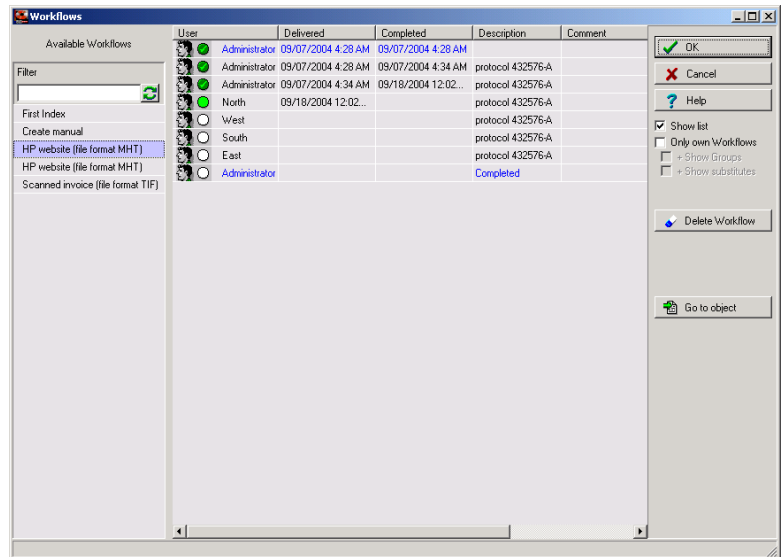
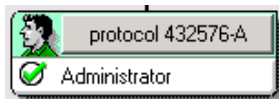
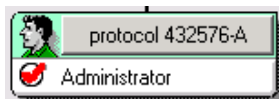


Fig. Displaying active workflows

The individual nodes for an active workflow give information about the status of the workflow. In other words, they are displayed differently:



Completed nodes, time limit met (**green tick** under the node icon)



Completed nodes, time limit not met (**red tick** under the node icon)



Active nodes, on target (**green dot** under the node icon)



Active nodes, late (**red dot** under the node icon)

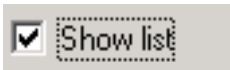


Inactive nodes (document not yet received or not yet forwarded by the previous node, **no marker**).

## List view

You can see active workflows in both graphic and list forms. The advantage is that you get to see all important information at a glance.

1. Click on the workflow you want to see. It is immediately displayed in diagram form.



2. Now check the *Show list* check box. The active workflow is displayed in an easy to read list.

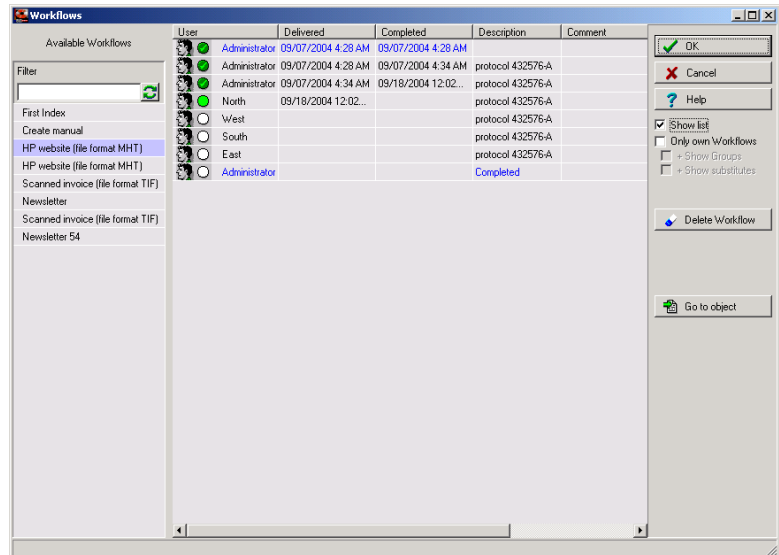
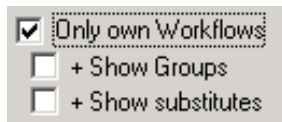


Fig. Workflow in list view

The list form shows all nodes for a workflow including a delivery and completion date, a name and the comments entered by the users.

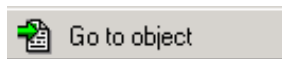
## Select display



Checking the *Only own workflows* option means only your own workflows are displayed. Using the *Show groups* and *Show substitutes* options, the workflows are displayed if they are related to a group or relevant to substitution.

## Viewing documents

Documents in an active workflow can also be viewed.



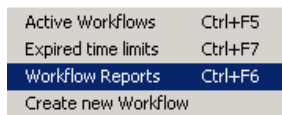
1. Click on the relevant workflow in the *Workflow diagram* area and it is then displayed in graphic form.

2. Now click on the *Go to object* button.

The document is immediately displayed in the archive in the background. Minimize or close the *Workflow* window the view the document in the archive.

## Workflow report

**ELO** shows you a report about workflow management containing all the vital information you need.



In the *System settings* menu, point to *Workflow* then click on *Overview* [CTRL+F6]. The *Workflow report* window opens.

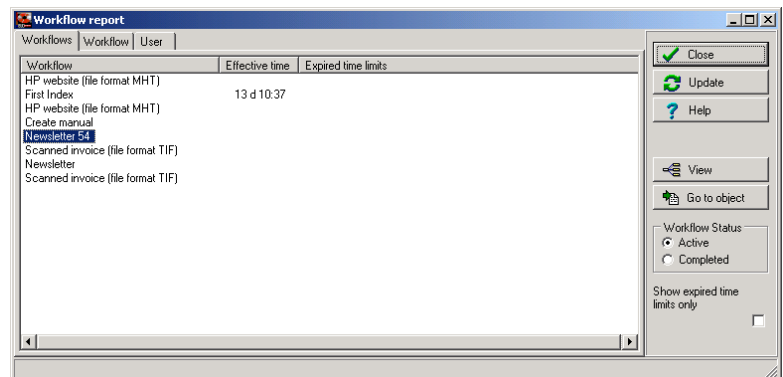
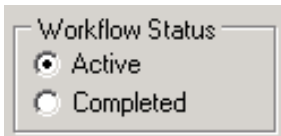


Fig. Overview of active workflows



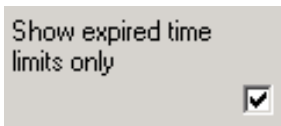
Workflows are displayed on the *Workflows* index card and you will receive information about retention periods and expired time limits.



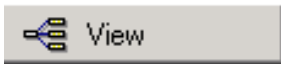
From the *Workflow status* button, you can toggle between active and completed workflows. That means that either all the active or all completed workflows are displayed.



Active workflows are those that still have active nodes that are still in users' Tasks areas. Completed workflows have no active nodes.

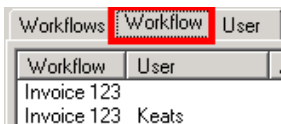


Using the *Show expired time limits only* option, workflows that were on time are hidden. That reduces the number of entries displayed and increases clarity.



You can display any workflow either graphically or in list form that is selected on the *Workflows* index card:

For graphical display, click on the *View* button on the right.



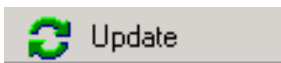
If, on the other hand, you want to display list view, click on the *Workflow* tab.

Ablauf	Anwender	Aktiv seit	Laufzeit	Freiüberschreitung
Newsletter 54	Administrator(+)	0 d 00:00		
Newsletter 54		0 d 00:00		
Newsletter 54	Defoe	0 d 00:01	0 d 00:01	
Newsletter 54	Shakespeare	0 d 00:01	0 d 01:00	
Newsletter 54	Walden			

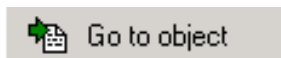
Both views provide you with information about the selected workflow. It shows you the users, active nodes and who has missed a time limit. In the list view, the user who started the workflow is denoted by a plus sign (+). In the graphic view, you get this information and more by opening the (user) node.



If you want specific information about a user for a particular workflow, first select the workflow, by clicking on the user cell in the workflow name. Then switch to the *User* index card. Alternatively, open the user node in the graphic view.



Report data is not refreshed automatically while you are in this work area. Clicking on *Refresh* brings you up to date.



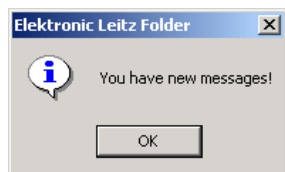
Clicking on the *Go to object* button displays the document for the selected workflow in the archive.

## Missed time limits

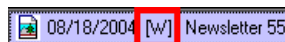
This report function allows you to determine rapidly which user is currently in possession of a document. Calling up the Missed time limits window (*System settings, Workflow, Missed time limits* – shortcut: Ctrl+7) displays workflows, users, the due date and notes. But users are only listed if they have not yet forwarded the document despite having exceeded the time limit.

## Continue workflow

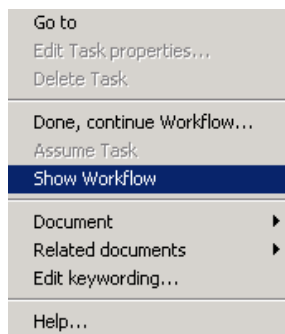
After a workflow is started, the document is sent to the *Tasks* area of every authorized user according to the workflow.



The user receives notification in **ELO** for his information. He can now view the document and the tasks associated with it and edit them accordingly.



To distinguish the document from "normal" reminder documents visually, the document icon displayed in the Task reminder list view looks different depending on your settings in System settings. In addition, a suffix in square brackets [ ] makes clear whether it is a workflow or a task reminder.



To display the workflow, select the task reminder document, open the context menu with the right mouse button and click on *Show workflow*.

Once you have completed all necessary tasks, re-open the context menu in Task and click on *Done, continue workflow*.

The *Forward workflow* window opens.

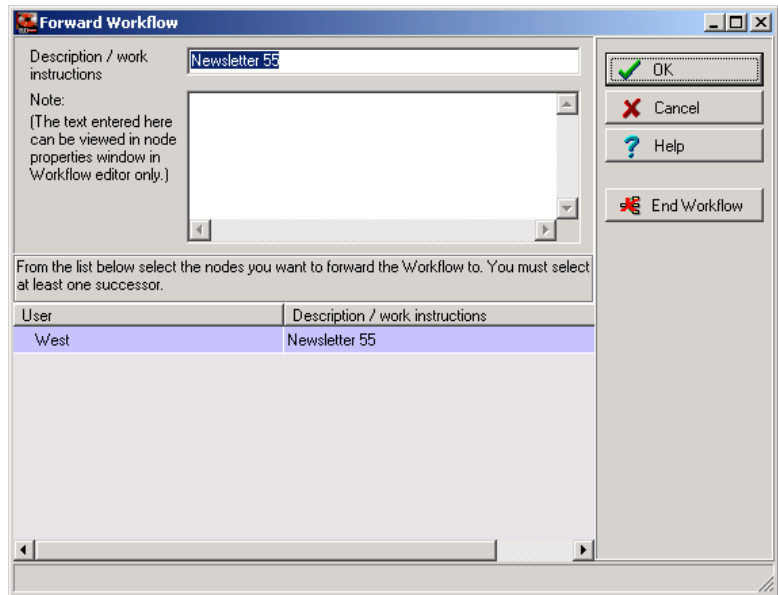
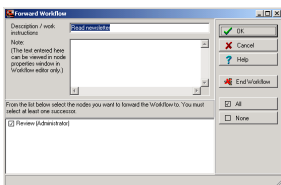


Fig. Forwarding workflows

It shows you the description once again (e.g. job instructions) and any notes that were entered.



You have the option of adding further notes here before sending the document on. So you can, for example, enter a comment explaining what you have done or containing detailed job instructions for the subsequent users.



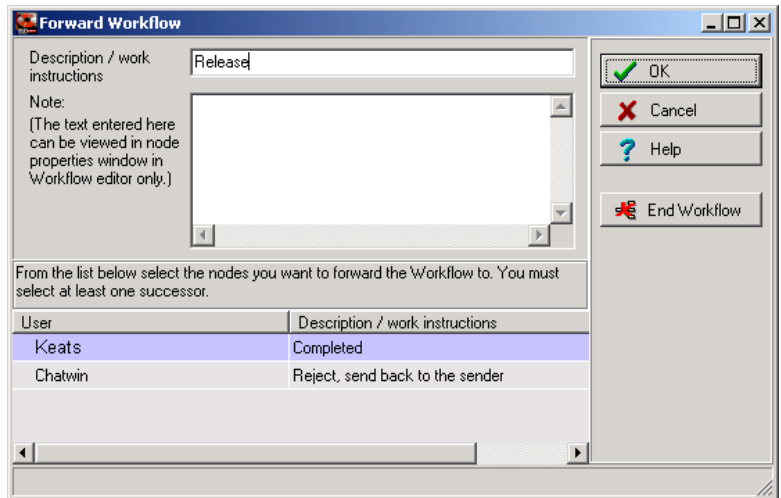
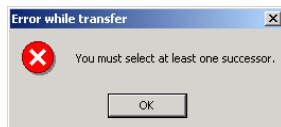


Fig. Selecting successors for forwarding

If there are several successors, these are displayed in a list box. Successors are defined as **all nodes** (users, collection and decision nodes) in the workflow. So you can forward the document to specific users.

If several successors are displayed, you can adjust the choice using the buttons *All* and *None*:

- Clicking on *All* selects all successors, i.e. the object is forwarded to all.
- To select only one user, first click on *None* and then select the required successor separately.



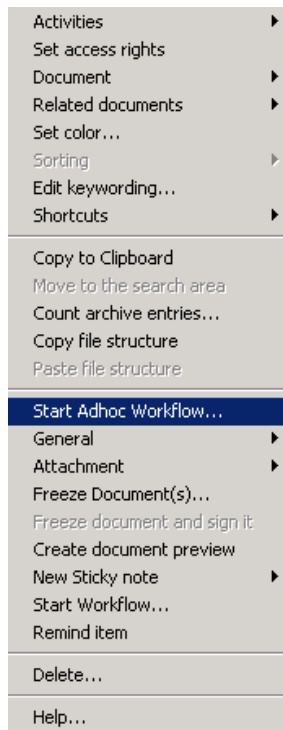
**Remember:** You can only leave this dialog box if you have selected at least one user, otherwise an error message appears..

Once you have made your selection (provided several successors are displayed), click on **OK**.

If a workflow document is destined for a group and only has to be edited by one member of that group, each group member can decide whether they want to accept the workflow.

---

# The Adhoc workflow



The Adhoc workflow is better suited for simple sequential or parallel business processes, e.g. to quickly and easily share certain documents among several employees. You can enter all your settings (e.g. selecting the employees or workflow type) in one, convenient dialog box.

1. In the archive, open the context menu by right-clicking on the document you want to forward using the adhoc workflow.
2. Click on *Start Adhoc workflow*. The window opens.

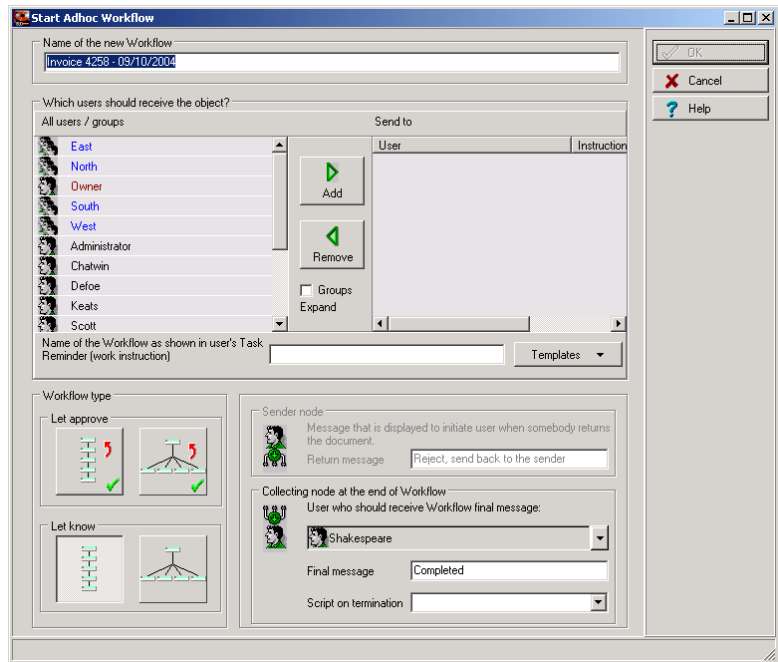
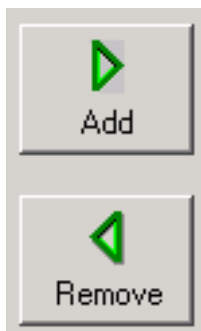
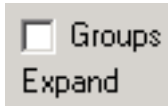


Fig. Starting the Adhoc workflow

3. In *New workflow name* enter a unique name, e.g. *Project name*.



4. Select the recipients from the list of all ELO users and ELO groups (with the Shift or Ctrl key). Clicking on *Add* enters the selected users in the *Send to* list (mailing list). You can change the order in which the mailing list is displayed by dragging and dropping. To remove a recipient, reverse the process: Click on the recipient in the *Send to* list then click on *Remove*.



5. You can also remove individual users from ELO groups. *Expand group* means that a group selected in the *All users/groups* area (denoted by a group icon) is expanded and the individual group members are displayed in the *Send to* list. You can then delete individual group members manually if necessary.

6. Right-click on the *General job instructions* field and enter an instruction, e.g. "Edit". For the instructions to appear to all recipients of the adhoc workflow, enter them in *Description*.

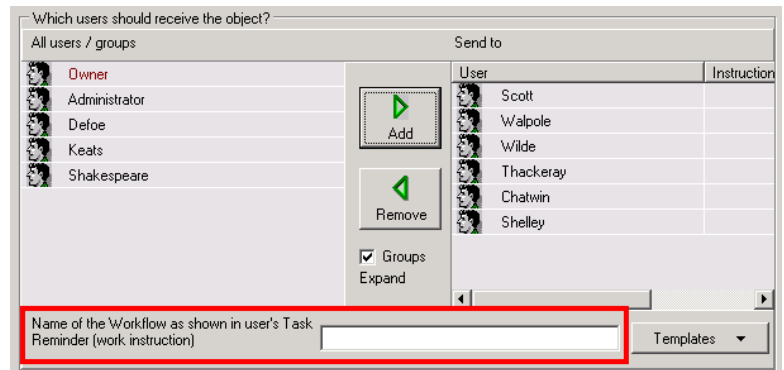
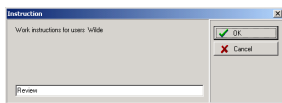


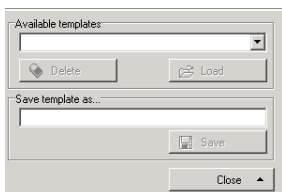
Fig. Entering job instructions for all users



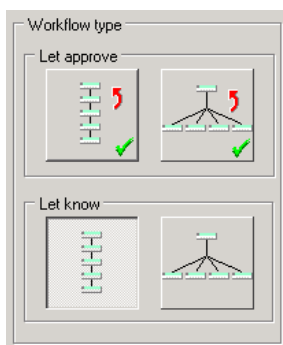
But you can also create *individual job instructions* for everybody participating in the workflow. To do this, select the participant in the mailing list and click on the right mouse button. Enter individual instructions in the *Instructions* dialog.



7. Using the *Templates* button, you can save the adhoc workflow to use again later.



A drop-down field opens. In the *Save template as* field, enter a name for the adhoc workflow. Using the drop-down menu *Available templates* you can choose from and reuse all saved adhoc workflows.



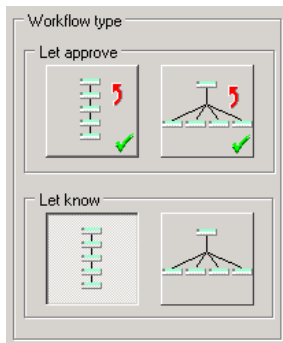
### Sequential workflow for approval

8. In the *Workflow type* area, enter how you want to route the workflow. You have the following four options:

A document is routed sequentially (one after the other) through the individual participants in an adhoc workflow. Any participant can end the workflow early if, for example, he does not approve a document.

### Parallel workflow for approval

The document is routed in parallel - i.e. every recipient receives it at the same time. Each of them has to approve the document to end the workflow.

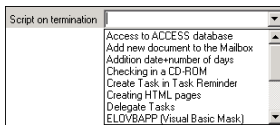
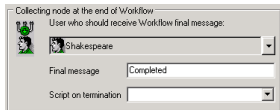
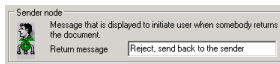


### Sequential workflow for information

A document is routed sequentially (one after the other) through the individual participants in an adhoc workflow. The workflow cannot be terminated.

### Parallel workflow for information

The document is routed in parallel - i.e. every recipient receives it for their information at the same time.



## An example

9. Enter a termination message in the *Return message* field. This message is sent to the initiator (originator) if a participant does not approve a document. This field is only active for an adhoc workflow for approval.

10. In the **Final message** area, enter a message to display when the workflow has finished and, using the drop down menu, select the users you want to receive it.

11. Using the *End script* drop down menu you can, if you wish, select a script to run when the workflow ends.

Using the *Adhoc workflow* function, create a quick and simple sequential or parallel workflow, e.g. for circulars, queries, in-house information or a newsletter.

The product manager of a company creates a technical guide. He sends it under the workflow name *Manual approval* and workflow type *sequential for approval* to the Development and Sales Managers. As soon as the Development Manager approves the document it is sent on to the Sales Manager. If he also approves the document, the Product Manager receives a message and the technical manual can go into production so that it can be printed.



# Chapter 13

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## The Document, Window and Help menus

This chapter provides you with an overview of the commands in the main *Document*, *Window* and *Help* menus.

This chapter will cover the following topics:

- the *Document* menu,
- the *Window* menu
- the *Help* menu.



---

# The Document menu

Scan single page	F2
Scan joined pages	F12
Scan page and join it to a document	Shift+F12
Insert file	
Recognize barcodes	Ctrl+B
Copy OCR to Windows clipboard	Ctrl+R
Search	
Copy to Mailbox	Ctrl+P
Open document	
Edit document	Ctrl+Ins
Print	Ctrl+D
Check-In	Shift+Ins
Freeze	
Create Tiff preview	
Send as e-mail	
Send as link	

Below, we will describe all the commands in the *Document* menu.



The functions available to you depend largely on which area of ELO you have switched to and whether you have selected a document.

## Scanning single pages

One of the prime purposes of **ELO** is to help you cope with the daily deluge of paper. All documents, whether invoices, delivery notes or order confirmations, in short all paper documents, can be sorted using ELO, forwarded to the colleague responsible or archived immediately. To do this, all you need is a scanner to digitize documents. If you only use one scanner, **ELO** usually recognizes it automatically. Clicking on the *Scan pages* function creates new pages and places them in the **ELO** mailbox. **ELO** either uses the *Scanner profile* option or *Scan with preview*. The mode that is used depends on your settings in the *System settings* menu. In the *Select scanner profile* submenu you can change scanning settings.

You can find more information about scanner profiles and setup options in the *Select scanner profile* and *Select scanner* sections.

## Scan stapled documents

If you are using a feed scanner with ADF you can scan several pages in a row using the *Scan stapled* function. After scanning, **ELO** joins the individual scans together into one file. Scan the pages in the right order to avoid having to separate and sort them later.

## Scan page and join it to a document

This feature lets you attach a TIFF document from the mailbox to a TIFF document in the archive. To do so, switch to the *Archive* work area. There, open the relevant structure element and select a TIFF document. Then return to the Mailbox and select the TIFF document there that you want to attach. Using the *Scan page and staple it to a document* function, you can add a page to the existing document in the archive. By default, the page added is the last page of the document. This function is not available for other file types (e.g. MS Word documents).

## Insert file

The *Insert file* command transfers a copy of a given file from your file system into your Mailbox.

## Recognize barcodes

This command starts barcode recognition for an available barcode form field. You can find more information in the **ELO***professional* BARCODE manual.

## Copy OCR to Windows clipboard

Activates the OCR area selection tool. The cursor changes to a crosshair and allows you to select a section of your TIFF document.

Find Sticky note	Shift+Ctrl+F2
Quick search	Ctrl+F1
Find item	Shift+F1
Search version history	Shift+Ctrl+F1
Fulltext search	

With OCR, text within the marked area is converted to computer-readable characters (CI data). You can assign this data to any form field as keywording information.

## Search

**ELO** contains the following search methods that you can choose from in the *Search* menu:

### Find sticky note

Opens the sticky note search window that lets you search all types of sticky notes for a particular term. It will return a hit list containing the documents and sticky notes that match your search query.

<b>Quick search</b>	Using this function, also called direct search, you can search the name, memo, fields, fulltext, sticky notes and version history.
<b>Find item</b>	Opens all available document-specific search templates. You can search through these for specific keywording attributes using the index fields.
<b>Search version history</b>	Use this function to search the version history of a document in the archive. Enter the appropriate search term in the dialog box.
<b>Fulltext search</b>	Opens the fulltext search window that allows you to search for any term in the contents of the document.
<b>Copy to Mailbox</b>	Using this command you can copy the selected document straight to the Mailbox from the <i>Archive</i> , <i>Clipboard</i> , <i>Searching</i> and <i>In Use</i> areas.
<b>Open document</b>	Opens a document in read-only mode.
<b>Check out and edit document</b>	If you click on this command, a selected document is opened in the application associated with the document, e.g. MS Word. You can now make any changes you want to, subject to the capabilities of the application. The document is checked out to the <i>In Use [F11]</i> area and has to be checked in again once it has been edited for release and to remove the document lock.
<b>Print</b>	Prints the selected document
<b>Check-in</b>	Opens the check dialog to check a document back in to the archive.
<b>Send as e-mail</b>	Sends a document by e-mail.

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# The Window menu

New window	
Close window	
✓ Arrange freely	
Tile vertically	F3
Tile horizontally	Shift+F3
Zoom	▶
Thumbnails view	F10
Rotate	▶
Use TIFF preview	Ctrl+T
Full screen	Ctrl+F
Window	▶
Previous page	PgUp
Next page	PgDn
First page	Shift+PgUp
Last page	Shift+PgDn
Refresh	Ctrl+F9
✓ Smooth B/W documents	Shift+F11
Sorting order	▶
Configure toolbars	
Annotations...	

**New window:** Opens a new ELO window.

**Close window**

Closes the current ELO window.

**Arrange freely**

Allows you to arrange ELO windows on your desktop.

**Tile vertically**

Opens a new ELO window and arranges both windows vertically next to each other on the desktop.

**Tile horizontally**

Opens a new ELO window and arranges both windows horizontally one above the other on the desktop.

**Zoom**

This menu contains different zoom factors to increase or reduce the size of the currently selected document. Remember that these zoom steps are not available for all document formats.

**Thumbnails view**

This function enables a selected ELO object or its content to be displayed as thumbnails.

<b>Rotate</b>	Allows you to rotate your document in the window. Remember that these rotation steps are not available for all document formats.
<b>Use TIFF preview</b>	This option must be enabled in order for the preview to work on the TIFF printer. Compare the settings under <i>System settings</i> , <i>Options</i> , <i>Viewing filters</i> , the entries under <i>Preview path</i> and <i>Preview printer</i> .
<b>Full screen</b>	Switches to full screen mode by hiding the document entries.
<b>Window</b>	Allows you to switch between the <i>Archive</i> , <i>Clipboard</i> , <i>Mailbox</i> , <i>Searching</i> , <i>Tasks</i> , <i>Messages</i> and <i>In Use</i> areas.
<b>Previous page</b>	Moves to the previous page of a multipage TIFF document.
<b>Next page</b>	Moves to the next page of a multipage TIFF document.
<b>First page</b>	Shows the first page of multipage TIFF documents.
<b>Last page</b>	Shows the last page of multipage TIFF documents.
<b>Refresh</b>	Refreshes the display.
<b>Smooth B/W documents</b>	Optimizes the display of scanned black and white documents.
<b>Sorting order</b>	Sorts the filing structure by different sorting criteria.
<b>Configure toolbars</b>	Opens the <i>Configure toolbars</i> window allowing you to customize the toolbar.
<b>Annotations</b>	This enables you to affex sticky notes directly to a document.

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# The Help menu

Content	F1
Online FAQ on the Internet	
About ELO	

**Content:** Launches **ELO***professional* online help.

## Online FAQ on the Internet

Calls up the FAQ pages on the Internet which always contain the latest answers to users' questions.

## About ELO

This command brings up brief information about the program. It is particularly important that you check the version number of your **ELO** Client here.



# Annex

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In this chapter, we will provide important additional information on the subject of electronic archiving. For example, you will find details about the legal ramifications of storing documents in digital form and about everything that awaits you on our Internet site. The chapter ends with an *overview of shortcuts*, a *glossary* and an extensive index.

You can read in detail about the following topics:

- Security aspects
- Internet forum
- Glossary
- Software License Agreement and End-user Agreement

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# Security aspects

When archiving documents that you are required to keep copies of, there are a number of legal requirements to keep in mind. There are two main areas:

- German commercial and tax law. This governs the retention of documents relating to business transactions.
- German civil law and law of civil procedure. This concerns proving the facts. Mostly, documents are submitted, because the most secure proof is still documentary evidence.



A scanned copy is not equivalent to an original document. In legal proceedings, a paper document has more value as evidence than an electronically archived document.

## Retaining scanned documents

The legal retention period for individual business-related documents is usually 6 to 10 years. The basis for the retention period is section 238, paragraphs 1 and 2 of the German Commercial Code. This section allows the electronic archiving of most accounting documents. Under sections 146 and 147 of the German Fiscal Code, there is no special requirement for official permission.

Exceptions to this include documents such as: opening balances, annual financial statements and group management reports. The original documents should be retained.



You can of course file a copy of these documents in **ELO**. You can then have the best of both worlds. In other words, internally, you can work with them in the same way as any other document. You only have to retain the originals in paper form.



According to the Regional Finance Office in Stuttgart, the following three factors determine the compliance of an electro-optical storage system:

1. Accounting records and other documents must be available for the duration of the legal retention period and be able to be accessed within a reasonable time. (Section 257 of the German Commercial Code/section 147 of the German Fiscal Code).
2. The archived document must correspond to the image of the original document. Scanned and optically-archived documents must also be able to be printed in the same form as the original.
3. It should also be impossible to make any changes after the event. This is the case for saving to optical CD and WORM media.

### Backing up to optical media

To store documents so that they cannot be modified, you must transfer the data to optical media such as CD or WORM. Only this process fully meets the demands of the tax authorities, namely that archived documents can no longer be modified. While **ELO** can secure the scanned data so it can no longer be manipulated directly, backing up to CD or WORM is advisable for some documents.

We recommend that you retain the original copies of official documents. Optically-archived documents are only admissible as evidence in a limited sense.



If you want to archive certain documents exclusively on optical disk, we recommend the following course of action:

1. Inform the tax office of your decision.
2. Consult carefully with an accountant or auditor.

## **CD recorders are inexpensive**

From a price point of view in particular, a CD recorder is attractive technology because you can buy the blank CD disks for just a few euros.

In the server base, **ELO** has mechanisms for storing CDs in optical jukeboxes and accessing them from there.

If possible, place a parallel copy of documents you access frequently on the hard drive. The reason for this is that data access time on a hard drive is still considerably faster than on a CD drive.

## **Be on the safe side**

Archive important documents to a CD. We would also recommend you make a **further copy** for long-term archiving. As a precaution, store this CD in a **separate location**. This will provide added security for your documents.

If stored correctly, a writable CD has a life of up to 30 years. Because most retention periods are between 6 and 10 years, this does not usually cause a problem.

The risk of a change in technology (new formats or technologies, e.g. DVD) is also not usually a problem within such a timespan.

## **Archiving to WORM**

WORM media are ideal for optical archiving. Although somewhat more expensive, they are more robust than CD-Rs and have greater storage capacity. In jukebox operation, these systems are highly reliable. That is another reason why they are particularly suited to large data volumes.

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# Internet forum

If you have access to the Internet, you can use our online service. Visit our web site at <http://www.elo-digital.com>.

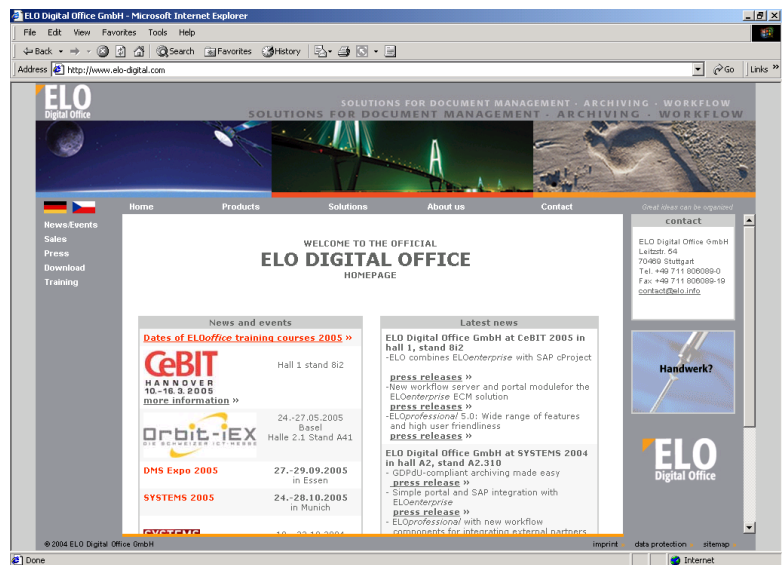


Fig. ELO Digital Office GmbH web site

In our Internet forum you will find e.g.:

- New features
- Program and manual updates
- Solutions to programming problems
- Latest hints and tips for ELO
- Information about our products
- Ordering options

You can find us on the Internet at:

<http://www.elo-digital.com>

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# Glossary

<b>Administrator</b>	The first and highest-level system user, possessing comprehensive access rights for a computer system.
<b>Archive</b>	This contains the filing cabinets.
<b>Archive system</b>	An archive system is used for the long-term unchangeable and tamper-proof storage of documents to be retained for legal or other reasons. It uses optical-electronic storage technology, i.e. storage of digital information on storage media using an optical, laser-based recording process. Compared to this, storage on magnetic storage media offers significantly less long-term security and is thus less well suited to long-term archiving.
<b>Button</b>	These are <i>command buttons</i> in a computer program, such as <i>New</i> , <i>Cancel</i> or <i>Edit</i> .
<b>Cartridge</b>	Magnetic tape storage in cassettes, used to back up hard disks.
<b>CCITT group III/IV</b>	Standardized compression process (also called Fax G4) used to compress documents for transmission by fax. This process is also used in the archiving field, and significantly reduces the file sizes for scanned data.
<b>CD-R</b>	Compact disc, Recordable: "Write-once" data medium in CD format (4.72 inches).
<b>CD-ROM</b>	Compact disc, read-only memory: Read-only data medium in CD format; not a blank to be written to.
<b>CI</b>	Coded Information: Coded storage of text or graphics that the computer can interpret for further processing (see also NCI).
<b>Client</b>	A workstation that requests services, data or access to peripheral devices on a network from the server.

<b>Client-server model</b>	System architecture on networks, where the interaction between the resources of a workstation (client) and a central instance (server) allows the capacity of the system to be used more effectively. The basic idea is to distribute computing processes among the different users of the system.
<b>COLD</b>	<i>COLD Computer Output on Laser Disc</i> – abbreviation for output of data on optical disks, usually WORM. The software on COLD systems supports the indexing and archiving of images and text documents; users can view these online and extract data.
<b>COM</b>	Computer Output on Microfilm: Output of computer data onto microfilm.
<b>Data backup system</b>	A data backup system is used to safeguard the availability and recoverability of data sets. To secure information against destruction, change, unauthorized access or the failure of external disks, access controls, periodic backups or identical replication of documents at different locations may be used.
<b>Database, relational</b>	Type of database in which the data is stored in the form of tables. Data records are held in rows and data fields (attributes) in columns. A record is then an element in a relationship based on field occurrences. This mathematical interpretation makes it easier to organise complex relationships. This type of database also allows different datasets to be linked together.
<b>DDE</b>	Dynamic Data Exchange: Standardized process by which programs can exchange data with each other.
<b>Decriptors</b>	Groupings used to classify search terms assigned to data/documents for subsequent searching.
<b>DMA</b>	<i>DMA Document Management Alliance</i> – Association of over 90 companies with the aim of providing standards and products to enable interoperability between document management applications, services and repositories.

<b>Document</b>	General term for all information in paper form (invoices, letters, drawings etc.) and electronic equivalents.
<b>Document imaging</b>	The electronically scanned image of a paper document (facsimile) constitutes non-coded information that cannot be processed directly by the computer. Imaging is used to create electronic copies of facsimiles using digital scanners, to allow IT-based processing.
<b>Document Management System (DMS)</b>	Document management covers all aspects of the digital processing of documents. These range from the capture of paper documents via scanners (imaging) and the processing of digitally-created documents (document management in the narrower sense) to archiving on optical disks. Document management systems therefore cover all systems used for these purposes. They include all data security systems, archiving systems, search and retrieval systems, and DMS in the narrower sense. We also include the automated forwarding and editing of digital documents (= workflow) within this definition.
<b>dpi</b>	Abbreviation for <i>dots per inch</i> : Number of pixels per unit of measure (inch, equivalent to 2.54 cm) with which recording and output devices reproduce a document. In electronic archiving, this is mainly used to indicate the resolution (display quality) of a scanner or printer.
<b>Drag and drop</b>	Selecting an object or text entry with the mouse pointer and moving it to any other place on the computer screen by pressing the left mouse button.

<b>EDM</b>	<i>Engineering Document Management</i> – Merging of the data streams from construction, ordering and manufacture. Example: a construction project. Initially, all documents are stored and administered on a central server in subject-based databases. Planners, construction companies and even reproduction companies use the common document pool and communicate via modem, ISDN or the Internet. The fact that all those involved in the project have access to this pool, and hence to up-to-date data and documents, allows enormous productivity improvements to be achieved.
<b>Electro-optical disk</b>	General term for a data medium written to by laser.
<b>E-mail</b>	Electronic mail, used to exchange messages and documents over a network (LAN and WAN).
<b>Filing cabinets</b>	These contain the folders.
<b>Fulltext database</b>	Database to manage unstructured data. In contrast to existing databases, there is no predefined structure with fixed field sizes. Despite the unstructured input, a full text database allows records to be selected and linked.
<b>Fulltext search</b>	Search for a term occurring anywhere in a text. To successfully match a string of characters, the term has to be in the full text database.
<b>Groupware</b>	Software components that enable colleagues to work together without the restrictions of structure, sharing schedules, exchanging electronic mail, etc.
<b>Highlighting</b>	Clicking on an object with the mouse to activate it.
<b>Hit list</b>	Result of a document search on an electronic archiving system.
<b>Host system</b>	A central mainframe system on a network that provides different users with specified processing facilities.
<b>Hybrid system</b>	A hybrid system is an archiving system that uses different storage options at the same time (in combination, e.g. electro-optical storage and microfilm).



<b>Image</b>	Copy of a document stored on the computer in digital form, where it can be processed. It consists of many individual pixels and cannot be interpreted directly (see also NCI and OCR).
<b>IMC (International Management Congress)</b>	Global organizer of DMS trade fairs.
<b>Index</b>	Property allocated to a document so that it can be located again later (uniquely identifiable).
<b>Indexing</b>	Database-supported process to generate the most unique access information for rapid retrieval of stored documents.
<b>Input screen</b>	This is where you enter information and commands. It generally appears after you select a menu option or icon.
<b>Interface</b>	. Generally used to connect two incompatible devices/applications.
<b>Internet</b>	The largest international union of many thousands of sub-networks. Each sub-network is technically, organizationally and financially independent. A major component of the Internet is the Worldwide Web (WWW).
<b>Intranet</b>	An Intranet is a closed, internal company network constructed according to Internet standards.
<b>IT</b>	Information technology.
<b>Jukebox</b>	Unit in which many optical data media are stored, which can make these media available quickly on request, by means of an automated change mechanism. Disk changer for storage media (WORM, CD, DVD).
<b>JPEG</b>	1. Group of experts (Joint Photographers Expert Group) developing processes for image compression. 2. Compression process developed by this group, which enables digital still images in true color (24-bit depth) to be compressed by a factor of 15:1 without any visible loss of quality. In such image files, adjacent information (colours) is consolidated. This is especially suited to photographs.

<b>Key</b>	Access security.
<b>Keyword</b>	Predefined search term assigned to a document in order to retrieve it later.
<b>MOD or MO-Disk</b>	<i>Magneto Optical Disc</i> – rewritable magnetic data medium, magnetised with a laser beam. It can be written to many times like a hard disk but unlike a CD or WORM.
<b>MPEG</b>	<i>Motion Picture Expert Group</i> – special compression process for moving images. MPEG works as follows: In order to save expensive disk space when storing moving images, all redundant (recurring) image information is filtered out of a video sequence. The only information stored is that which has changed from the previous image in a sequence. The advantage is a reduced storage requirement and faster data transmission over the Internet.
<b>Multiserver concept</b>	Client-server system, in which one server is installed many times or many servers are installed in parallel on the network. The individual servers can then be allocated to specific departments or clients.
<b>NCI</b>	Non coded information: Storage of a document as a copy, i.e. in pixel form, which cannot be interpreted by the computer without prior conversion.
<b>OCR/ICR</b>	Optical/Intelligent Character Recognition: Automatic recognition of letters and characters in a document copy (NCI). OCR converts characters that cannot be interpreted by the computer, e.g. a scanned document, into characters that can be processed. In contrast to OCR, ICR can also “learn”, significantly increasing the accuracy of transfer.
<b>ODMA</b>	<i>Open Document Management API</i> – standardized platform-independent high-level interface between desktop applications and document management systems (client interface).
<b>OLE</b>	Object Linking and Embedding. Procedure for exchanging data between two Windows programs.

<b>Orange book</b>	Standard for writable CDs. Controls the standards for re-writable MO disks and CD-Rs.
<b>Scalability</b>	Possibility of expanding the DMS, e.g. in terms of disk space or system capacity, with old and new components forming a single unit.
<b>Scanner</b>	Device for scanning optical information, which is converted into electronic impulses and sent to the computer.
<b>Search and retrieval systems</b>	Enables computer-assisted searching of documents or document contents in electronic archives.
<b>Server</b>	An instance providing a client with specified services on request over a network (e.g. fax or printing services). A typical server function is central database management.
<b>SQL</b>	<i>Structured Query Language</i> – enables the user to access data in a relational database. SQL may also be used to update, define and delete data.
<b>Streamer</b>	Tape drive for data backup.
<b>Task reminder</b>	Temporary, personalized pointer to a document or transaction, displayed to the user at a specified time.
<b>TIF/TIFF</b>	<i>Tagged Image File</i> – supports the electronic storage of up to 24-bit colour images across a variety of formats. Files may be compressed or uncompressed. Not all TIF implementations work with all display programs. <i>Tagged Image File Format</i> – standardized file format for storing NCI and graphical data. There are many versions of the TIFF format.
<b>TWAIN</b>	Name of a standardized interface protocol used by most scanner systems.
<b>User</b>	Predefined and authorized ELO user.
<b>VOI</b>	<i>Verband Optische Informationssysteme e.V.</i> – German association of manufacturers, suppliers and consultants for DMS products. It was founded in 1991 in Darmstadt and now has over 100 member companies.

**WfMC**

*Workflow Management Coalition* – set up in 1993 as an international association of workflow manufacturers and consultants from over 25 countries. Its aim is to standardize software terminology, interoperability and the various interfaces between workflow products, and to disseminate them further.

**Workflow systems**

Electronic transaction control systems used for process-oriented integration of documents into the individual work steps. There is a distinction between production workflows for structured processes and ad hoc workflows for one-off and variable processes. Workflows shorten processing times enormously, as transfer and waiting times are eliminated and processes can be carried out in parallel.

**WORM**

*Write Once Read Many*– optical disk, based on MO but not rewritable and so well suited to long-term archiving.

**WWW**

*World Wide Web* – so-called hypermedia system for storing not only text and graphics but also moving images and sound. The WWW provides access to digital documents stored on servers distributed across the whole world.

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# Software License and End-user Agreement

By opening the sealed package containing the data media, you expressly agree to the terms and conditions in the following Software License and End-user Agreement. Therefore, we ask you to read the whole Agreement carefully. If you do not agree to the terms of the Agreement, you must not open the package containing the data media. If this is the case, please return the unopened package containing the data media and everything else included in the delivery (including all documentation and packaging) immediately to the place of purchase; the purchase price will be refunded in full.

## **1. Object of the Agreement**

The object of the Agreement is the computer program stored on the data medium, the program specification, operating instructions and other associated material. ELO Digital Office GmbH (the "Licensor") reminds you that it is impossible to manufacture computer software so that it functions perfectly in all applications and with all hardware combinations, given the current state of technology. Therefore, the subject to this Agreement is only software which is fundamentally usable as described in the program specification and user manual.

## **2. Licensee's rights**

The purchaser or user (the "Licensee") is only granted ownership of the physical data medium on which the software is stored and usage rights to the software purchased. The purchase does not imply any rights to the software itself. The Licensor reserves all publishing, reproduction, adaptation and application rights for the software.

## **3. Retention of title**

The software as provided, the program specification, operating instructions and other associated material remain the property of the Licensor until all demands by the Licensor arising from the business relationship have been paid in full by the Licensee.

## **4. Scope of use**

(1) The Licensee may use the software on any hardware available to him. If, however, the Licensee replaces the hardware, he must delete the software from the hardware used previously. The software may not be saved, stored or used on more than one hardware system, except where expressly permitted by the Licensor.

(2) Using the software on a network or any other multi-user computer system is not permitted where this allows the program to be used concurrently at more than one workstation. If the user wishes to use the software within a network or other multi-user system, he must purchase an appropriate number of additional licenses for the other workstations connected to the network system. A license must be purchased and installed on every workstation that gives access to the ELO archiving server. However, it is not sufficient to own licenses corresponding only to the number of users working concurrently. Using the software in such a network or multi-user system is only permitted after the extra licenses required have been purchased in full.

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(3) Program modifications that go beyond the scope of paragraph 2, particularly for the purposes of debugging, or increasing the functionality of the program are only permitted for personal use. Personal use as defined here particularly covers private use by the Licensee. Personal use also includes professional or commercial use, where it is used only by the Licensee or his employees and is not used externally in any form.

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(5) Copyright notices, serial numbers and other marks used to identify the program must on no account be removed or modified.

## **6. Resale and sub-leasing**

(1) The Licensee may resell or give the software including the user manual and other accompanying material to a third party provided that the third party acquiring the software agrees to be bound by the present terms and conditions.

(2) The Licensee must keep these terms and conditions in a safe place. He must bring them to the attention of the new Licensee before handing over the software. If the original Licensee no longer possesses the terms and conditions at the time of the handover, he must request a new copy from the Licensor. The Licensee will be liable for the cost of postage and packing.

(3) At handover, the original Licensee must provide the new Licensee with all copies of the program including any backup copies, or destroy those copies not handed over. Once the handover has been completed, the original Licensee's usage rights lapse. The entire program must be deleted from the server and the computer hard drive.

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(1) The Licensee may transfer ownership of the software including the user manual and all other accompanying material to a third party, as long as this does not constitute hire for reward or leasing and the third party agrees to be bound by the present terms and conditions. The original Licensee must hand over all copies of the program including any backup copies, or destroy those copies not handed over. During the period of the handover of the software to a third party, the original Licensee has no right of use of the program. Renting for commercial purposes or leasing are not permitted.

(2) The Licensee may not hand over the software to a third party when they have good reason to believe that the third party will not adhere to the terms and conditions, particularly in respect of making unauthorized copies.

## **8. Reproduction rights**

(1) The program and accompanying documentation are protected by copyright.

(2) The Licensee may make copies of the program as supplied where these copies

are required to use the program. These necessary copies include installing the program from the original data medium to the main server for the hardware to be used and loading the program to internal memory.

(3) The Licensee may make an additional copy for backup purposes. However, only one backup copy may be made and stored at any time.

(4) The Licensee is not permitted to make any further copies, including printing the program code or photocopying the manual.

## **9. Term of Agreement**

The Agreement is valid indefinitely. If the Licensee breaches any provision of this Agreement, the right to use the purchased program will be terminated without notice. You are obliged to destroy the original data carriers and all copies of the program including any altered versions and also any written material upon termination of this Agreement.

## **10. Compensation for breach of contract**

The Licensor expressly declares that the Licensee will be liable for all losses incurred by the Licensor arising from copyright infringements by the Licensee in breach of this Agreement.

## **11. Modifications and updates**

The Licensor is entitled to create updates to the program at its discretion. The Licensor is not obliged to make updates available to Licensees who have not signed the registration card and returned it to the Licensor and have not paid the update fee.

## **12. Warranty, duty to examine and to give notice of defects**

(1) The Licensor warrants that the program as sold and as described to the purchaser is usable under normal conditions of operation and maintenance and has the functionality claimed for a period of twelve months from the date of delivery. A negligible reduction in usability will be disregarded. Claims in respect of defects in the software must be raised with the vendor supplying the software. For private purchase as defined by the German Civil Code, the warranty period is two years from the date of delivery.

(2) If a program package is shown to be unusable within a six month warranty period



starting from the date of delivery of the program package to the customer, the Licensor will take back replace the program package supplied and replace it with an equivalent new program package. If this is also shown to be unusable, and if the Licensor is unable to establish usability at reasonable cost and within a reasonable time, the Licensor will be entitled to a price reduction or to return the program package and to receive a full refund.

(3) There is no further obligation under the provisions of this warranty. In particular, there is no guarantee that the program will meet specific requirements of the customer or its users. The Licensee bears sole responsibility for the selection, installation and use of the software, and for the intended results. Nor is there any warranty for modified or edited versions of the program, where it can be shown that defects are connected with the above modifications and alterations.

(4) The Licensee is required to inspect the software for obvious defects that would be immediately evident to an average customer. Obvious defects, particularly a missing data medium or manual and substantial, easily visible damage to the data medium must be reported to the supplier in writing within two weeks. Defects, particularly the symptoms, must be described in as much detail as possible (e.g. details of error messages).

(5) Defects that are not obvious must be reported to the supplier within two weeks of detection by the Licensee.

(6) If the provisions of the duty to examine and to give notice of defects are not met, the software is considered to be accepted with due consideration for the respective defect.

### **13. Data security**

It is expressly stated that every user is personally responsible for, and must make provision for, proper backup of all data saved in the program. The Licensor offers no guarantee and accepts no responsibility whatsoever for loss of data in the event of an error.

### **14. Liability**

(1) The Licensor shall be liable for damages for which he is responsible up to the purchase price.

(2) The Licensor accepts unlimited liability for damages resulting from defects of title

and the failure to provide the warranted characteristics. Liability for misfeasance will be limited to five times the purchase price and to the losses that would typically be expected in relation to a software license.

(3) Otherwise, the Licensor accepts unlimited liability only for intent and gross negligence, including that of its legal representatives and executives. Where others performing an obligation for which the Licensor is principally liable are at fault, the Licensor is only liable for misfeasance as defined above.

(4) For slight negligence, the Licensor is only liable where it has neglected an obligation that is central to achieving the purpose of the Agreement (cardinal obligation). If the cardinal obligation is not fulfilled, limited liability for neglect of duty in accordance with paragraph 1 of this liability clause applies.

(5) Liability for loss of data is limited to the typical cost of recovery that would have been incurred had regular data backups been made corresponding to the level of risk.

(6) There is no liability for consequential losses caused by a defect not covered by insurance or for loss of profit, unrealized savings or other indirect losses.

(7) Liability under section 14 of the German Product Liability Act (ProdHG) is not affected.

(8) The Licensor is not liable for any indirect or direct damages that result from faulty configuration of the system environment, the operating system or the purchase of the Licensor's software as sold. Nor does the Licensor accept any liability for such damages as may result from faulty or unapproved scripts, from other faulty or unapproved program updates or upgrades produced or commissioned by the Licensee, or from faulty or unapproved interface programming.

(9) If one of the parties to the Agreement breaches any item from section 15, the other party to the Agreement is entitled to claim compensation.

## **15. Duties of confidentiality and of exercising proper care**

Both parties to the Agreement will not divulge any trade or business secrets, data or documents that they become aware of through their business relationship either during or after the term of the Agreement.

Trade and business secrets include the names of the license holder's clients and the

agreed terms and conditions of sale. To fulfil the Agreement, both parties must also extend the obligation of secrecy to their employees.

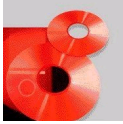
## **16. Severability clause**

Should any of the individual provisions of this Agreement or any individual Agreements concluded separately prove invalid, either wholly or in part, this will not affect the validity of the remaining provisions. The invalid provision will be replaced by another that most closely matches the commercial intent of the invalid provision

## **17. Place of jurisdiction**

Our entire commercial relations with the Licensee are exclusively subject to the law of the Federal Republic of Germany. Where this law refers to foreign legal systems, these references are invalid.

The place of jurisdiction for any disputes arising from this Agreement and any Agreements derived from it is Stuttgart. The law of the Federal Republic of Germany applies, to the exclusion of the U.N. Convention on Contracts for the International Sale of Goods.



# What's new?

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New features in **ELO***professional*.

The following section is a roundup of all the new features in **ELO***professional*. The intention here is to give those users familiar with the previous version an overview of the new features offered in the new version.

- Archive security
- Modularity and scalability
- Workflow
- System enhancements

# Archive security

## Document paths

With the *MD5 filing* option documents can be encrypted using the MD5 process. A separate directory is created for each document when it is filed.

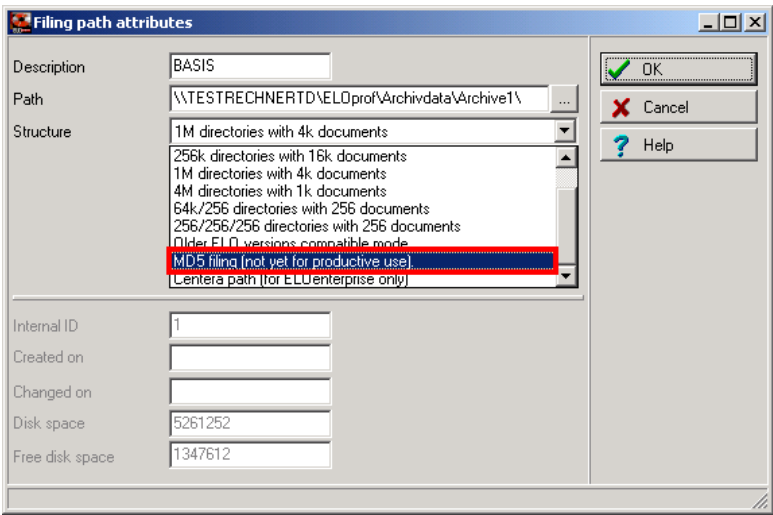


Fig. Defining document paths with MD5 encryption

## User rights

**“Delete versions” user right:** Only users with this right can delete individual versions of a version-controlled document.

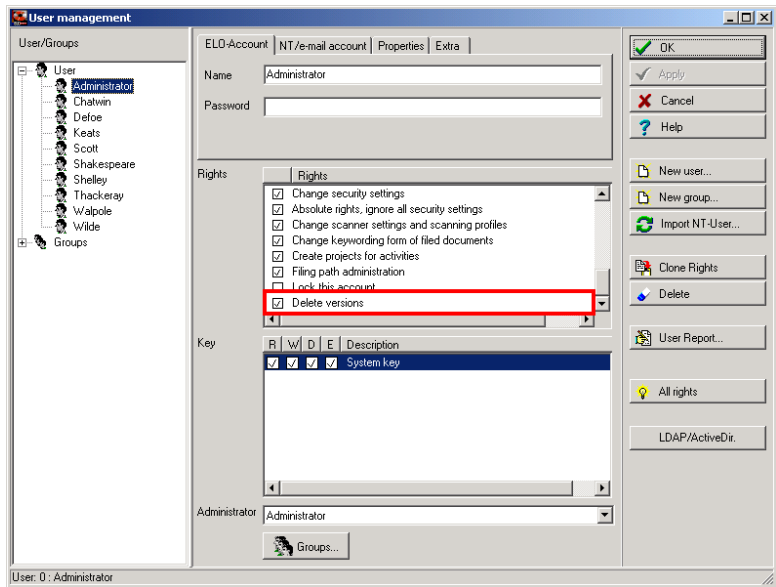
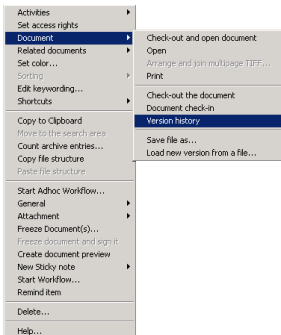


Fig. 'Delete versions' user right



To delete a version of a document, activate *Version history*, via the *Document* context menu.

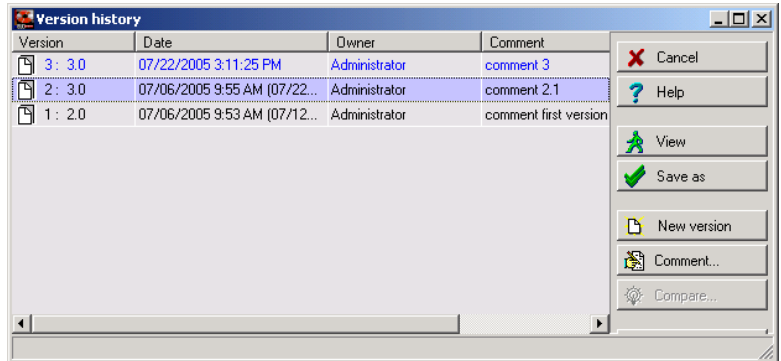
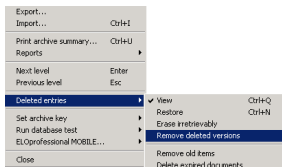


Fig. Deleting versions

The versions must be selected before deletion. To restore a deleted version, enable the *View* option under *Archive, Deleted entries*.



## Remove deleted versions



## Extended report settings

Then select the version with the deletion marker and click on *Undelete*.

Deleted versions can also be deleted from the archive irretrievably.

To do this, go to *Archive, Deleted entries, Remove deleted versions*.

The options for the archive report (Archive menu, Report) have been extended to include: *Document displayed*, *Structure element displayed*, *File collected from substitute mailbox* and *Version deleted*.

# Modularity and scalability

## Display PDF documents

PDF documents are displayed in Internet Explorer by default. A current version of Acrobat Reader must, of course, be installed on the system in order to use this function.

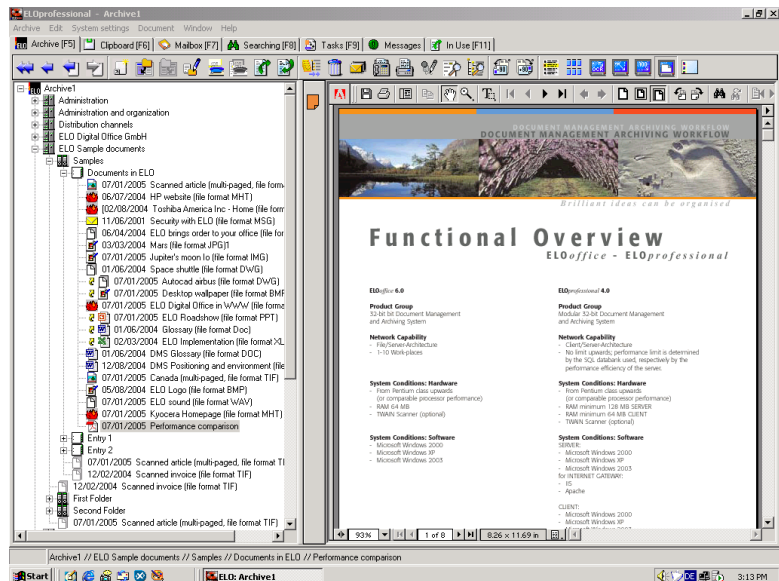
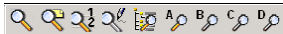


Fig. Displaying PDF documents in Internet Explorer

## Searching work area



## Quick or direct search

The *Searching* area has been reworked.

The configuration of the search icons has been modified and new functionality implemented.

Using *Direct search* you can search the following fields: *Name*, *Memo*, *Index lines*, *Fulltext*, *Sticky notes* and *Version history*.



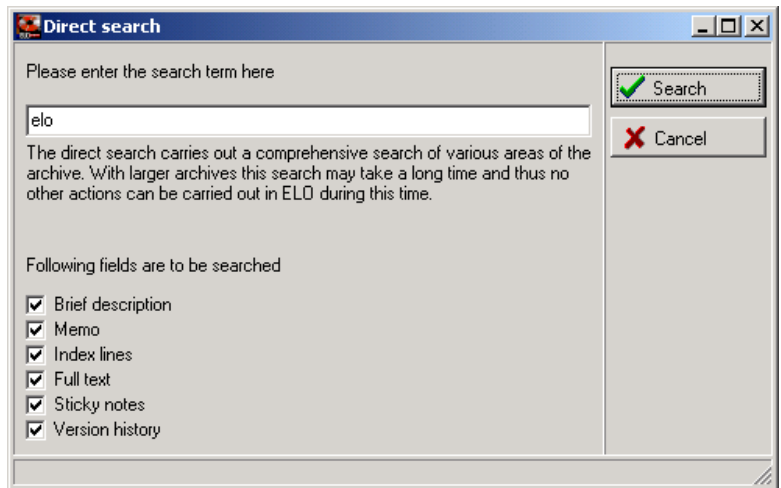
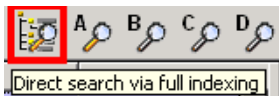


Fig. Direct search in the archive



## Sounds-like search

Click on *Direct search via full indexing* to call up the dialog box. Confirm your choice by clicking on *OK*. The search results are displayed in the *Searching* work area.

This search enables terms with similar spellings to be found. An exclamation mark must be placed in front of the search term here.

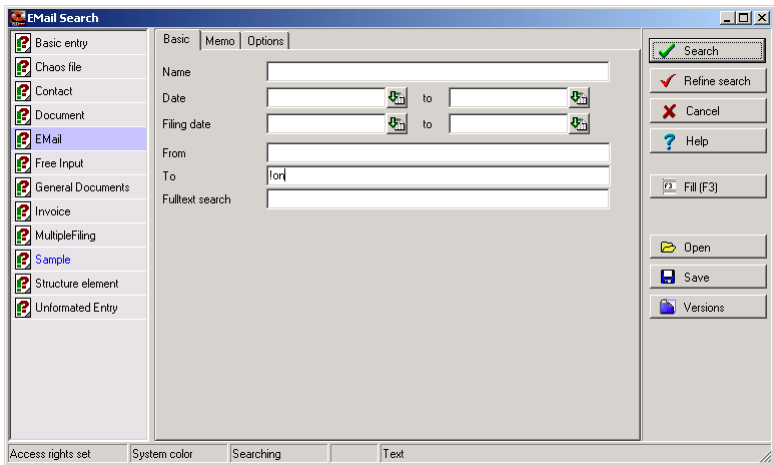


Fig. Sounds-like search

All possible variations are found in the search results, e.g. Mai, Mei, Mey, May, etc.

## Display previous search requests

If you have already carried out several search requests, clicking on the *Fill* button will call up a list of previous search requests.

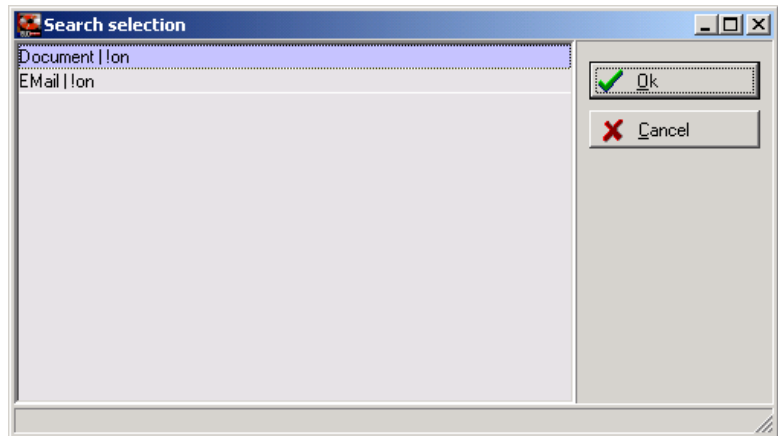
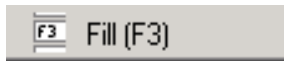


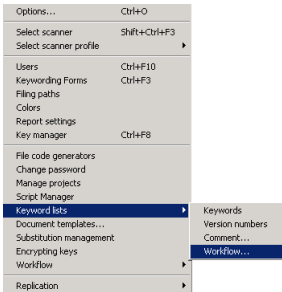
Fig. Displaying previous search requests

Select the entry in the list and click on *OK*. The entries are transferred to the search form.

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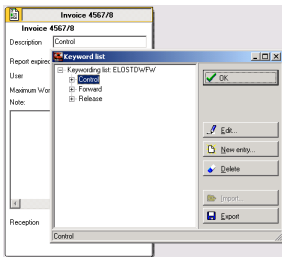
# Workflow

## Keyword lists



Keyword lists can also be used for the workflow.

They are defined under *System settings, Keyword lists*.



The keyword lists defined in the Workflow context menu are then available.

## Cycle nodes

These new nodes enable frequently recurring procedures to be repeated. The following example shows the procedure for release of an invoice.

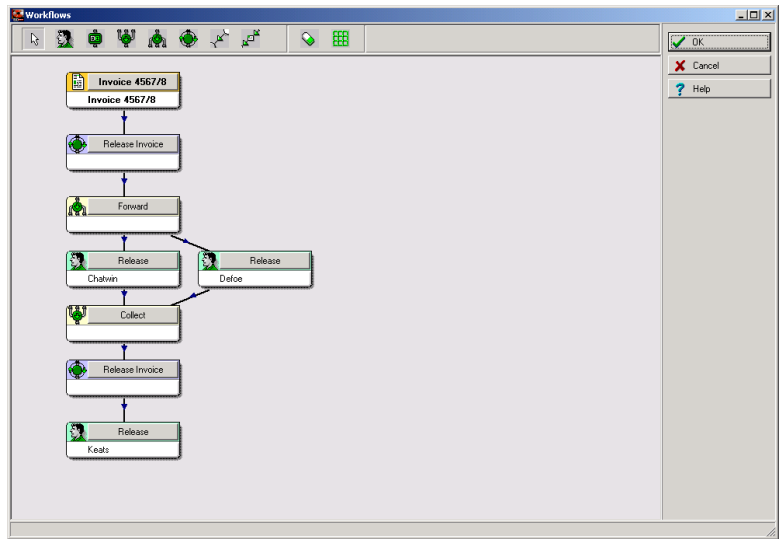


Fig. 'Invoice' workflow with cycle nodes

If the invoice is not released by both editors, the workflow runs through the same release cycle again.

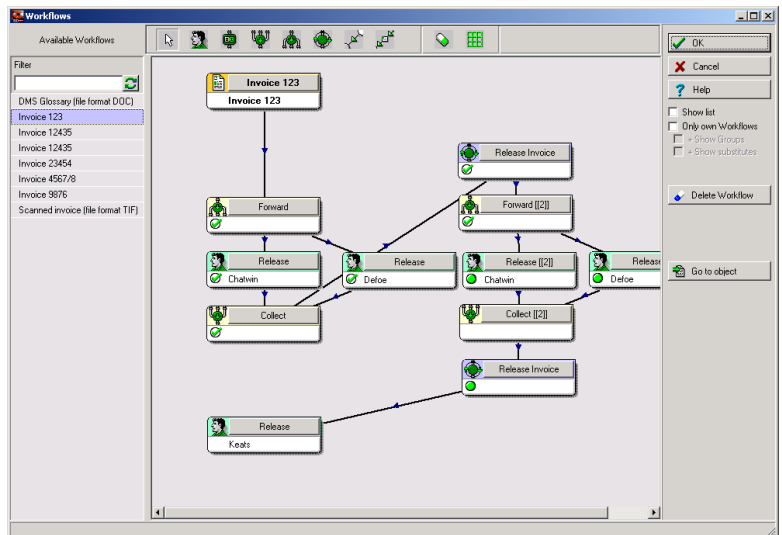


Fig. Cycle nodes running through for second time

The cycle node is duplicated after the second run-through of the workflow. Note that the cycle nodes comprise an open and a close node which must both have the same name. You can also determine the number of run-throughs. In the closing node define a start script in which, for example, you can request the results of the release in order to start a second run-through of the workflow if necessary.

## New options in person nodes

**Reset following nodes:** It may be necessary to enable this option if a branch of the workflow runs through a loop several times. This has the effect of resetting the "complete" status of all the following nodes, e.g. these nodes have the same status as on the first run-through. This option has become more or less redundant since it has since become possible to design real cycles. Remember: All loop designs in workflows should be set up using the new cycle nodes.

**2nd group:** This option is used if a user must belong to the 2nd group in order to receive workflow nodes. All node users are entered as the first group.

---

# System enhancements

## Tree view in the archive

When displaying documents in the Archive area you can choose between the traditional list view and a view incorporating a tree structure (tree view).

For this, activate the option *Use the tree view when starting next time* in *System settings, Options, View index card*.

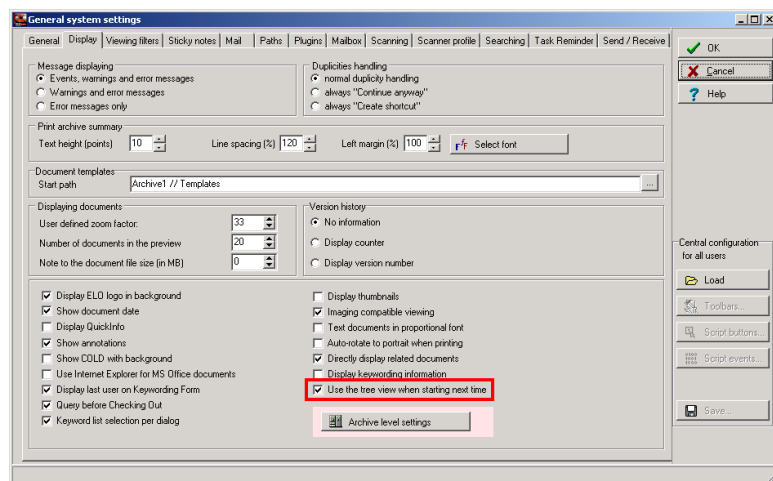


Fig. Activating the 'Tree view' option

Close your CLIENT after enabling this option, and restart **ELO**. The archive area will then be shown in *Tree view* mode.

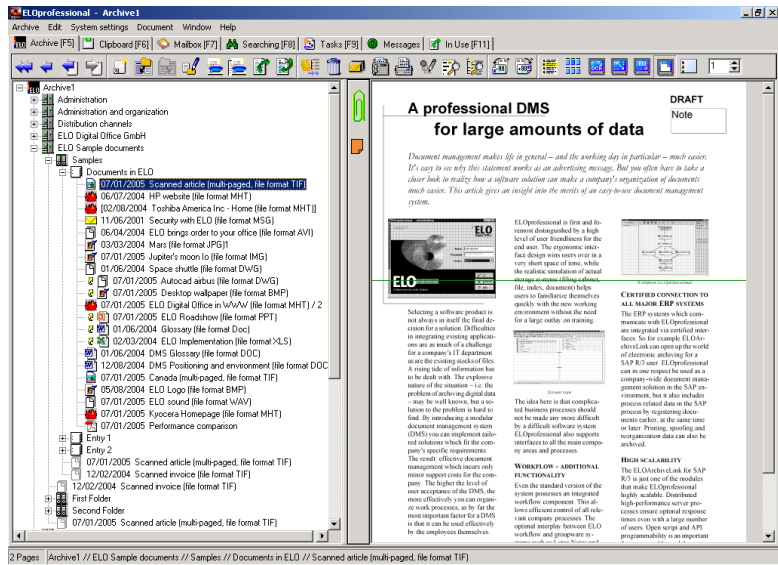


Fig. Tree view in the 'Archive' area

If you wish to reactivate the list view, deactivate the *Use the tree view when starting next time* option in **System settings, Options, View index card**. **ELO** must be restarted in order to reactivate the list view.

## View options in tree view

The keywording information taken from the keywording name for displaying ELO objects can be used in the tree view to add to information in the index lines.



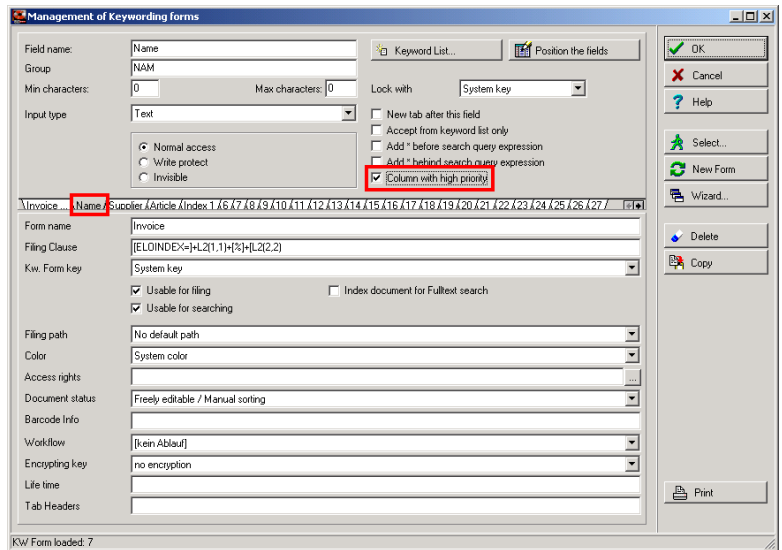


Fig. Setting object view for tree view

Activate the *Column with high priority* option in Management of keywording forms to display information in the tree view.

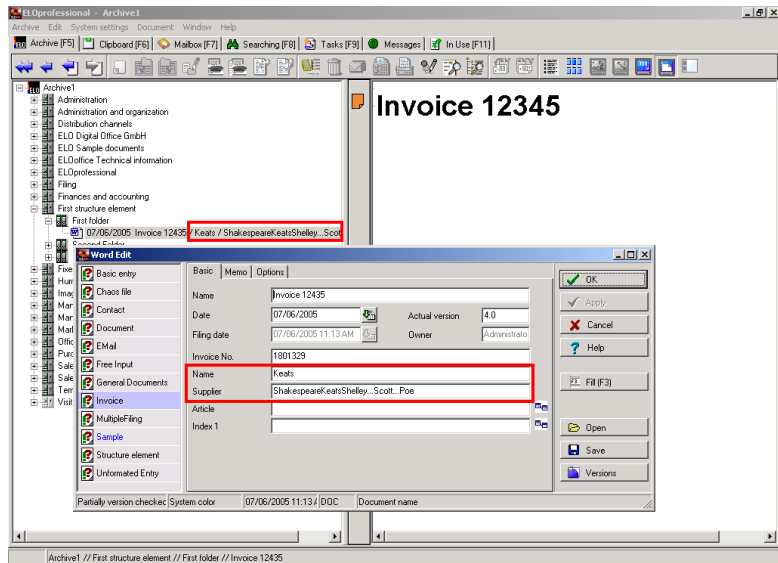


Fig. Displaying index information in tree view

The information will be shown in the left window in the *Archive* area.

## Multiple selection in tree view

In the *Archive* area it is possible to select multiple ELO objects, but only on the right-hand side of the main screen. The selected entries are ready for further actions.

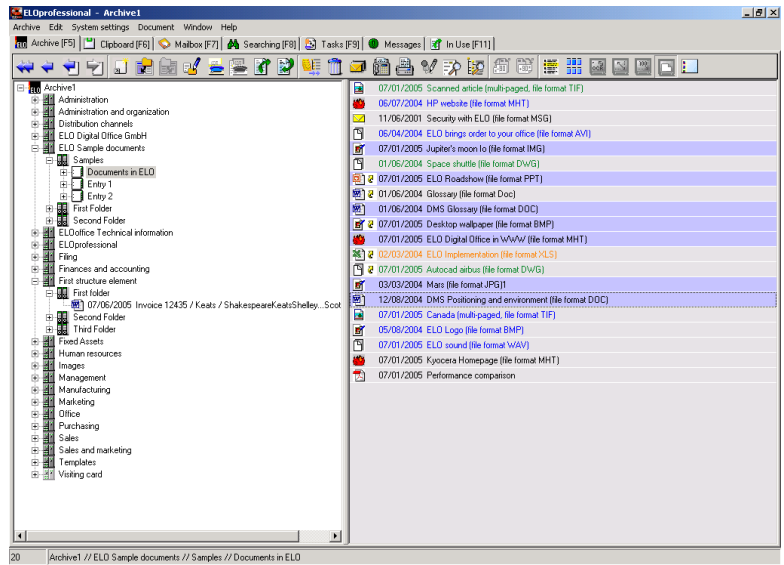


Fig. Multiple selection in tree view

## Document templates

Personal and global document templates are filed in the archive. You can set this folder via *System settings*, *Options*, *View index card*, *Document templates* option, *Start path*.

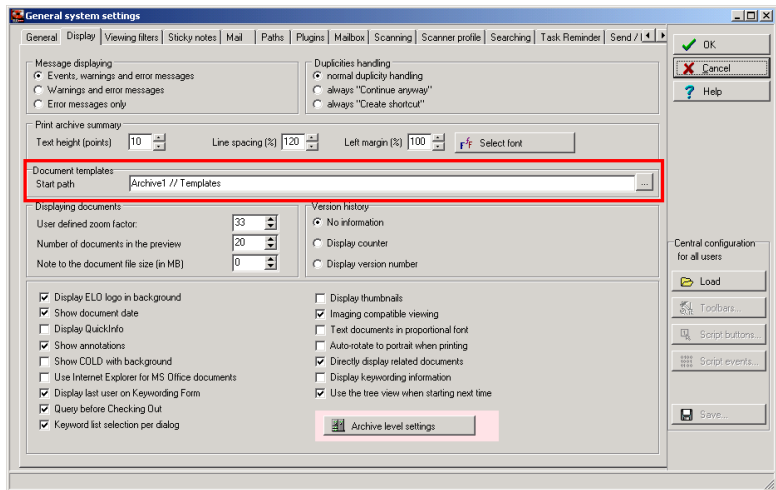
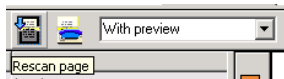


Fig. Document template settings

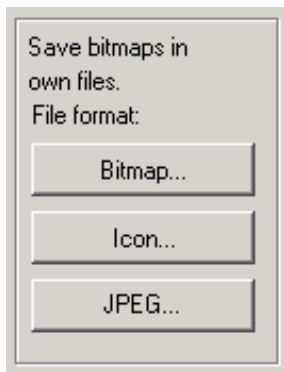
## Rescan page



Click on *Rescan page* to repeat the scanning procedure for TIFF files in the mailbox.

The pages selected in the mailbox are rescanned.

## Save icons



The icons used to show document entries in the archive can be saved separately. The options can be found under *System settings, Options, Display, Archive level settings* button.

Using the *Bitmap, Icon* or *JPEG* buttons you can select a folder on a system level in which you wish to save the icons.

Options, “Display” index card

You can see information about the performance of a program when displaying documents using the “Display” options.

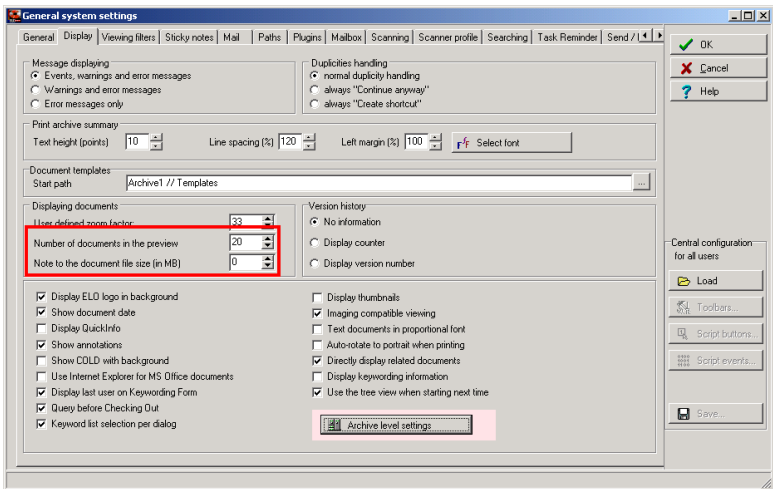


Fig. Options - 'Display' index card

Displaying documents

**Number of documents in the preview:** Here you can determine the number of documents to be displayed in the preview.

**Warning on the document size (in MB):** If the document activated in the archive exceeds the size specified here, a warning is shown so that the user can decide whether the document should be collected from the server, even though this would require a significant amount of time.

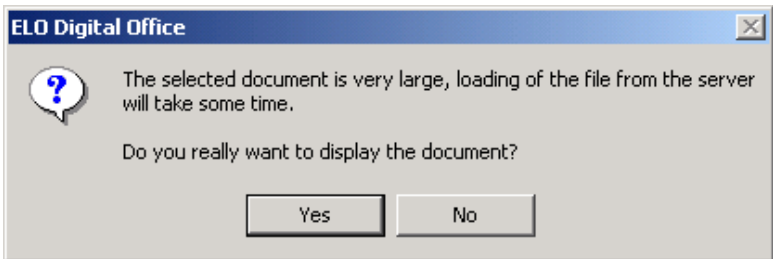


Fig. Warning on document size

## Options, “Display” index card

The Viewing filters options for file formats have been expanded.

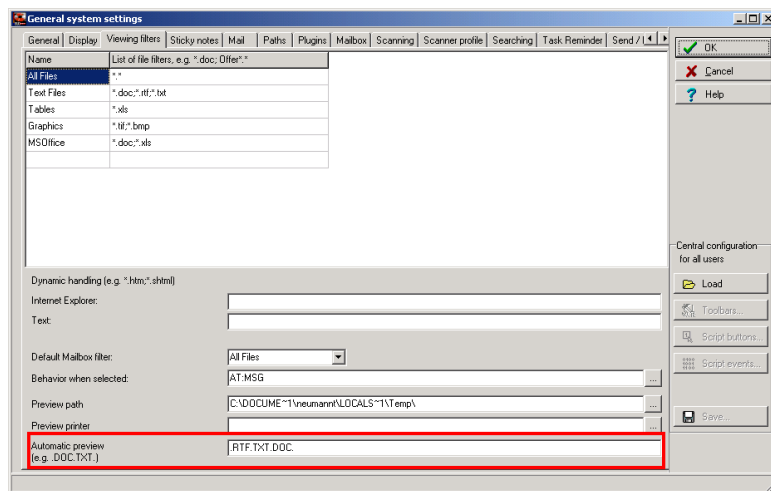


Fig. Display options with preview option for file formats

**Automatic preview:** The file formats are entered in the lines to be used in an automatic preview. The file extensions are separated by a full stop.

## Options, “Viewing filters” index card

Using the *Dynamic handling* option, files with the file extension entered (e.g. \*.pl) are displayed in Internet Explorer or in **ELO**.

**Dynamic handling:** Enter \*.pl in the input field if you wish to display a Perl file (\*.pl) as a text file in the archive. The individual entries are separated by a semicolon.

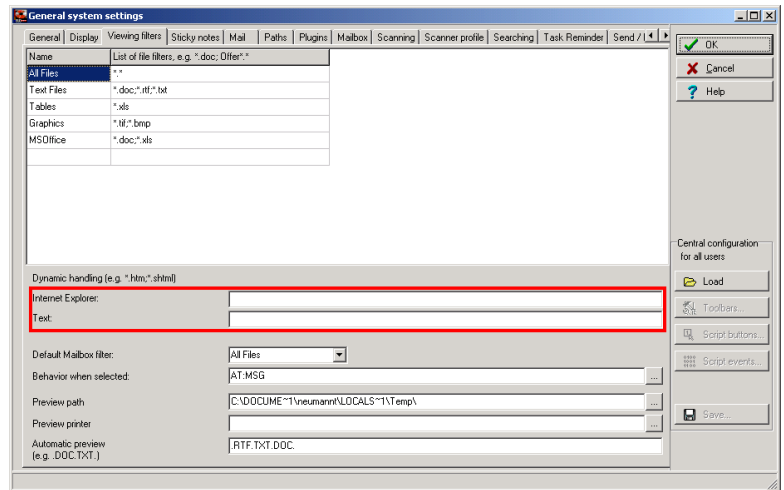


Fig. Assigning file extensions

## Options, “Mailbox” index card

**Request other shortcuts automatically in tree view:** If this option is selected, you can request other shortcuts to the filed document when filing documents from the Mailbox via the selection dialog box, after the document is filed.

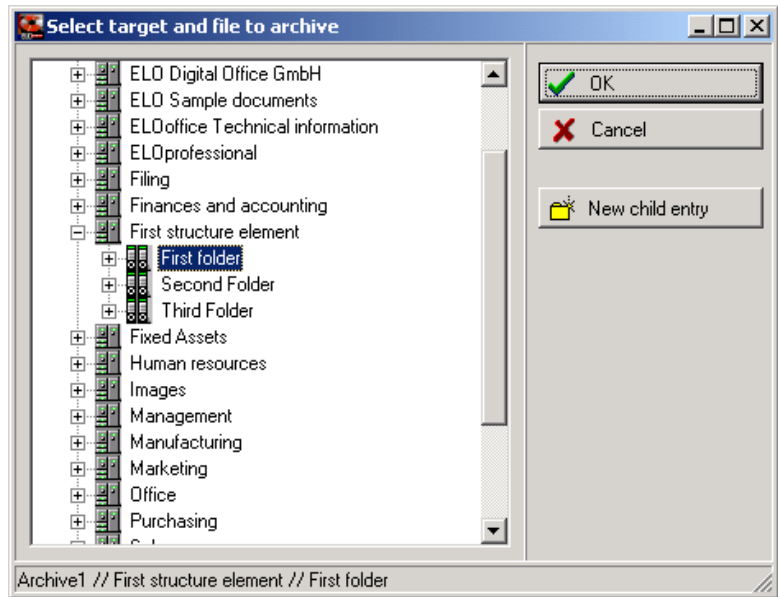
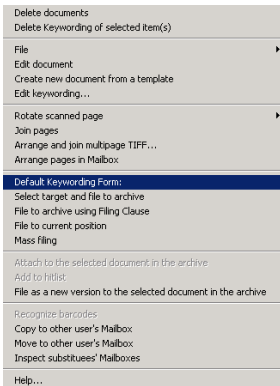


Fig. Creating shortcuts when filing using the selection dialog

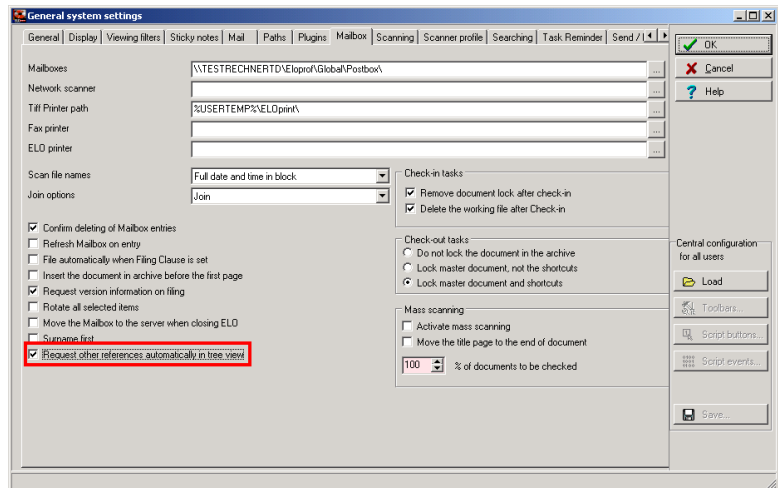


Fig. Option for creating other shortcuts when filing using the selection dialog

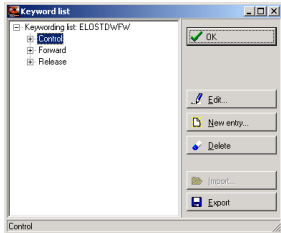


The *Request other references automatically in tree view* option must be enabled in order to open another dialog with which shortcuts can be created when filing.

## Keyword list selection per dialog

If you activate the option *Keyword list selection per dialog* in *System settings, Options, Display* index card, the keyword list will not be shown as a context menu.

The Keyword list dialog box opens, from which you can select the appropriate entries.

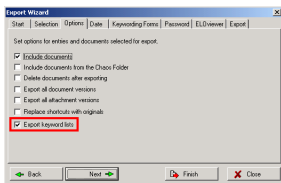


**Please note:** If you wish to accept your existing keyword lists, you can import them into an empty keyword list using the *Import* button. The *Import* option is only available if you have not yet made an entry in the keyword list.

## Export - exporting keyword lists

When exporting data and documents, Keyword lists can be selected on the Options index card (Archive menu, Export).

Existing keyword lists are exported and made available to the user again after importing the data.



## Embedded sticky notes

Sticky notes can also be affixed directly to a document. This feature is available for all raster graphic formats, e.g. TIFF, BMP, JPG, PNG, etc.

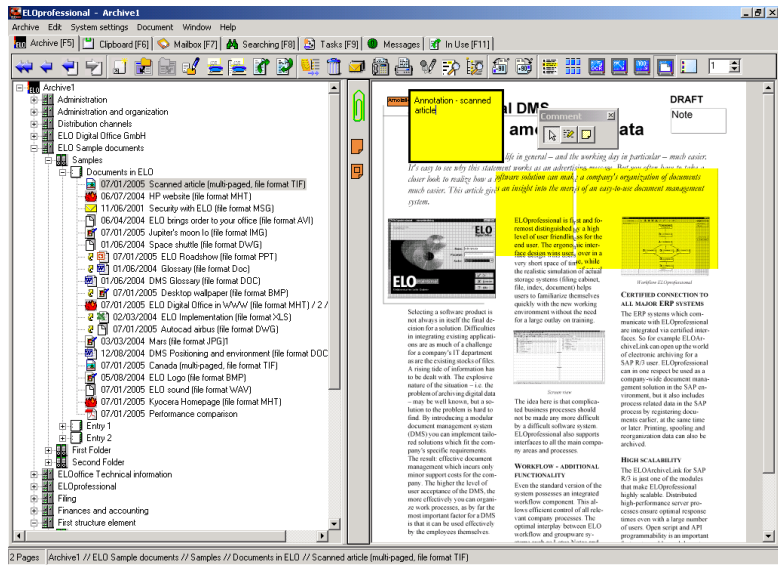


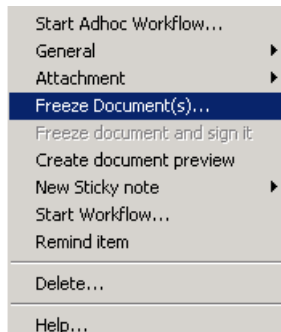
Fig. Embedded sticky notes

Embedded sticky notes can be edited, moved, made smaller, made larger and deleted on the document.

## Freeze document and sign it

This feature can be found in the Archive context menu. This feature is only available in **ELO** if a signature component has been installed.

A document is "frozen" and then signed.







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