ELOoffice 11

July 2020

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Introduction

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

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

Please note

We have made every effort to supply product documentation that is as accurate as possible. However, as we are continuously developing ELOoffice and produce multiple versions in parallel, the status of these programs changes very quickly. For this reason, there may be minor discrepancies between the descriptions and images in the manual and in the program.

We ask for your understanding if this occurs.

Conventions

This manual describes a large number of interactions, program dialogs, menus, and interfaces. The following conventions apply for this.

General information   Important information is displayed in a gray box with an information icon. The following types of notes exist:

Information: This is additional information that makes working with ELO easier.

Please note: This information should be noted to ensure the program runs without problems.

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

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

Example: Click *ELO > Configuration* and choose the *Display* option.

Keyboard shortcuts   Shortcuts are written in UPPER CASE. Keys pressed at the same time are indicated with a plus sign (+).

Example: CTRL + C

Bold   **Notes** and **headers** are highlighted in **bold** in the manual.

Courier   Program code, program outputs, inputs and scripts are written in `Courier` font.

Example: `MsgBox "Hello world!"`

Paths   This manual differentiates between three types of paths:

Navigation paths: These paths describe the order of buttons and menu items you click through to use certain functions. You can recognize navigation paths by the pointy brackets (>) and the italic font.

Example: Click the *ELO button > Configuration > Notes > Print margin notes*.

Filing paths: These paths describe filing paths within the ELO repository. Storage paths are indicated by a double slash (//).

Example: Save the document under *//Filing//Year//Month*.

Document and filing paths: These paths describe storage locations for files within the operating system. We indicate this by using backslashes (\).

Example: Save the document under *C:\Documents\Vacation*.

General information

What you can expect   We have written this manual so that you can start using the features of ELO as quickly as possible. It explains the first steps. In the introductory chapters, you will learn what you need to know to successfully work with ELO.

Functions   The *Function overview* summarizes all available ELO functions.

Dialog boxes   The *Dialog boxes* section explains the options and functions that you will find in the individual program dialog boxes of ELO. The information on the dialog boxes is **only** available in the online help.

Contents and index   A *table of contents* and an *index* give you access to the individual functions and topic areas in ELO.

Sample repository and repository template   This documentation uses a sample repository tailored specifically to our test scenarios. ELO comes with a repository template that differs from the repository used in this manual.

The following sections describe different topics and usage scenarios that make working with ELO easier. Please also read the notes in the appendix.

Installation

This chapter provides information on:

- Starting the installation
- Installation methods

Starting the installation

The installation program guides you through the ELO installation. The installation process depends on whether you have ELO as a DVD or whether you have a download version. If you purchased ELO as a DVD, continue on from *Start installation program (DVD)*. If you purchased ELO as a download, continue on from *Start installation program (download)*.

Information: Windows Internet Explorer must be installed to start the installer.

Start installation program (DVD)

Place the ELO DVD in your DVD drive.

The installation program should start automatically.

Alternative: If the installation program does not start automatically, open Windows Explorer and navigate to your DVD drive. Double-click *autostart.exe* to start the installation program.

After the installation program starts, read on from *Starting the installation*.

Start installation program (download)

Double-click the downloaded file.

The installation files are extracted automatically. The installation program then starts.

After the installation program starts, read on from *Starting the installation*.

Starting the installation

Perform the following steps before every installation as soon as you have started the installation program (see above).
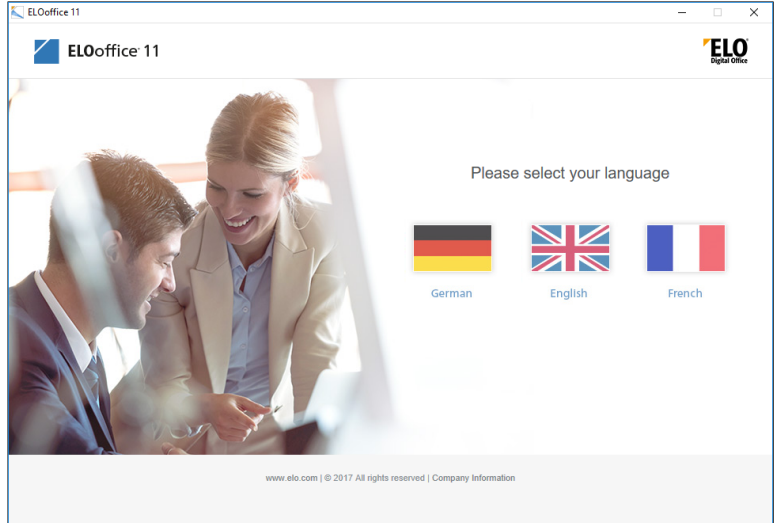
Fig. 1: Start installation program

1. After the installation program starts, select a language.
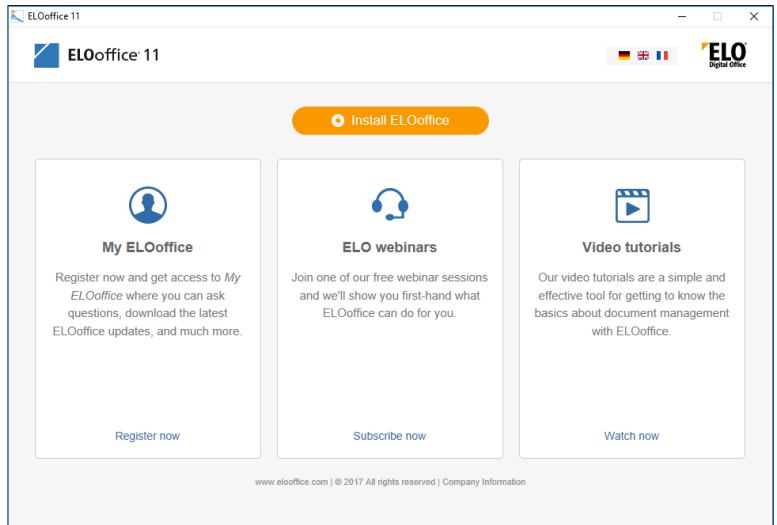
Fig. 2: Installation main page

The main page of the installation program opens.

2. Click *Install ELOoffice*.
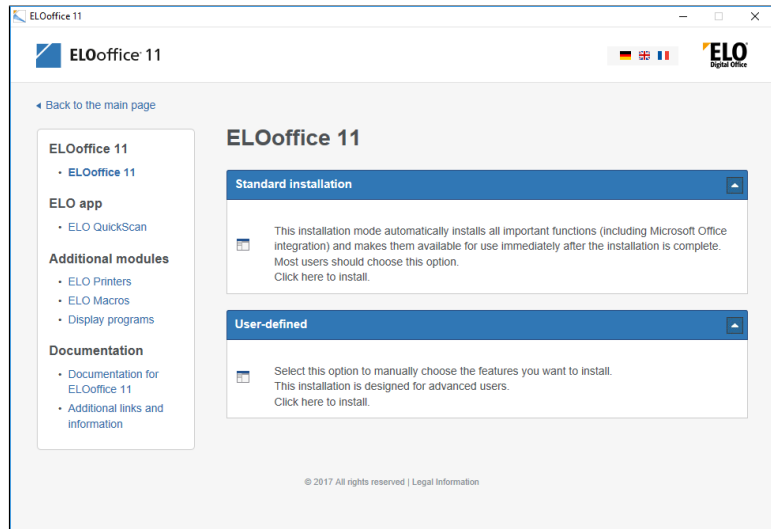
Fig. 3: Installation overview page

An overview page opens. Use this page to choose what you want to install (main program, printers, macros, or additional programs).

You can choose from two installation modes for the main program:

- **Standard installation**: The fast version. All important program components are installed automatically. This installation method is designed for when you only want to use ELO on a single computer.

- **User-defined**: You determine the program features you want to install. This mode also allows you to perform a network installation.

3. Start one of these methods by clicking *Standard installation* or *User-defined*.

Installation modes for a single workstation

The following table provides an overview of the two installation modes for single workstations.

For more information on the different installation modes, read the sections on *Standard installation* and *User-defined installation*. Read the section titled *Network installation* for more information on installing ELO on a network.

Standard installation	User-defined installation
Windows confirmation request	Windows confirmation request
InstallShield® Wizard starts	Confirm start of InstallShield® Wizard
	Confirm conditions for installation
License agreements: Please read carefully and confirm	License agreements: Please read carefully and confirm
	Installation information: Please read carefully and confirm
Enter serial number	Enter serial number
Local installation is selected automatically	Select the option for *Local installation*. Read the section on *Network installation* for information on how to install to the network.
	Select installation directory
	Select Postbox directory
	Select ArchivData directory
	Select/create the program folder
	Select additional installation options
	Select whether you want to install the ELO printers and ELO Macros
InstallShield® Wizard for ELO Macros starts	InstallShield® Wizard for ELO Macros starts
	Select whether you want to install all ELO Macros
	Start the ELO Macros installation
	Starts the installation program for the selected ELO printer(s)
	Assign a name for the selected ELO printer(s)
	Start the ELO printer(s) installation
Activation and registration	Activation and registration

Standard installation

If you started the installation program and decided on the standard installation, perform the installation as follows:

Fig. 4: Select standard installation

Start

1. Click the box for *Standard installation*.

The *User Account Control* dialog box appears.

2. Click *Yes* to confirm.

The InstallShield® Wizard runs. The actual installation process starts.

Fig. 5: ELOoffice License Agreements

The *License Agreements* dialog box appears.

3. Carefully read through the License Agreement and click *Yes* to confirm.
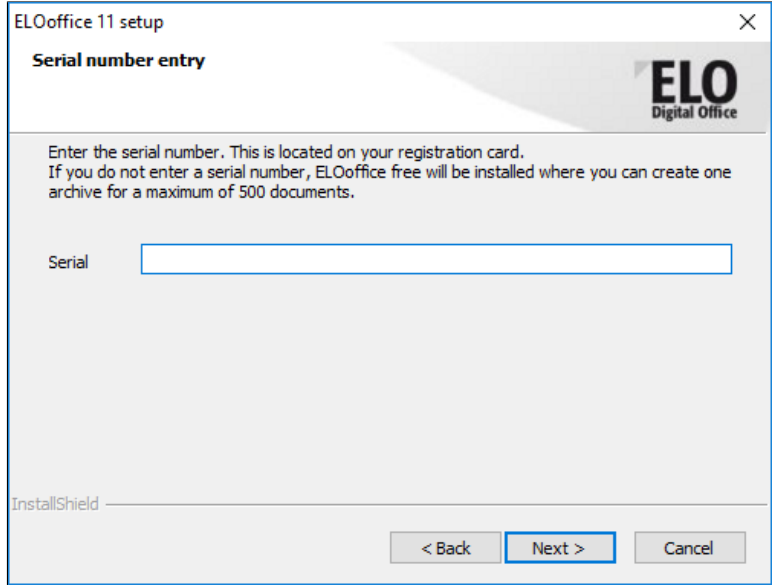
Fig. 6: Entering a serial number

4. Enter the serial number. You can find your serial number on the license certificate.

5. Click *Next*.

ELO is installed to your computer.

Installation folder:

`C:\Program Files (x86)\ELOoffice`

Postbox directory:

`C:\ProgramData\ELO   Digital   Office\ELOof-fice\Postbox`

ArchivData directory:

`C:\ProgramData\ELO   Digital   Office\ELOof-fice\ArchivData`

After installing the main program, the installation for the ELO printers and ELO Macros starts.
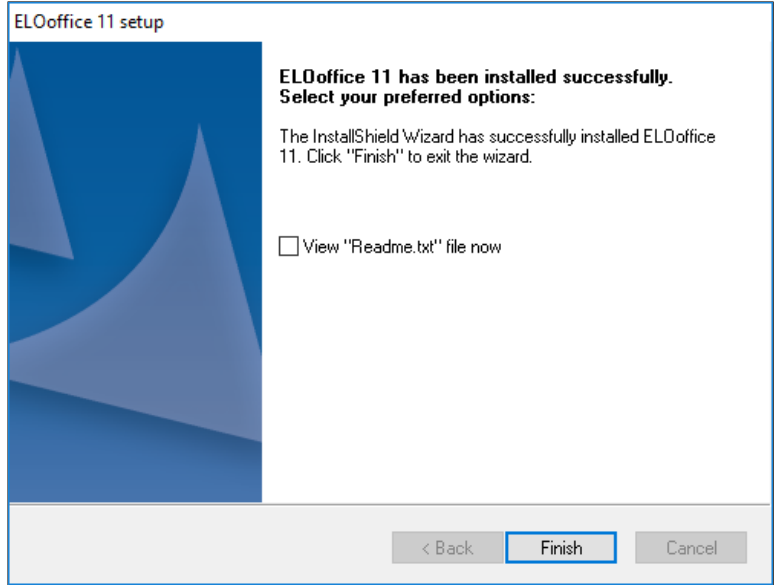
Fig. 7: Installation complete

6. Select whether you want to read the readme file.

7. Click *Finish* to complete the installation.

⚠️ **Please note**: You must activate ELOoffice to use its full range of functions.

Activation and registration

8. Start ELOoffice.
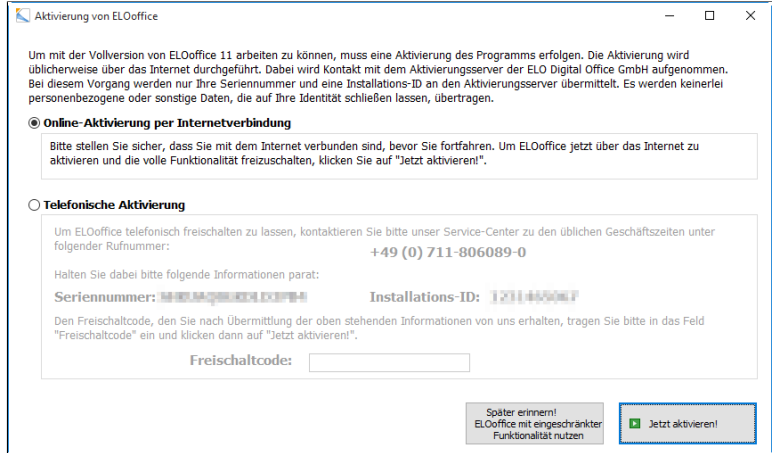
Fig. 8: ELOoffice activation

The *ELOoffice activation* dialog box appears the first time ELO starts.

9. Select one of the following options:

- **Activate online**: Your serial number is checked via the Internet.
- **Activate by phone**: You will receive an unlock code by telephone.

10. Click *Activate now*.

Alternative: Click *Remind me later! Continue to use test version*. ELO then runs as a test version.

The dialog box closes. Now you can use ELO.

Information: Don't forget to register your ELO version. Registered customers have access to the *My ELOoffice* area on our website. The *My ELO* area contains additional information, downloads, and much more. The menu items *Register ELOoffice* and *My ELOoffice* are located in the ELO menu.

Refer to the chapter *Basics and examples of use* for further information on starting ELO.

User-defined installation

If you started the installation program and opted for the user-defined installation, perform the installation as follows:
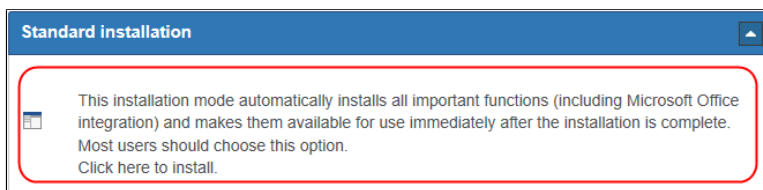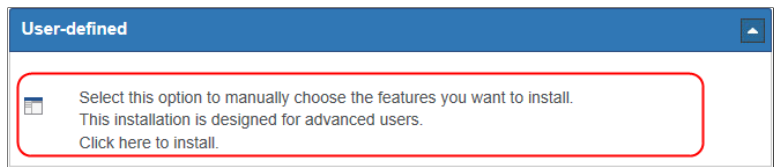

Fig. 9: Select standard installation

Starting the installation

1. Click the box for *User-defined*.

The *User Account Control* dialog box appears.

2. Click *Yes* to confirm.
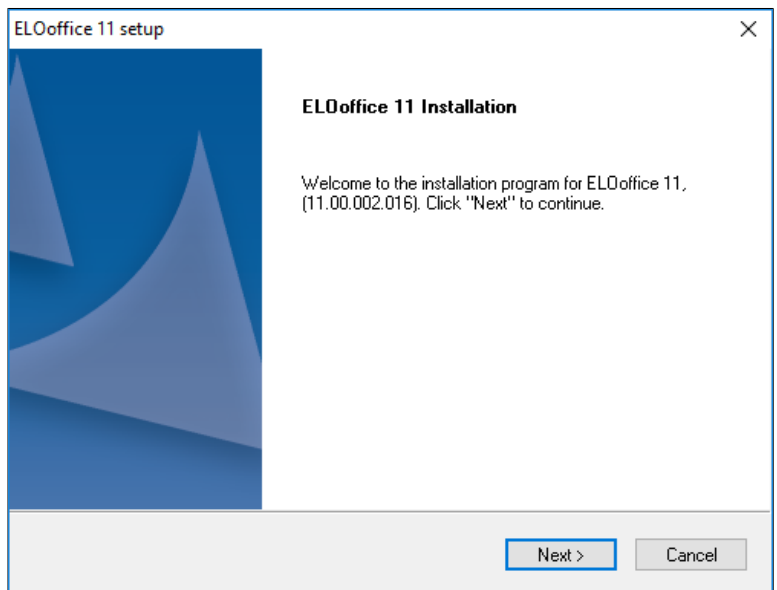
Fig. 10: Starting the installation wizard

The InstallShield® Wizard starts the installation process.

3. Click *Next*.
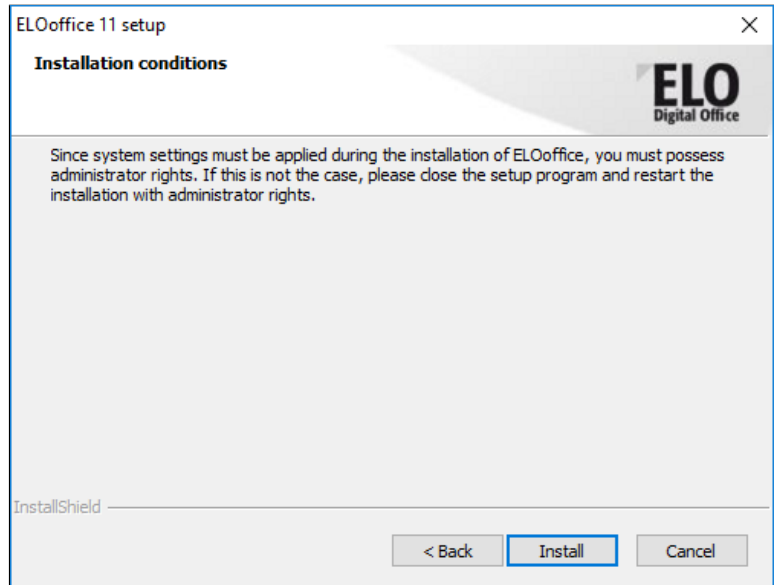
Fig. 11: Notification about permissions required for installation
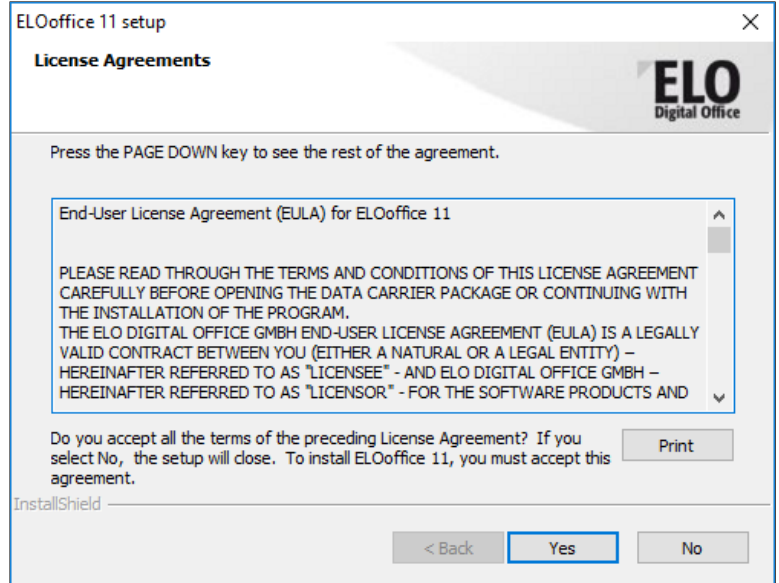
4. Click *Install*.
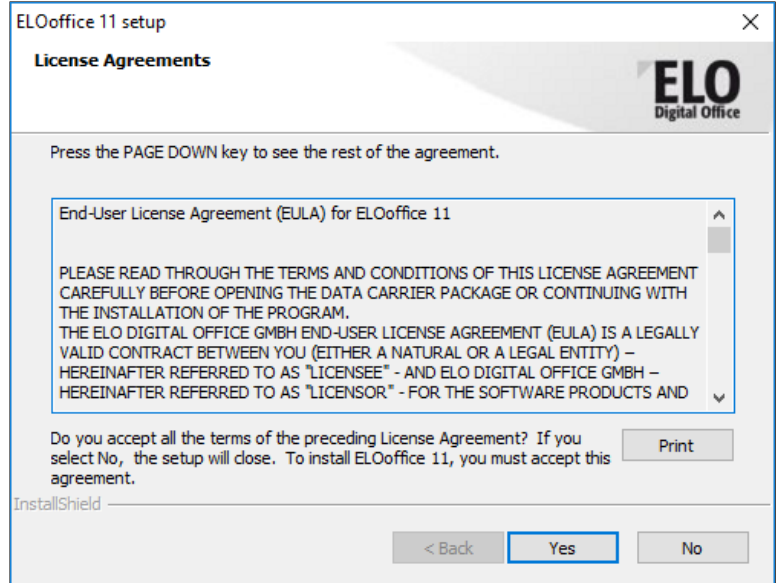
Fig. 12: ELOoffice License Agreement

The license agreements for ELO are displayed.

5. Carefully read through the license agreements and click *Yes* to confirm.
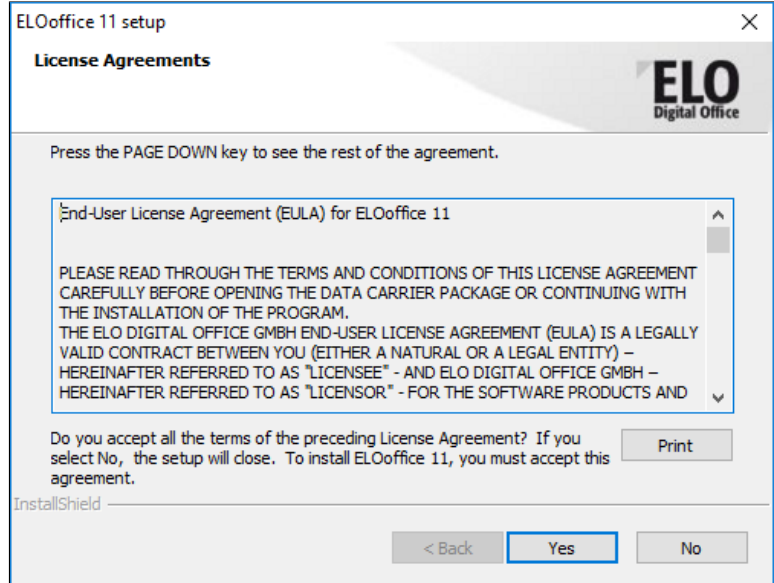
Fig. 13: Important installation notes

6. Carefully read through the installation notes and click *Next* to continue.
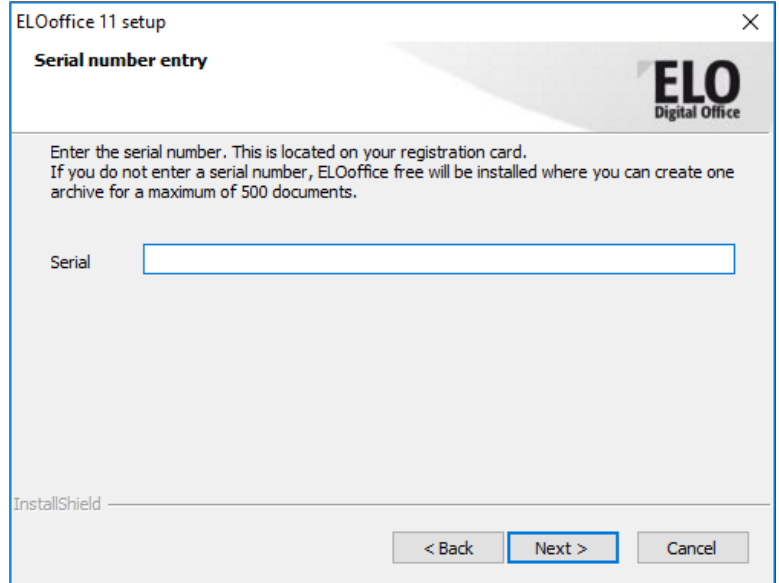
Fig. 14: Entering a serial number

7. Enter the serial number. You can find your serial number on the license certificate.
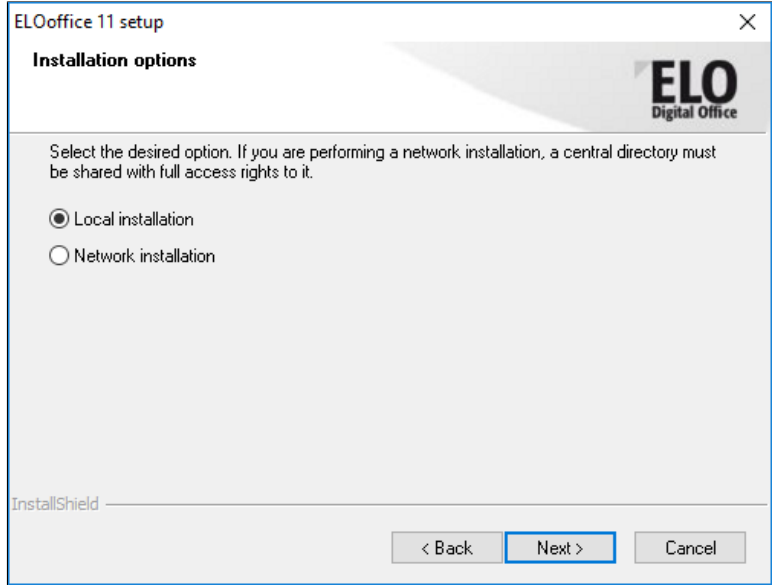
Fig. 15: Selecting local or network installation

You can choose between a *Local installation* and a *Network installation*.

Information: This section describes the *Local installation*. For the network installation, read the section titled *Installation on a network*.

8. Click *Next*.
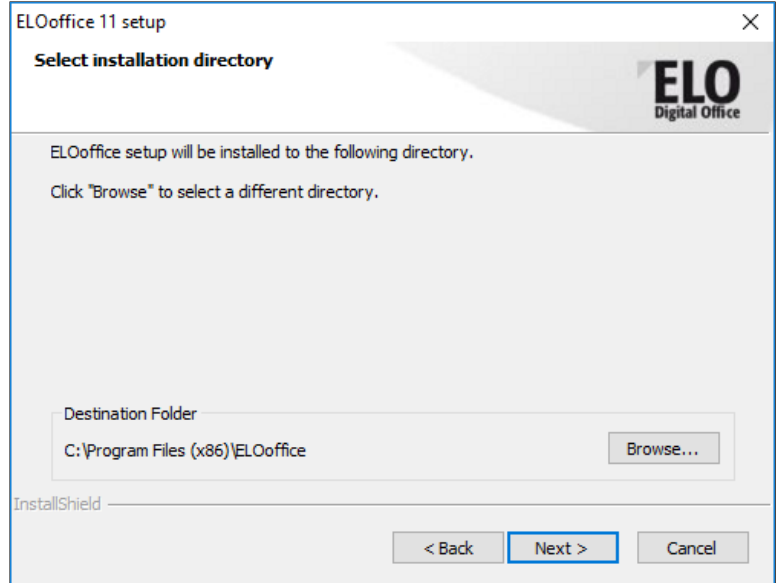
Fig. 16: Installation folder

9. Choose the directory that you want to install ELO to. Click *Browse* to select a target folder.

The default installation directory is:

`C:\Program Files (x86)\ELOoffice`

10. Once you have chosen a directory, click *Next*.
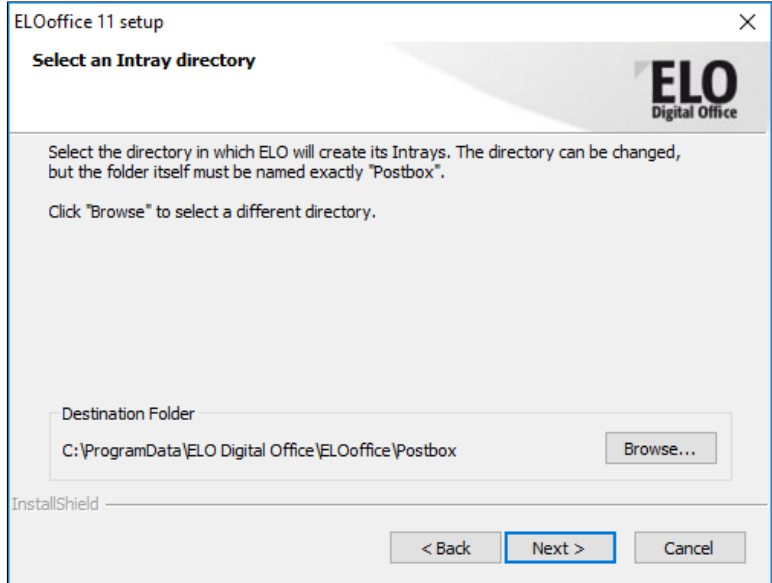
Fig. 17: Postbox directory

11. Select the directory that you want to create the Postbox directory in. Click *Browse* to select a target folder.

By default, ELO creates a Postbox directory under:

```
C:\ProgramData\ELO    Digital    Office\ELOof-
fice\Postbox
```

12. Once you have chosen a directory, click *Next*.
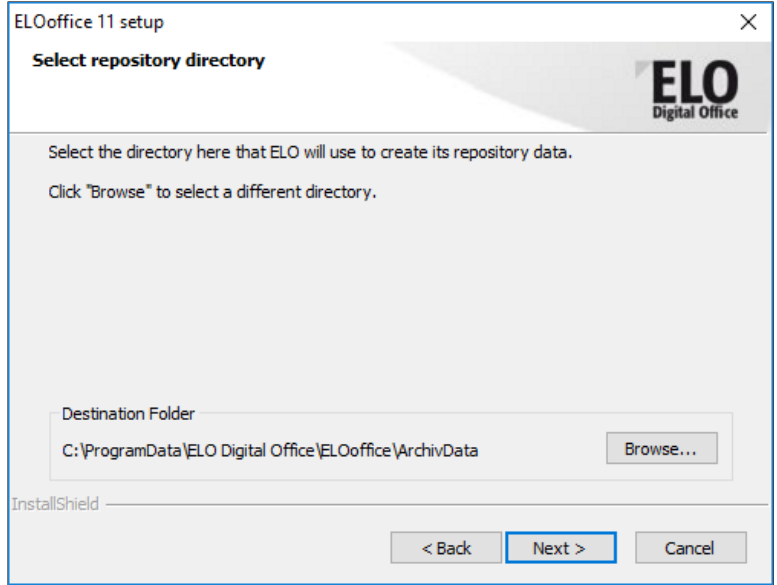
Fig. 18: ArchivData directory

13. Select the directory that you want to create the repository directory (*ArchivData*) in. Click *Browse* to select a target folder.

By default, ELO creates the repository data directory under:

```
C:\ProgramData\ELO    Digital    Office\ELOof-
fice\ArchivData
```
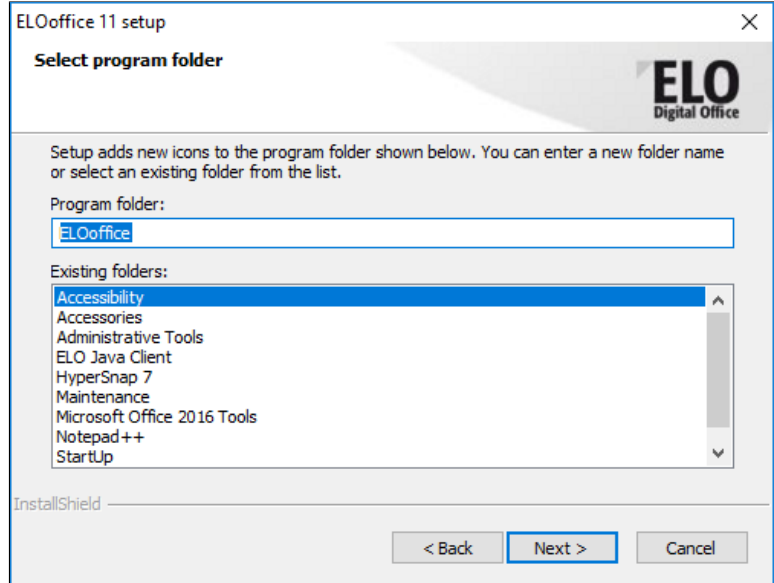
Fig. 19: Program folder

14. Select a program folder and click *Next*.
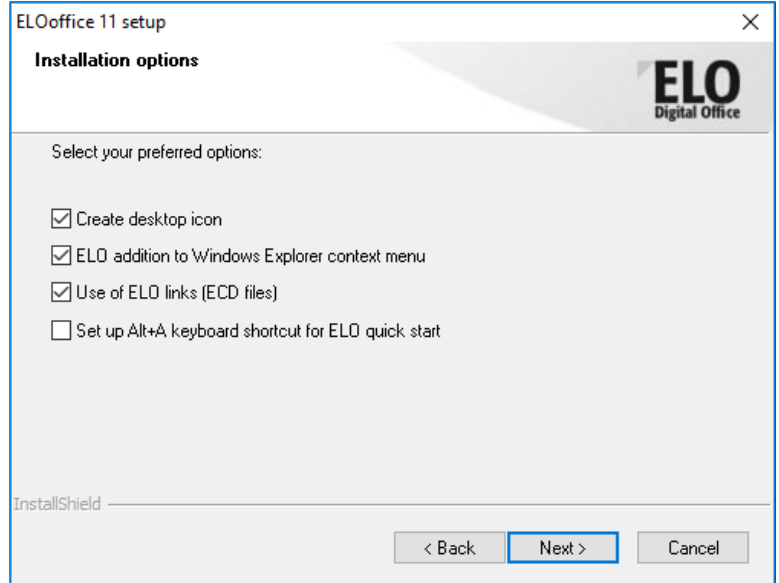
Fig. 20: Installation options

15. Select the options for installation and click *Next*.

ELO is installed to your computer.
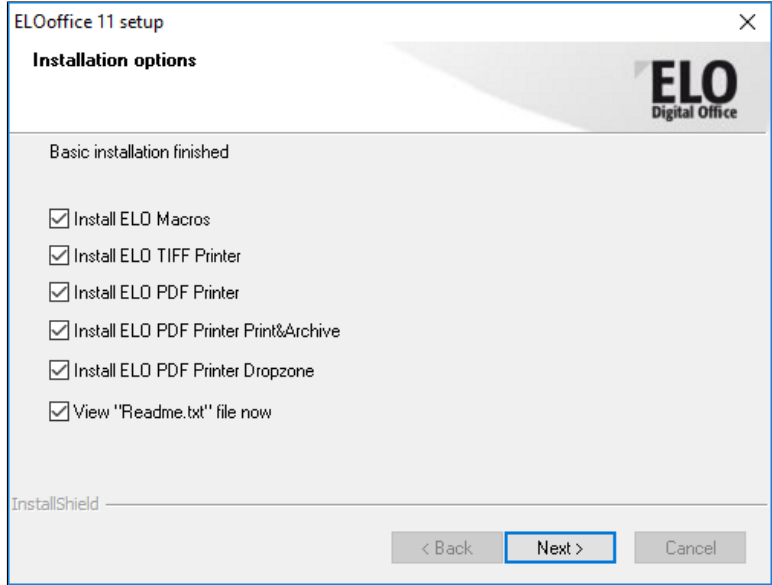
Fig. 21: Selecting printers and macros to install

16. After installing the main program, additional options can be selected, such as installing the ELO printers and ELO Macros.

Information: Printers and macros can be installed later as needed.

17. Once you have made your selection, click *Next*.

Install macros   If you have chosen the option to *Install ELO Macros*, the macro installation wizard starts.
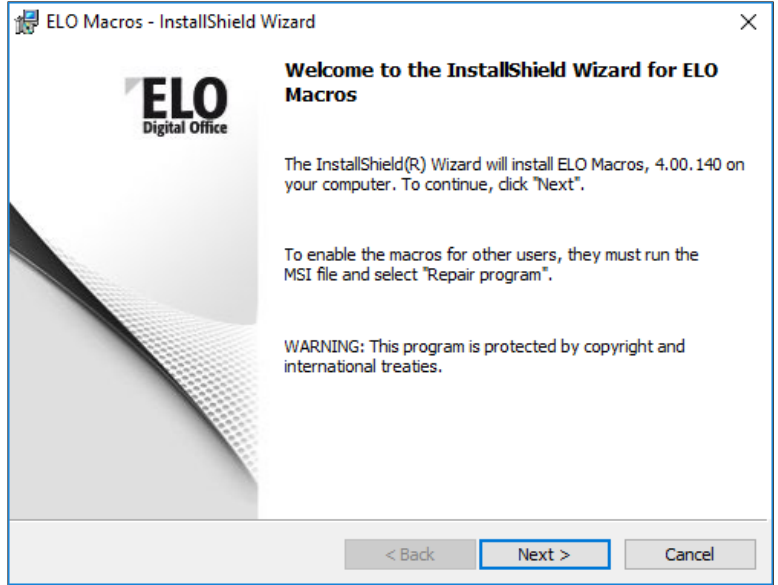
Fig. 22: Macro installation wizard

18. Click *Next*.

The macro installation starts.
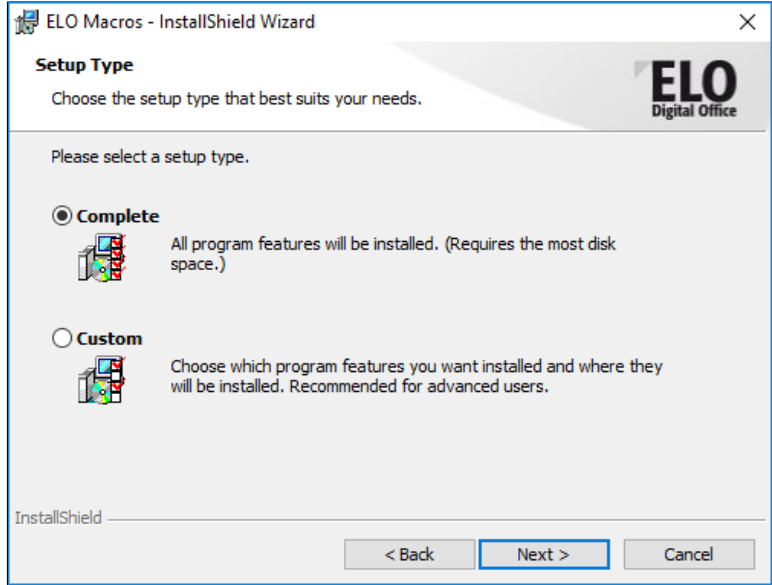
Fig. 23: Choose setup type

19. Select the complete or custom installation for the macros. If you choose the custom installation, you can define which macros you want to install later on. We chose the option *Complete*.

20. Once you have made your selection, click *Next*.
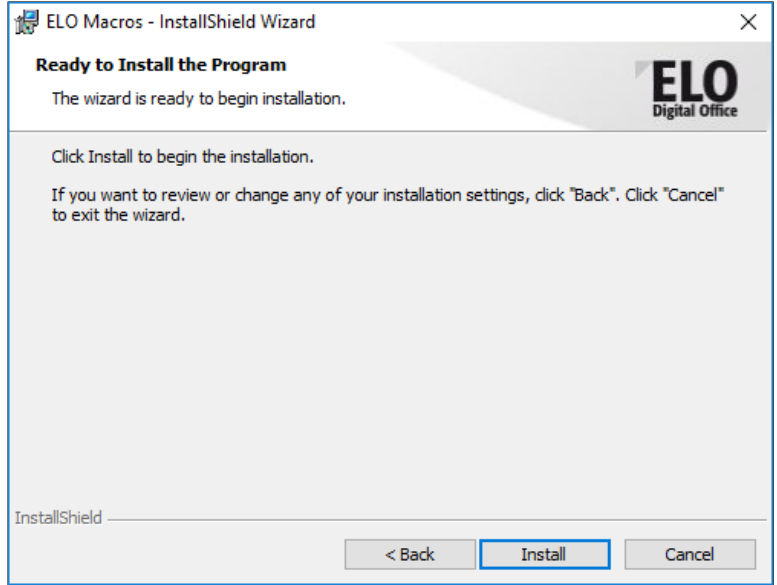
Fig. 24: Start the macros installation

21. Click *Install*.

The macros are installed.

Please note: You require the .NET Framework 2.0 for the Outlook macro to work. In Windows, enable the framework by navigating to *Control Panel > Programs > Turn Windows features on or off > .NET Framework 3.5 (includes .NET 2.0 and 3.0)*.
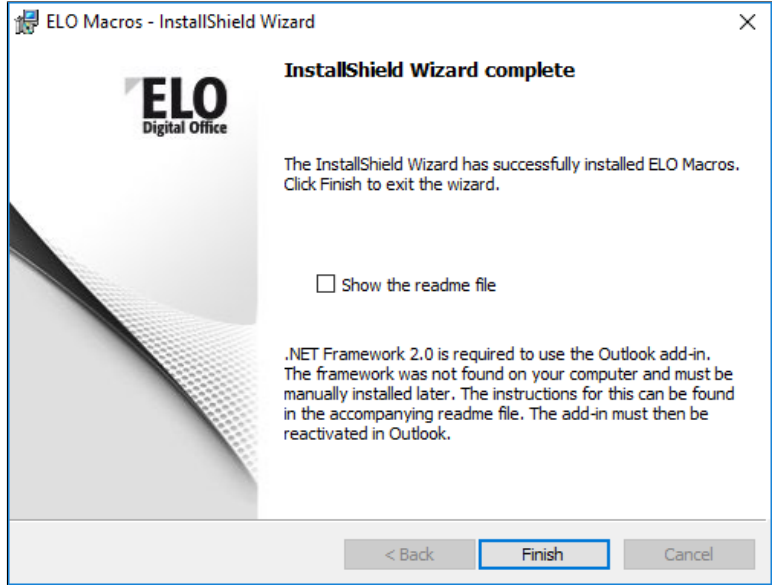
22. Select whether you want to view the readme file and then click *Finish*.

Install ELO TIFF Printer
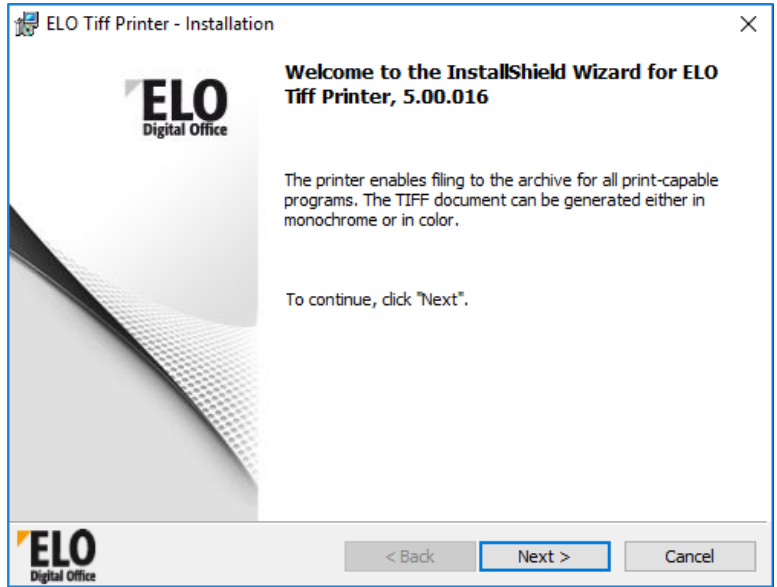
Fig. 26: Install ELO TIFF Printer

If you chose the option *Install ELO TIFF Printer*, the ELO TIFF Printer installation wizard starts.
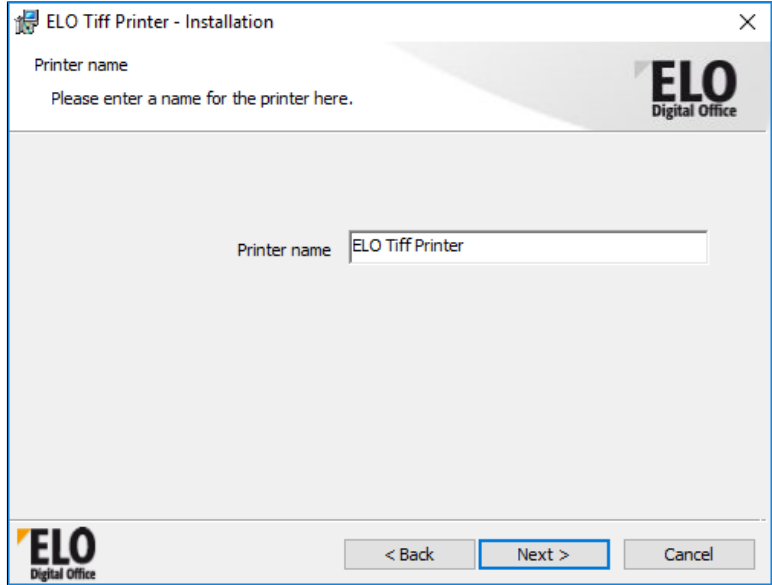
Fig. 27: Name of the ELO TIFF Printer

23. Select a name for the ELO TIFF Printer and click *Next* to confirm.
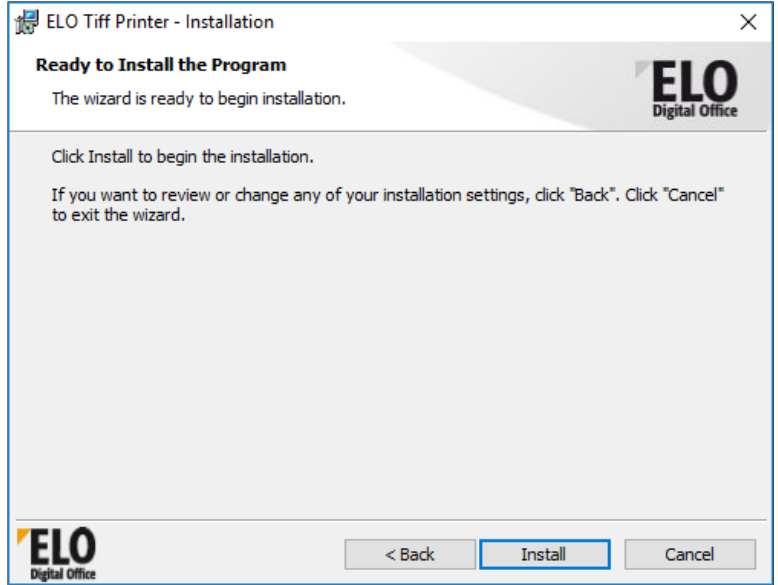
Fig. 28: Starting the ELO TIFF Printer installation

24. Click *Install*.

The ELO TIFF Printer is installed.
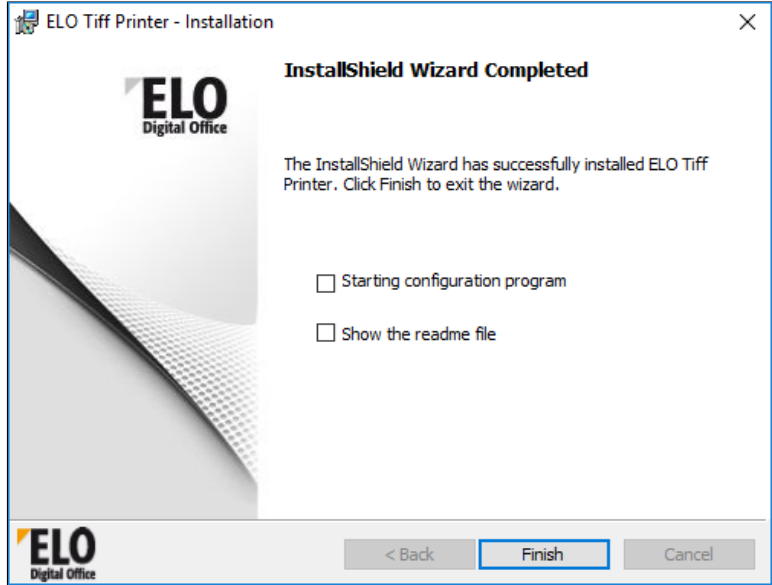
Fig. 29: Completing the ELO TIFF Printer installation

25. Select the options you want and then click *Finish*.

Install ELO PDF Printer
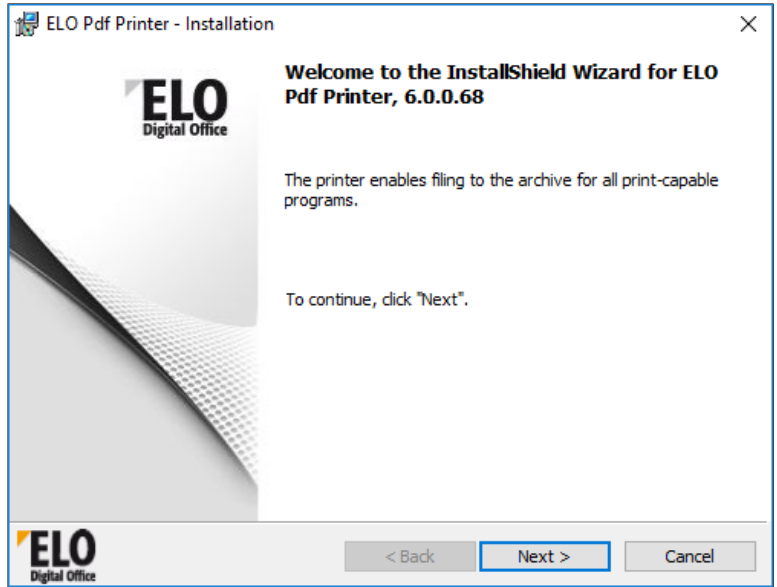
Fig. 30: Install ELO PDF Printer

If you chose the option *Install ELO PDF Printer*, the ELO PDF Printer installation wizard starts.

26. Click *Next* to start the installation process.
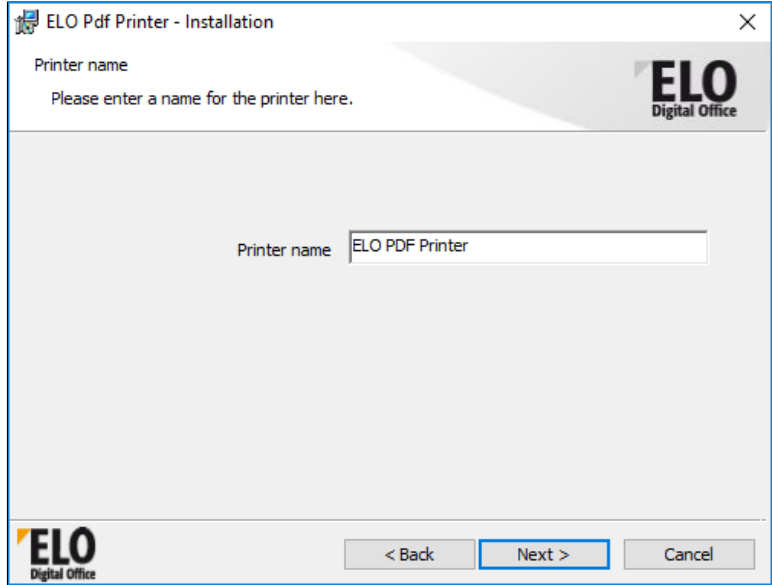
Fig. 31: Name of the ELO PDF Printer

27. Select a name for the ELO TIFF Printer and click *Next* to confirm.
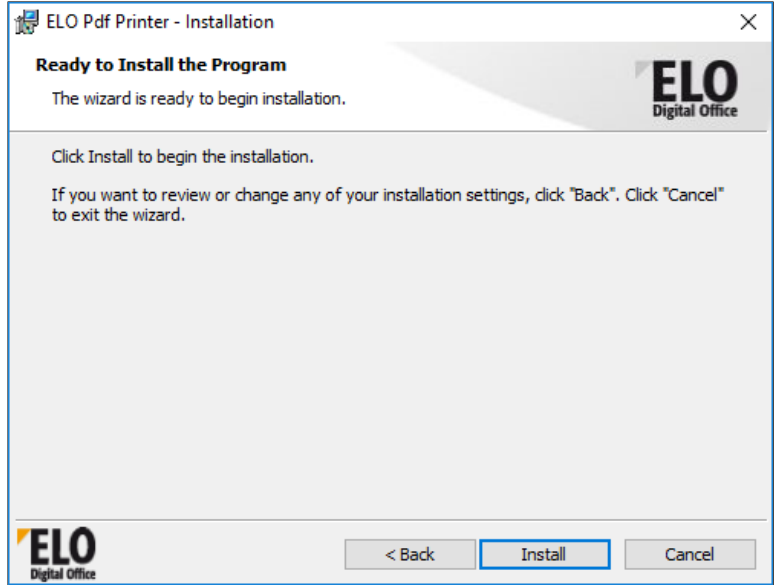
Fig. 32: Starting the ELO PDF Printer installation

28. Click *Install*.

The ELO PDF Printer is installed.
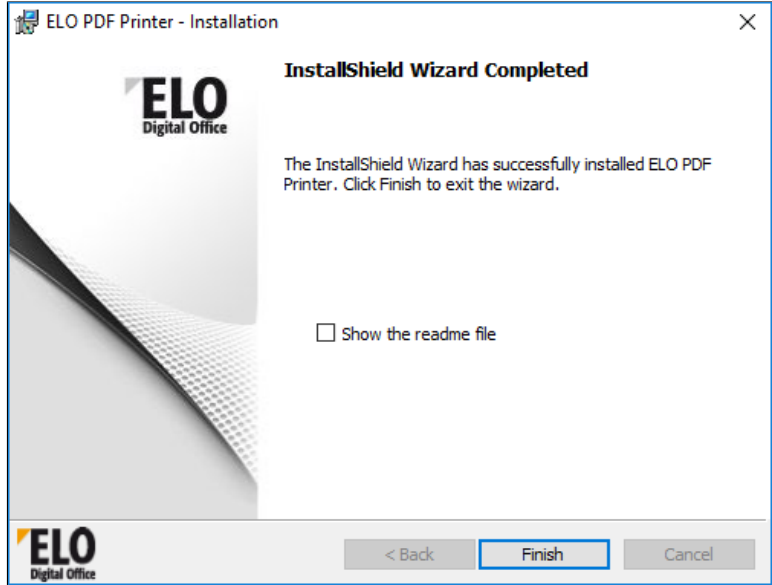
Fig. 33: Confirmation option for the ELOoffice readme file

29. Select whether you want to view the readme file. Click *Finish*.

**Installing the ELO PDF
Printer Print&Archive**
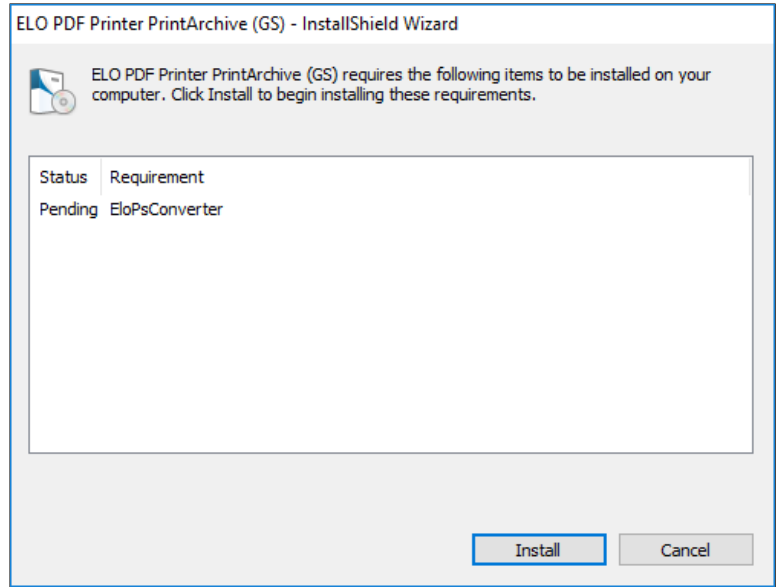
Fig. 34: Installing the EloPsConverter for the ELO PDF Printer PrintArchive (GS)

30. Click *Install* to install the EloPsConverter for the ELO PDF Printer Print&Archive.
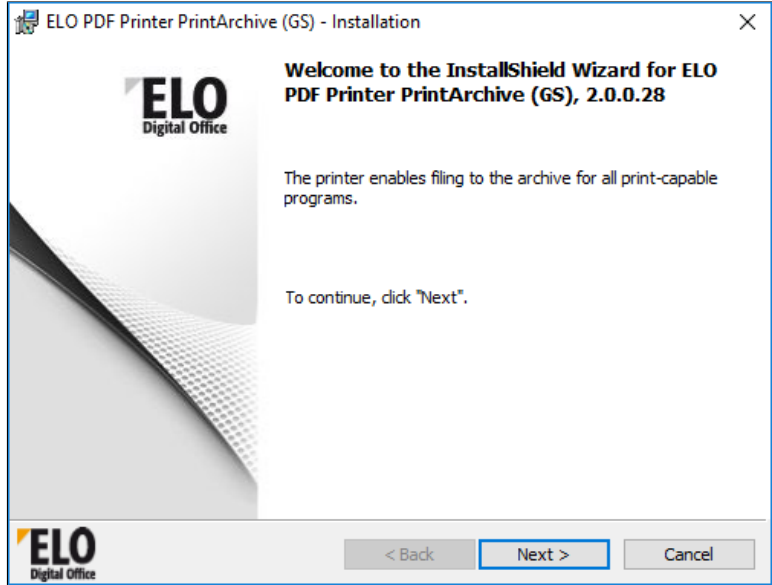
Fig. 35: Installing the ELO PDF Printer PrintArchive (GS)

If you chose the option *Install ELO PDF Printer Print&Archive*, the PDF Print&Archive Printer installation wizard starts.

31. Click *Next* to start the installation process.
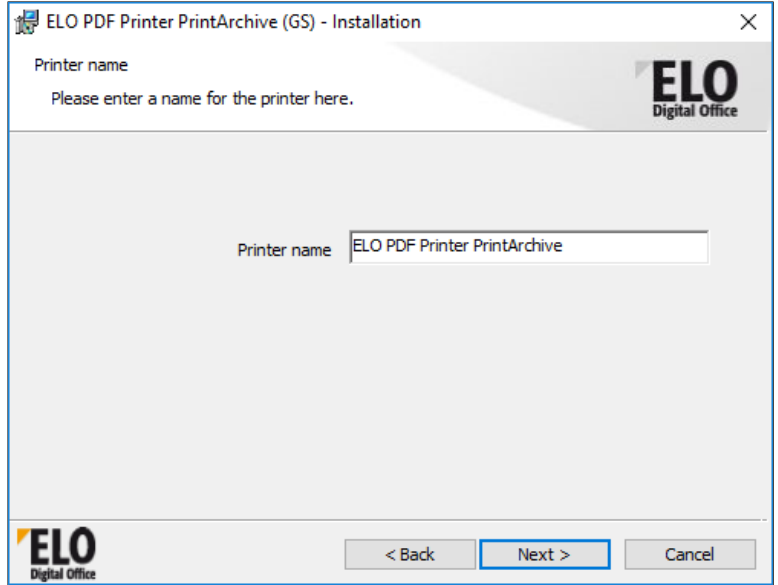
Fig. 36: Name of the ELO PDF Printer PrintArchive (GS)

32. Choose a name for the PDF Print&Archive Printer and confirm by clicking *Next*.
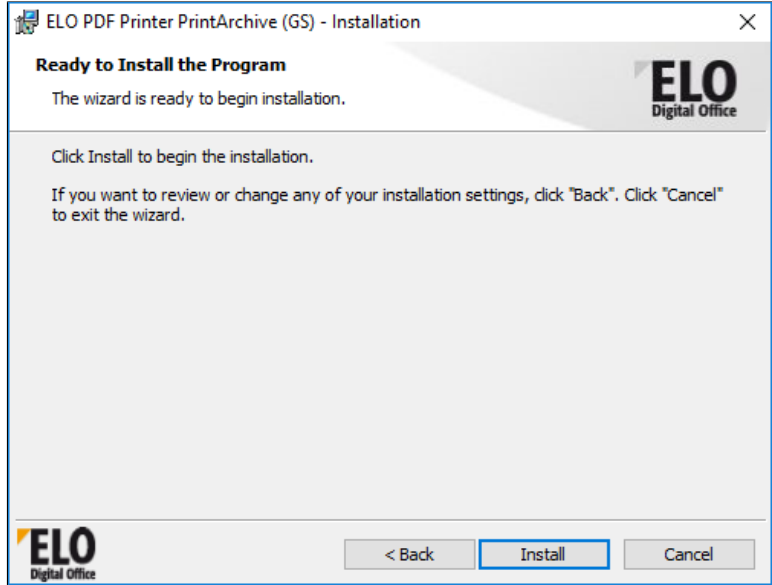
Fig. 37: Installing the ELO PDF Printer PrintArchive (GS)

33. Click *Install*.

The ELO PDF Printer PrintArchive (GS) is installed.
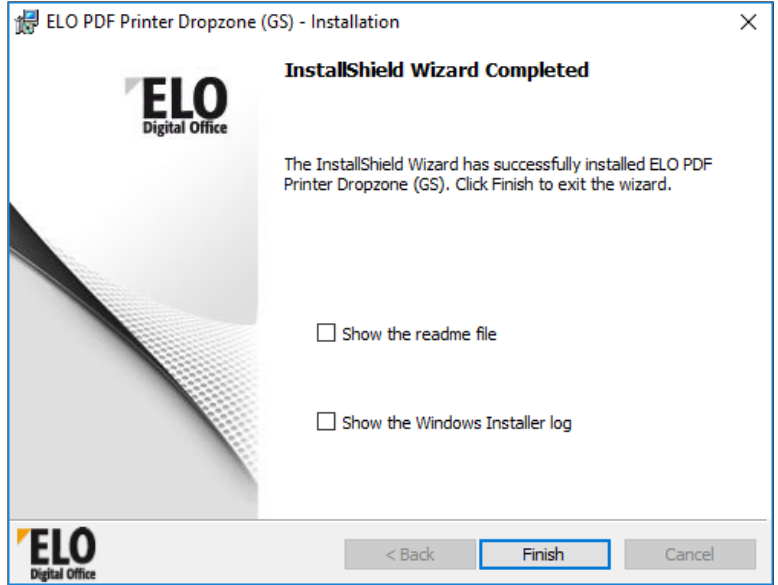
Fig. 38: Completing installation of the ELO PDF Printer PrintArchive (GS)

34. Select the options you want and then click *Finish*.

**Install ELO PDF Print-
er Dropzone**

ELO PDF Printer Dropzone (GS) - InstallShield Wizard

ELO PDF Printer Dropzone (GS) requires the following items to be installed on your computer. Click Install to begin installing these requirements.

Status	Requirement
Pending	EloPsConverter

Install   Cancel
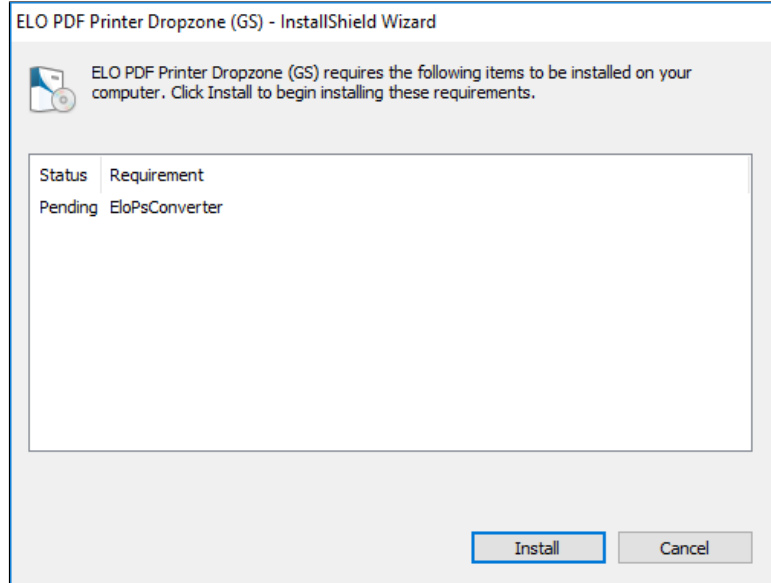
Fig. 39: Installing the EloPsConverter for the ELO PDF Printer Dropzone (GS)

35. Click *Install* to install the EloPsConverter for the ELO PDF Print-
er Dropzone (GS).
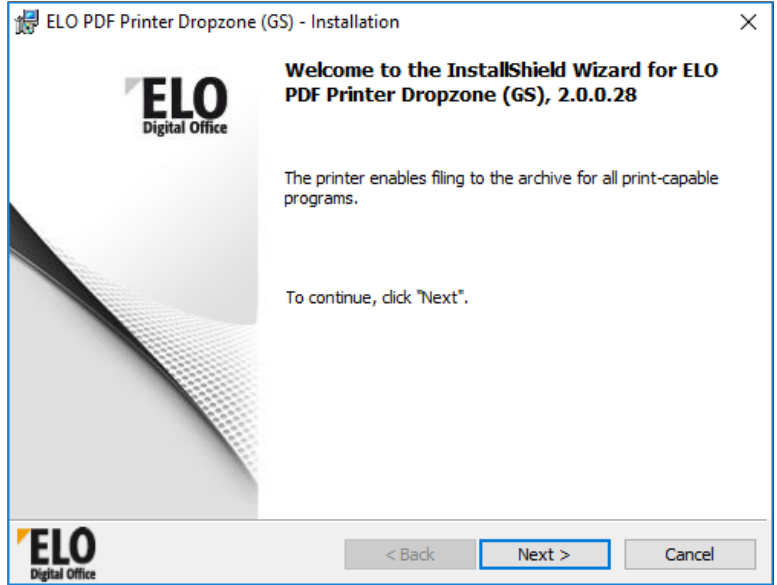
Fig. 40: Installing the ELO PDF Printer Dropzone (GS)

If you chose the option *Install ELO PDF Printer Dropzone (GS)*, the ELO PDF Printer Dropzone (GS) installation wizard starts.

36. Click *Next* to start the installation process.
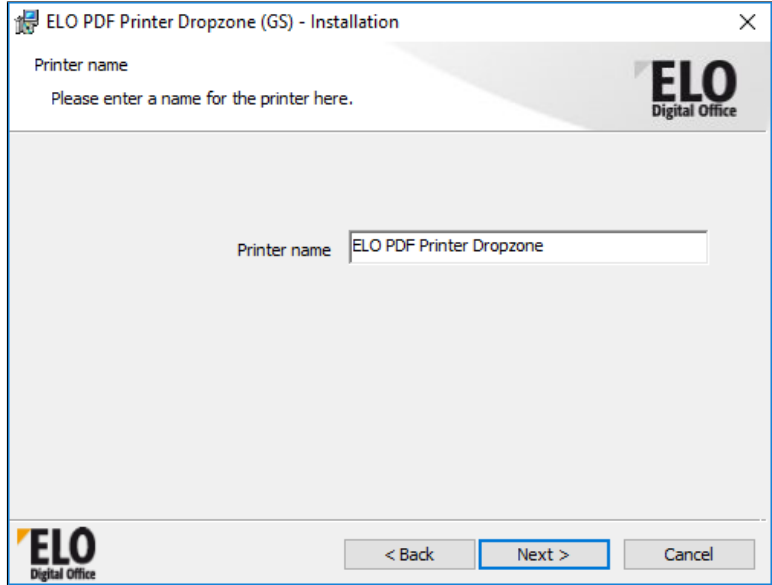
Fig. 41: Name of the ELO PDF Printer Dropzone (GS)

37. Select a name for the ELO PDF Printer Dropzone (GS) and click *Next* to confirm.
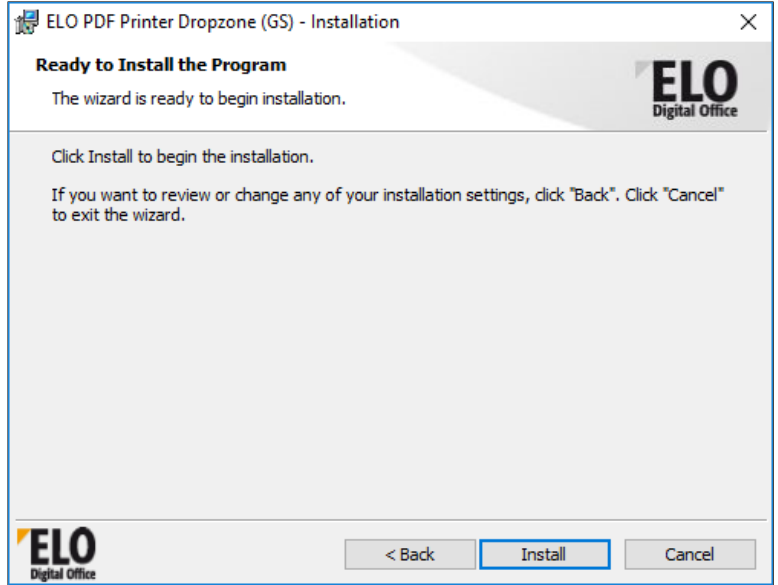
Fig. 42: Installing the ELO PDF Printer Dropzone (GS)

38. Click *Install*.

The ELO PDF Printer Dropzone (GS) is installed.
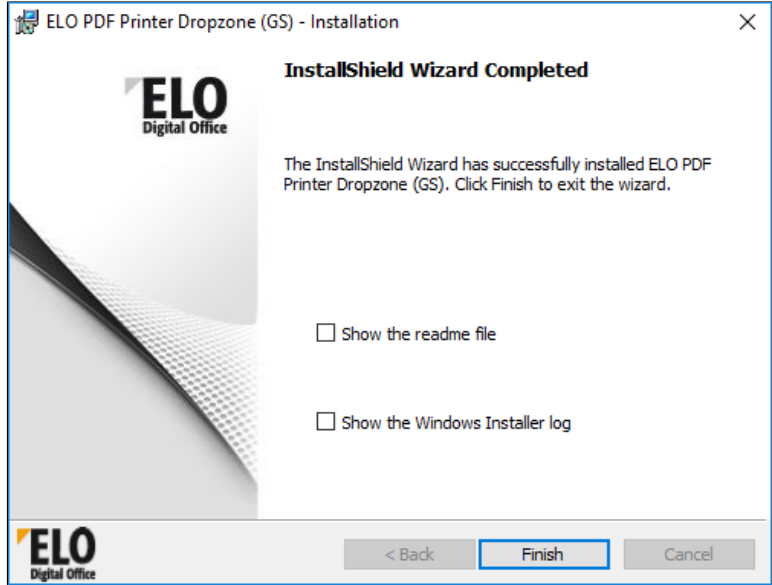
Fig. 43: Completing installation of the ELO PDF Printer Dropzone (GS)

39. Select the options you want and then click *Finish*.

40. Click *Finish* to complete the installation.

Please note: You must activate ELOoffice to use its full range of functions.

**Activation and regis-
tration**

41. Start ELO.
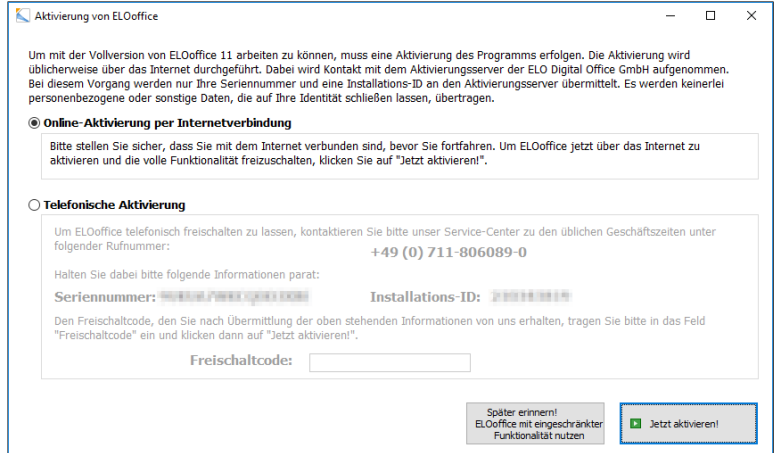
Fig. 44: ELOoffice activation

The *ELOoffice activation* dialog box appears the first time ELO starts.

42. Select one of the options:

- **Activate online**: Your serial number is checked via the Internet.

- **Activate by phone**: You will receive an unlock code by telephone.

43. Click *Activate now*.

Alternative: Click *Remind me later! Continue to use the trial version*. ELO then runs as a trial version.

The dialog box closes. Now you can use ELO.

Information: Don't forget to register your ELO version. Registered customers have access to the *My ELO* area on our website. The *My ELO* area contains additional information, downloads, and much more. The menu items *Register ELOoffice* and *My ELO* are located in the ELO menu.

Refer to the chapter *Basics and examples of use* for further information on starting ELO.

Installation on a network

If you want to use ELO on a network, select the *Network installation* mode. Installing ELO on a network is to a large extent the same as the user-defined installation. However, there are some things that you will need to do first.

Preparing a network installation

The following steps are required:

- Creating directories
- Sharing directories

Creating directories

First, create a directory on the central computer (server) named *ELOoffice*. Create two additional child directories in this directory: *ArchivData* and *Postbox*, then share all three folders on the network.

Please note: This is only a simple scenario for a small network. Please understand that we cannot provide support for the configuration of permissions and other settings in complex Windows networks.

Sharing directories

The *ELOoffice*, *ArchivData* and *Postbox* directories you created must be shared on the network for other network users to be able to access the repository data.

Please note: The Windows configuration must allow you to share networks. Select the option to *Turn on file and printer sharing* in the Windows dialog box *Advanced sharing settings* (*Control Panel > Network and Internet > Network and Sharing Center > Change advanced sharing settings*).

1. Open the context menu for the *ELOoffice* directory.
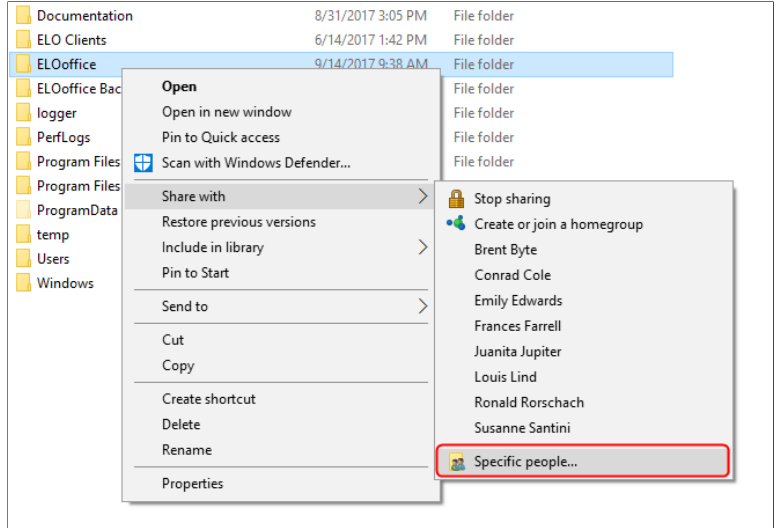
Fig. 45: Share directory

2. In the context menu, select *Share with*, then select *Specific people* in the next menu.

The *File Sharing* dialog box opens.

3. Add the users that should have access to the repository over the network.
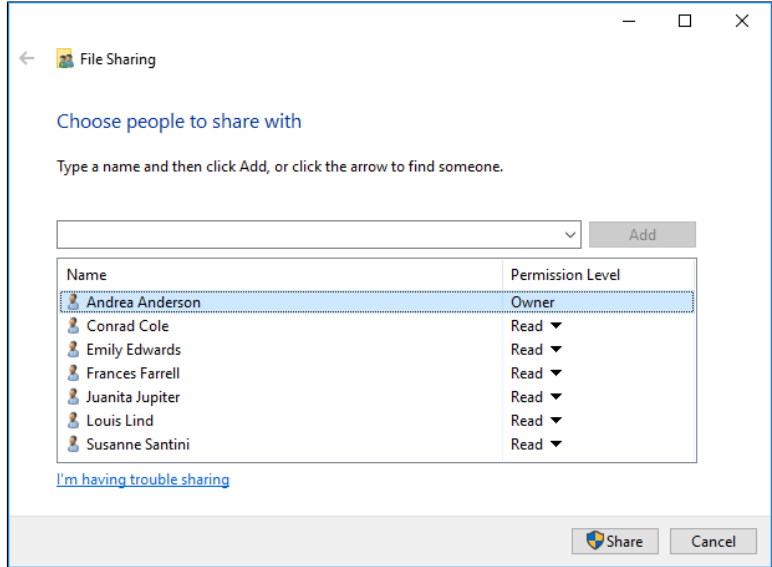
Fig. 46: Selecting users for the network share

> ⚠️ **Please note**: It is recommended to give users full access to the *ELOoffice* folder and all child folders in order to guarantee that ELO can be accessed without problems. ELO is unable to guarantee support for issues arising from incorrect access configurations.

4. Click *Share*.

Windows confirms that the directory is shared.

5. Click *Finish*.

The *ELOoffice* directory and its child folders are now shared.

ELO client installation As soon as the necessary directories have been created on the server, install ELO on the computers on the network.
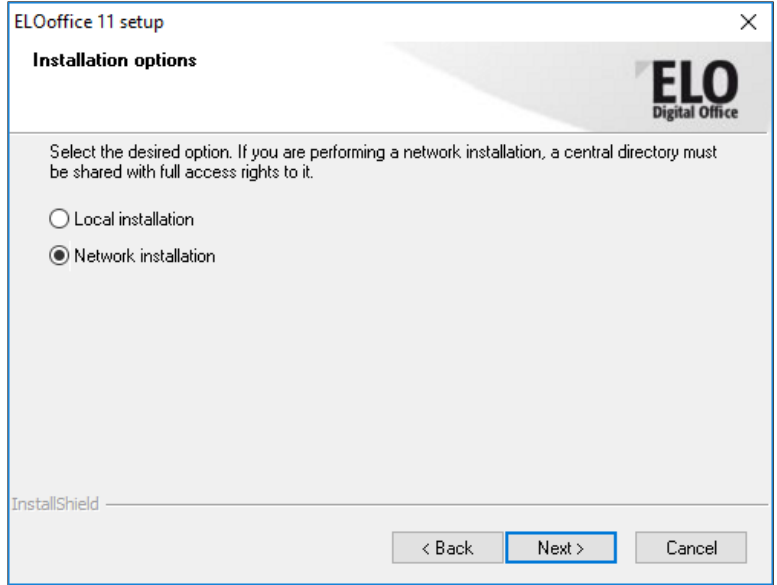
Fig. 47: 'Network installation' option

1. Go through the user-defined installation until you have completed step 8 (enter serial number). After step 8 of the user-defined installation mode, choose the option for *Network installation* and click *Next*.

2. Select a folder for the local installation directory. Click *Next* to confirm your selection.
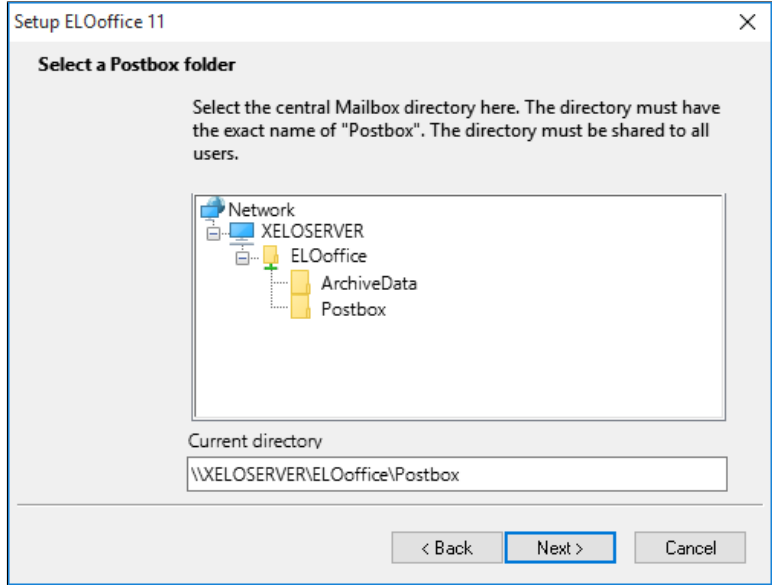
Fig. 48: Select Postbox directory

3. Select the Postbox directory that you already created and shared on the server.

EloMDb.txt not found
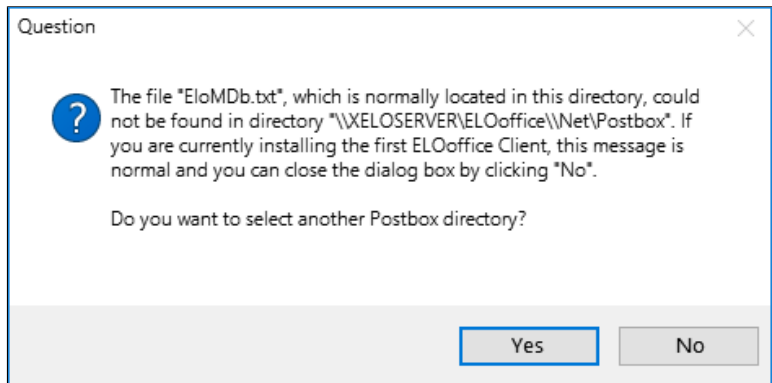
Fig. 49: 'EloMDb.txt' confirmation request

When you select the Postbox directory during the first installation, a dialog box will pop up to inform you that the *EloMDb.txt* file could not be found, since you have just created the Postbox directory. The file is created during installation. The confirmation request should no longer appear when you are installing additional clients.

4. Click *No* to continue the installation.
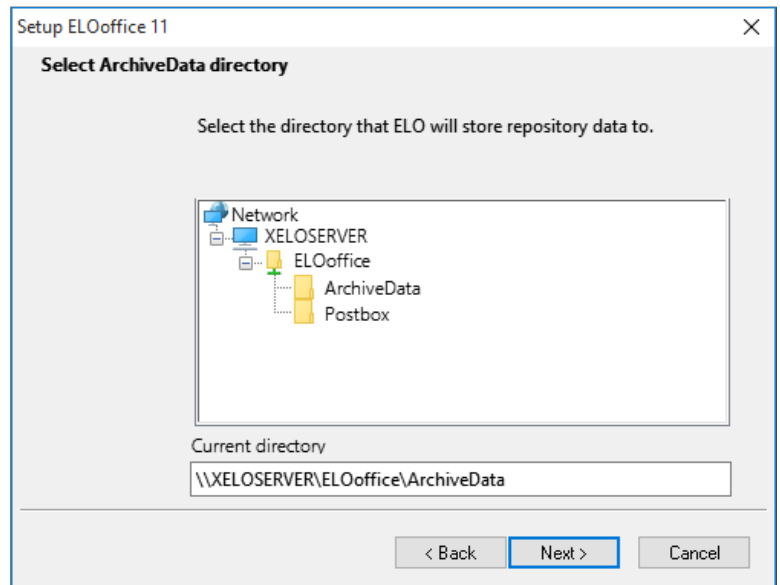
Fig. 50: Select ArchivData directory

5. Select the `ArchivData` directory that you created and shared on the server. Click *Next*.

Information: The directory you created on the server will usually be selected automatically as the default. If not, you can choose the directory on the network in this dialog box, or enter it directly by choosing *Current directory*.

Syslog.esp not found
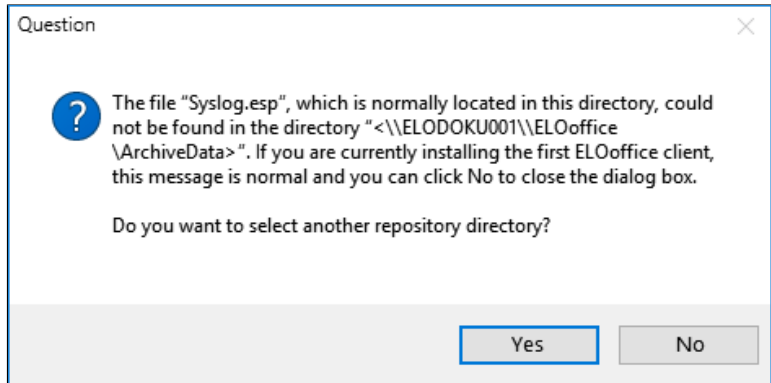
Fig. 51: 'Syslog.esp' confirmation request

After selecting the ArchivData directory during the first installation, a dialog box will pop up to inform you that the *Syslog.esp* file could not be found, since you have just created the ArchivData directory. The file is created during installation. The confirmation request should no longer appear when you are installing additional clients.

6. Click *No* to continue the installation.

Complete installation

Next, continue with the other steps as described for the user-defined installation.

Installing additional clients

Complete the steps mentioned above for all additional clients on the network. This completes the network installation.

Update installation

The following items need to be considered when installing an update:

Please note
You do not need to uninstall an older version of ELO. You can start the new installation without having to delete the older program first, and you do not need to export or import your data.

You cannot use a *hybrid* of two ELO versions. Once ELO has connected to a database, it can no longer be opened with an older ELO version.

Back up the ArchivData and Postbox directories, as well as all directories that ELO saves data to (*ELO menu > Configuration > Paths*). You should back up your data before carrying out any update.

Single sign-on (*ELO menu > Configuration > General*) must be deactivated.

You must log on to ELO as the *Administrator* in order to execute the update.

The Windows user performing the update must have at least local Windows administrator privileges. You also need to take into account the security settings for your operating system (firewall, etc.).

Please note: Once the update is complete, open each of your repositories as the *Administrator* user so that the system can make any necessary extensions to the database.

Basics and examples of use

Preliminary note

This chapter shows you the various parts of ELO using practical examples. Each practical example will begin with an outline of the contents.

Starting ELO

Start the program in the same way as other Windows programs.

1. Double-click the ELO icon on the desktop to start ELO.

The logon dialog box appears.
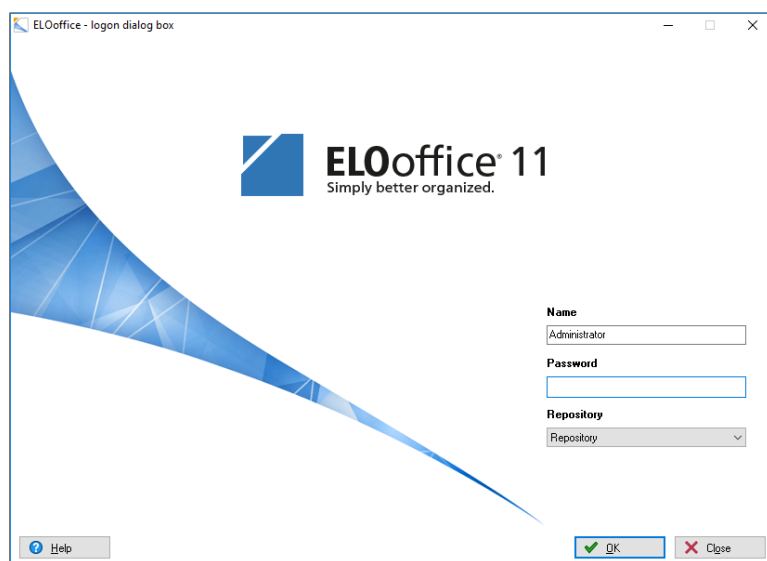
Fig. 52: ELO logon dialog box

2. Enter your logon data. The first time you start *ELO*, log on as the Administrator. Leave the *Password* field empty. In the *Repository* field, select the repository that you want to work with. When you start ELO for the first time, you need to create a new repository by selecting the New repository menu item. Select the *New repository* menu item.

3. Click *OK* to confirm your selection.
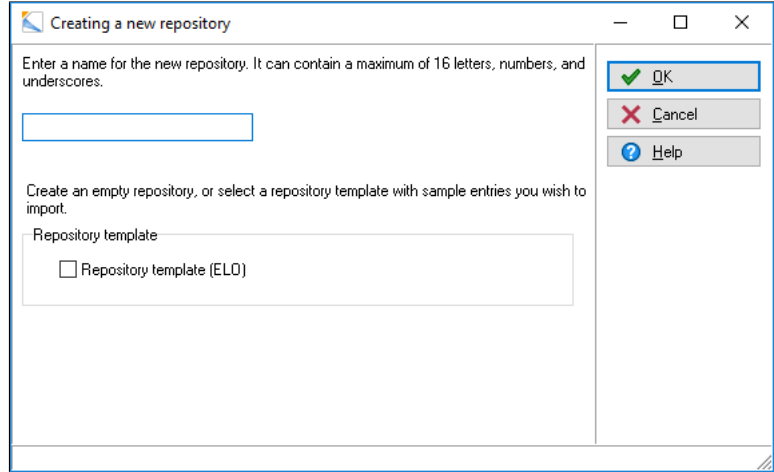
Fig. 53: 'Create new repository' dialog box

The *Create new repository* dialog box appears.

4. Enter the name of the repository to the text field.

Please note: The name of the repository cannot be changed once created.

Optional: ELO provides the option to use a repository template with a ready-made structure. Select the check box next to the repository template if you want to use it as the new repository.

Information: This documentation uses a sample repository tailored specifically to our test scenarios. The repository template is not identical to the repository used in this manual.

5. Click *OK* to confirm.

ELO starts.

Navigating through the repository
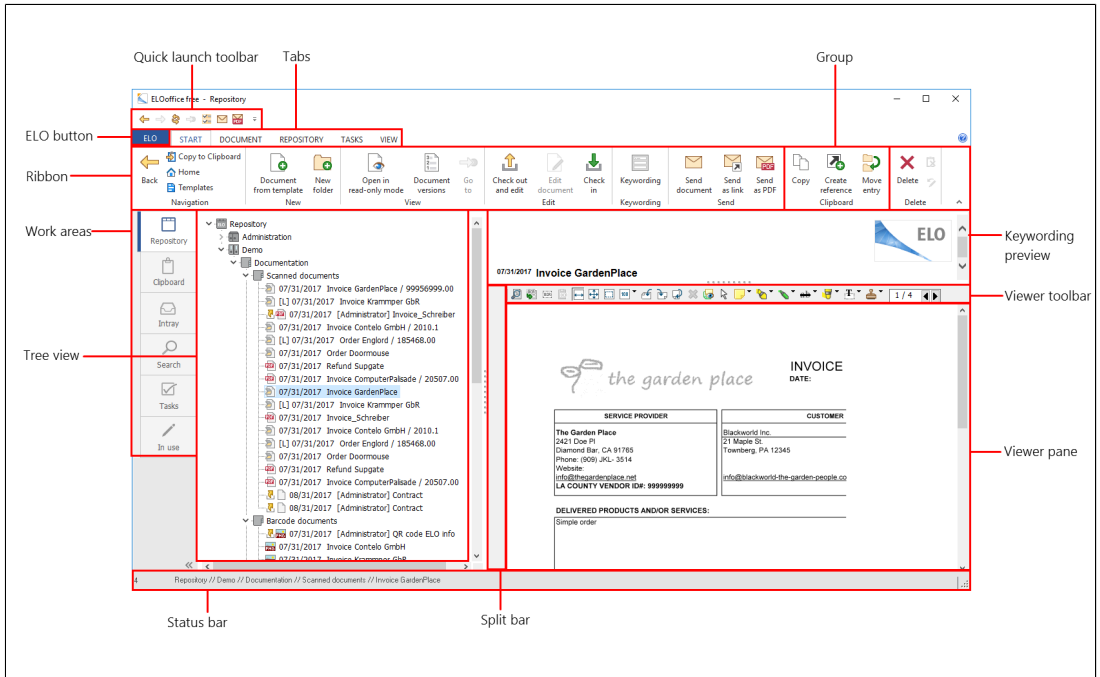
This section explains the functions in the ELO user interface. The interface can look different depending on the work area and on the function that the user selects. The following describes the user interface that you see when you start the program.

The ELO menu
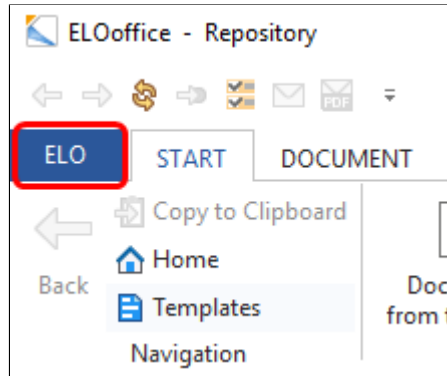
Fig. 55: The ELO menu

The *ELO button* opens up the *ELO menu*. The *ELO menu* gives you access to a wide range of functions to help you to organize your ELO repository.

The quick launch toolbar
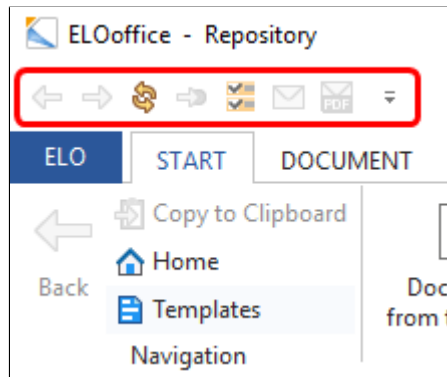
Fig. 56: The quick launch toolbar

Important functions are located on the quick launch toolbar. Configure the quick launch toolbar by clicking the *Advanced functions* button (downward-facing arrow on the right). Select the buttons you want to show on the quick launch toolbar.

The ribbon
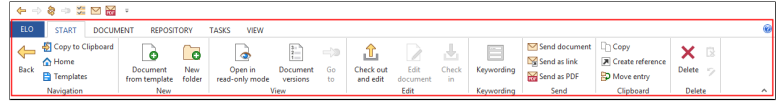
Fig. 57: The ribbon

The ribbon provides access to almost all ELO functions. The ribbon is divided into several tabs.

Tabs
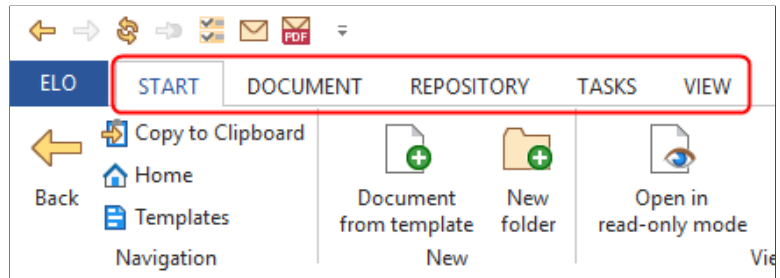
Fig. 58: Tabs on the ribbon

The tabs that you see on the ribbon will depend on the work area you are in. When you click a tab, you will see all functions contained on it. All tabs are separated into groups.

Groups
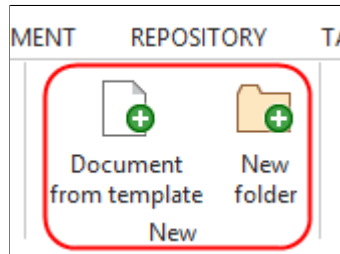
Fig. 59: The 'New' group

The functions on the ribbon are organized in logical groups.

Work area toolbar
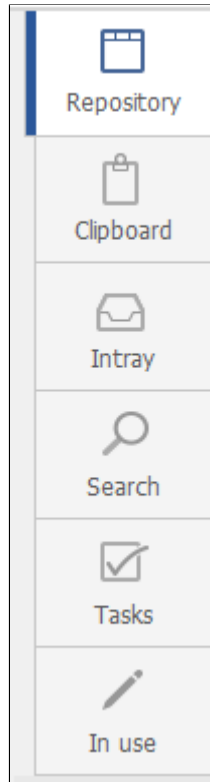
Fig. 60: The work areas. Selected here: the 'Repository' work area

You can open the different work areas from the toolbar on the left-hand pane in ELO.

Basics and examples of use
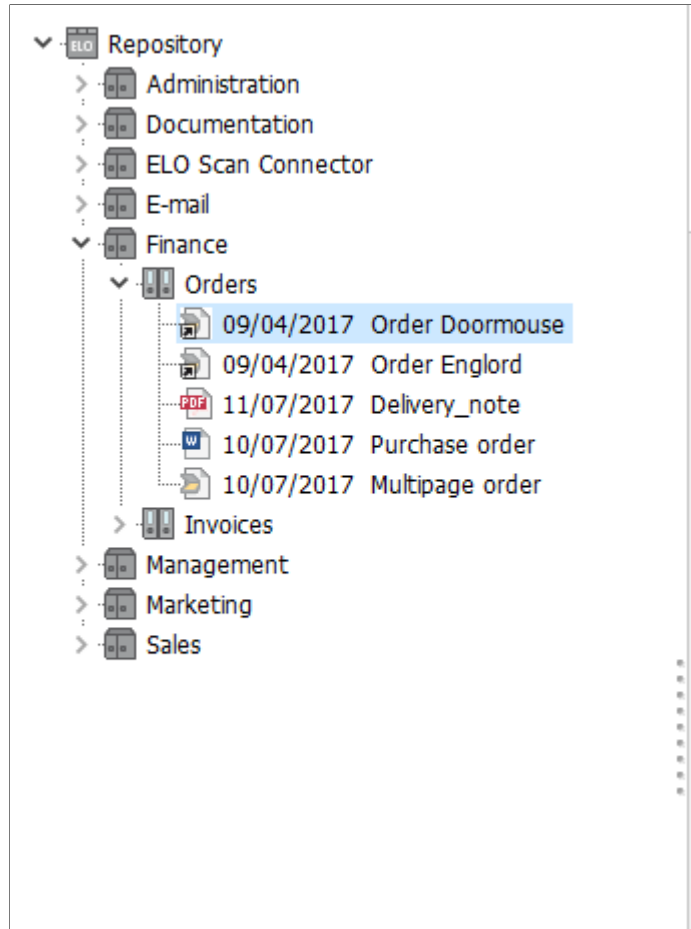
Tree view

Fig. 61: The tree view

The tree view displays the files and folders in the repository in a tree structure. When you are in the *Search* work area, the files and folders are shown in a list view.

The split bar
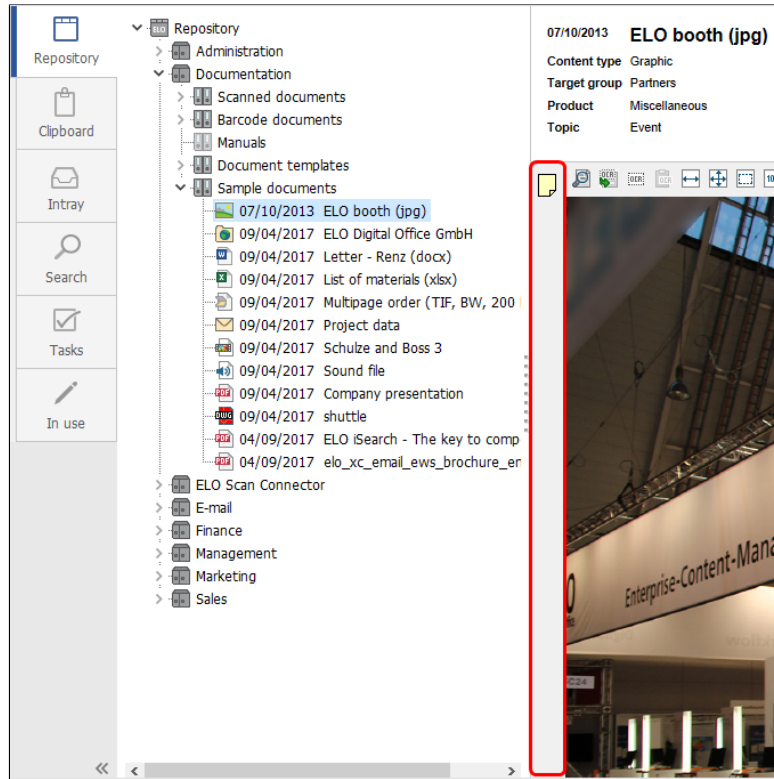
Fig. 62: The split bar

The split bar appears when a document is opened in the viewer pane. The split bar is used for margin notes. Double-click the split bar to open the selected document in read-only mode.

The keywording preview
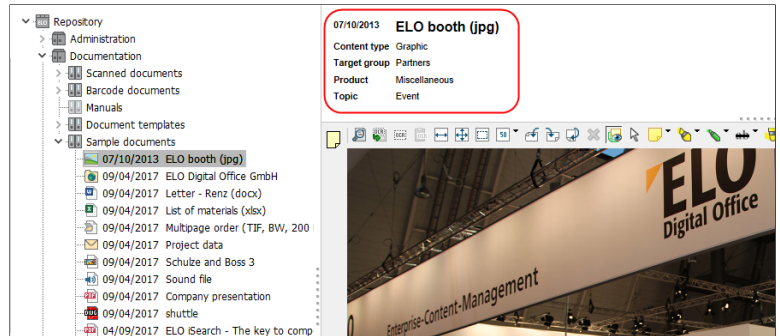
Fig. 63: The keywording preview

The keywording preview provides an overview of a document's keywording information.

The viewer pane
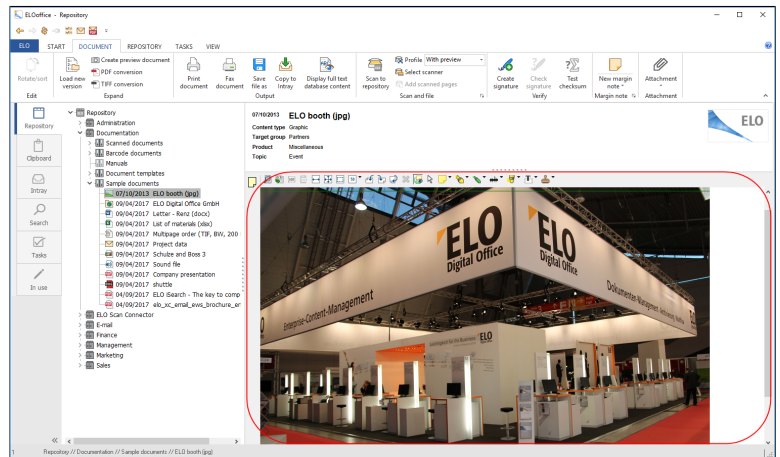
Fig. 64: Viewer pane with viewer toolbar

The viewer pane shows you a preview of the document currently active in the tree view.

Document viewer toolbar
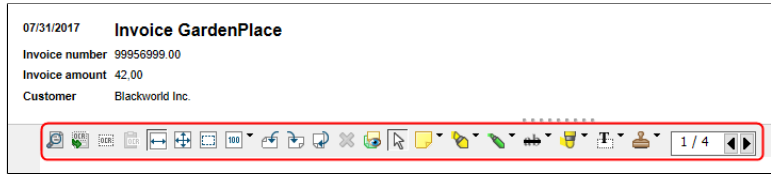
Fig. 65: Document viewer toolbar

The document viewer toolbar appears when you select an image document in the tree view (*TIFF*, *JPG*, ...). The document viewer toolbar provides you with various editing options.

The status bar
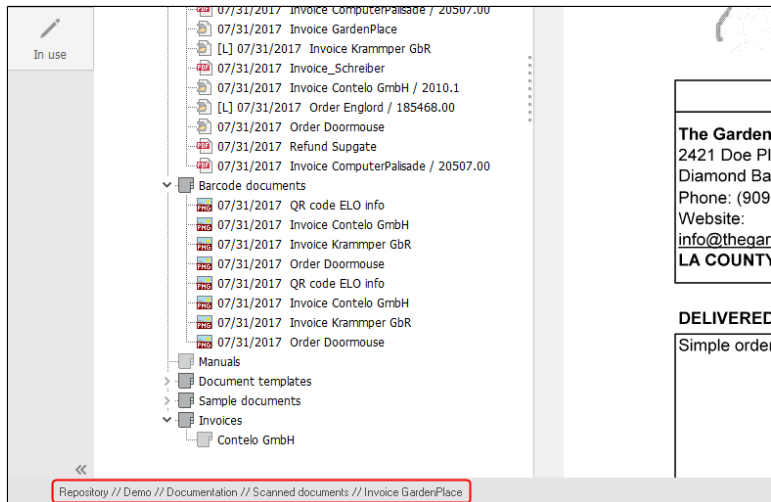
Fig. 66: The status bar

The status bar indicates where the selected document was filed in the ELO repository. If you select a document that exists as a reference, you will see the filing path to the original document in the status bar. If you click a document while holding down the CTRL key, you see the physical storage location of the document in the status bar.

Context menus

Context menus provide you with fast access to frequently needed commands. Right-click an entry (folder or document) to open the context menu.
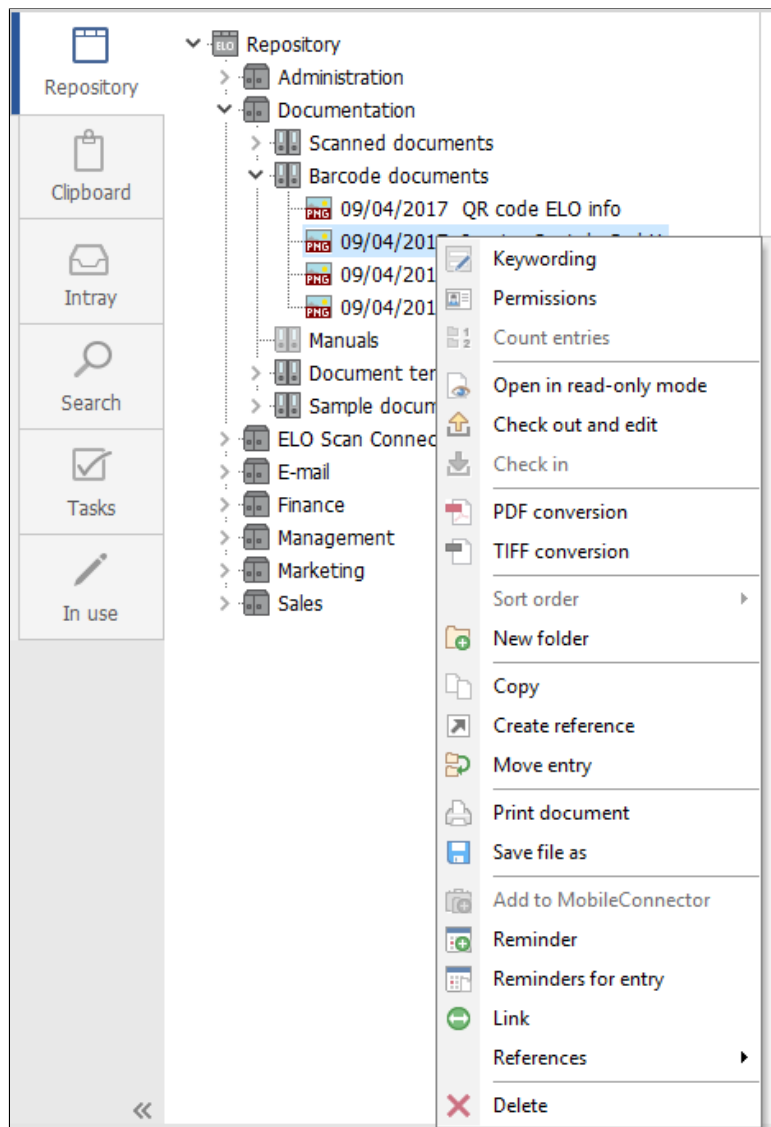
Fig. 67: Document context menu

The functions within a context menu will depend on multiple factors:

- **Work area**: Some functions are only available in specific work areas, such as the *Intray*. Others can only be accessed in the *Search* work area, and so on.

- **Entry type**: Some functions can only be used on folders, for example, while other functions are reserved for documents.

- **Document status**: Some functions depend on the status or mode an entry currently possesses. For example, if a document has not been checked out, the *Check in* function will not be available.

- **Rights and permissions**: The main administrator is able to define which rights are provided to each user. Accordingly, not all functions will necessarily be available to all users. It is also possible to place access restrictions on individual entries to restrict the range of functions given to individual users in specific contexts.

There is also a context menu for margin notes that opens when you right-click the split bar. This context menu gives you access to all functions relating to margin notes.

You can find more information about the margin notes context menu in the section titled *Adding margin notes*.

The viewer pane

Documents are displayed in the viewer pane. There are various functions that you can use with these documents.

The viewer pane supports PDF documents as well as almost all raster graphics formats: BMP, DCX (Multipage PCX), DIB, ELO, EMF, G3/G4, ICO, J2C (JPEG 2000), JPC (JPEG 2000), JPG, LDF (LuraDocument), MME (ELO COLD), MMF (ELO COLD), PCX, PDS (NASA format), PGM, PNG, PNM, PPM, RAS, RLE, SGI/RGB (Silicon Graphics format), TIF (compression methods: Hufman RLE, G3, G4, RLE, Packbits, Thunderscan, JPEG 6, JPEG 7), Vicar2 (NASA format), WMF, XBM , XWD, ZBR.

Information: You need to select the option *Annotations on PDFs* if you also want to use the functions on the document viewer toolbar for PDFs. (*ELO menu > Configuration > Display > Settings* **OR** *ribbon > View*)

Functions in the viewer pane

Fig. 68: Document viewer toolbar

The viewer pane features the following functions:

Search within current document

Fig. 69: 'Search within current document' button

Use the *Search within current document* button to find text within the displayed document.

Enable OCR mode

Fig. 70: 'Enable OCR mode' button

Click the *Enable OCR mode* button to start OCR mode (OCR = **O**ptical **C**haracter **R**ecognition). When you enable OCR, you can define fields in a document that OCR is to be performed on. OCR reads marked text and transfers the data to the keywording. You can also save OCR fields as a template.

Define OCR area

Fig. 71: Set OCR area

Use the *Define OCR area* button to read the text of a machine-readable document (raster graphics formats and PDFs created in ELO). For example, you can add the address field of an invoice as information to your keywording form.

Information: OCR (Optical Character Recognition) converts image information (pixels) into machine-readable text. The text can be processed by the computer, for example by entering keywording information to an ELO keywording form. For OCR recognition to work properly, documents should be in a readable font and scanned documents should have a resolution of at least 200 dpi.
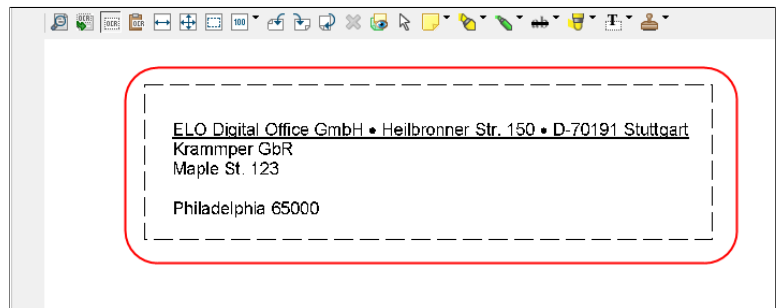
Fig. 72: Drag OCR area

Copy OCR text

Fig. 73: 'Copy OCR text' button

The *Copy OCR text* function copies text recognized by the OCR reader to the Windows Clipboard. You must have selected an OCR area for this to work. You can insert the text to the input field of the keywording form using the keyboard shortcut CTRL+V.
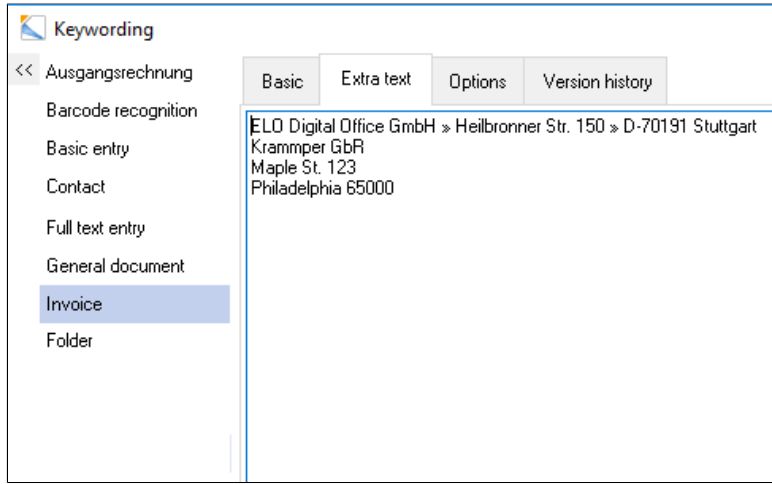
Fig. 74: Extra text with OCR text

Zoom function

When you open documents, they are often too small to read or are only partially visible.

There are functions in ELO that let you zoom in and out of documents or adjust the size of the page to the screen. The following functions are available:

Fig. 75: 'Fit width' button

Fit width: Adjusts the size so that the document fills the viewer pane horizontally.

Fig. 76: 'Fit page' button

Fit page: Resizes the document to fit entirely within the viewer pane.

Fig. 77: 'Zoom to rectangle' button

Zoom to rectangle: Adjusts the document view to show the area selected on the screen.

Fig. 78: Zoom to 25, 50, or 100%

Zoom to 25, 50 or 100%: Displays the document preview at 25%, 50% or 100% of its original size. The setting 100% is the actual size of the document.
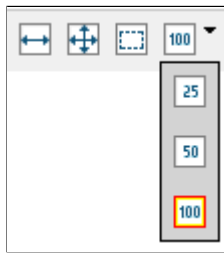
Fig. 79: Select zoom level

Click the downward-facing triangle icon behind the button to open a drop-down menu. Use the drop-down menu to choose whether to display the document at 25%, 50%, or 100%.

Information: Depending on the zoom setting, you can hold down the left mouse button to move the document around in the viewer pane.

Rotate view

The following buttons let you rotate the view of the selected document.

Information: The page rotation only affects the current document view. The document itself is not rotated. The setting will not be saved. To permanently rotate a document, use the *Rotate/sort* function (ribbon tab *Document > Rotate/sort*).

Fig. 80: Rotate left 90°

Rotate left 90°: The page is rotated 90° to the left.

Fig. 81: Rotate right 90°

Rotate right 90°: The page is rotated 90° to the right.

Fig. 82: Rotate 180°

Rotate 180°: This option rotates the page by 180°.

Annotations

In the document viewer toolbar you can create, edit, or delete annotations (e.g. margin notes, markers, or stamps) on a document using the following tools:

Information: There are different variations for each annotation type, which you can select from a drop-down menu. Open the drop-down menu via the downward-facing triangle to the right of each tool on the viewer toolbar. You can change the color, line width, or size of the text on the annotation, for example. You can also make additional settings under *ELO menu > Configuration > Notes > Annotations*.

Fig. 83: Delete selected annotations

Delete selected annotations: Use this button to delete the selected annotation on the document.

Fig. 84: Show annotations

Show annotations: Click this button to view or hide the annotations on the document.

Fig. 85: Switch to normal mouse cursor

Select: Click this button to switch back to the normal mouse cursor after editing or creating an annotation. You can only select existing annotations on the document if you are using the normal mouse cursor.

Fig. 86: Applying a sticky note

Sticky note: This tool creates rectangular notes on a document.
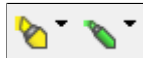
Fig. 87: The two horizontal markers

Horizontal marker: The viewer toolbar contains two tools named the *Horizontal marker*. Both these markers are used to draw horizontal, semi-transparent lines on a document.

Fig. 88: Adding a strikethrough

Strikethrough: This is a tool that allows you to strike through text within a document.
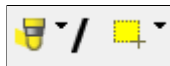
Fig. 89: The two types of the 'Freehand marker/Marker' button

Freehand marker/Marker: Two types of tools are hidden behind this tool on the viewer toolbar.

- The *Freehand marker* tool lets you draw lines freely on a document.
- Use the *Marker* to draw rectangular highlights.

Fig. 90: Adding a text note

Text note: Drag open a text box on the document Next, enter annotations in text form to the document.

Fig. 91: Adding a stamp

Stamp: This tool applies a stamp directly to a document.

Information: Some stamps are already available by default. You can create your own stamps using the stamp dialog box. Open the *Stamps* dialog box by right-clicking the *Stamp* button.

Page number display
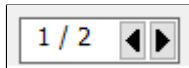
Fig. 92: Paging through a multi-page document

Use the page number display to page through multi-page TIFF documents. The first number shows the current page; the second number is the total number of pages.

The page number can only be seen if a multi-page document is selected.

Permissions

There are two ways to use permissions in combination with annotations:

In the configuration: If you assign permissions to an annotation type under *Annotations* in the *ELO menu > Configuration > Notes*, these permissions apply generally. Only users with corresponding permissions are able to view, create, edit, or delete your annotations.

Right-click on a selected annotation: You can set permissions for an annotation after you have placed it on a document. These permissions only apply to the selected annotation.

Information: General permissions to stamps can only be assigned while you are creating a new stamp.

Archiving a document from the file system in ELO

Information   You use a wide range of different documents in your daily work. ELO offers you several ways to file your documents. For example, you can file a document directly from Microsoft Word to ELO, or you can drag the document from Windows Explorer to the ELO repository. For both of these options, you can either place the document in the *Intray* first or file it straight to the *Repository*. You can always file a document from the *Intray* to the *Repository* later on.

The following example shows how to drag a document from Windows Explorer and file it to the repository.

Requirement   You need a document located in a folder on your computer or on a USB flash drive, for example. The file or document will always be referred to as the **document** in the following.

Step by step   1. Minimize the Windows Explorer and ELO windows. Arrange both windows side-by-side.

Information: Use the keyboard shortcut WIN + arrow key right or WIN + arrow key left. WIN stands for the Windows key.

2. Switch to the *Repository* work area.

3. Select the folder in ELO where you want to file the document.

4. Click the document in Windows Explorer and drag the file to the ELO tree view. Release the left mouse button.

Basics and examples of use
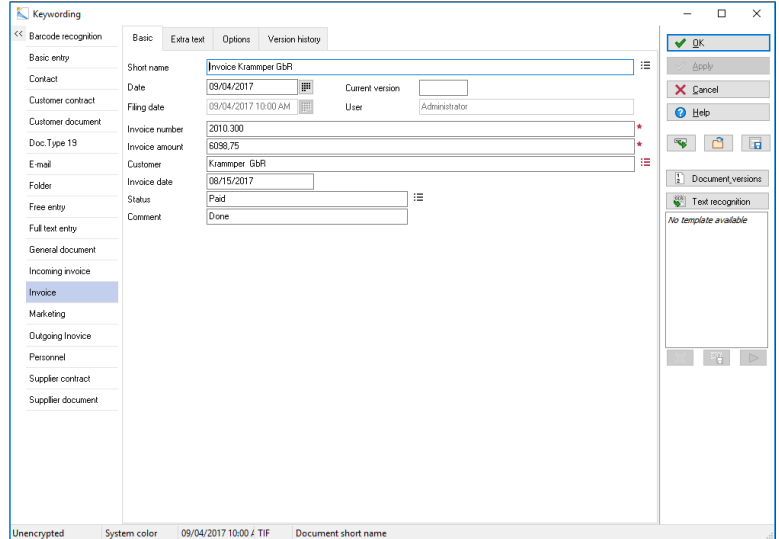
Fig. 93: Select keywording form

The keywording form appears.

5. In the list on the left-hand area of the dialog box, select a keywording form that corresponds to the document type. If you want to file an invoice, for example, select the *Invoice* keywording form.

6. Enter a short name. This will be the document's name in ELO. Enter further information in the available index fields if needed.

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

7. Click *OK*.

The dialog box closes and your entries are saved.
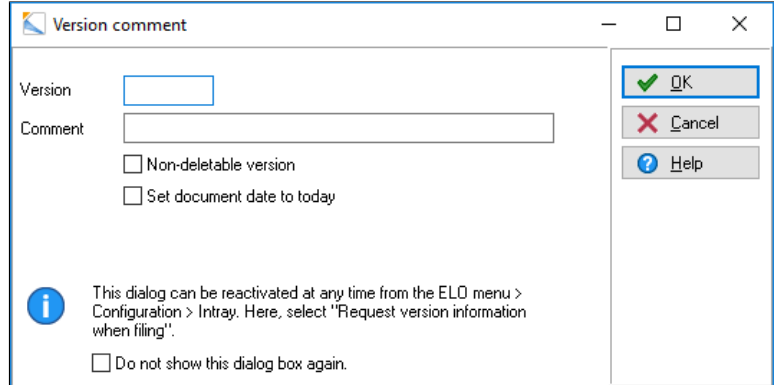
Fig. 94: 'Version comment' dialog box

The *Version comment* dialog box appears.

Information: ELO stores all versions of a document as a default setting. You can change these settings under *ELO menu > Configuration*.

8. In the *Version* and *Comment* fields, enter a version number and corresponding version comment.

Information: The keywording form saves information about a document. The version comments contain information on each document version, i.e. the course of changes to each document.

9. Click *OK* to confirm your entries.

The dialog box closes.

Result   The file or document has been filed to ELO.

Scanning and filing a document to the repository

Information

The following example shows how to scan a document and file it to the repository.

Requirements

- You need to connect a scanner to the computer. The scanner must also be recognized as a scanner by ELO.

-

- You require a document (such as a letter, invoice, or delivery note) that you want to scan and file to the repository. The file that the scanner generates will be referred to in the following as the **document**.

Step by step

1. Switch to the *Repository* work area.

2. Switch to the *Document* tab on the ribbon.

3. In the tree view, select the folder where you want to file the document you are going to scan.

4. Place the document in the scanner.
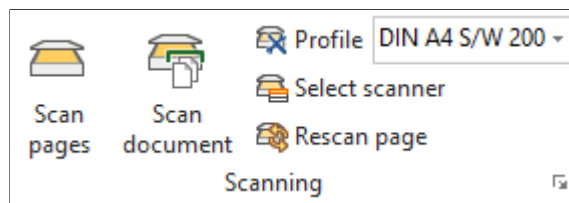
Fig. 95: 'Scan and file' group

5. Select a scanner (ribbon tab *Document > Select scanner*).

6. Select a profile for the scan process (ribbon tab *Document > Profile*).

7. Click *Scan to repository* on the *Document* ribbon tab.

The scan process will begin and a status message will appear showing the progress of the scan.
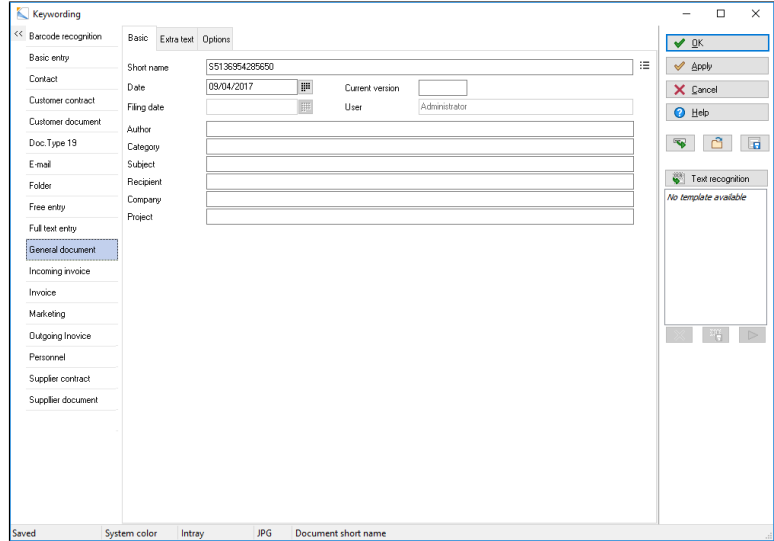
Fig. 96: Keywording dialog box

The *Keywording* dialog box opens.

8. Select a keywording form that is appropriate for the document type from the list on the left-hand side. If you want to file an invoice, for example, select the *Invoice* keywording form.

9. Enter a short name. This will be the document's name in ELO. Enter any necessary information to the other index fields.

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

10. Once you have entered all the necessary information, click *OK*. This will close the dialog box and save your entries to the filed document.
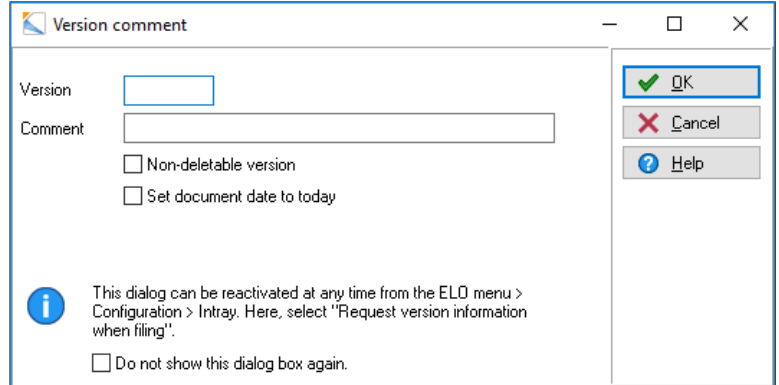
Fig. 97: Enter version comment and version number

The *Version comment* dialog box opens.

Information: If the *Version comment* dialog box does not appear, it must have been deactivated. You can reactivate this dialog box under *ELO menu > Configuration > Intray*.

11. In the *Version* and *Comment* fields, enter a version number and corresponding version comment.

12. Click *OK* to confirm your entries.

The entries are saved and the dialog box closes.

Result   The document has been scanned and filed to the selected folder in the repository.

Scanning a document to the Intray and filing it to the repository

Information

The following example shows how to scan a document with one or more pages and file it to the repository. To do so, the document is first scanned to the *Intray* work area, then filed to the repository.

Requirements

- You need to connect a scanner to the computer. The scanner must also be recognized as a scanner by ELO.

-

- You need a multi-page document (such as a magazine article) that needs to be scanned and filed to the repository. The file that the scanner generates will be referred to in the following as the **document**.

1. Switch to the *Intray* work area.

The *Scan/File* tab on the ribbon becomes active automatically.
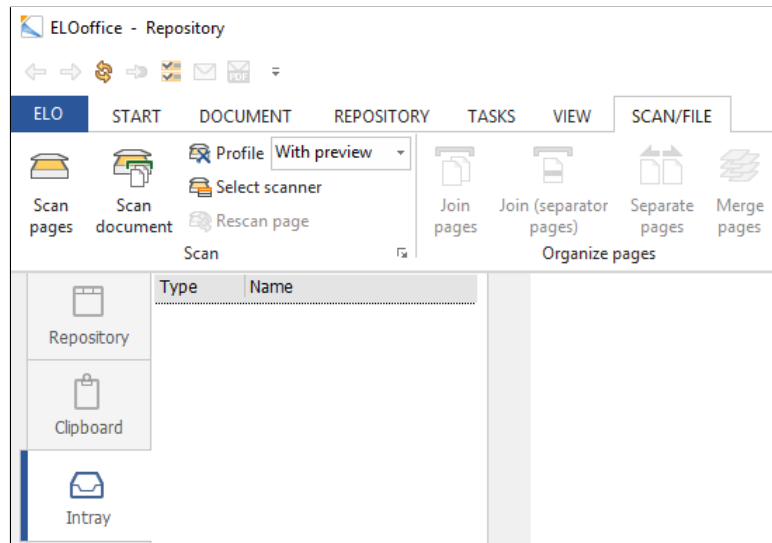
Fig. 98: 'Scan' ribbon group in the 'Intray' work area

Option A: Document scanner

1. Put at least one sheet of the document into the scanner feeder.

2. Click *Scan document* to scan the document, which can have one or more pages.
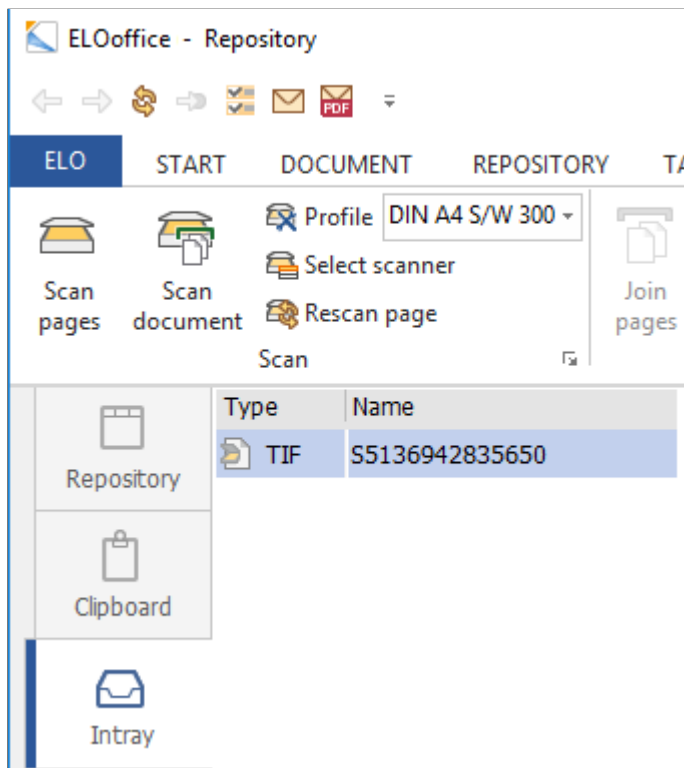
Fig. 99: Scanned document in the Intray

After scanning is complete, the document is shown in the viewer pane in the Intray. When ELO scans a document using a document scanner, it automatically combines the different pages to one document.

Option B: Flatbed scanner

1. Place the first page of the document on the scanner bed.

2. Click *Scan document*.

Optional: Repeat steps 1 and 2 for additional pages of the document.

After scanning, one or more document pages are listed in the Intray viewer pane.

Information: The page number of a document is displayed in ELO in the lower left of the program pane.
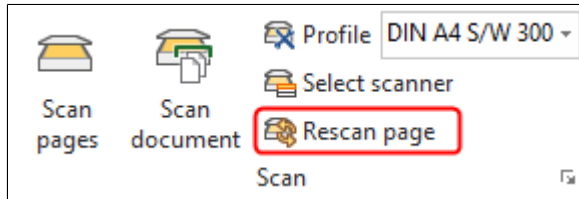
Fig. 100: Rescan pages

Information: If you scanned a page incorrectly, you can repeat the scan process for individual pages by clicking *Rescan page*. This only applies to documents whose pages have not yet been merged.
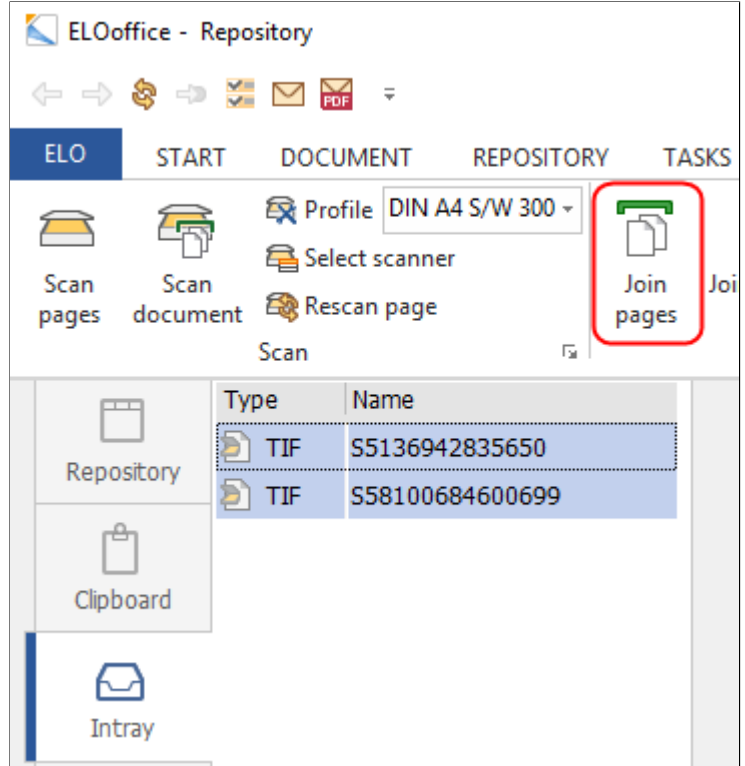
Fig. 101: 'Join pages' button in the Intray

Join pages (Merging individual pages)

Click *Join pages* to merge several pages into a single document. To do so, select the individual document pages in the Intray and then click *Join pages*. This joins the single pages into a multi-page document.

Information: You can use the function *Separate pages* to separate a multi-page document in the Intray into individual pages. To do so, select the multi-page document in the Intray and click *Separate pages*. The function is available for TIFF and PDF documents.

File to repository

1. To file the scanned document to the repository, select it in the Intray.
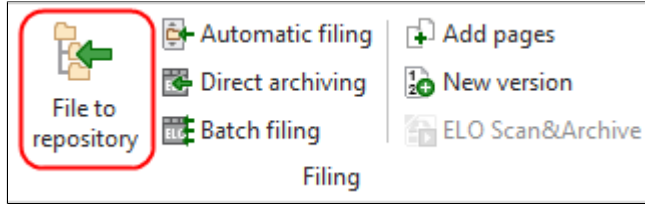
Fig. 102: 'Filing' group on the ribbon

6. Click *File to repository* on the *Scan/File* ribbon tab.
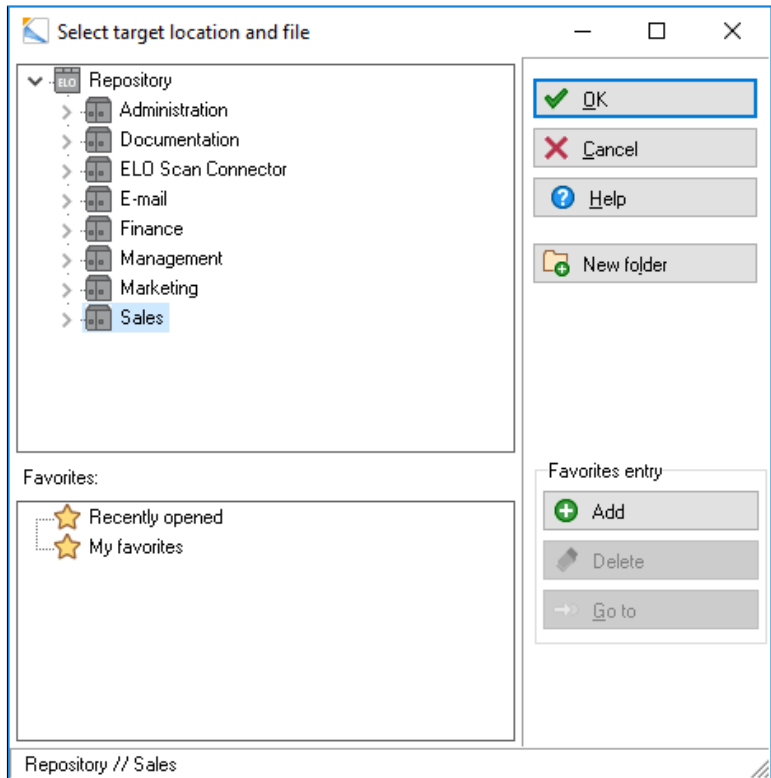
Fig. 103: Select target location and file

The *Select target location and file* dialog box opens.

Please note: You need to keyword documents in TIFF and PDF format before you can file them using this dialog box.

7. Select the folder that you want to file the document to.

Fig. 104: Keywording dialog box

The *Keywording* dialog box opens.

8. Select a keywording form that is appropriate for the document type from the list on the left-hand side. If you want to file an invoice, for example, select the *Invoice* keywording form.

9. Enter a short name. This will be the document's name in ELO. Enter any necessary information to the other index fields.

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

10. Once you have entered all the necessary information, click *OK*. This will close the dialog box and save the data you entered for the document.
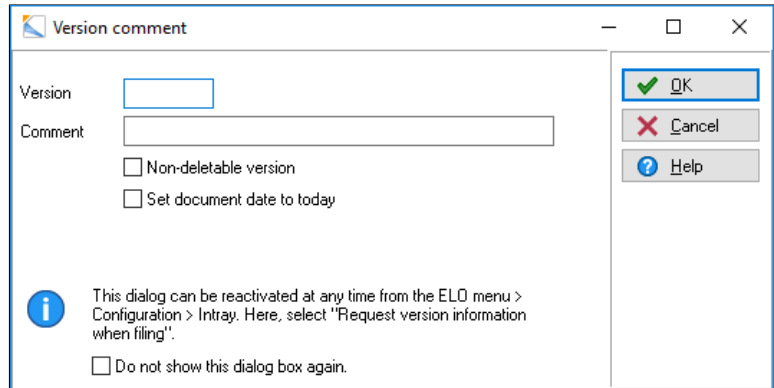
Fig. 105: Enter version comment and version number

The *Version comment* dialog box appears.

Information: If the *Version comment* dialog box does not appear, the dialog box display has been previously deactivated. You can reactivate this dialog box under *ELO menu > Configuration > Intray*.

11. In the *Version* and *Comment* fields, enter a version number and corresponding version comment.

12. Click *OK* to confirm your entries.

The dialog box now closes.

Result   The paper document is scanned and filed to the repository.

Keywording assistance using text recognition

You can use the text recognition/OCR (OCR = **O**ptical **C**haracter **R**ecognition) function in ELO to help you keyword documents. The OCR function recognizes text in defined fields and then transfers the information to a keywording form.

You can also save recognized text as an OCR template that you can use for documents of the same type.

The text recognition function supports the file types *TIFF* and *PDF*.

Information: If you want to use the file type *PDF*, you need to select the option *Annotations on PDFs*. You will find this option under *ELO menu > Configuration > View > Settings*.

Enable OCR mode

1. Select the document that you want to keyword.
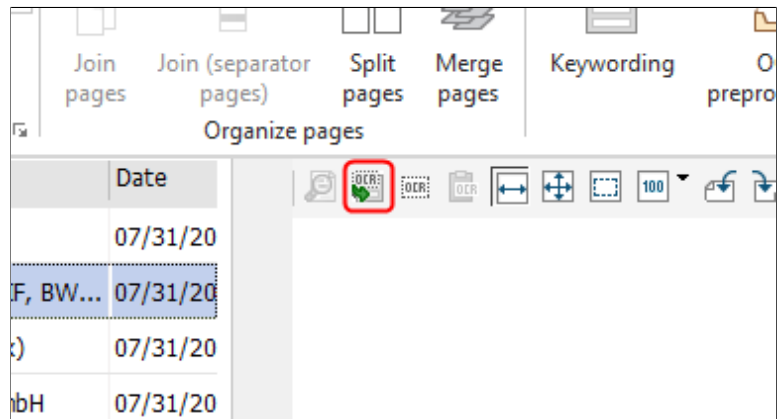
Fig. 106: Document viewer toolbar, 'Enable OCR mode' button

2. Click the *Enable OCR mode* button to enable OCR mode via the document viewer toolbar.
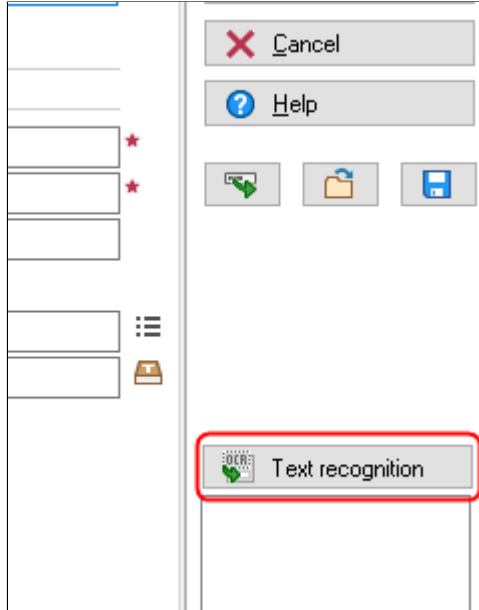
Fig. 107: 'Keywording' dialog box, 'Text recognition' button

Alternative: Click the *Text recognition* button to enable OCR mode in the *Keywording* dialog box.

Information: You may see a dialog box that contains information about OCR mode. Once you have read this information, you can check the box that says Do not show this dialog box again so it will not appear every time. Click *OK* to close the dialog box.

OCR mode is now enabled. You can tell that OCR mode is enabled if the *Short name* index field is green.

Optional: You can switch to another keywording form if the one you need is not selected.

3. Select the index field that you want to transfer the information to.

Fig. 108: Selected index field

The index field will turn green once selected.

Information: OCR mode will not start immediately as it takes a few moments for the OCR technology to be initialized. For this reason, it makes sense to keyword multiple documents at one time with OCR. To do so, run OCR mode in the *Intray* area and click *Apply* once you have keyworded the first document. With this method, OCR mode remains enabled and can be used to keyword the next document without having to wait for OCR to reinitialize.

4. Place the cursor focus on the document preview in the viewer pane.
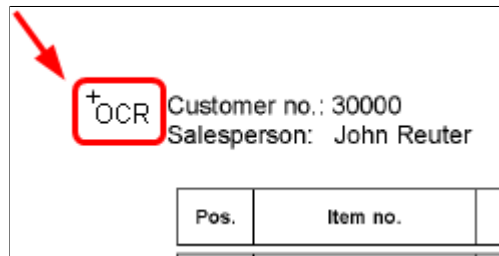
Fig. 109: Cursor turns into the OCR icon

The cursor turns into an OCR icon.
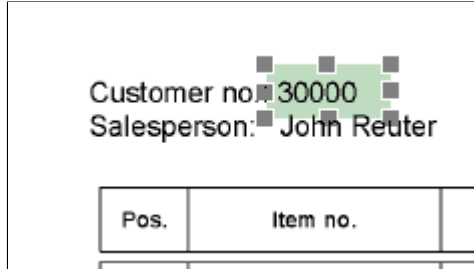
Fig. 110: Rectangle around the text you want to perform OCR on

5. Draw a rectangular field with the mouse around the area that you want to perform OCR on.

Fig. 111: Transferred data

Please note: There are certain restrictions that apply to the data that can be transferred to index fields. If the text that was read by OCR does not conform to the index field settings, the transfer process will be canceled. For example, if the setting only allows you to transfer data from the keyword list to the index field, the text recognition function will not work.

Information: If the settings are correct, but the text cannot be read, the OCR area might not be the right size. You can adjust the size of the OCR area by clicking one of the gray squares at the edge of the area selected and dragging it to the size you want.

The text is transferred to the index field. The next index field is selected automatically and turns green.

Information: You set the tab order for the index fields when you create the keywording form. The tab order can differ from the order of the index fields in the keywording form. To view or change the tab order, open the *Form designer*. The form designer is located in the *ELO menu > System settings > Keywording forms > Form designer*.

Alternative: You can also select another index field manually using the TAB key.

6. Repeat steps 4 and 5 until you have completed all the index fields.

7. Click *OK* to save the keywording.

Alternative: Click *Apply* if you want to keyword other documents.

Saving OCR templates   OCR templates are a useful tool if you have recurring documents such as invoices. When you recognize text using OCR, you can save that data in a template and use it for other documents,
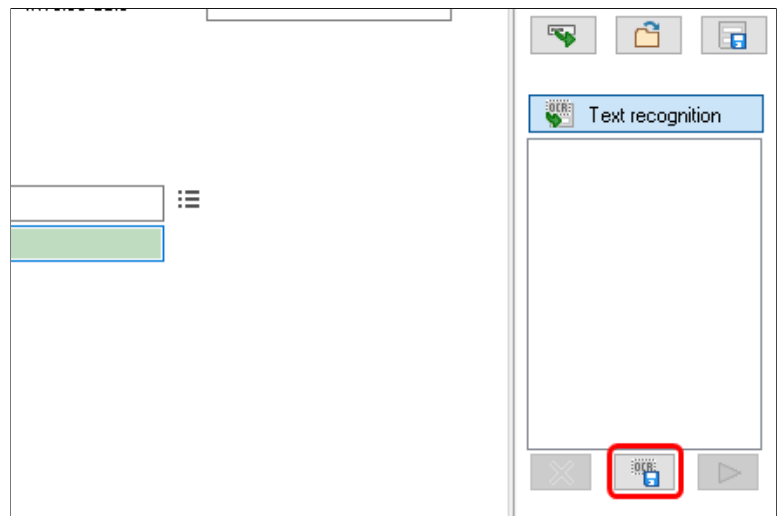
Fig. 112: 'Save OCR template' button

1. To save an OCR field as a template, click *Save as OCR template* (floppy disk OCR icon).
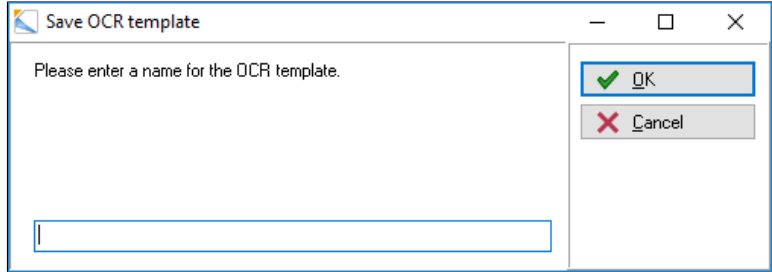
Fig. 113: 'Save OCR template' dialog box

The *Save OCR template* dialog box opens.

2. Enter a name for the OCR template.

3. Click *OK*.
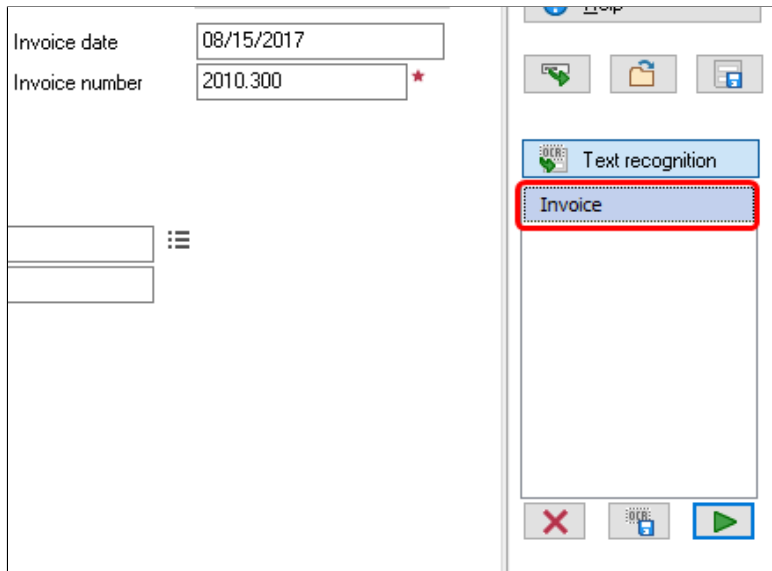
Fig. 114: New OCR template

The template is saved and is now linked to the keywording form.

Using an OCR template

If you have already created an OCR template, you can use it to keyword other documents of the same type.

1. Select the document.

2. Open the keywording.

Optional: You can switch to another keywording form if the one you need has not been selected.
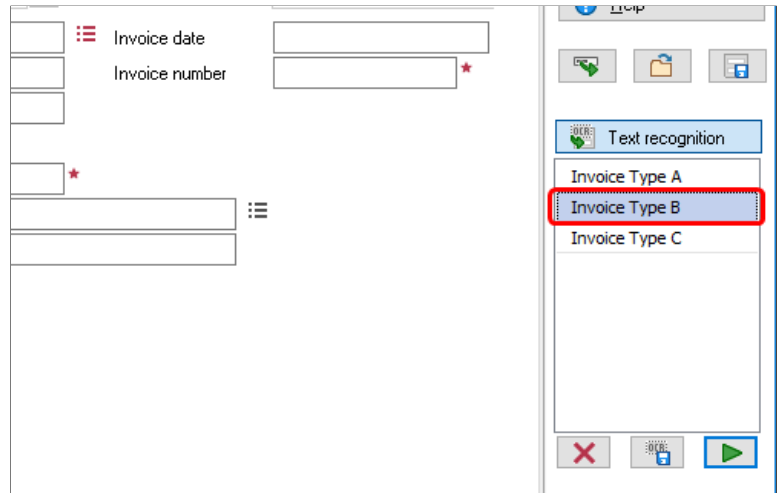
Fig. 115: Selected OCR template

3. Select a template from the list below the *Text recognition* button.

The selected OCR template is marked blue.
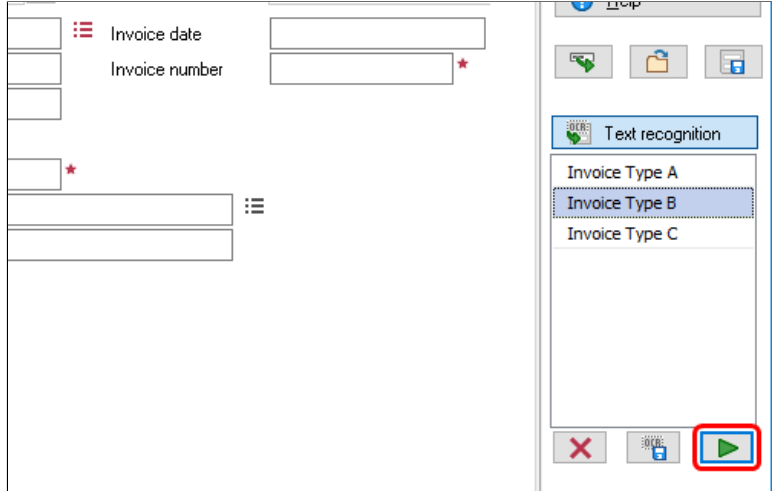
4. Click the *Complete index fields* button (green triangle).

OCR will try to apply the OCR fields on the selected document.

Fig. 117: Manually adjusting the OCR field

Optional: If the data is not transferred to the index field or it is not done correctly, select the index field again and adjust the OCR field so that the data fits within the field border.

5. Click *OK* to save the keywording.

Alternative: Click *Apply* if you want to keyword other documents.

Basics and examples of use

Optional: If you modified the OCR template, you will see the *Save rectangle as OCR template* dialog box. In this dialog box, you have the option to save the changes to the OCR template. If you click *Yes*, the *OCR template changed* dialog box will appear. In this dialog box, you can choose between different options for saving the changes.

Changing an OCR template

You can save changes to an OCR template.
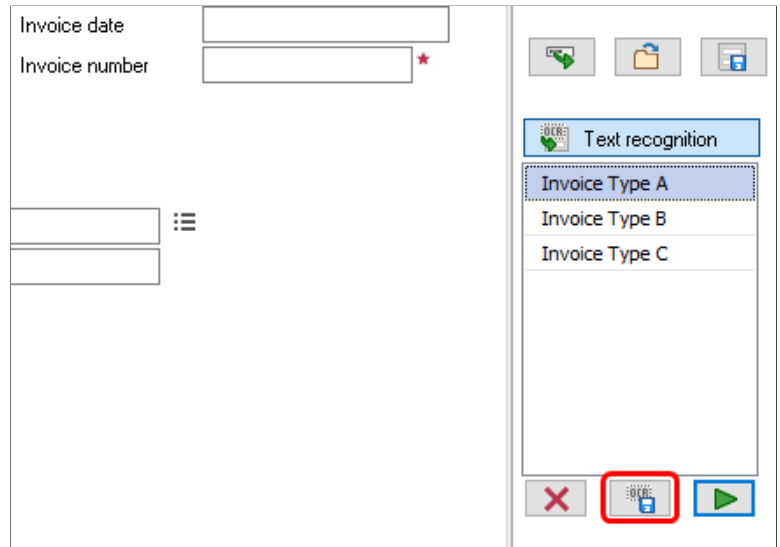
Fig. 118: 'Save OCR template' button

1. Once you have changed the OCR fields in the template, click *Save as OCR template* (floppy disk OCR icon).
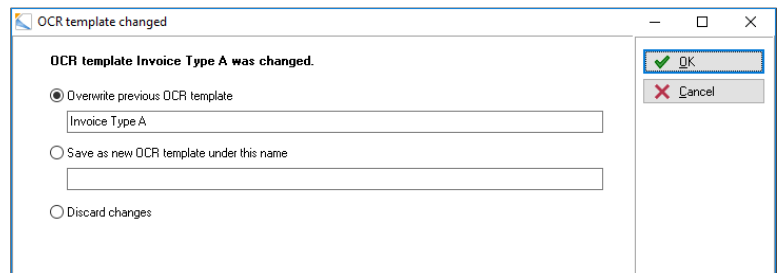
Fig. 119: 'OCR template changed' dialog box

The *OCR template changed* dialog box will appear. You can choose from the following options:

- **Overwrite previous OCR template**: The changes are applied and the current OCR template is overwritten.

- **Save as new OCR template under this name**: Enter a name for the new OCR template. The changes are applied to the new OCR template and the current OCR template is retained.

- **Discard changes**: The changes are not applied. Alternatively, you can click *Cancel*.

2. Select the option you require.

3. Click *OK* to confirm.

Deleting an OCR template

You can also delete OCR templates that you no longer need.

1. Choose the OCR template that you want to delete.
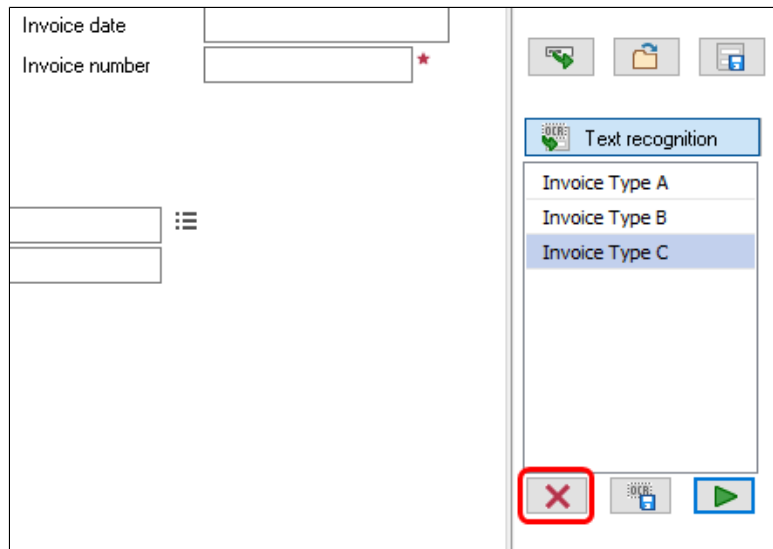
Fig. 120: 'Delete OCR template' button

2. Click *Delete OCR template* (X icon at the bottom of the list of templates).
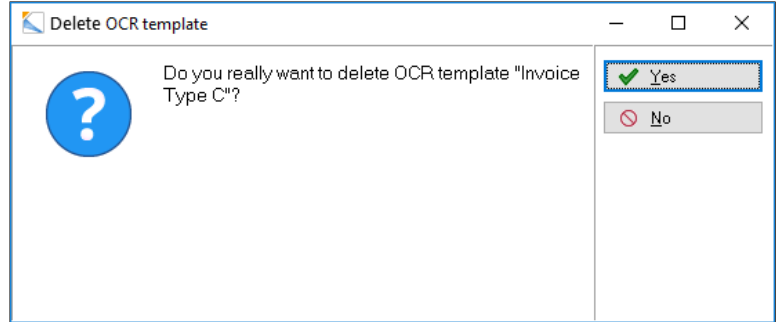
Fig. 121: Confirm deletion

A confirmation dialog box appears.

3. Confirm deletion by clicking *Yes*.

The OCR template will be deleted.

Creating new folders in the repository

Information

We want to create a new structure in the repository, i.e. add new folders as well as child folders.

Step by step

1. Switch to the *Repository* work area.

The *Start* tab is active on the ribbon.

2. Select the folder in the repository in which the new folder will be created. In our example, the folder will be created on the uppermost level of the repository.
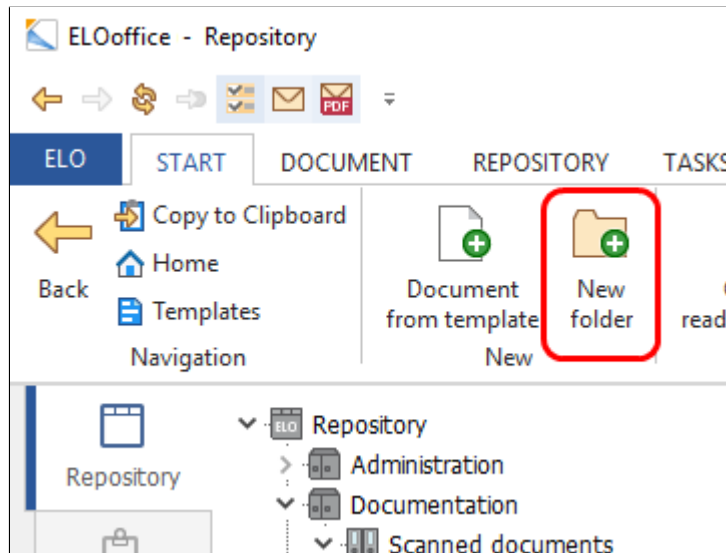
Fig. 122: 'New folder' button

3. Click the *New folder* button.
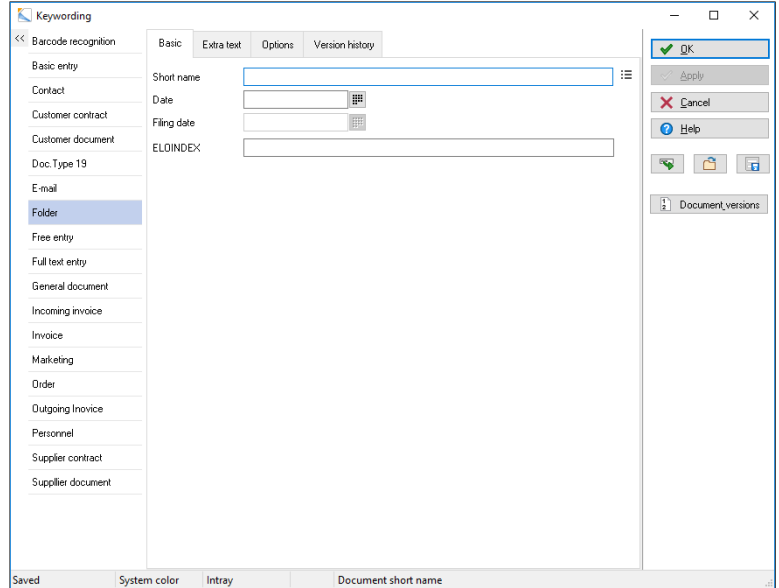
Fig. 123: Keywording form for new folders

The *Keywording* dialog box opens. The *Folder* keywording form opens by default.

Optional: Select a keywording form that is appropriate for the document type from the list on the left-hand side.

Information: In the *Keywording* dialog box, you will only see keywording forms for which the option *Use as folder/document keywording form* has been selected.

4. Enter a short name. This is the folder name in ELO. Enter any necessary information to the other index fields.

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

5. Once you have entered all the necessary information, click *OK*. This will close the dialog box and save your entries for the new folder.

Result

The folder has now been created in the repository and can be used for storing documents or for creating additional child folders.

Defining and inserting default indexes

If you want to create multiple folders at once, you can do so with the *Insert default index* function. ELO comes with several default indexes. You can also define your own default indexes. You can insert a default index to as many locations in the repository as you want.

Requirement

Create a folder here named *Project* as described under *Creating new folders in the repository*. Now create some child folders: *Users, Administrators, White papers, Training*.
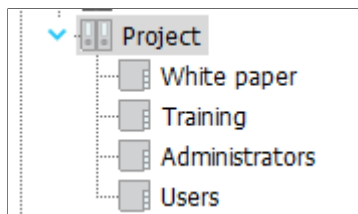
Fig. 124: Creating a default index folder

Define default index

1. Select the *Project* folder in the repository.
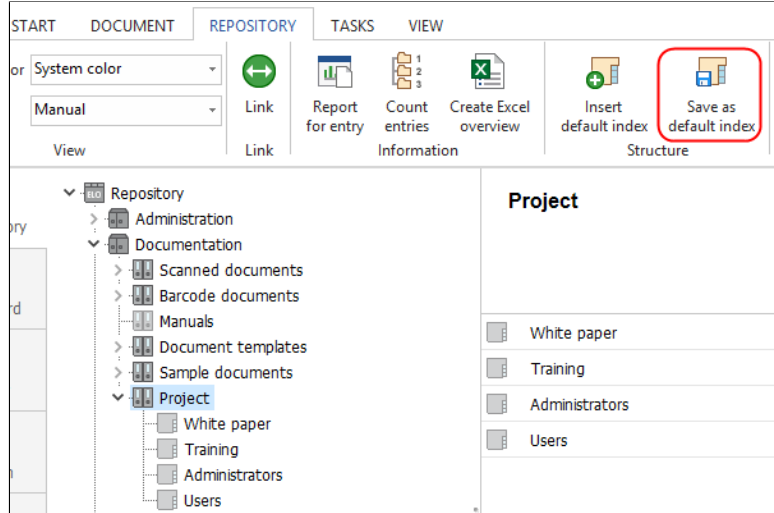
Fig. 125: 'Save as default index' button

2. Click *Save as default index* (ribbon tab *Repository*).
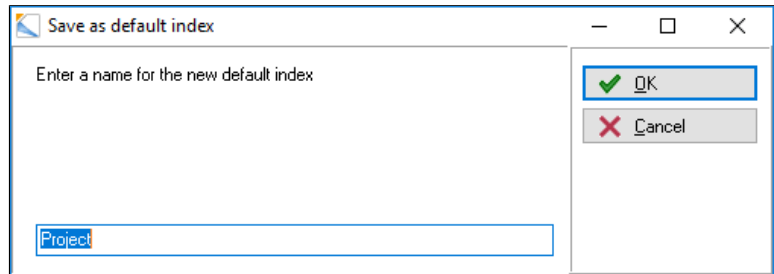
Fig. 126: Assign a name to the default index

The *Save as default index* dialog box appears.

Optional: Change the name of the new default index if you wish.

3. Click *OK*.

This will save the default index. It will be available to every user when they click *Insert default index*.

Insert default index   1. Select a folder in the repository that you want to insert a default index into.
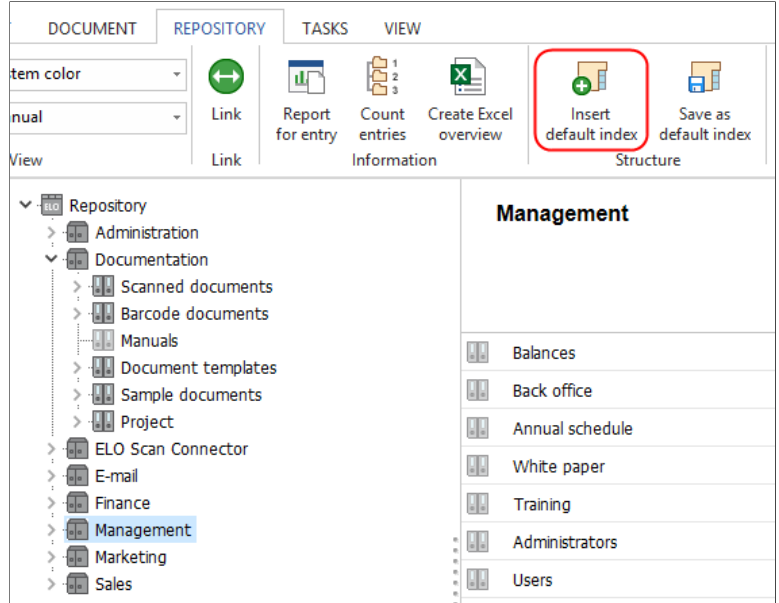
Fig. 127: 'Insert default index' button

2. To add the index, click *Repository > Insert default index*.
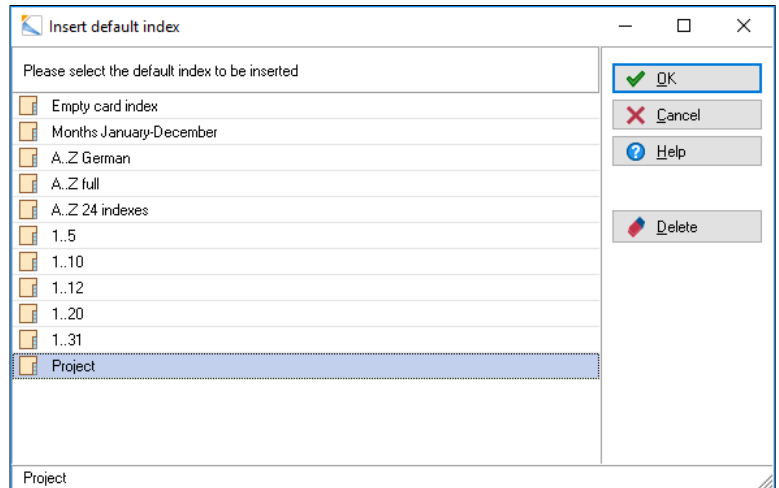
Fig. 128: Dialog box for selecting a default index

The *Insert default index* dialog box appears.

3. Select the desired default index from the list of default indexes.

4. Click *OK*.

The dialog box closes.

Result A new default index has been defined and saved to the repository.

Editing a document, checking documents in and out

Information

We want to edit a document that is stored in the repository and file the new version to the repository. Check the document out. The document is then locked for editing and cannot be changed by any other user. This also prevents anyone from opening and changing the document in the meantime by accident. You can check the document back in again after editing is complete.

Checking out

1. Go to the *Repository* work area and open the folder that contains the document you want to edit.

Optional: Click the *Start* tab on the ribbon if it is not already active.

2. Click the document you want to edit.
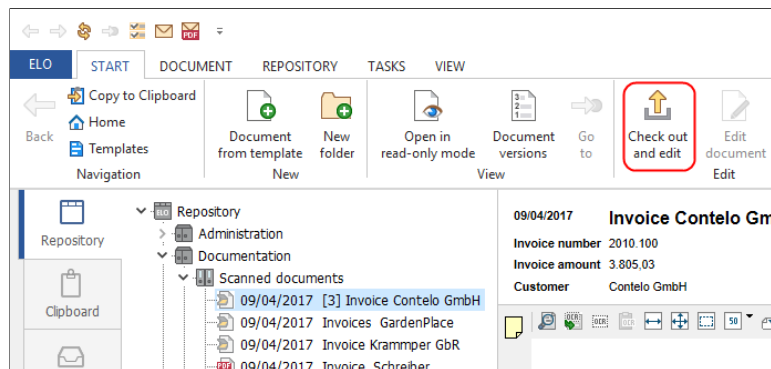
Fig. 129: 'Check out and edit' button

3. Click *Check out and edit*.
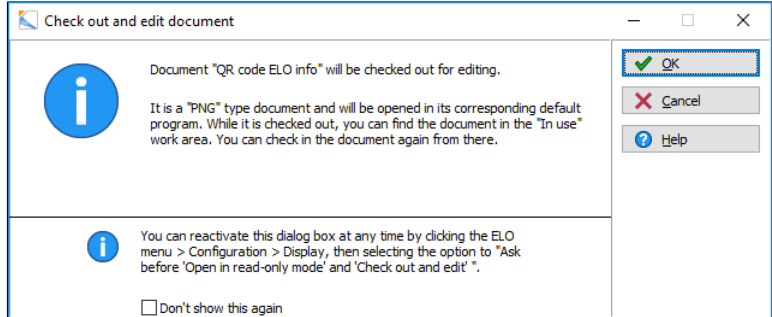
Fig. 130: 'Check out and edit document' notification dialog box

4. Click *OK* to close the dialog box.

The document is checked out and subsequently locked for other users.
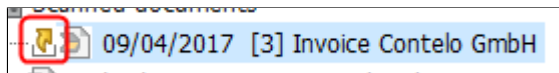
Fig. 131: Document marked as checked out from the repository

A small yellow arrow to the left of the document indicates that the document has been checked out of the repository and is being edited. If someone else attempts to open the document, a message will pop up notifying the user that the document is locked as it is being edited by another user.

The document, such as the TIFF file in the following screenshot, is opened in an external application, where it can be edited.
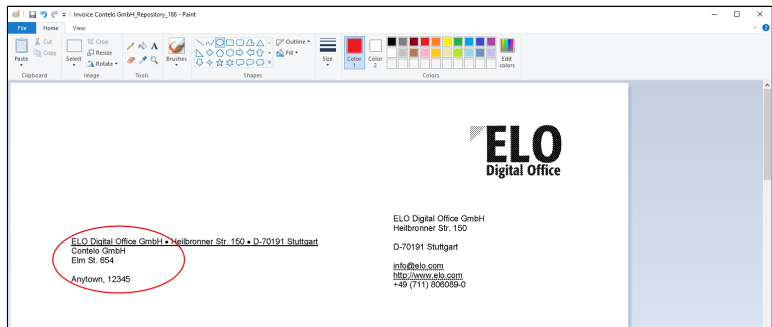
Fig. 132: Editing a TIFF file in Paint

Basics and examples of use

5. Once you have finished editing the document, save it and close the external application.

6. Select the document in the repository that you just edited.

Checking in
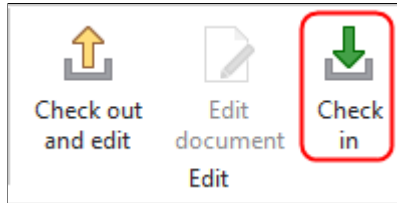
Fig. 133: Checking in a document

7. Click *Check in* to transfer the document back to the repository.
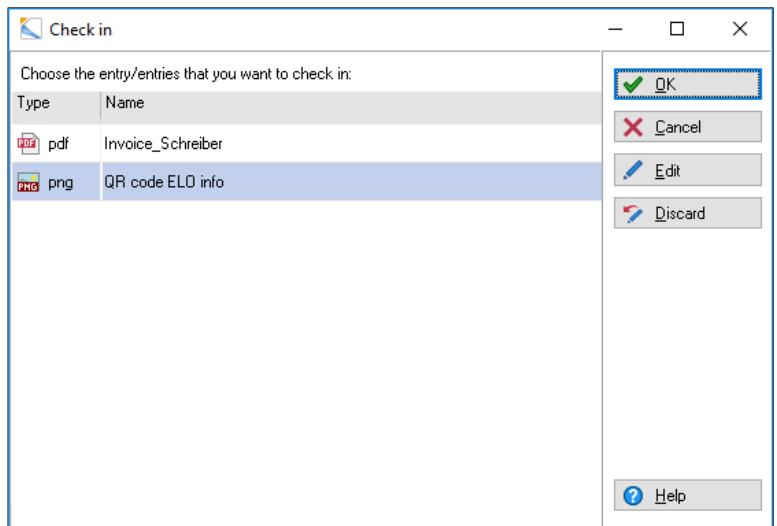
Fig. 134: 'Check in document' dialog box

The *Check in document* dialog box appears.
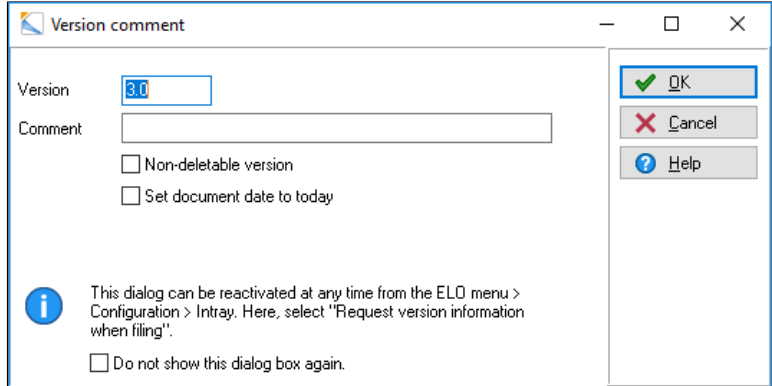
Fig. 135: Entering a version and version comment

Optional: If multiple documents were checked out, select the document you want to check in.

8. Click *OK* to close the dialog box.

The *Version comment* dialog box appears.

9. In the *Version* and *Comment* fields, enter a version number and corresponding version comment.

Optional: If the document date needs to be set to the current date, select the option *Set document date to today*.

Information: Even when a document is version controlled, individual document versions can be deleted from the version history by users with sufficient permissions. If you do not want to delete the current version you just transferred back to the ELO repository, change the version status into a non-deletable version by clicking the option *Non-deletable version*.

10. Click *OK* to confirm.

The dialog box now closes.
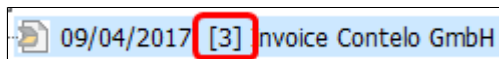
Fig. 136: Checked in document

Result   The new document version is displayed in the repository.

After the document is checked back into the repository, it is no longer shown in the *In use* work area. The changes you have made are shown on the document.

Alternative: Discard changes
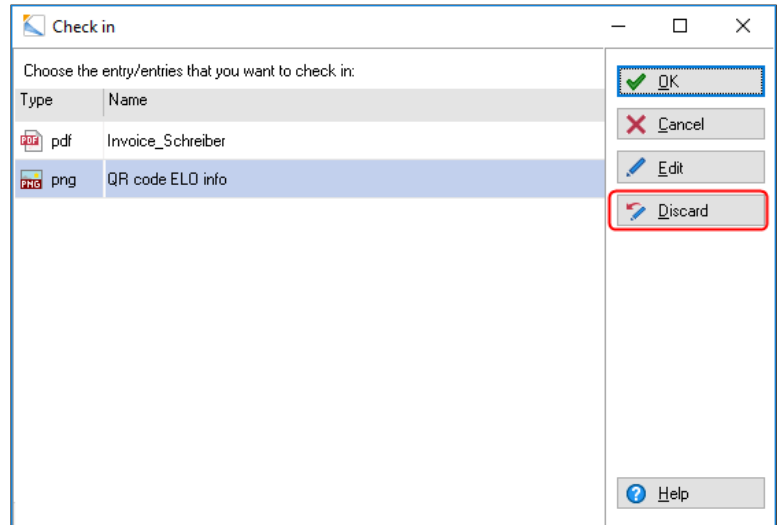
Fig. 137: Discard changes

1. If you want to check a document back in, but you do not want to apply the changes to the version in the repository, click *Discard* in the *Check in document* dialog box.

A confirmation request appears.

2. Click *Yes* to confirm.

The selected document is removed from the checkout directory. The original file is not changed and the document lock is removed. The document remains unchanged in the repository.

Edit a checked out document

If you check out a document, ELO will open the document in the application it detects as the editor program for the corresponding document type. If you have closed the editor program but not checked the document in yet, you can continue editing the document without creating a new document version first.
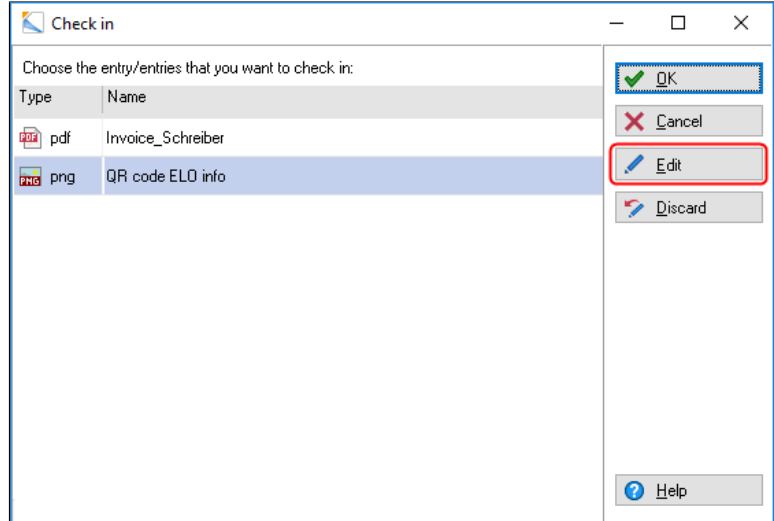
Fig. 138: 'Edit' button

1. In the *Check in document* dialog box, click *Edit*.

The editor program opens again, where you can make additional changes to the document.

2. Once you have made your changes, check the document in as described in the *Checking in* section.

Working with document templates

Information

We want to create a new document with the help of a document template.

Requirements

- The templates must be defined in an external program (e.g. Microsoft Word).
- A document template must exist in the repository, such as one for Microsoft Word documents.

Step by step

1. Switch to the *Repository* work area.

2. Click the *Start* tab on the ribbon.

3. Select the folder in the tree view that you want to file the document to.
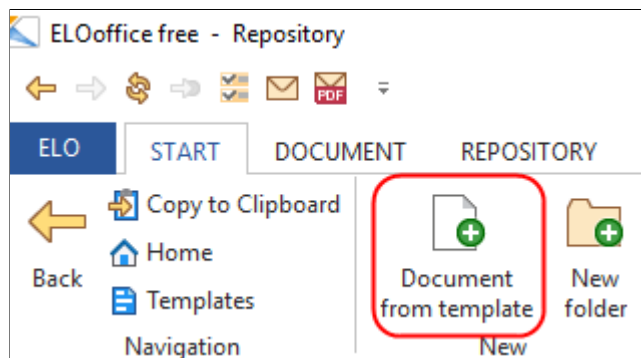
Fig. 139: 'Document from template' button

4. Click *Document from template*. The *Keywording* dialog box opens.

5. Select a keywording form and enter the required information. Click *OK* to confirm your entries.

The dialog box closes.

The *Select document template* dialog box opens.

6. Navigate to the folder that contains the document templates. Enter a name for the folder. Double-click to open the folder.
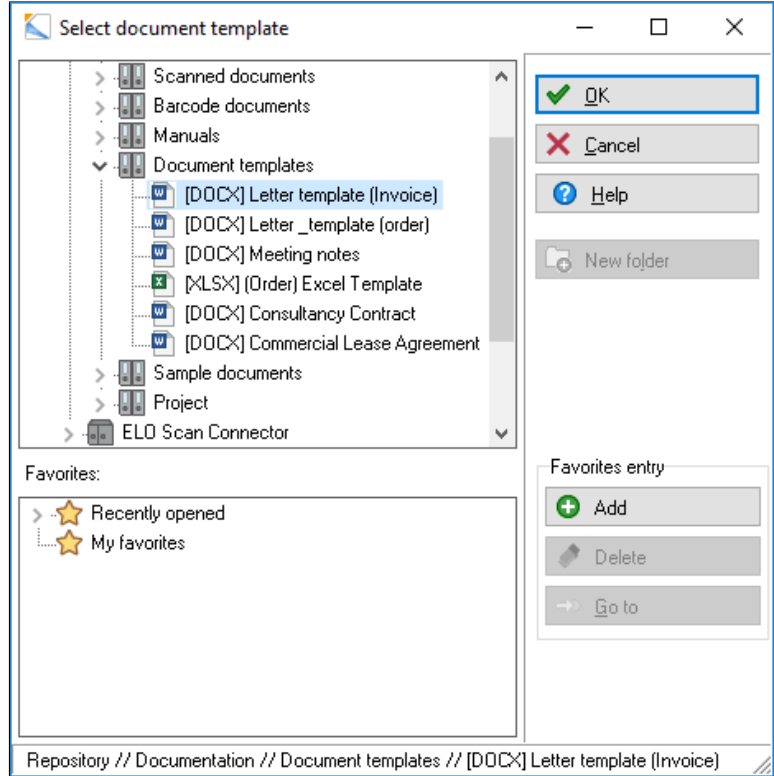
Fig. 140: Select 'Letter template (Invoice)' document template

7. Click to select a document template. Select, for example, the *Letter template (Invoice)*.

Information: You can use any Microsoft Office file as a document template, but it must be filed to the document templates folder.

8. Click *OK* to confirm your selection.

The dialog box now closes. The corresponding application starts and opens the document template.

Basics and examples of use
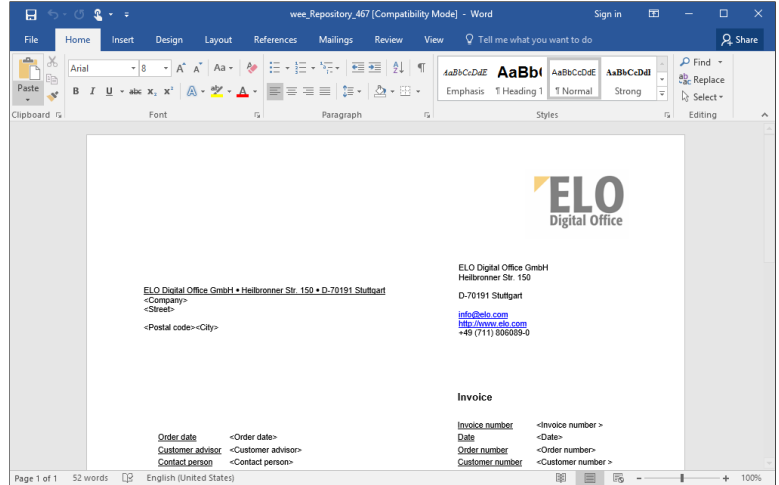
Fig. 141: Create document from template

9. Make the required changes to the document.

10. Now save your changes and close the document in the external editor program.

The document will be filed to the repository in the folder you selected at the start. The document will be marked as checked out and is still located in the *In use* work area.

11. Select the checked out document in the tree view.
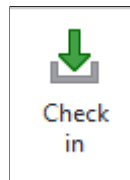
Fig. 142: Check in document created from template

12. Click *Check in* on the *Start* tab of the ribbon.

13. Check the document in.

Result   A new document has been created from a template and filed to ELO.

Adding annotations

Information   Annotations refer to sticky notes, stamps, markers, strikethroughs, and text notes. Annotations can be placed on raster graphics documents that are displayed in the viewer pane (PDFs and raster graphics such as TIF, JPG, etc.).

Annotations are placed directly on a document page. Annotations can be placed on any page of a multi-page document.

Requirement   You require a PDF, TIFF or JPG document that has been filed to ELO.

Information: You need to select the option *Annotations on PDFs* if you also want to use the functions on the document viewer toolbar for PDFs. (*ELO menu > Configuration > Display > Settings* **OR** *ribbon > View*)

Preparation   1. Switch to the *Repository* work area.

2. Open the folder containing the document that you want to place an annotation on.

Fig. 143: Select document for annotation

3. Click the document in the tree view.

The document is displayed in the viewer pane to the right.

Fig. 144: Annotation tools on the viewer toolbar

In the viewer pane, the viewer toolbar is shown above the document, which contains various annotation tools.

- Sticky note
- Horizontal marker
- Strikethrough
- Freehand marker
- Marker
- Text note
- Stamp

You can find more information on the various types of annotations in the *Viewer pane* section.

All annotations are created in the same way. We will show you how to do this in the following example using a sticky note.

Applying a sticky note

1. Click *Sticky note* in the viewer toolbar. The color of the icon on the toolbar button indicates the color of the sticky note.
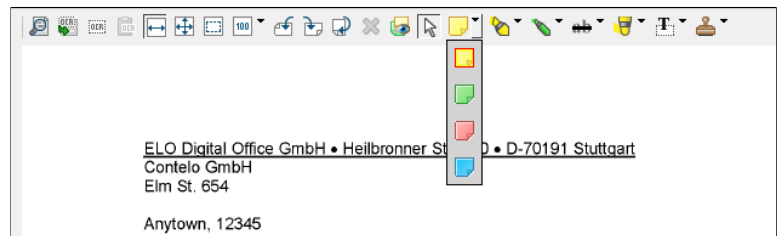
Fig. 145: Sticky note colors

Alternative: To change the color, click the downward-facing triangle next to the *Sticky note* button and select a sticky note color from the drop-down menu.

The cursor turns into a small cross above a sticky note.

3. Place the cursor on the document, then click and hold down the left mouse button.

4. Create the sticky note in the size you want by dragging the cursor to make it larger or smaller.

5. Release the mouse button. The sticky note has now been created.

The cursor is now inside the sticky note.

6. Enter the required information to the sticky note.
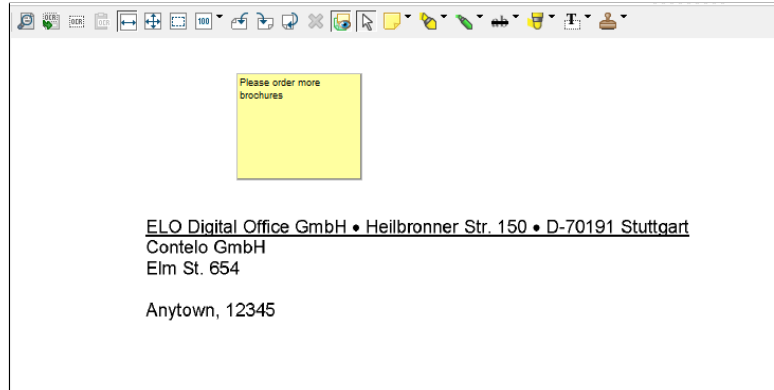
Fig. 146: Sticky note with text on a document

7. Click somewhere else in the document.

The sticky note has been added to the document.

Information: Double-click the sticky note if you want to add or delete text.

Moving an annotation

Annotations can be moved within the selected document page after they are created. To do so, you first need to change the mouse cursor back to normal mode, where it appears as a white arrow. If you just created an annotation, click the mouse cursor symbol on the viewer toolbar before moving the annotation.

1. Click the annotation.

2. Drag the annotation to the place you want it on the page.

3. Click somewhere else on the document outside of the annotation.

The annotation is now located in the new position.

Deleting an annotation

Annotations can be deleted at any time. To do so, you first need to change the mouse cursor back to normal mode, where it appears as a white arrow. If you just created an annotation, click the mouse cursor symbol on the viewer toolbar before deleting the annotation.

1. Click the desired annotation.

2. Click *Delete selected annotation* (red X icon).

The annotation is removed from the document.

Adding margin notes

Margin notes are small, practical tools for adding short messages, notes or memos to a document. Margin notes are similar to annotations, but margin notes are not placed directly on a document. Instead, they appear on the split bar beside the document.

ELO provides you with three different types of margin notes:

- **General margin note (yellow)**: Can be created and edited by all users.

- **Personal margin note (green)**: Only the creator can read and edit this type of margin note.

- **Permanent margin note (red)**: This margin note cannot be removed from the document.

Please note: A permanent margin note cannot be edited or removed from a document.

Margin notes context menu

A separate context menu exists for margin notes. Use it to perform all necessary work on existing margin notes and to create new notes.

1. To open the context menu for an existing margin note, right-click the margin note.

Alternative: To open the context menu for margin notes, right-click the split bar.

The following menu entries are available depending on the context:

Basics and examples of use

- **New**: Select this menu item to create new margin notes. *New* opens a submenu with the three types of margin notes.

- **Edit**: Opens the dialog box for creating margin notes. Make your changes to the text on the margin note.

- **Settings**: Opens the *Notes* tab of the *Configuration*. You can customize the settings for the margin notes here, such as their size and color. Refer to the *Configuration* chapter for more information.

- **Delete**: Removes the selected margin note.

- **Help**: Opens the in-program help.

- **Print**: Select this command to open the *Print note* dialog box. Use this dialog box to print the text of the selected margin note.

Adding margin notes

Margin notes can be placed on every document. You can set the size and color of the margin notes in the configuration. You can enter a maximum of 200 characters. The margin notes always stay on your document, even if you transfer the document to the Intray, for example.

1. Open a folder that contains at least one document.

2. Select the document you want to place a margin note on. Switch to the *Document* tab of the ribbon.
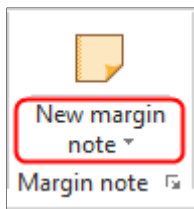
Fig. 147: 'New margin note' button

3. Click *New margin note*.
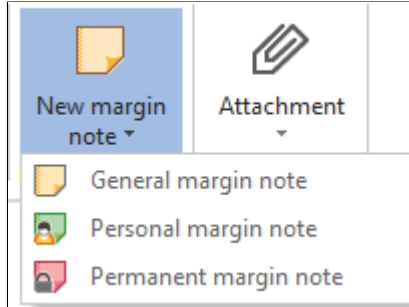
Fig. 148: Margin note drop-down menu

A drop-down menu appears.

4. Choose a type of margin note.
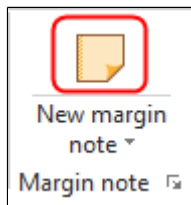
Fig. 149: Creating a general margin note directly

Optional: To immediately create a general margin note, click the yellow margin note symbol above the *New margin note* button.
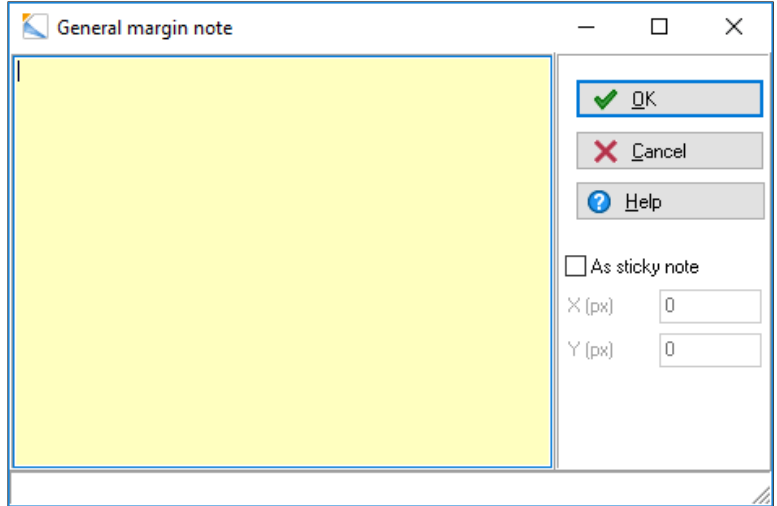
Fig. 150: Placing a new margin note on a document

The dialog box for creating margin notes opens.

5. Enter text to the note and click *OK* to confirm.
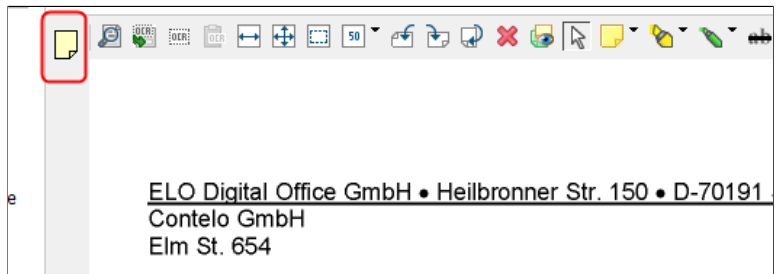
Fig. 151: Attached margin note

The margin note immediately appears as an icon on the split bar to the left of the document. If there are multiple margin notes, they are shown above and below each other.

Information: As soon as you place a margin note on a document, the same margin note is placed on all references for this document, since they all share the same keywording information.

Viewing margin notes
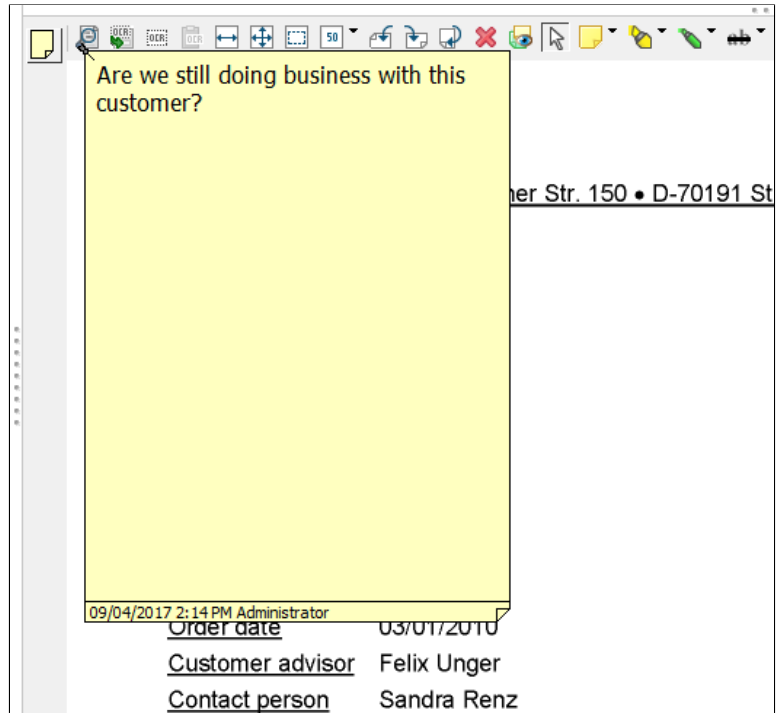
Fig. 152: Viewing a margin note

To read a margin note, point to the margin note icon on the split bar. The margin note appears above the document. To close the margin note, move the mouse away from it.

Restoring deleted entries

Information

The *Delete* function does not actually delete a folder or document from the repository. The entry is assigned a deletion marker and is hidden in the repository. This deletion marker can be removed later. If you do so, the document or folder will be visible again in the repository.
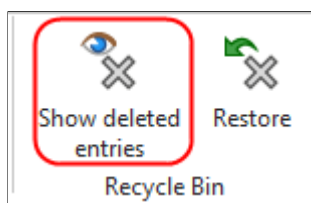
Fig. 153: 'Restore' button

1. Click *Repository > Show deleted entries*.
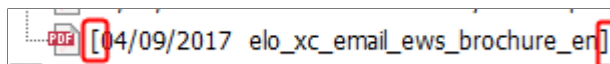
Fig. 154: Deleted document

You can recognize deleted entries in the tree view because their names are shown in brackets.

2. Select the object you want to restore.
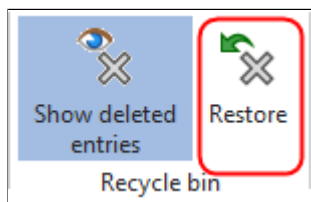
Fig. 155: Restore deleted entry

3. Stay on the *Repository* ribbon tab and click *Restore*.

The brackets disappear from the entry and it is returned to its original location in the repository. Finally, you should deactivate the *Show deleted entries* function.

Information: There is no function that shows the deleted entries in a list. This means you need to know where your deleted entry is located to be able to restore it.

Permanently remove deleted entries

1. Open the *ELO menu > Maintenance > Permanently remove deleted entries*.

A message appears, notifying you that all deleted entries can no longer be restored after this action is performed.

2. Click *OK* to confirm.

The documents are permanently deleted from the repository.

Please note: This function permanently removes all deleted entries in the current repository. You are unable to restore this data later. For this reason, we recommend that you perform a full backup first.

Remove deleted versions

Click *ELO menu > Maintenance > Remove deleted versions* to permanently remove deleted versions of version-controlled documents.

Forwarding documents from within ELO

If you use ELO with multiple other users in a network environment, you can send documents directly to colleagues. This function is available in the *Intray* work area.

There are two methods to send documents from your Intray to another Intray:

- **Move to other user's Intray**: Transfer a document directly to another user's Intray. After it is moved, the document is no longer in your Intray.

- **Copy to other user's Intray**: Create a copy in a colleague's Intray. The original document remains in your Intray. This enables you to send a document to multiple Intrays in sequence.

The method for using the two functions is identical. Here, we use the function Copy to other user's Intray as an example.

Requirements

- There must be a document in the Intray.
- There must be at least two users in ELO.

1. Go to the Intray and select the document you want to send.
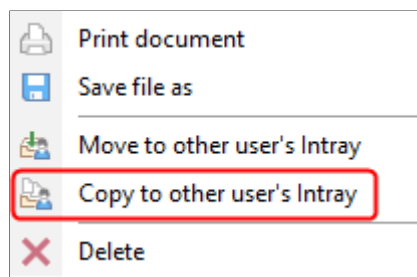
Fig. 156: 'Copy to other user's Intray' button in the Intray context menu

2. Right-click to open the context menu.

3. Select *Copy to other user's Intray* from the context menu.
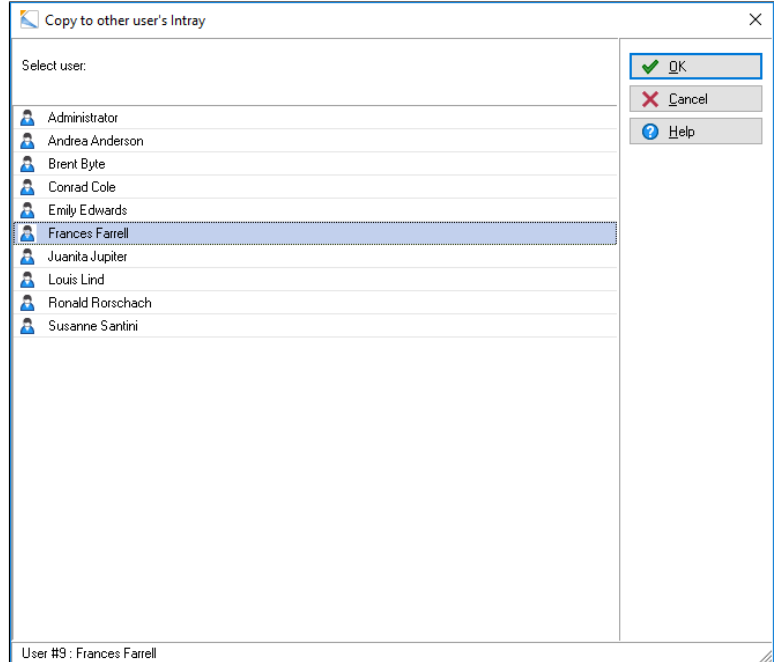
Fig. 157: 'Copy to other user's Intray' dialog box

The *Copy to other user's Intray* dialog box opens. You see a list of all the users that you can send documents to.

4. Select a user you want to send the document to.

5. Click *OK* to confirm your selection.

The document is now located in the Intray of the selected recipient.

Linking documents

The *Repository* ribbon tab and the *Repository* work area context menu contain the *Link* function. Documents can be linked to other documents within a repository. The purpose of this is to connect documents in different areas of the repository so that they can reference one other or so that they are easier to find.

1. Select a document in the *Repository* or *Search* work areas.
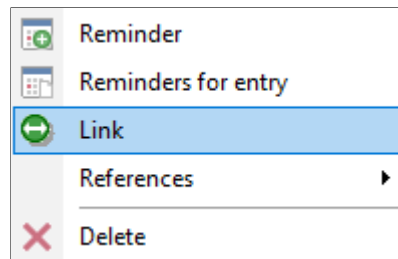
Fig. 158: 'Link' button in the context menu

2. Open the context menu.

3. Click *Link*.
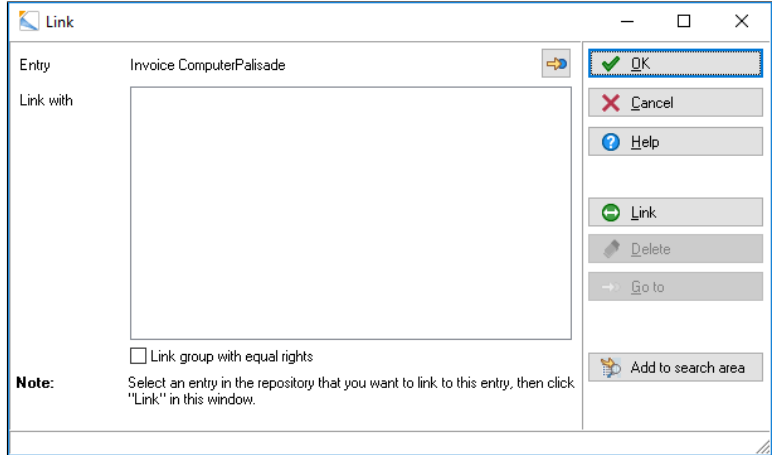
Fig. 159: 'Link' dialog box

The *Link* dialog box appears.

4. In the ELO repository, highlight the document you want to link to the previously selected document.

5. Click *Link*.

Fig. 160: Linked document

Basics and examples of use
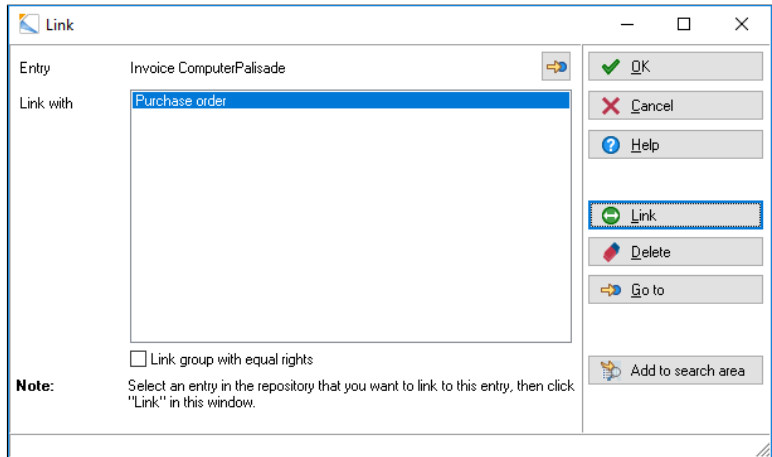
ELO links the selected document to the original document and shows the linked document's *Short name* in the *Link* dialog box. You can recognize linked documents in the repository by an [L] in front of the short name.

Showing links

You can retrieve linked documents from the context menu. Click *Link* to open the *Link* dialog box, which shows a list of linked documents.

Placing linked documents in the Search work area

Click *Add to search area* in the *Link* dialog box to generate a list of linked documents and place it in the *Search* work area.

Deleting a link

You can delete links between various documents.

1. Click the linked document and open the context menu.

2. Select the *Link* menu item.

The *Link* dialog box appears. All documents linked with the document are shown in the *Link with* area.

3. To delete a link, select the corresponding documents and click *Delete*.

The documents are removed from the list and the links are deleted.

Encrypting documents

You can encrypt files in ELO. The only way to access encrypted documents is with a password. Even if the documents are accessed outside of ELO, in Windows Explorer for example, you cannot read encrypted documents.

Please note: Use encryption keys to encrypt documents. First, define your encryption keys and assign passwords to them in *ELO menu > System settings > Encryption keys*.

- Make sure you choose an appropriate name for the encryption key and a secure password.
- Make sure that only authorized users have access to the password and are permitted to use it.

Warning: Keep the password in a secure location. If you forget your password, you will no longer be able to access the encrypted files.

A document's encrypted status cannot be reversed after the document is filed. You can decide whether to encrypt a document either when you create the keywording form or when you file the document.
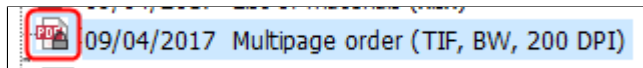
Fig. 161: Encrypted document

You can tell if documents are encrypted by the lock symbol in the tree view.

Functions

This chapter lists all functions in the program in alphabetical order. Each function is explained briefly. Other parts of the program are explained elsewhere in the manual. More information on individual functions and dialog boxes is also available in the in-program help.

Information: As not every user has access to every function in every work area, some functions are grayed out. The ELO main administrator is also able to limit the range of functions. For this reason, some of the functions may not be available to you.

Function overview

About

Available in: *ELO menu*

This function shows you some brief information about the program. In particular, you can find the version number of your program here. This is useful for support cases.

Activate report

Available in: *ELO menu*

Click the menu item again to deactivate the function. When this option is enabled, ELO logs all repository processes.

Activities for entry

Available in: *Ribbon > Tasks*

Here you can see a list of activities that have already been set up for a document as well as when and by which user, etc.
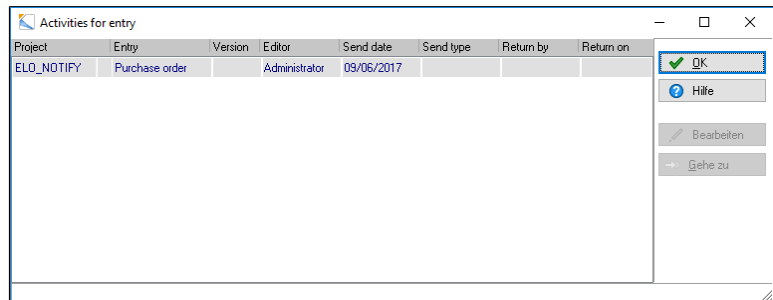
Fig. 162: 'Activities for entry' dialog box

Activity

Available in: *Ribbon > Tasks*

You can create activities for both documents and folders. In the *Activity* dialog box, you can assign a document to a project, and then assign the activity to a recipient, for example.

Activity projects

Available in: *ELO menu > System settings*

Activities enable you to more closely monitor a document within a work process, as well as to log actions that occur in regard to that document. Activities are always associated with individual documents. Any process that affects an individual document can be logged.

Activities are always assigned to a project so it is easier to differentiate between them. The data within a project that is to be logged in the respective activities is structured in a form. If you want to use the *Activities* function with a custom activities form, you first need to create an activity project. Activities are always managed in relation to projects and are always tied to a document.

Refer to the *Advanced functions* chapter, *Activities* section for detailed instructions on how to create an activity project.

Add attachment

Available in: *Ribbon > Document > Attachment*

You can attach graphics, sound and video files to any document stored in ELO using this function. That means that you can attach almost any file to a document in ELO, including standard text fields or .exe files.

Use this function to select a file that you want to attach to a selected document in the repository. A copy of the file is then saved in ELO as an attachment. If the document already has an attachment, it is stored to the version history. If the *Version control disabled* option on the *Options* tab of the keywording form is selected for the document, an existing attachment will be replaced with the new one without confirmation.

Add folder (Mobile-Connector)

Available in: *Repository > ribbon > Repository*

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

Add pages

Available in: *Intray > ribbon > Scan/File*

This function enables you to attach a TIFF document from the Intray to an existing TIFF document in the *Repository* work area. Switch to the Repository work area.

Select the corresponding TIFF document that you want to add to the Intray document in the *Repository* or *Search* work area. Go back to the Intray and select the TIFF document that you want to attach. Now click the *Add pages* button on the *Scan/File* tab. This feature is only available for TIFF documents.

Add scanned pages

Available in: *Ribbon > Document*

Use this option to scan individual pages and attach them to the document (TIFF format) selected in the repository.

Add to full text database

Available in: *Ribbon > Repository*

This function lets you add the contents of a document to the full text database. This allows you to search for any term in the document. This means that you can search for a specific term in the full text database. All documents that contain this term are shown.

If you want to add a document to the full text database, select the relevant document and click the *Add to full text database* button. A dialog box containing a progress bar appears. Afterwards, the contents of the document will have been indexed.

Information: We do not recommend adding every document to the full text database, because it can cause the full text database to become too large, which slows down the search. We recommend that you use this ELO feature with caution.

You can also add documents to the full text database during filing. There are two ways to do this:

☑ Add document to full text database
☐ Create path automatically

Fig. 163: 'Add document to full text database' setting

Option 1: When creating or modifying a keywording form, activate the *Add document to full text database* function in the *ELO menu > System settings > Keywording forms*. If you check this box, every document filed using this keywording form is automatically added to the full text database.

Option 2: Click the *Options* tab in the keywording form when keywording a document.

Fig. 164: 'Add to full text database' option

Activate the *Add to full text database* option here. The document is added to the full text database during filing. If a document is already in the repository, you cannot add it to the full text database using this function.

Additional references   Available in: *Context menu*

The *References* function gives you an overview of all the references to a document or ELO object in the repository.

Annotations   Available in: *Document viewer toolbar*

The *Annotations* function offers the option to place notes or markings on PDF documents and documents in raster graphics format (TIFF, BMP etc.). The individual functions are explained in the *Viewer pane* section.

> **Information**: You need to select the option *Annotations on PDFs* for the functions to also be available for PDF in the document viewer toolbar. (*ELO menu > Configuration > Display > Settings* **OR** *ribbon > View*)
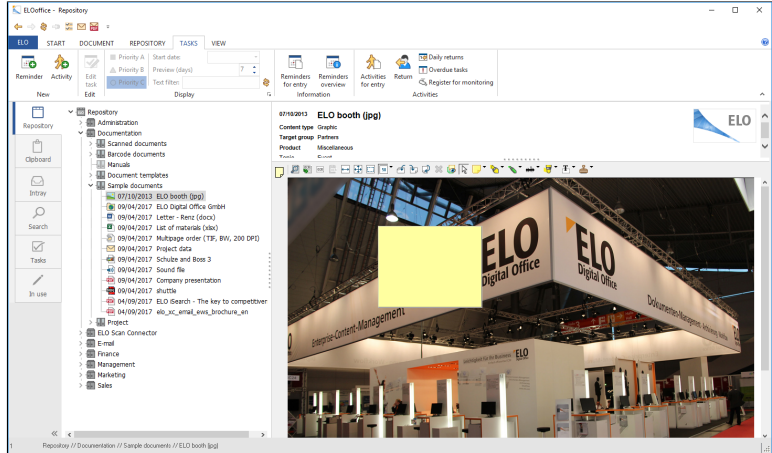
Fig. 165: Adding annotations

Information: Annotations are not margin notes.

Annotations on PDFs	Available in: *Ribbon > View*
	If the *Annotations on PDFs* function is selected, the functions of the document viewer toolbar are also available for PDF documents. Alternatively, you can also enable this option via *ELO menu > Configuration > Display > Settings*.
Arrange freely	Available in: *Ribbon > View*
	Use the *Arrange freely* function to open a second ELO window. This enables you work to with different views of the repository.
Attachment versions	Available in: *Ribbon > Document > Attachment*
	The *Attachment versions* function enables you to track and edit the history of a file attachment.
Automatic filing	Available in: *Intray > ribbon > Scan/File*

The *Automatic filing* function enables you to file a document from the Intray straight to a folder. First of all, you need to create a filing definition for the keywording form and set up specific conditions for the target folders. This enables ELO to recognize where the document should be filed to based on the selected keywording form (document type),

For additional information on the topic of *Automatic filing*, refer to the *Keywording* chapter, *Advanced keywording forms* section.

Back

Available in: *Ribbon > Start*

Click *Back* to return to the most recent document you viewed in your ELO session.

Barcode recognition

Available in: *Intray > ribbon > Scan/File*

Use this function to start barcode recognition on a document in the Intray. Please note that you must create a corresponding keywording form for barcode recognition.

Batch filing

Available in: *Intray > ribbon > Scan/File*

The *Batch filing* function makes it easy to file several documents at the same time.

Let us assume that you have a folder full of older documents that you do not want to keyword individually. The *Batch filing* function allows you to file all documents at once using a single keywording form.

Change password

Available in: *ELO menu*

All ELO passwords can be changed. For security reasons, we recommend that you change passwords from time to time. There are two ways to change passwords:

- The ELO administrator can change passwords in the *ELO menu > System settings > Users*.

- Authorized users can change their own password in the *ELO menu > Change password* option.

Information: When changing the password, a minimum of six characters is required.

Check for updates

Available in: *ELO menu*

This function checks whether there is a current update for ELO. If an update is ready and you want to update the program, click *OK*.

Check in

Available in: *Ribbon > Start*

This function moves a document from the *In use* work area back into the repository. This means that the document will no longer be locked and can be edited by other users. After it is checked in, the edited document will be filed as a new version for version-controlled documents.

Check out and edit

Available in: *Ribbon > Start*

This opens the selected entry for editing in an external application. The document is checked out and locked for other users. Checked out entries are located in the *In use* work area.

A confirmation dialog box or specific information is displayed before the document is opened for editing.
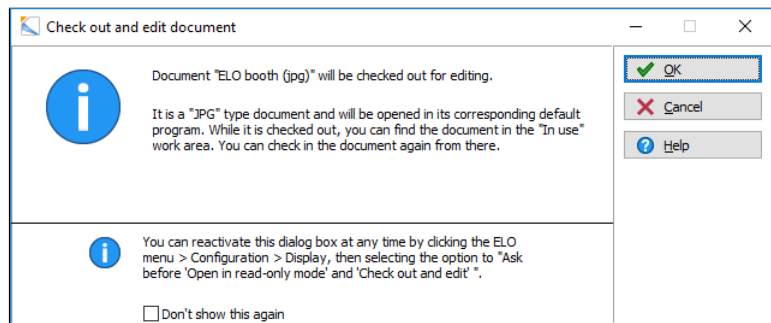
Fig. 166: Confirmation dialog box during checkout

Information: Refer to the *Checking out and editing folders* section for further information on checking out folders.

After you have made all the changes you want to your document, save it in the application. Then close the program to return to ELO. To apply the changes, you need to check the document back into the repository.

Close

Available in: *ELO menu*

This closes the program.

Compare versions

Available in: *Ribbon > View*

The *Compare versions* function lets you compare document versions. Click the *Compare versions* button on the ribbon.
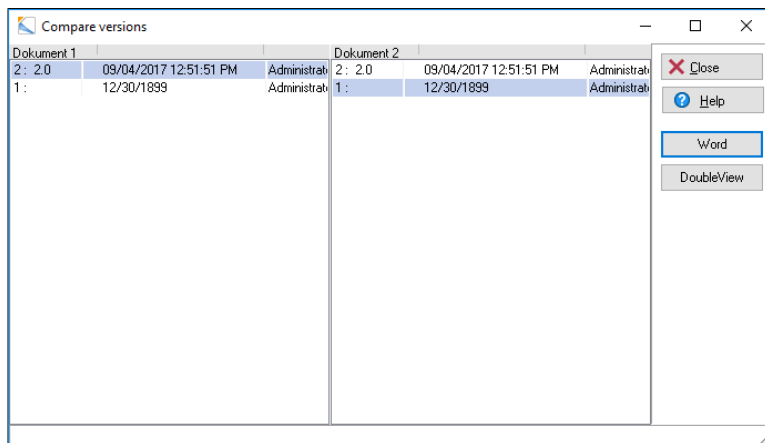
Fig. 167: Comparing two document versions

In the dialog box that opens, select the versions in the left-hand and right-hand windows that you want to compare. Then click *Double-View*. The two versions are displayed side by side, enabling you to compare them for differences.

Configuration

Available in: *ELO menu*

The administrator makes basic changes in ELO via the configuration. This enables you to configure the program tailored to your business needs.

Configure ELO Scan&Archive

Available in: *ELO menu > System settings*

If you want to use the *ELO Scan&Archive* module, you first need to define and save areas for document types using a sample document. These make it easier for you to store documents of the same type using OCR.

Copy

Available in: *Ribbon > Start*

Use the *Copy* function to copy an entry (document or folder) to the system clipboard in ELO. From there, you can paste the copied entry anywhere in the repository using the *Insert copy* function. This is helpful if you need to create the same folders and indexes every year.

Copy to Clipboard

Available in: *Ribbon > Start*

The Clipboard is a type of cache, or temporary repository, that you can copy any object to and create temporary information folders.

Information: Documents are normally deleted from the Clipboard when you close ELO and are no longer available when you restart the program. If you check the option *Save Clipboard contents* under *Configuration - General*, these documents will remain on the Clipboard.

Copy to Intray

Available in: *Ribbon > Document*

The *Copy to Intray* function creates a copy of the selected document in your own Intray.

Copy to other user's Intray

Available in: *Intray > ribbon > Scan/File*

The Intray has a variety of functions besides just receiving documents. You can also send documents (or copies) over the network to colleagues or other departments.

For more information on *Copy to other user's Intray*, refer to the *Basics and examples of use* chapter in the *Forwarding documents from within ELO* section.

Count entries

Available in: *Ribbon > Repository*

When you click the *Count entries* function, you will see a dialog box with an overview of the properties of the selected entry, such as the number of documents or the amount of disk space used.

Create Excel overview

Available in: *Ribbon > Repository*

With the *Create Excel overview* function, you can create an overview in Excel of the data associated with folder entries. The table is filed to your Intray and can be filed or deleted from there after viewing.

	Information: The template documents for the Excel overview are located in the repository template under *Administration > Excel templates*. They can be customized, but the structure of the data in the first tab must always correspond to that of the respective keywording form since it is entered there. Besides the template documents for the folders, you can also create templates for other folders. The templates are assigned on a name basis.

Create preview document

Available in: *Ribbon > Document*

The *Create preview document* menu item creates a preview document for the active document. You will see this preview document when you use the *Display preview document* or *Thumbnail view* functions.

	Information: To create a preview document via the ELO TIFF Printer, the settings in *ELO menu > Configuration > Display filters* must be correct. You must enter valid values to the *Preview path* and *Preview printer* fields.

Create reference

Available in: *Ribbon > Start*

With the *Create reference* function, you can create a reference to a document or folder in the repository. References are not copies (duplicates), but references in the traditional sense. References allow you to make contents available at different locations within the repository. You can recognize a reference by a small black arrow in the reference entry's icon.

The *Reference* tab appears on the ribbon when you click the *Create reference* function. Select a target folder for the reference, then click the Create reference button.

You will find a list of all references for an entry in the context menu under *References*. Use the topmost entry in the list to go to the original entry.

Create signature

Available in: *Ribbon > Document*

This function uses a signature component to sign a document. This function is only available when you have installed a signature component. You can find more information on this feature in the documentation on the signature component.

Daily returns	Available in: *Ribbon > Tasks*
	Activities were created to more closely monitor a document within a work process, as well as to closely log actions that occurred in regard to that document. Activities are always associated with individual documents. The activities list that is displayed only contains those documents that have not yet been returned. If you want to complete an activity, you can select this option and then double-click an activity to edit it.
Data backup	Available in: *ELO menu*
	The *Data backup* function allows you to create a backup of your repository.
Delete	Available in: *Ribbon > Start*
	Deletes the selected entry from a list, regardless of whether it is a reminder or another ELO object (folder or document). You can select and delete multiple entries at the same time.

Information: ELO does not immediately delete the entries permanently, but initially marks the selected entries for deletion. The entries are only deleted if you execute the *Permanently remove deleted entries* function. Deleted entries can be restored up to this point.

Delete attachment	Available in: *Ribbon > Document > Attachment*
	Use this menu item to delete an existing attachment for a document selected in the repository.
Delete expired documents	Available in: *ELO menu > Maintenance*
	Every ELO object can be assigned an expiration date. This is a useful option if you have documents that need to be retained over a specific period by law. Use the *Delete expired documents* function to tag all objects that have reached their expiration date. Use the *Permanently remove deleted entries* function to delete these documents permanently.
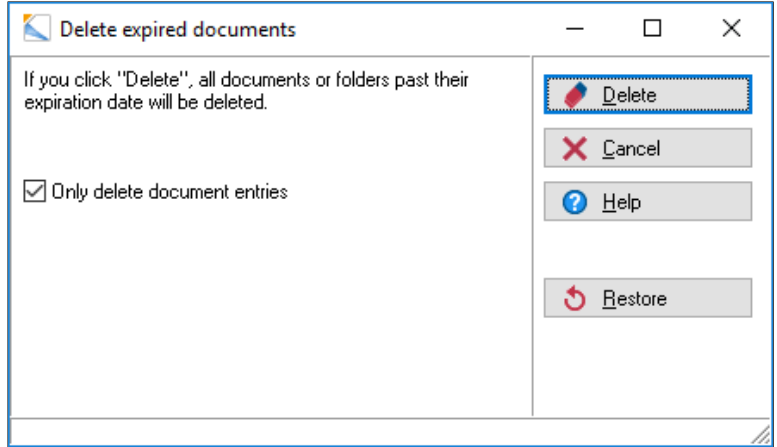
Fig. 168: 'Delete expired documents' dialog box

For additional information on *expired documents*, refer to the *Administration* chapter, *Lifetime and expiration documents* section.

Delete from full text database

Available in: *Ribbon > Repository*

Use this function to delete a document from the full text database. This means that you cannot find the document with the full text search. This is useful if the contents of the document should only be available to specific users and you have set the corresponding rights.

Delete keywording

Available in: *Intray > ribbon > Scan/File*

You can keyword entries again once they are in the Intray, but you may need to delete existing keywording information first.

Click *Delete keywording*. This deletes all the information you entered, e.g. keywords, names etc. The document itself remains unchanged and retains the name it had before you keyworded it. The name is the same as when it was imported into the Intray.

Delete margin note (split bar)

Available in: *Viewer pane > split bar > context menu > Delete*

Use this function to delete the selected margin note.

Direct filing

Available in: *Intray > ribbon > Scan/File* or the context menu

Use the *Direct filing* function to file documents directly to the repository from the Intray.

The direct filing function is similar to other filing methods. However, please keep in mind that you first need to select the target folder in the repository before you can use this function.
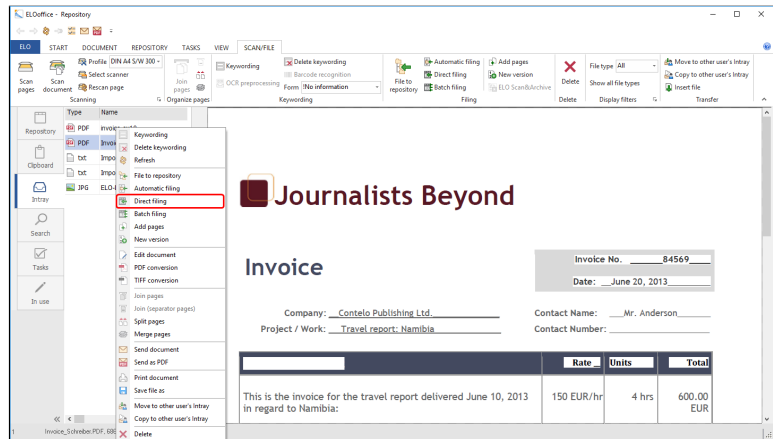
Fig. 169: Direct filing from the context menu

Direct search (all keywording data)

Available in: *Search work area > ribbon > Search*

The direct search performs a search throughout various areas of the repository. The search includes short names, extra text in the keywording form, index fields, the full text database, margin notes and information placed in the version comments, provided you have selected these in the dialog box *Search options* (*ribbon > Search > Additional options*). Please note that it may take a considerable amount of time to search through all areas of large repositories.
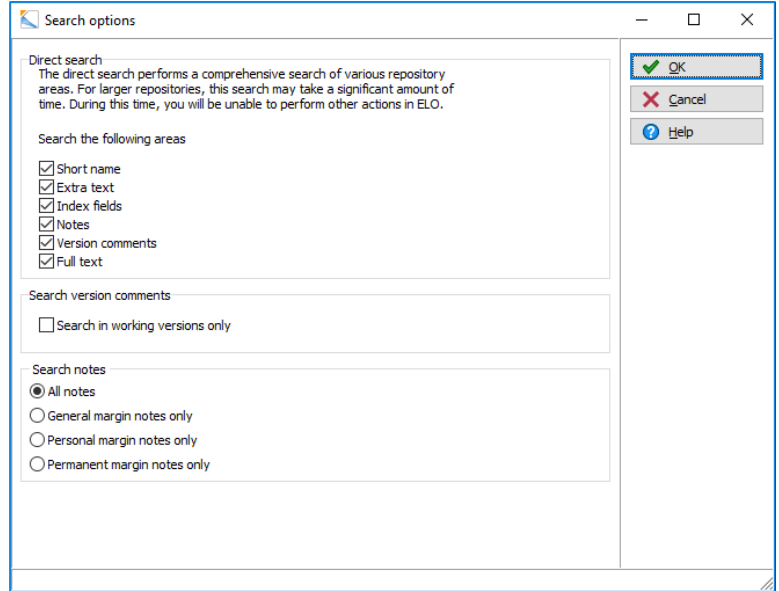
Fig. 170: Configure direct search

Discard document changes

Available in: *In use > ribbon > Start* or the context menu.

If you open the context menu and click *Discard document changes*, the working copy is deleted. The document is checked in without any version changes. You may have to close the editing program beforehand.

Document from template

Available in: *Ribbon > Start*

ELO allows you to store document templates (for Microsoft Word, Microsoft Excel, etc.) in the repository. This gives you faster access to your document templates. Documents that you create from a template stored in ELO are filed straight to the repository. You do not need to import the document to the repository once you have finished editing it. Instead, you can simply check it in.

For more on the *Document from template* function, refer to the *Basics and examples of use* chapter in the *Working with document templates* section.

Document manager consistency check

Available in: *ELO menu > Maintenance*
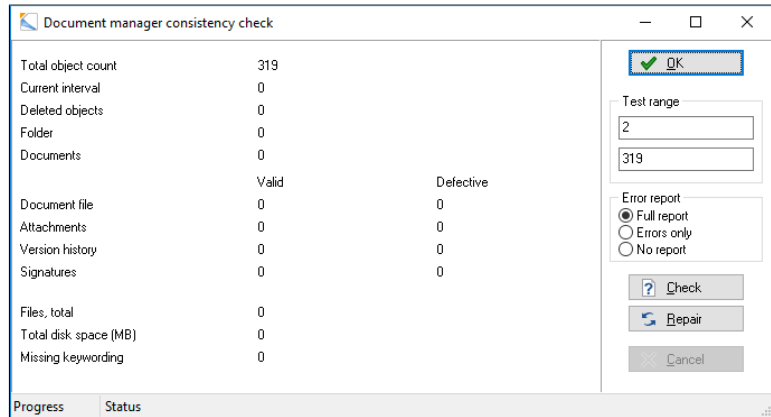
Fig. 171: Perform a document manager consistency check

The administrator can use the *Document manager consistency check* dialog box to check the repository for inconsistencies that may occur due to script errors during filing and correct them automatically.

Document paths

Available in: *ELO menu > System settings*

ELO uses document paths to manage storage locations. These allow you to configure new storage media, renew access to documents that have been moved, or monitor the amount of free disk space. The document path specifies the physical storage location of the documents. Normal users will usually not have to worry about document paths, since they are already defined in the keywording forms, such as in the default *Basis* path.

It is occasionally a good idea to define multiple filing paths, for example, to save certain documents on another hard drive for backup purposes.

See the *Filing paths* section in the *Administration* chapter for more on *document paths*.

Document versions

Available in: *Ribbon > Start*

Displays the version history of a document.
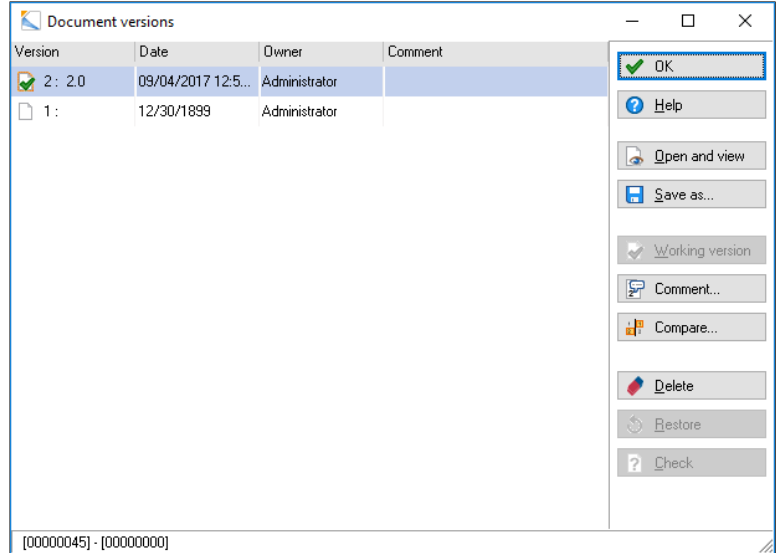
Fig. 172: Show document versions

You can add comments to the individual versions of a version history using the *Comment* button.

> **Information**: The *Document versions* function does not show you the version of the attachments. You can find the *Attachment versions* on the ribbon in the *Attachment* submenu.

Edit (margin notes, split bar)

Available in: *Viewer pane > split bar > context menu*

If there are any margin notes on a document, use this function to open the dialog box to edit them. This does not apply to permanent margin notes.

Edit document

Available in: *Ribbon > Start*

Select the *Edit document* function in the context menu or on the ribbon to open a file with the corresponding original application. You must have checked the document out of the *Repository* beforehand. You can make as many changes as you need to as well as save intermediate versions of your work.

Edit margin note (split bar)

Available in: *Viewer pane > split bar > context menu > Edit*

Use this function to edit the selected margin note.

Edit task

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

Use this function to open the *Reminder* or *Activity* dialog box in the *Tasks* work area to edit a reminder or an activity for a document. It shows you all the document data relevant for the reminder/activity.

ELO Scan&Archive

Available in: *Intray > ribbon > Scan/File*

The *ELO Scan&Archive* function enables you to file selected documents using predefined areas.

Please note: The button will not be enabled until you have defined areas for at least one document type. You can make these settings under *ELO menu > System settings > Configure ELO Scan&Archive*.

Encryption keys

Available in: *ELO menu > System settings*

ELO enables you to safeguard your document files using 128-bit encryption. You can use up to 16 encryption keys. Each key has its own password. You can choose any name you like for the encryption keys. It is important to remember that you need to decide which encryption key you want to assign to a document when you are creating it as it cannot be changed later for security reasons. In addition, you cannot add encrypted documents to the full text database.
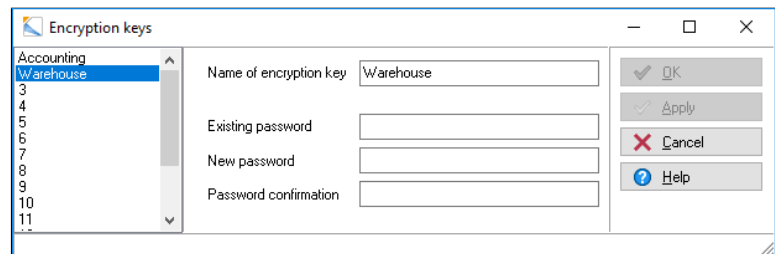
Fig. 173: Encryption keys

All 16 encryption keys are created along with a new repository. These are numbered 1 to 16 and all have the default password "elo". You can change this password at any time by selecting the relevant encryption key and then entering the old password once and the new password twice.

Export

Available in: *ELO menu > Data exchange*

This function exports all or parts of the repository from the ELO data structure. The export data set that is created can be imported later if needed. However, you should be aware that an export data set is not an adequate replacement for a proper backup.

See also: The *Export wizard* chapter.

Export list to Excel

Available in: *Search work area > ribbon > Search*

The *Export list to Excel* function allows you to export your search results as an Excel list. The ELO_SearchListToExcel.VBS script is used for this. If you want to make changes to the output format, you can make the corresponding changes in the script manager.

Fax document

Available in: *Ribbon > Document*

Use the *Fax document* function to create a fax message that contains a copy of the selected document.

File to repository

Available in: *Intray > ribbon > Filing*

File to repository transfers documents from the Intray directly to a selected location in the repository.

1. First, select one or multiple documents in the Intray and click *File to repository*. The following dialog box appears.
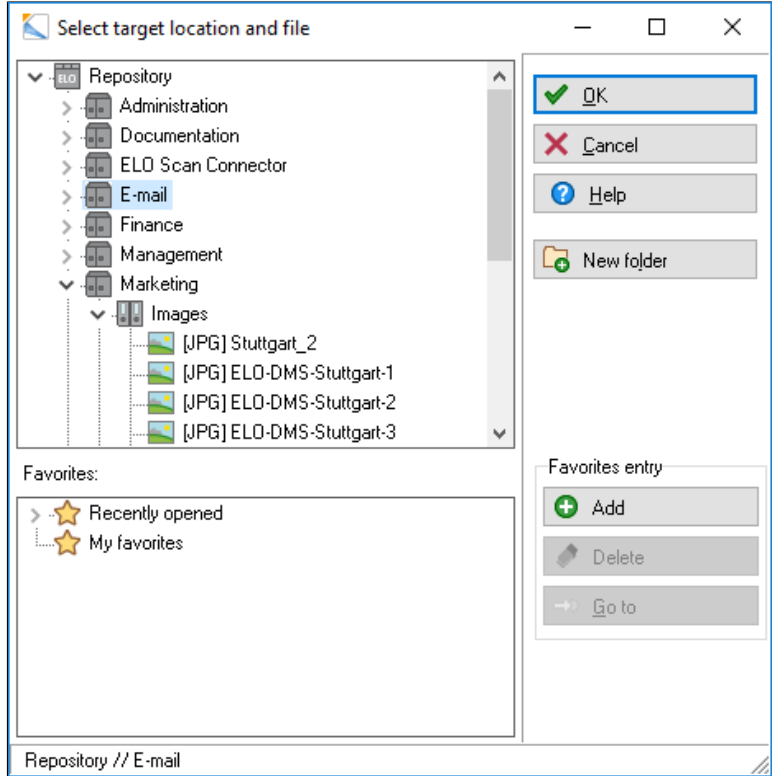
Fig. 174: Selection dialog box for filing documents in the Intray

2. Select the repository location that you want to file your documents to. Click *OK*.

Click *New folder* if you want to create a new filing location for your document.

This will open a dialog box that you can enter the corresponding keywording information to.

Please note: You need to keyword documents in TIFF and PDF format before you can file them using this dialog box.

File type   Available in: *Intray > ribbon > Scan/File*

In the Intray, use the *File type* function to determine which file types are shown in the list view, e.g. only images or Microsoft Office documents. Display filters give you a better overview of the Intray if it contains a large number of documents and different file types.

The *File type* option on the ribbon tells you which file type is being displayed in the Intray. Set the display filters for the Intray in the *Display filters* group.

1. Click the arrow to the right of the box. In the drop-down menu, you can see the file formats that you can filter the Intray entries by.

- *All*: Displays the entire contents of the Intray.
- *Text*: Only shows files created using a word processing program (such as Microsoft Word).
- *Spreadsheets*: Only shows files created using a spreadsheet application (such as Microsoft Excel).
- *Images*: Only shows files created using a graphics application (such as Microsoft Paint).
- *MSOffice*: Only shows those documents created with a Microsoft Office application.

2. Click the file type you want to display. This now restricts the documents displayed in the list of Intray files to those of the selected file type.

Information: The file type drop-down menu allows you to configure the settings according to your needs so you can add file types to the list or remove them if you don't want them to be listed.

Font color

Available in: *Ribbon > Repository*

You can assign a font color to any entry in the repository. The default color is always black. There are two ways to assign a color to an entry:

- In the keywording form
- From the *Repository* tab on the ribbon

For additional information on *font colors*, refer to the *Administration* chapter, *Color management* section.

Font color (system settings)	Available in: *ELO menu > System settings*
	You can use the *Font* function to define font colors for displaying documents and folders in the repository. Once you have defined the colors, you can access them on the *ribbon > Repository* or in the keywording form.
Form	*See also*: Set default keywording form
Forward	Available in: *Quick launch toolbar*
	If you click the *Forward* button in the work area, you go to the next document in the document display sequence.
Full screen	Available in: *Ribbon > View*
	Click the *Full screen* button to hide the list view. Click this button a second time to return to the list view.
Full text (search)	Available in: *Search work area > ribbon > Search*
	Use the *Full text* function to search for any term in documents that have been added to the full text database.
	Enter the text that you want to find in the full text database to the input field. Click the *Full text database* button and click *Start search*. You can also use the placeholder * for the search in the full text database. The placeholder is a wildcard character that stands for all letters or numbers. For example, you could enter the search term "garden*". This would find all terms that start which the character string Garden, such as *Garden shed*, *Garden herbs*, and so on.
General margin note	Available in: *Ribbon > Document*
	By default, a margin note appears in yellow. It contains the text you entered and can be seen by anyone. The footer contains the date, time and the name of the user who created the margin note.
	See also: Personal margin note, permanent margin note
Global keyword list	Available in: *ELO menu > System settings > Keyword lists*
	ELO lets you create a keyword list with child groups that is available for all keywording forms. The global keyword list (right-click the respective field) is available if no other keyword list is defined for an index field.
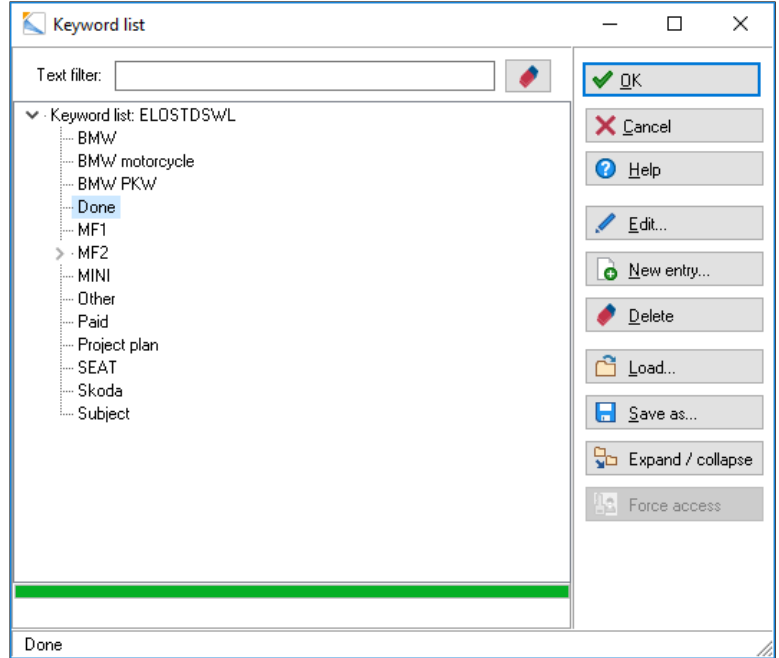
Fig. 175: Global keyword list

Go to	Available in: *Ribbon > Start*
	This takes you directly from the currently selected object to the document you wish to view in the *Repository*.
Help	Available in: *ELO menu*
	Click this button or press the F1 key to launch the in-program help window.
Home	Available in: *Repository > ribbon > Start*
	Use this function to return to the topmost level in the tree view. All other levels are hidden.
Import	Available in: *ELO menu > Data exchange*
	Starts the import wizard. This is used to re-import a section of a repository (such as a folder or single document) you previously exported into your ELO repository.
Insert copy	Available in: *Ribbon > Insert copy*

When you copy an entry (document or folder), the *Insert copy* tab appears on the ribbon. Choose a target folder. You can paste folders and documents to all levels of the repository.

Insert default index   Available in: *Ribbon > Repository*

Inserts a default index in a selected folder.

Insert file   Available in: *Intray > ribbon > Scan/File*

This function lets you import a file into the repository.

An *Open file* dialog box opens. Search for and select the desired file. Click *Open*. The file is copied to your Intray.

Join (separator pages)   Available in: *Intray > ribbon > Scan/File*

In the Intray, each page in a scanned document is listed as an individual file (unless you have used the *Scan document* function). You can now join the pages in your scanned documents as required. Click *Join (separator pages)* to merge the selected pages.

Join pages   Available in: *Intray > ribbon > Scan/File*

In the Intray, select the TIFF or PDF documents that you want to merge. After clicking *Join pages*, the individual TIFF or PDF files will combine to form a multi-page document.

Keys   Available in: *ELO menu > System settings*

The ELO administrator may define up to 255 access keys and assign them to users. Users then only see the contents of the repository that they have a key for.

For more on *Keys*, refer to the *Administration* chapter, *Key management* section.

Keywording   Available in: *Ribbon > Start*

Use the *Keywording* dialog box to open and edit the keywording information of a document or folder.

All objects in ELO (folders and documents) must be keyworded when you create them or during filing. The keywording information helps you to find entries later on. For example, you can use the *Keywording* dialog box to change the *Short name* of an entry or you can define individual *Options* for an entry.

Keywording forms   Available in: *ELO menu > System settings*

You can create, edit, or define keywording forms in this dialog box. Use these forms to keyword your documents. Keywording forms help you to file your documents in standardized formats with specific settings for permissions or colors, etc. You can create custom keywording forms, such as for invoices.

Refer to the *Keywording forms* chapter for more information.

Link

Available in: *Ribbon > Repository*

Use the *Link* function to open *Link* dialog box. Use this dialog box to create and manage links between entries in the repository. An [L] in front of the entry in the repository indicates that a link exists for that entry.

For additional information on *links*, refer to the *Basics and examples of use* chapter, *Linking documents* section.

Load new version

Available in: *Ribbon > Document*

To replace an old version of a document in the repository with a new one from your hard drive, select the *Load new version* function and upload a new version to the repository. The version control and version history functions enable you to view and compare previous versions of documents.

Margin note help (split bar)

Available in: *Viewer pane > split bar > context menu > Help*

This function launches the ELO in-program help function. Here you can find information on margin notes.

Margin note settings (split bar)

Available in: *Viewer pane > split bar > context menu > Settings*

You can change the size, color and font size of margin notes and footers. Use this function to switch to the *Configuration* dialog box on the *Notes* tab. You can define the appearance of the margin notes here, for example. You will find the options for printing margin notes in the lower part of the tab with the *Print annotations* check box.

Merge pages

Available in: *Intray > ribbon > Scan/File*

The *Merge pages* function makes it easier to scan and sort double-sided documents.

Example: You are scanning four duplex pages with a feed scanner. First, scan pages 1, 3, 5 and 7 (the page fronts). Then turn the pile over and scan the reverse sides, i.e. pages 8, 6, 4 and 2. Now select the individual pages in the Intray and choose *Merge pages* from the context menu. ELO sorts the scanned pages in the correct order. The *Join pages* function lets you join the eight pages back into a single document.

Move document files   Available in: *ELO menu > Maintenance*

This function lets you move files, file versions, file attachments and/ or versions of file attachments from ELO to another storage medium (i.e. onto a different document path). However, the ELO repository structure remains the same. Select the ELO object that you want to move the files from. Select *ELO menu > Maintenance > Move document files*.
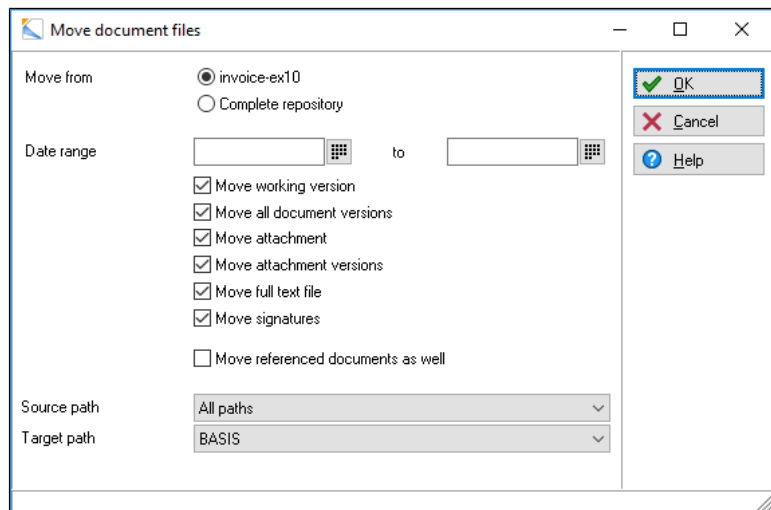

Fig. 176: Moving documents in the repository

In the *Move document files* dialog box, the previously selected ELO object is selected under *Move from*. If you want to move all files in the repository, select the *Entire repository* option. You can also define a time frame in the date range boxes so that only the documents within a selected range will be moved.

Specify what you want to move and enter the target path. If the target path you want is not displayed, you will need to define it under *ELO menu > System settings > Document paths*. Select the source path if you only want to move files from a specific path.

Move entry

Available in: *Ribbon > Start*

Use the *Move entry* function to move an entry to another location in the repository. To do so, select a folder or document in the repository. Click the *Move entry* button to open the *Move* tab. Select a folder in the repository that you want to move the folder or document to.
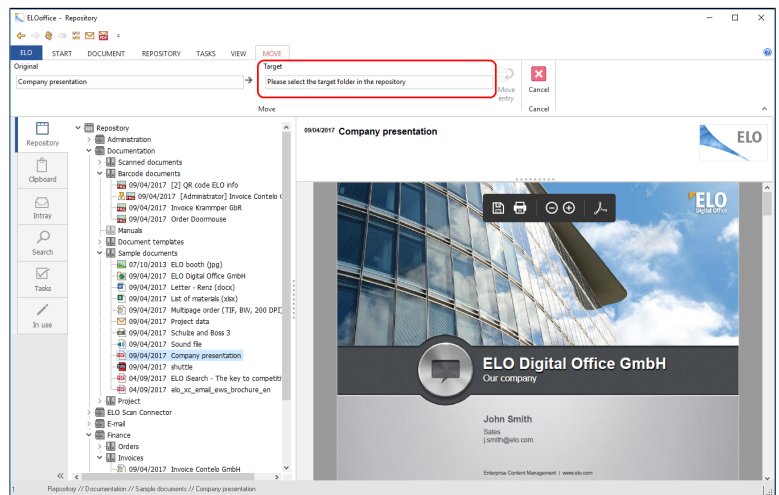
Fig. 177: Move entry

Click the *Move entry* button to confirm the action.

Move list to search area

Available in: *Ribbon > View*

Using this menu option, you can move documents or folders to the search area where you have access to various functions that you can use on the documents located there. If necessary, select the documents in the Search work area first.

Move to other user's Intray

Available in: *Intray > ribbon > Scan/File*

The Intray has a variety of functions besides just receiving documents. You can also send documents (or copies) over the network to colleagues or other departments.

For more information on the *Move to other user's Intray* function, refer to the *Basics and examples of use* chapter in the *Send documents* section.

Multicolumn view

Available in: *Search work area > ribbon > Search*

ELO offers a *multicolumn view* in the search. Here, you can define which columns will be displayed. The columns provide you additional information. When you click a column, the list of search results is sorted based on the selected column.

Fig. 178: Multicolumn view
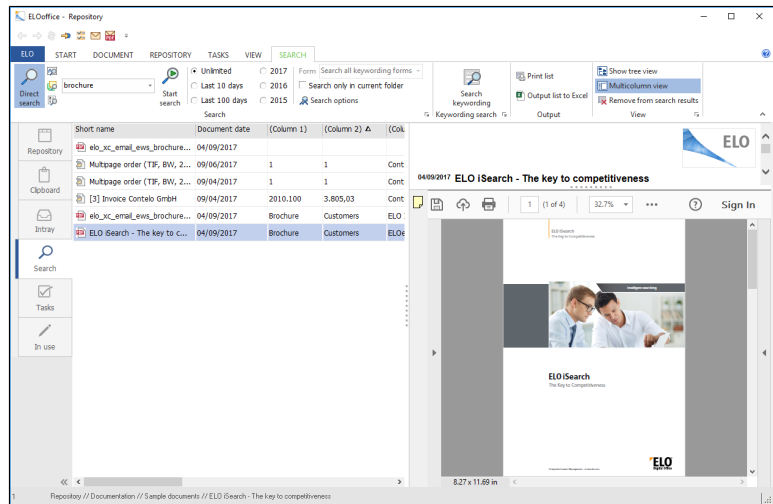
My ELOoffice

Available in: *ELO menu*

The *My ELOoffice* function takes you to the *My ELOoffice* section of the ELOoffice website. Here, you can log on with your ELO account and get access to updates. information, and much more. Your ELO account is created when you register your copy of ELOoffice.

New (margin note)

Available in: *Viewer pane > split bar > context menu*

Click *New* on the split bar context menu to add margin notes to a document. Choose one of the three types of margin notes. Write your note and click *OK*.

New folder

Available in: *Repository > ribbon > Start*

The *New folder* option creates a new folder in the current repository. You can create a folder at each repository level.

New margin note (split bar)

Available in: *Viewer pane > split bar > context menu > New*

If you select *New*, an additional menu opens. Select one of the three margin note types (general, personal, permanent). Write the new margin note and affix it to your document.

New version

Available in: *Intray > ribbon > Scan/File*

The *New version* function enables you to file a new version of the selected document to the repository. The new version of the document inherits the keywording of the selected document.

Notes (search)

Available in: *Search work area > ribbon > Search*

This function searches all notes that you have access permissions for in the repository. If you click the function, you can enter a search term via the search field on the *Search* tab. The selected search function acts like a filter.

OCR preprocessing

Available in: *Intray > ribbon > Scan/File*

Use the *OCR preprocessing* function to preprocess the full text information in a document. Before you can use the function, you must configure the required index fields. To do this, open the keywording forms manager and enter the value ELO_FT to *External data* for each of these index fields.

For further information on *OCR preprocessing*, refer to the *Keywording* chapter in the section *Automatic keywording support using full text*.

Open in read-only mode

Available in: *Ribbon > Start*

This opens the program that was used to create the selected document. An internal ELO number is displayed in the title bar of the program (e.g. Microsoft Word). Changes that you make to a read-only document are not stored to the ELO repository. However, you can edit the document and save it with a different name in an external program.

Open MobileConnector

Available in: *Ribbon > Repository*

You can use the *Open MobileConnector* button to synchronize a repository folder with an assigned folder or mobile device or to create a copy of the repository folder. You can create a link between a repository folder and an external folder in the configuration under MobileConnector.

Outlook (Add to Outlook)

Available in: *Ribbon > Repository*

Use this function to connect a folder in the repository with a folder in Outlook.

For additional information on *Outlook*, refer to the *Advanced functions* chapter, *Outlook connection* section.

Outlook (File Outlook folder)

Available in: *Ribbon > Repository*

Microsoft Outlook integrates seamlessly with ELO. That means that you can file e-mails, faxes and so on straight to your ELO repository from Outlook.

You may need to do a manual refresh to ensure that all documents are transferred between Outlook and ELO. There are different options available for this function. You can access them with the *Outlook* button on the *Repository* tab of the ribbon.

For additional information on *Outlook*, refer to the *Advanced functions* chapter, *Outlook connection* section.

Outlook (Move documents)

Available in: *Ribbon > Repository*

When you set up a link, you can copy the entire contents of a folder to Microsoft Outlook.

For additional information on *Outlook*, refer to the *Advanced functions* chapter, *Outlook connection* section.

Outlook (synchronize)   Available in: *Ribbon > Repository*

Use the *Synchronize* function to transfer new documents in the folder to Microsoft Outlook and to transfer new elements in the Microsoft Outlook folder to the ELO repository.

For additional information on *Microsoft Outlook*, refer to the *Advanced functions* chapter, *Outlook connection* section.

Overdue tasks   Available in: *Ribbon > Tasks*

This list displays all activities for a document or folder which are already overdue.

PDF conversion   Available in: *Ribbon > Document*

Convert a document into PDF format to preserve all the data in the original file. The ELO PDF Printer creates a PDF file with the current contents of the document. You will see a message saying that the process was completed successfully. The original version of the document is maintained in the version history. The PDF version becomes the current working version.

Permanent margin note (split bar)   Available in: *Viewer pane > split bar > context menu > New*

A permanent margin note is a margin note that cannot be deleted and is red by default. The footer contains the date, time and author's name.

Please note: Permanent margin notes cannot be removed or edited.

Permanently remove deleted entries   Available in: *ELO menu > Maintenance*

This function permanently erases all deleted objects in the current repository. You will not be able to restore the deleted entries afterwards.

Please note: We recommend that you perform a full data backup before you carry out this action.

Permissions (repository)	Available in: *Ribbon > Repository*
	You can use the *Permissions* function to assign permissions and keys for a select object (document or folder).
Permissions (System settings)	Available in: *ELO menu > System settings > Users*
	You can use access control lists to define access rights to objects (e.g. folders and documents) and determine which users can see objects within a repository. Each object has its own permissions. Entries in the access control lists for particular ELO objects (e.g. documents or folders) enable comprehensive access protection.
	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. For example, you can now make a distinction between whether a user has read or write permissions for a specified object.
Personal margin note (split bar)	Available in: *Viewer pane > split bar > context menu > New*
	A personal margin note is *green* by default. This margin note contains whatever text is entered to it and it is only visible to the author. The footer contains the date, time and author's name.
Print document	Available in: *Ribbon > Document*
	Click the *Print document* button to print a selected document.
Print list	Available in: *Search work area > ribbon > Search*
	After you run a search query in the Search work area, this function prints a list of the search results.
Print margin note (split bar)	Available in: *Viewer pane > split bar > context menu > Print*
	Use this function to print the selected margin note.

Print repository sum-
mary

Available in: *ELO menu > Maintenance*

This function lets you create and print various summaries of the repository. This gives you a better overview of the repository and the folder structure.
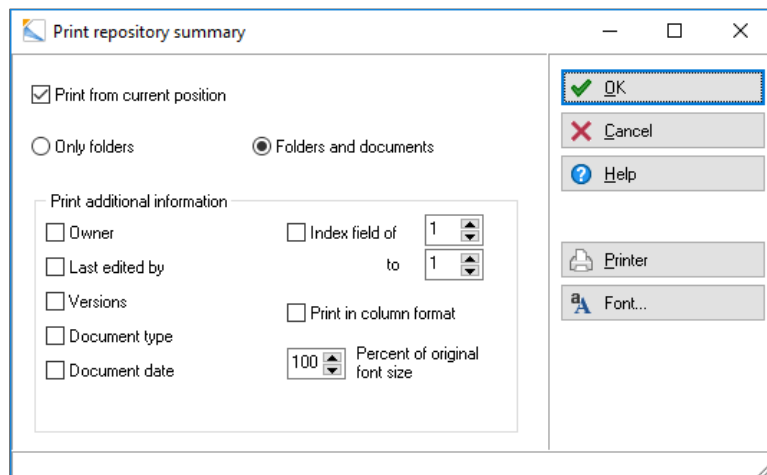

Fig. 179: 'Print repository summary' dialog box

Priority A

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

If you click the *Priority A* button, documents with priority A will be shown in the viewer pane.

Priority B

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

If you click the *Priority B* button, documents with priority B will be shown in the viewer pane. Use *ELO menu > Configuration > Tasks > Show by priority* to determine whether only documents with the priority you selected should be shown or also documents with a higher priority.

Priority C

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

If you click the *Priority C* button, documents with priority C will be shown in the viewer pane. Use *ELO menu > Configuration > Tasks > Show by priority* to determine whether only documents with the priority you selected should be shown or also documents with a higher priority.

Profile (scan)

Available in: *Intray > ribbon > Scan/File*

Choose a scan profile from the *Profile* drop-down menu. Scan profiles are convenient for quickly accessing defined scan settings. You have the option to create a separate profile for each document type that you want to scan.
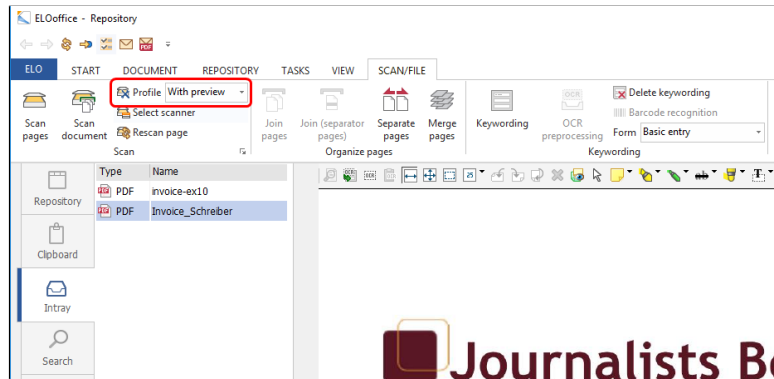

Fig. 180: Scanning with profiles

Scan profiles can be edited via *ELO > Configuration > Scan profiles* or created with the *wizard* for scanner settings.

The *With preview* profile is always available as the default profile. If you have selected this profile, you can set all parameters and manage all settings individually. This is particularly recommended for hard-to-read documents.

Read-only copy of the repository

Available in: *ELO menu > Data exchange*

Use this function to export your entire repository to an external storage medium (e.g. DVD) and open and use those files on another computer. This ensures you have access to your documents even when ELO is not running. You can view a read-only copy of a repository on a mobile device, for example.

Refresh view

Available in: *Quick launch toolbar*

Click the *Refresh* icon to refresh the selected work area. You may need to do this if new documents or tasks are not yet displayed.

Information: To automatically refresh your Intray whenever you switch to it, turn on this function in the *ELO menu* on the *Intray* tab under *Configuration*.

See also: OCR preprocessing

Register ELOoffice

Available in: *ELO menu*

Use the *Register ELOoffice* function to register your copy of ELOoffice. This has several benefits, such as receiving two free support tickets as well as access to additional downloads and updates.

Please note: You need to be online to register.

Register for monitoring

Available in: *Ribbon > Tasks*

Use the *Register for monitoring* option to register a document or folder for monitoring.

This means that ELO automatically creates the activity project ELO_REQ. When a monitored entry is changed, a corresponding entry appears in the *Tasks* work area. If you click the *Activities for an entry* function, you can also see that the activity project ELO_NOTIFY was created.

Reminder

Available in: *Ribbon > Tasks*

Reminders appear in the Tasks work area of the respective selected user when they are due. This enables you to set yourself reminders for a document or a folder to send a reminder to other users. Select the entry in the repository that you want to create a reminder for. Click the *Reminder* function to open the *Reminder* dialog box. In this dialog box, you can choose a reminder and a user as well as leave a job instruction.

Reminders for entry

Available in: *Ribbon > Tasks*

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

Reminders overview

Available in: *Ribbon > Tasks*

This function allows the main administrator to see an overview of reminders for each user. All users can generate an overview of their own reminders with this function. You can also define a time frame so that you only see reminders during this time.

Remove deleted versions

Available in: *ELO menu > Maintenance*

Use this function to remove deleted document versions from version-controlled documents.

Remove from Clipboard

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

Click this button to remove the selected object from the *Clipboard* work area. The object in the repository remains unchanged.

Remove from search results

Available in: *Search work area > ribbon > Search*

This function removes the selected entries from the search results.

Remove old documents

Available in: *ELO menu > Maintenance*

Documents you no longer need in the repository that point to a document path (such as a backup) can be permanently deleted here.

Report for entry

Available in: *Ribbon > Repository*

Use *Report for entry* to obtain a report on the selected entry. You must activate the report function to retrieve report data. It is crucial that you log processes in an electronic repository, primarily due to security reasons. The reports that are generated can help you analyze errors as they occur.
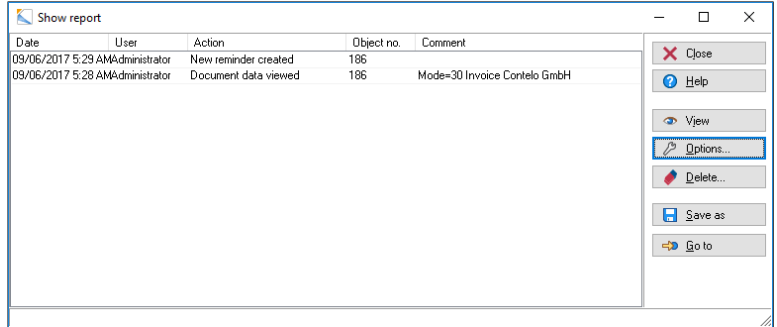
Fig. 181: Show the report for an entry

Repository report

Available in: *ELO menu > Maintenance*

The *Repository report* function provides an overview of all actions within the repository over a certain period of time. You must enable the report function in *ELO menu > Maintenance*.

Rescan page

Available in: *Intray > ribbon > Scan/File*

You can use this function to rescan a page that was not scanned correctly.

Click *Rescan page* to repeat the scan process.

Restore

Available in: *Ribbon > Repository*

This lets you restore deleted entries. First, run the *Show deleted entries* function. This restores entries marked for deletion to the repository. You can recognize documents that are marked for deletion by the square brackets. Select the document that you want to remove the deletion marker from. Enable the *Restore* function.

Return

Available in: *Ribbon > Tasks*

If you click the *Return* button, an activity list will be shown. This list only contains the activities that have not yet been returned. If you want to conclude an activity, select this option and then double-click the activity to open it for editing.

Rotate/sort

Available in: *Ribbon > Document*

This function opens the *Rotate/sort* dialog box to sort, rotate and invert TIFF documents and delete individual pages from multipage TIFF documents.

Save as default index	Available in: *Ribbon > Repository*
	This function allows you to set an index of a selected folder as a default index. Once you have entered a name, you can use it as a default index. Example: You have a folder with a user-defined index or a default index you modified. This function allows you to define the entire folder structure as a default index. You can access the index via the *Insert default index* function on the ribbon.
Save attachment as	Available in: *Ribbon > Document > Attachment*
	Select *Save attachment as* to save the file attachment on an external storage medium such as a USB flash drive.
Save file as	Available in: *Intray work area > ribbon > Document*

Information: Alternatively, you can drag and drop documents to the file system. To do so, keep the ALT key pressed while dragging from ELO into the desired location in Windows Explorer.

The *Save file as* function lets you save any file from the ELO repository to your computer's file system.

Scan document	Available in: *Intray > ribbon > Scan/File*
	In combination with an ADF (Automatic Document Feeder) scanner, you can use the 'Scan document' button to consecutively scan multiple pages. After scanning, ELO combines the individual pages into one file. Scan the pages of your document in the correct order to avoid having to resort pages afterwards.
Scan pages	Available in: *Intray > ribbon > Scan/File*
	Click the *Scan pages* button to scan individual pages to the Intray. Each page generates a separate document.
Scan to repository	Available in: *Repository > ribbon > Document*
	This function allows you to scan documents straight to the repository instead of to the Intray. If you have a feed scanner, you can scan multiple pages after another. ELO merges pages into a document on completion of the scan process. You should make sure that you scan the pages in the correct order, otherwise you may have to separate, sort, and join the pages again later.

The *Keywording* dialog box opens once the scan process is complete. Select a keywording form and keyword the document you have scanned.

Information: Use this function for simple one or two-page documents only. You should scan large documents to the Intray first.

Scripts

Available in: *ELO menu > System settings*

This function opens the script manager. New script buttons can be added to any ribbon and to any group on the ribbon. First, create a script in the script manager or import a script.

Select a script from the pane on the left-hand side. To add a new button, close the dialog box, go to the tab you want, keep the CTRL key pressed and right-click the space above the ribbon to select the script from the list that appears.
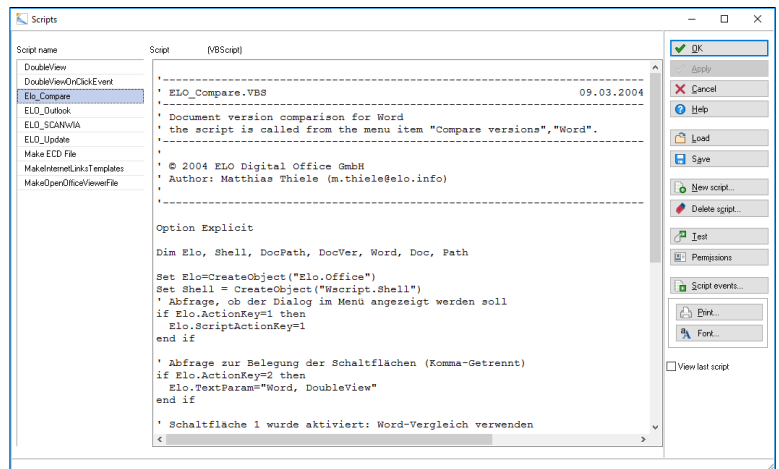
Fig. 182: Show imported script

Next, keeping the CTRL key pressed, select the group that you want to add the button to from the submenu that appears. The button will be placed on the ribbon.

Fig. 183: Custom script button

| **Search buttons (individual configuration)** | Available in: *ELO menu > Configuration > Search* |

You can create up to four individual additional buttons for the keywording search in the *Keywording search* area. This enables you to connect the buttons with the search forms you use most frequently. It is also possible to reassign the *Search keywording* button. The buttons you configured appear in the *Keywording search* group under *Search work area > ribbon > Search*.
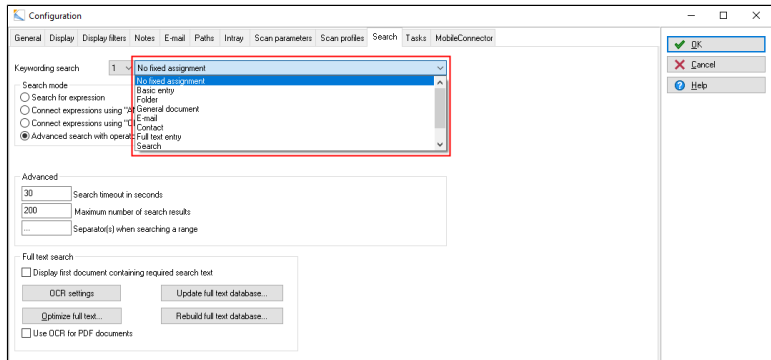
Fig. 184: Settings for the keywording search

For further information on the buttons, refer to the *Administration* chapter, *Search tab* section.

| **Search keywording** | Available in: *Search work area > ribbon > Search* |

Use this function to search through the keywording information in your repository.

| **Select all** | Available in: *Quick launch toolbar* |

	Clicking this icon selects all existing documents in that particular work area.
Select scanner	Available in: *Intray > ribbon > Scan/File*
	If there are multiple scanners connected to your computer, switch between the devices via the *Select scanner* button.
Send as link	Available in: *Ribbon > Start*
	This function creates an e-mail and a link to the selected document. The link is saved as an internal ELO link and sent as an e-mail attachment. The recipient can use the link to access the document in the repository. ELO links only work for users of the same repository.
Send as PDF	Available in: *Ribbon > Start*
	This function converts a selected document into PDF format and adds it to an e-mail as an attachment.
Send document	Available in: *Ribbon > Start* or the *quick launch toolbar*.
	This function creates an e-mail and attaches the selected document as an e-mail attachment. Enter any necessary additional information and send the document.
Set default keywording form	Available in: *Intray > ribbon > Scan/File > Form*
	The keywording form that you define here will open by default when you click *Keywording* in the context menu or press the F4 key for a selected document or folder.
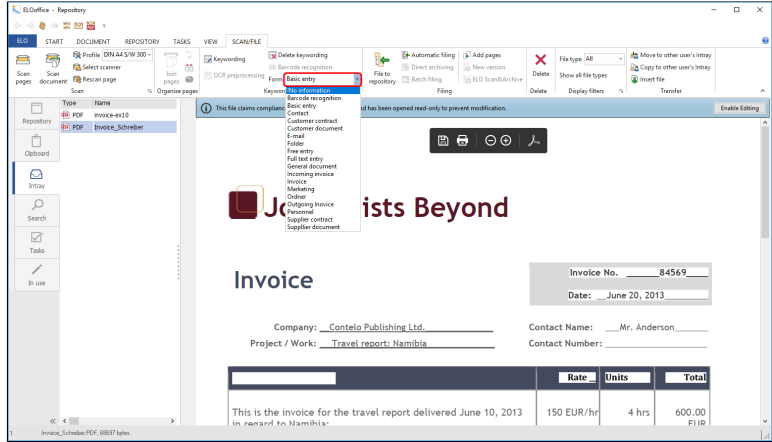
Fig. 185: Default keywording form

Click *OK* to confirm.
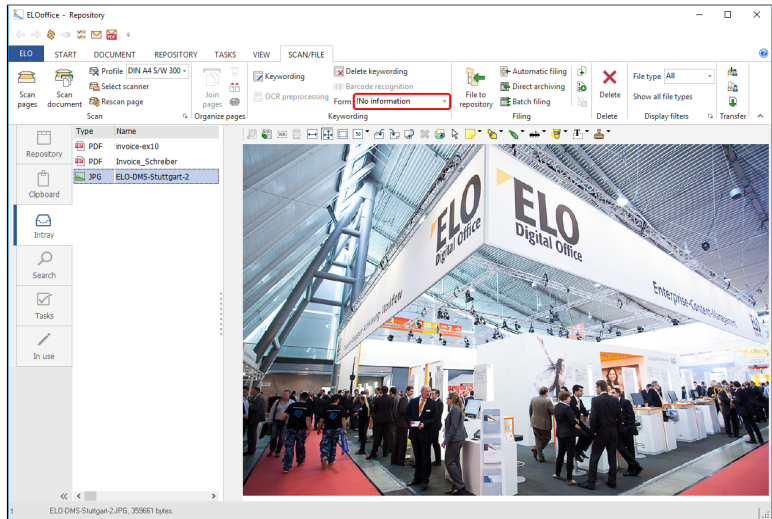
Fig. 186: 'Set default keywording form' selection menu

If you want to file multiple documents one after the other with different keywording forms, set the option *!No information* in the *Form* menu item. The *Edit document* dialog box will always open on *Free entry*.

Settings (margin notes, split bar)	Available in: *Viewer pane > split bar > context menu*
	Use the *Settings* menu item to switch to the *Notes* tab in the *Configuration*. You can define the appearance of the margin notes and assign permissions here.
Show all file types	Available in: *Intray > ribbon > Scan/File*
	If you enable the *Show all file types* function, you will see all documents that are in the Intray. In this case, the *File type* drop-down menu will be grayed out. If you click the button again, the drop-down menu will be enabled.
Show deleted entries	Available in: *Ribbon > Repository*
	When this function is enabled, deleted objects will be restored to the repository. You can recognize deleted entries by the square brackets before and after the entry. Entries that were removed permanently are not displayed.
Show full text database content	Available in: *Ribbon > Document*
	This function saves the full text information for a selected document in the repository to the *Intray* in a TXT file.
	After creating the Intray file, you can click *Refresh* on the quick launch toolbar to refresh the view in the Intray.
Show keywording	Available in: *Ribbon > View*
	If the *Show keywording* function is enabled, the keywording information for a document is displayed as soon as you select a folder and mouse over a document in the viewer pane.

Information: The *Show keywording* function is only available in the viewer pane.

Show preview document	Available in: *Ribbon > Document*
	This function displays preview documents. Before you can display a preview of a document, you need to create one using the *Create preview document* function.

Show side by side	Available in: *Ribbon > View*
	This function lets you view two ELO windows side by side so that you can compare documents or use two different work areas. The function opens a second program window.
Show stacked	Available in: *Ribbon > View*
	This function opens a second ELO window. The two ELO windows are tiled horizontally on your desktop.
Show tree view	Available in: *Search work area > ribbon > Search*
	Use this button to have ELO display the results of your search within a tree structure. ELO shows all entries that match your search, including their position within the tree structure.
Sort	Available in: *Ribbon > Repository* or the context menu
	The sort order determines the order that entries appear in in the repository. You can apply sort settings at different levels. You can define a sort order for the entire repository (*ELO menu > Configuration > Display*), or you can assign a separate sort order for each folder.
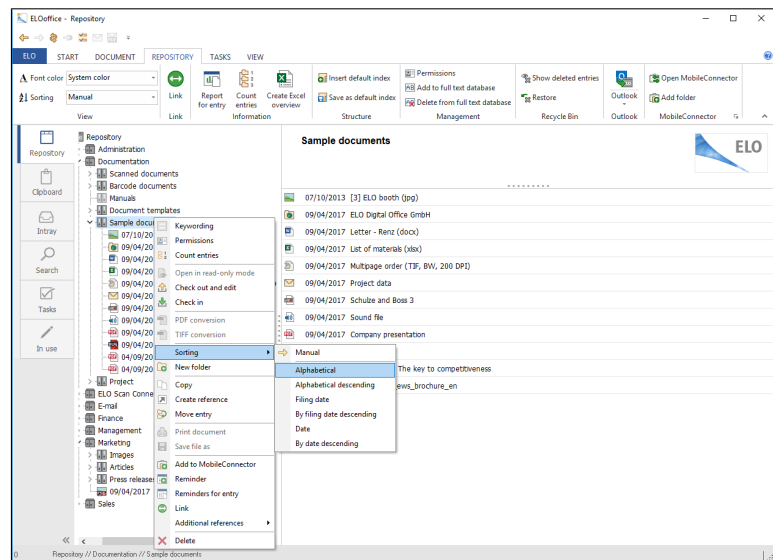
Fig. 187: Setting the sort order for a folder

You can choose from the following sort orders:

- **Manual**: This setting lets you sort entries using drag-and-drop actions. This is particularly useful for custom folders and indexes.

- **Alphabetical ascending**: A-Z.

- **Alphabetical descending**: Z-A.

- **Filing date**: The entries are sorted by 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 most recent date is placed at the top.

- **Date**: This setting applies only to documents. The documents are sorted by document date. The document with the most current date will be at the bottom.

- **By date descending**: This setting only applies to documents. The documents are sorted by document date in reverse order. The document with the most current date is placed at the top.

Split pages

Available in: *Intray > ribbon > Scan/File*

Multi-page TIFF and PDF documents can be split up again. Select the document. Click the *Split pages* icon.

Start date

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

Use this function to define a start date from which tasks and reminders are shown.
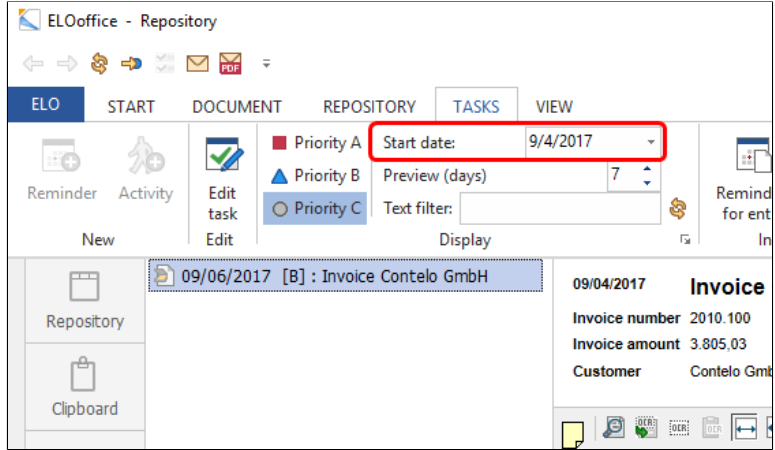
Fig. 188: Define dates for tasks to be displayed

Start search (search)

Available in: *Search work area > ribbon > Search*

Use this button to start a search from the search field. The settings that you made via the ribbon, the *Search options* (available via the *Additional options* button) or the configuration settings in *ELO menu > Configuration > Search* apply.

Start slide show

Available in: *Ribbon > View*

This function gives you a quick overview of all documents that have been filed to a folder. The slide show displays the documents in full screen mode.
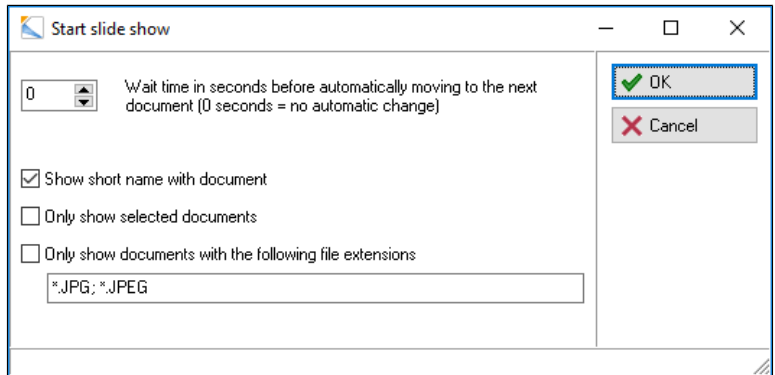
Fig. 189: Configuring the options for the slide show

System diagnostics	Available in: *ELO menu > Maintenance*
	Use the *System diagnostics* function to check whether your program settings are valid. This helps you to quickly pinpoint incorrect settings and makes it easier to troubleshoot problems. It also provides you with an overview of all installed ELO components and modules.
System information center	Available in: *ELO menu > Maintenance*
	This function helps you manage users. You can print a complete overview of all assigned permissions and keys for individual or all users.
Templates	Available in: *Ribbon > Start*
	You can define different document templates in ELO. However, these need to be in a folder that you can add child folders to.

- **General**: Document templates can be used by everyone.
- **Personal**: Document templates that can only be used by whoever created them.

First of all, you need to define the folder for document templates in *ELO menu > Configuration > Paths*.

Test checksum	Available in: *Ribbon > Document*
	Use the *Test checksum* command to open the checksum report, which shows a checksum for each document version. If the checksum is correct, the font is black. If a checksum was not calculated when the document was saved (e.g. if you filed it before turning on this option), the font is dark red. If the document has been modified, the font is bright red. This enables you to see at a glance whether the current document or one of the previous versions has been modified.
Thumbnail view	Available in: *Ribbon > View*
	Using this function to display images enables you to keep a clear overview of large collections of images in individual folders. ELO provides thumbnails of the images contained in the current folder.
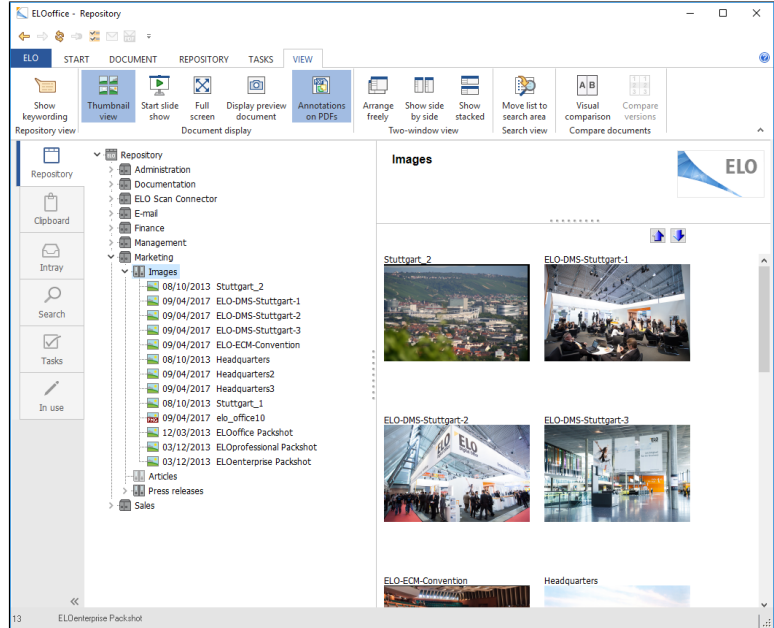
Fig. 190: Thumbnail view of a folder

TIFF conversion

Available in: *Ribbon > Document*

You can freeze a document in its current state. The ELO TIFF Printer creates a TIFF file with the current contents of the file. You will be notified once this has completed. The original version of the document will be maintained in the version history. The TIFF version becomes the current working version.

Tips and tricks

Available in: *ELO menu*

If you have any questions regarding ELO, you can access the FAQ website of the ELOoffice blog via *Tips and tricks*.

User feedback

Available in: *ELO menu*

This function allows you to send anonymous feedback about ELOoffice.
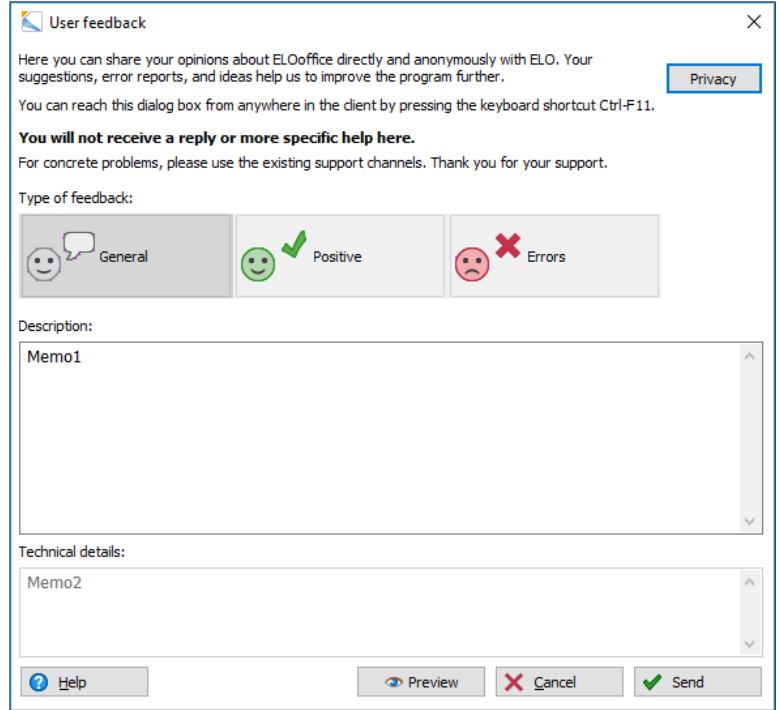
Fig. 191: User feedback

Users (user manager)

Available in: *ELO menu > System settings*

Opens the user manager. The system administrator and designated users are responsible for managing users. For security reasons, most ELO users will not be able to access the user manager.

New users are entered and permissions are assigned in *User manager*. You can edit information on existing users or remove users from ELO.
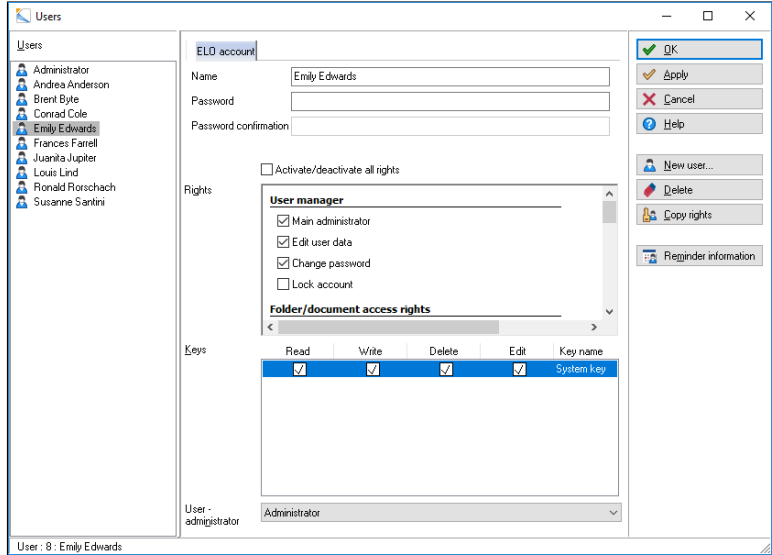
Fig. 192: User manager

Version comment keyword list	Available in: *ELO menu > System settings > Keyword lists*
	If you have filled in the keyword list for version comments, this keyword list (ELOSTDCOM) is available to all users when they are filling in the version comments.
Version comments (search)	Available in: *Search work area > ribbon > Search*
	Use the *Version comments* button to search for comments in the version history of your filed documents.
	You can restrict the search to the working versions of documents with *Additional options > Search in working versions only* option. Remember that you can set other filters in the keywording form so that only documents keyworded using that keywording form will be searched.
Version number keyword list	Available in: *ELO menu > System settings > Keyword lists*

The version number keyword list allows you to use individual version numbers. Version numbers do not necessarily have to consist of numbers. If you have completed the version comments keyword list, this keyword list (ELOSTDVER) is available to all users.
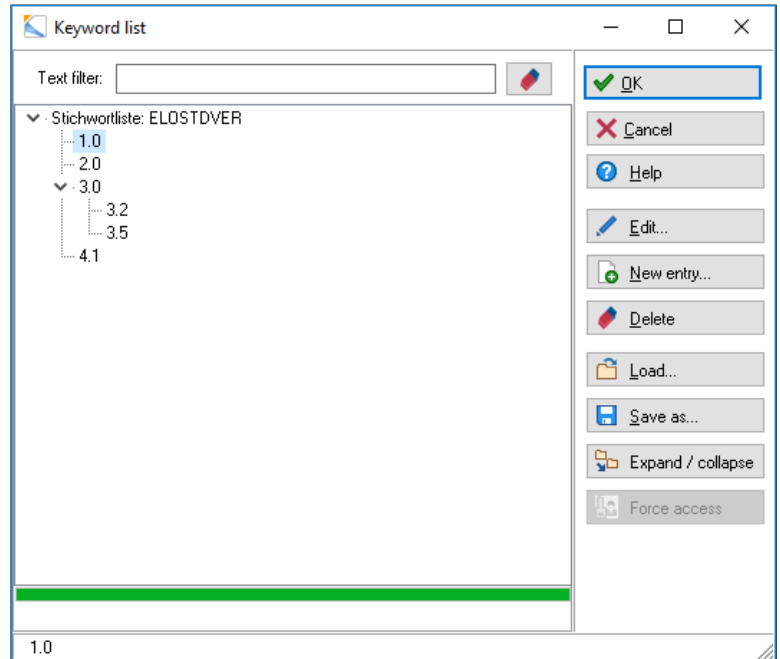
Fig. 193: Version number keyword list

When saving or editing a document, right-click the *Version* field in the *Version comment* dialog box to open the keyword list for version numbers and right-click the *Comment* field to open the keyword list for version comments.

Information: ELO also assigns automatic version numbers. Every version of a document is assigned such a number. The version number defined in the keyword list is also saved. Both numbers are displayed in the *Document versions* dialog box.

View attachment

Available in: *Ribbon > Document > Attachment*

Use this function to view the attachment in an external program. You can attach any file to a document stored in ELO.

Visual comparison

Available in: *Ribbon > View*

This function displays the last two documents that you selected in the repository side by side so you can compare them for differences.

Voice note

Available in: *Ribbon > Document > Attachment*

You can add a voice note to a document as an attachment.
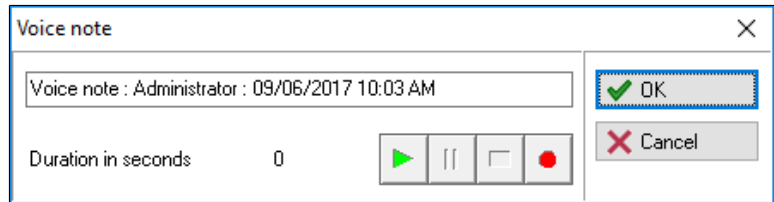
Fig. 194: Adding a voice note

Select the *Voice note* menu item from the submenu. A dialog box opens. Click the red record button to start the recording. Keep in mind that you need a microphone for this. Click the play button to play the recording. Confirm the recording by clicking *OK*. The recording is automatically added to the current document as an attachment.

Search

You can run a search for entries (folders or documents) from the *Search* work area. The *Search* tab automatically appears when you switch to the *Search* work area. The *Search* tab is only available in the *Search* work area.

ELO provides you with various ways to search the ELO repository.

- Keywording form search
- Wildcard search
- Universal search
- Search margin notes
- Search the full text database
- Search version comments

Information: The permissions settings affect the search. You can only find documents that you at least have read permission for.

Search functions on the ribbon
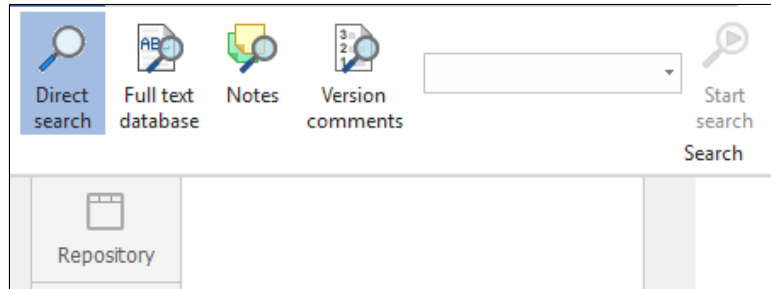
Fig. 195: Search functions in the 'Search' group

There are four basic search functions in the *Search* group on the *Search* tab:

- **Direct search**: This function searches the entire repository. Depending on the search term, the list of search results can be very long.

- **Full text**: This function exclusively searches the full text database. It only searches in documents that were added to the full text database. If ELO finds the search term in the full text of a document, that document will show up in the list of search results. You can also run the full text search from the keywording search.

- **Notes**: This function searches margin notes and annotations with text content (sticky notes, text notes, stamps). When ELO finds a search term with a note, the corresponding document will appear in the list of search results.

- **Version comments**: This function searches the version comments of all documents. When ELO finds a search term with a version comment, the corresponding document will show up in the list of search results.

All four search functions can be used the same way. We will show you how to do this based on the *Direct search* function.

Direct search example   1. Click the *Direct search* button on the *Search* tab of the ribbon.

The *Direct search* button is highlighted to indicate that it is selected.
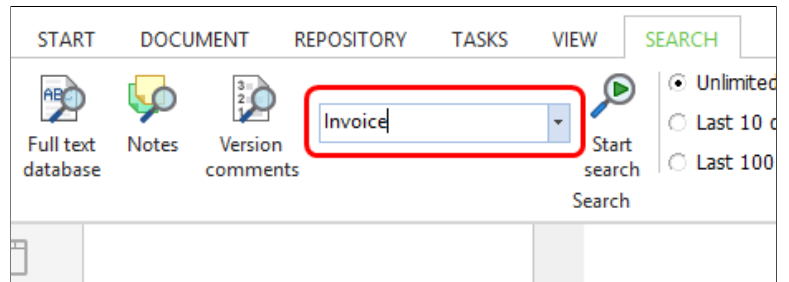
Fig. 196: Entering a search term to the search field

2. Click the search field on the ribbon and enter your search term to the search field. Here: `Invoice`.

3. Click the *Start search* button.
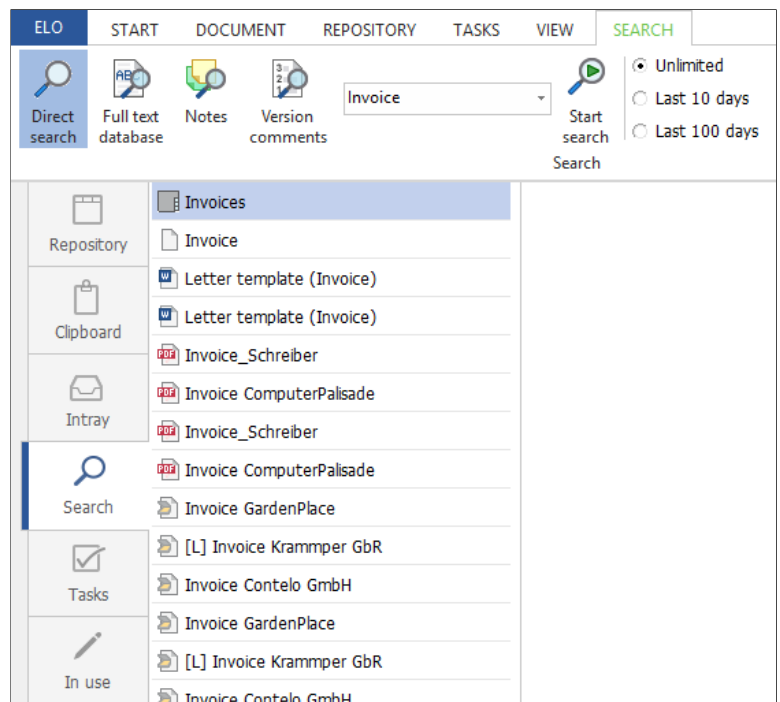
Fig. 197: List of search results

The list of search results appears.

Information: You can edit and check out all documents straight from the results list. You can also check documents back into the repository from the *Search* work area.

Search options
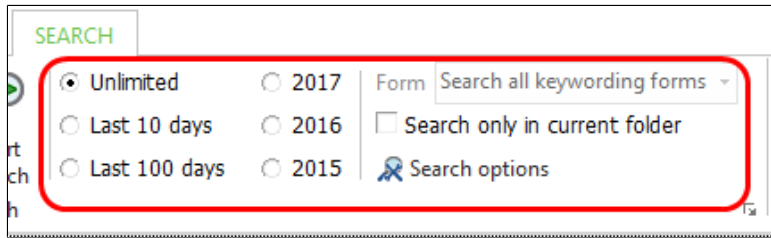
Fig. 198: Search options on the ribbon

In the *Search* group on the *Search* tab, there are a number of options to enable you to filter the search results.
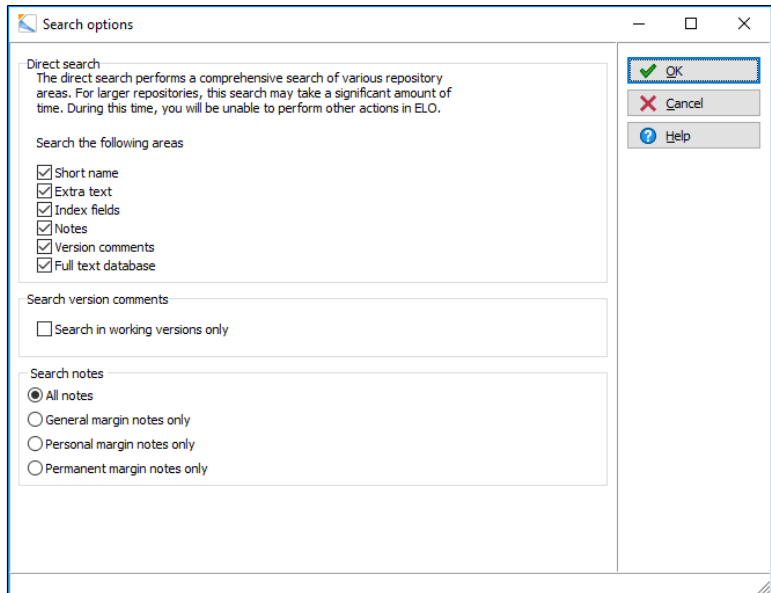
Fig. 199: Configure search options

Use the *Additional options* button to make additional settings for the *Direct search*, *Full text*, *Notes,* and *Version comments* search functions. This encompasses settings such as which areas of the *Direct search* to include in the search.

Search keywording

Use the *Search keywording* function to use keywording forms as search forms. This enables you to search the repository based on keywording information.

Requirements
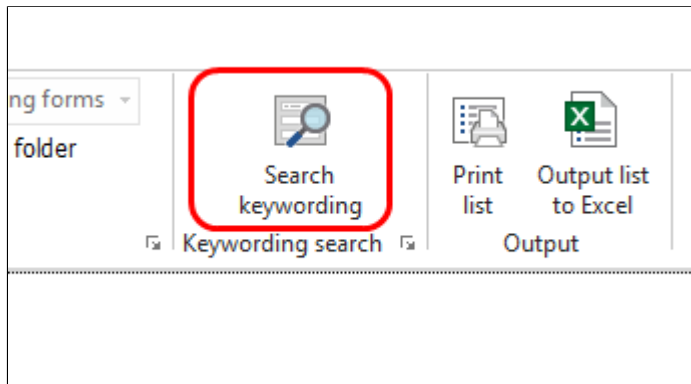
Fig. 200: Use keywording forms as search forms

In order to be able to use a keywording form for searches, you need to enable this function by checking *Use as search form* in the keywording forms manager (*ELO Menu > System settings > Keywording forms*).

Start search

The keywording search encompasses a large number of options since every field of a keywording form can be used as a search filter. In addition, multiple fields of a keywording form can be used as a combined search filter. The simple example below explains this principle.

Example

You are looking for all invoices issued by one vendor. In this example, we are looking for invoices from `Contelo Inc.`.
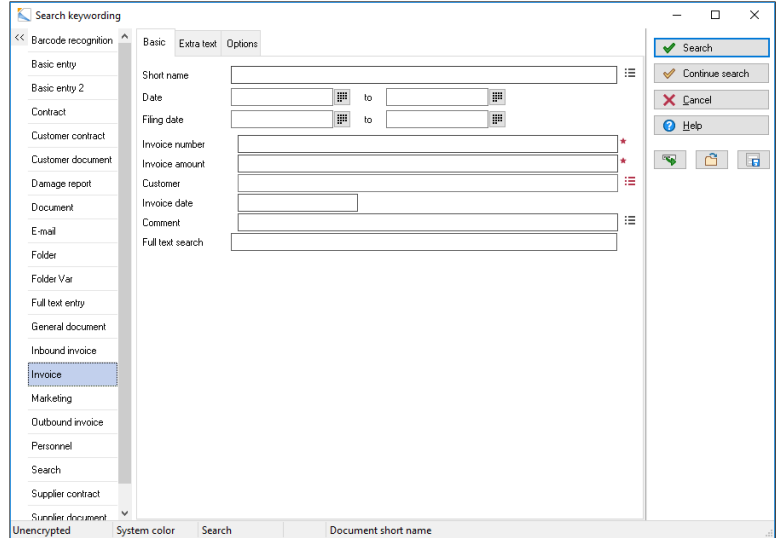
Fig. 201: 'Search keywording' dialog box

1. Click the *Search keywording* dialog box in the *Search* work area (*ribbon > Search > Search keywording*).

The *Search keywording* dialog box appears. All keywording forms that can be used as a search form will be displayed.

2. Select the keywording form that you used to keyword the object that you want to search for. Here: *Invoice*.

The selected keywording form appears. You see all fields that are also available when you keyword with this form. You can now look specifically for the entries in these fields. You have access to the same functions as for keywording (keyword lists, etc.).

3. Select the field that you want to use for the search and enter the search term. We will use the *Customer* field. We choose `Contelo Inc.` from the keyword list.

Optional: Restrict the search via the additional index fields. ELO then searches for the combination of all fields that you have entered data to in the search form.

4. Click *Search*.
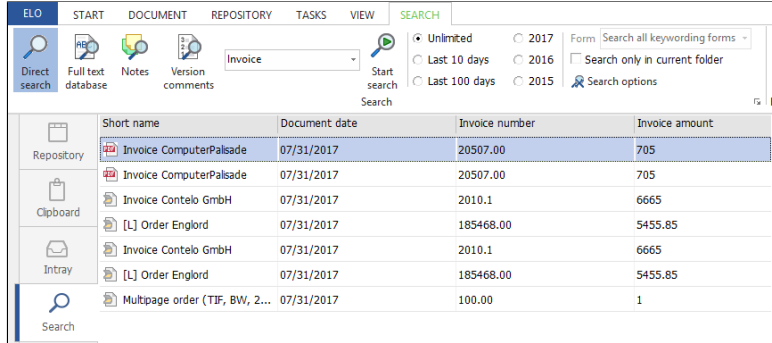
Fig. 202: Search results

The list of results appears.

Search all keywording forms
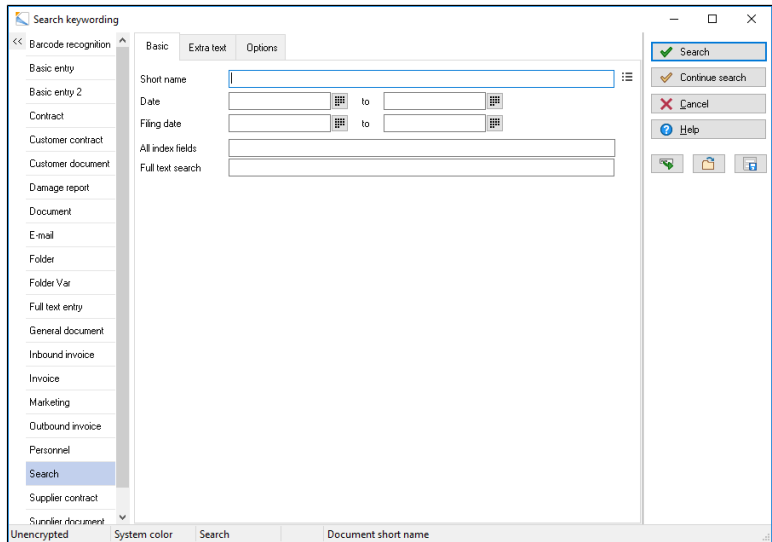
Fig. 203: 'Search' search form

The *Search* form is installed by default in ELO. Use this search form to search all keywording forms. You have the following options:

- **Short name**: Search the short name of all documents.
- **Date**: Define a search period for the document date.
- **Filing date**: Define a search period for the filing date.
- **Full text search**: Search the full text database.

Assign the search form to a button

You can add up to four additional buttons besides the *Search keywording* button. These buttons give you quick access to specific search forms. Define the additional buttons in the *Configuration*.

Proceed as follows to add new buttons for search forms:

1. Open the *Search* tab in the *Configuration*.
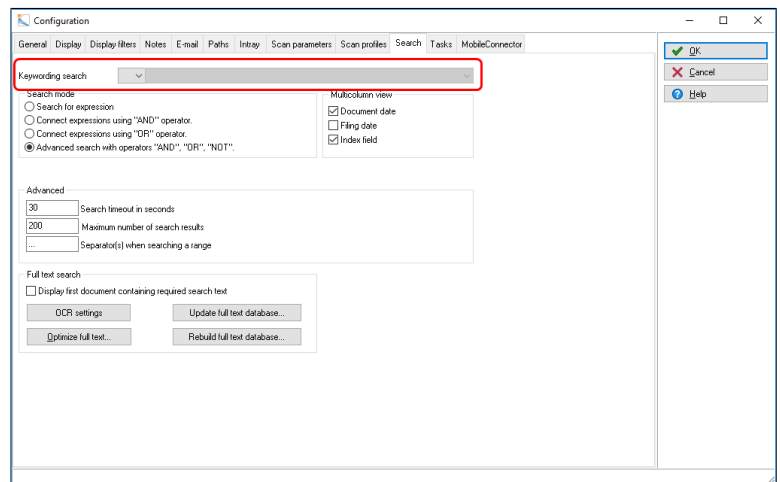
Fig. 204: Configuration, 'Search' tab

2. Click the arrow icon next to *Keywording search*.
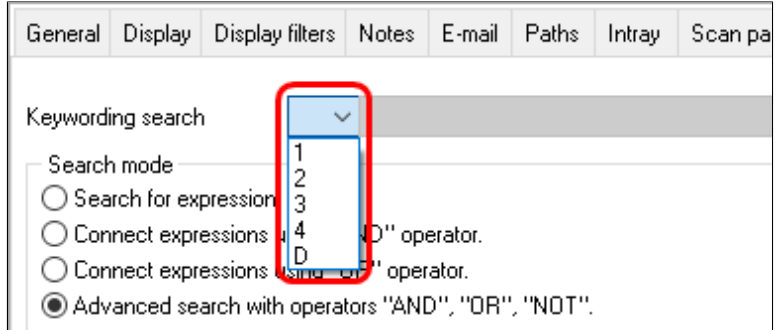
Fig. 205: Select assignable button

A drop-down menu appears that contains numbers which you can assign to the buttons. D represents the existing *Search keywording* button.

Information: You can also assign a specific search form to the *Search keywording* button.

3. Select an entry in the drop-down menu.

The adjacent field is now also enabled.

4. Click the arrow icon to the right of the input field.
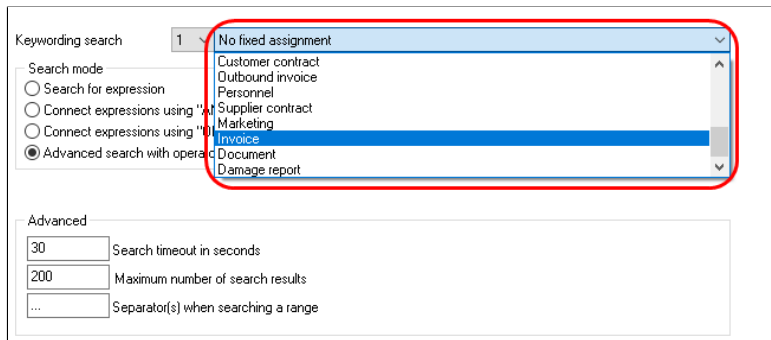
Fig. 206: Drop-down menu for selecting the search form

A drop-down menu appears. This contains all the available search forms.

5. Choose a search form.

6. Click *OK*.
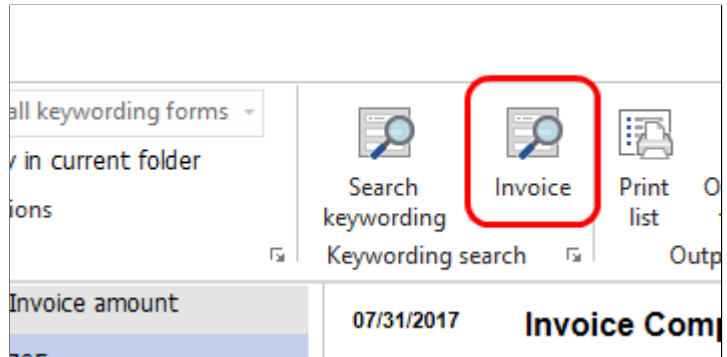
Fig. 207: New button

The configuration closes. You have added another button for the keywording search on the ribbon.

Information: To deactivate the buttons on the ribbon, you must assign the button the *No fixed assignment* option under the *Search* tab in the *Configuration*.

Universal search

ELO lets you perform a universal search for certain attributes. This makes it easier to search for information in large repositories.

To perform a universal search, use the same group (e.g. *CUSTOMER*) for certain index fields (e.g. *Customer*, *Buyer*, etc.) in different keywording forms. This create a logical horizontal link between keywording forms with the same entry in the *Group* field. The diagram below illustrates this.
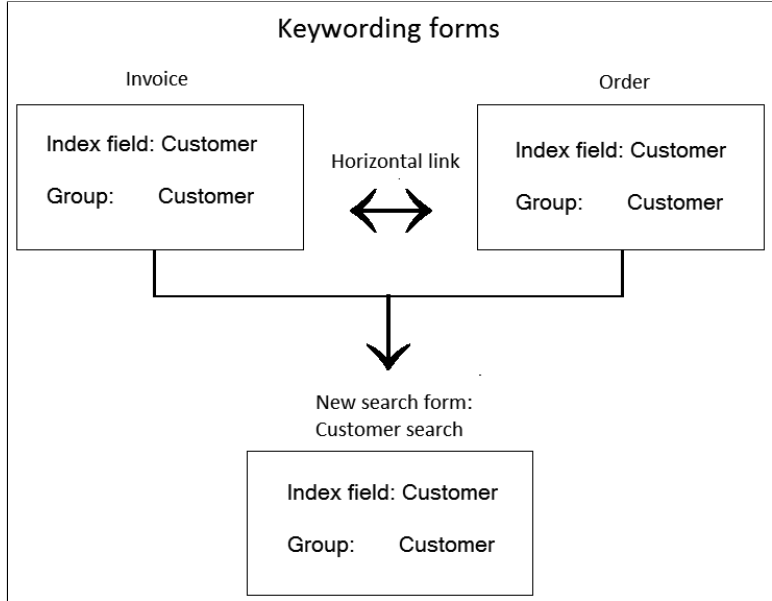
Fig. 208: Diagram of the relationship between keywording forms

Example   You have created different keywording forms. Here: *Invoice* and *Order*. There is an index field with the CUSTOMER group in both keywording forms.

Fig. 209: Search form with the 'CUSTOMER' group field

You now want to look for all invoices and orders for a specific cus-
tomer. It makes sense to add a separate search form for this pur-
pose. Create a Customer search keywording form with the index
field Customer in the keywording forms manager (ELO menu > Sys-
tem settings > Keywording forms). Enter the name CUSTOMER into
the *Group* field of this index field.

Fig. 210: Context list for the 'Group' field

Right-click the empty *Group* field to select the appropriate group
from the context list containing the existing groups.

Information: If a group has already been entered, the context list
will contain all keywording forms that also use this group.

Fig. 211: Options for the search form

You need to set the following options to ensure that the keywording
form is only available as a search form:

- The *Use as folder/document keywording form* option must
  be disabled.

- The option *Use as search form* must be enabled.

Now, when you use the search form, all you need to do is enter the customer's name to the *Customer* input field. Instead of searching the whole repository, ELO will only search the keywording forms that have *Customer* entered in the Group input field.

Search strategies

Search strategies help to improve your search results and make it easier for you to run searches.

Wildcard search
You can also use the * wildcard for the search. A wildcard is a placeholder. You do not have to enter a whole word for the search when you add a wildcard to it. This makes sense if you want to find the singular and plural of a word, for example.

Example
You are searching for every customer whose customer number begins with 15. You have a search form that contains the *Customer number* field. Enter *15** (without spaces) to the Customer number field of the search form. This returns all documents where the customer number in the *Customer number* index field starts with 15.

Information: Instead of the * symbol, you can also use the SQL-specific % symbol as a wildcard. Both have the same function, so it is merely a matter of preference as to which one you use.

Searching for specific character strings
The * wildcard also allows you to search for specific character strings.

Example
Let's assume you are looking for company names that contain the letters mi. You have a search form that contains the *Company* field. Enter *mi to the *Company* field. The query will return all documents that contain the letters "mi" in the company name, e.g. Blacksmith, Smithsonian, MIT etc.

Information: You do not need the wildcard to look for specific character strings in the *Short name*, *Date*, and *Extra text* fields. The *Short name* and *Extra text* fields are always searched in sequence. ELO displays every object that contains the letters you entered in the relevant field.

AND, OR, NOT
The Boolean operators AND, OR, NOT can be used for search queries in the *Short name* field and in the *Extra text*.

- **AND**: Finds entries that contain both search terms.
- **OR**: Finds entries that contain at least one of your search terms.
- **NOT**: Finds entries that contain one term, but not the other one.

Information: Change the search mode in the *Search* tab of the configuration.

Views

ELO shows search results in a list view by default. You have the option to choose other view modes for the search result list.

Tree view

You can view the results of your search as a tree structure. ELO then shows all entries that match your search, including their position within the tree structure.
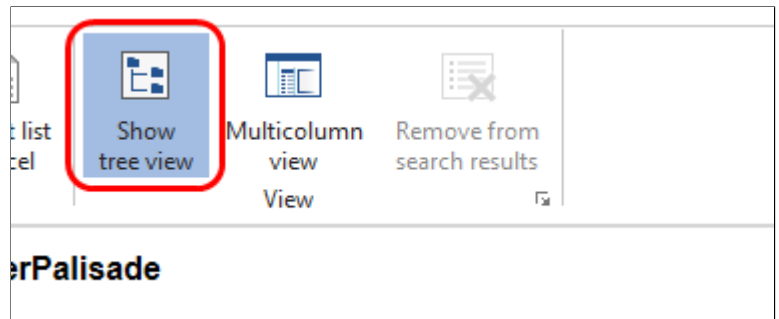
Fig. 212: 'Show tree view' button

Click the *Show tree view* button on the ribbon on the *Search tab* to activate the tree view.

Multicolumn view
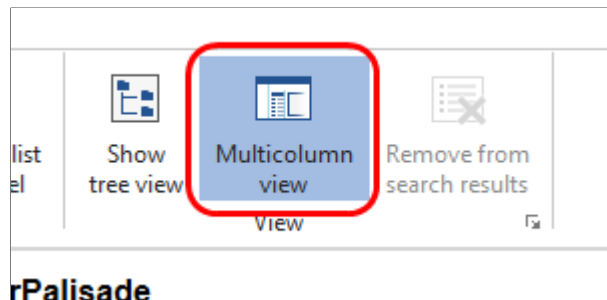
Fig. 213: 'Multicolumn view' button

ELO offers a *multicolumn view* function in the search. If this option is enabled, you can right-click the header to open a drop-down menu. This drop-down menu allows you to define which columns to display. The columns provide additional information on the documents in the search results list. When you click a column, the list of search results is sorted based on the selected column.

Keywording

Keywording forms are a complex, yet integral function in ELO, which is why this manual contains an entire chapter on the subject.

Keywording forms enable you to define a document as a particular document type, such as an *invoice*. You need to establish specific defaults for every document type that exists, i.e. for every keywording form. This includes *Permissions* and *Filing path*, for example.

In addition, ELO can automatically save the file to the correct folder using a filing definition in the keywording form.

Objective of keywording forms

Keywording is the process of assigning keywords to a document. The keywording information represents the document metadata. Keywording forms allow you to organize documents in a standardized way and file them quickly to the repository. It is therefore essential that you keyword documents correctly to ensure that you get the most out of your repository. Keywording also makes it easier to search for information later on.

You should keyword and file documents of one type, such as invoices, with the same keywording form. This form contains parameters specifically designed for this document type. For example, it ensures that the permission settings for documents of a certain type are identical and are filed to the repository using a set filing definition.

In ELO, text fields in a keywording form are called index fields. They are essential and practical aids for filing and locating different types of documents. The keywording information for a document is entered to the index fields.

Fig. 214: 'Invoice' keywording form

> **Information**: Have a look at the keywording forms in the repository template provided. These will help you to create your own keywording forms.

You can have up to 50 additional index fields for a document in a single keywording form. This enables you to create keywording forms for each document type, such as:

- Letters
- Expense reports
- Business cards
- Offers
- Corporate brochures

The following elements always exist by default in a keywording form:

- The *Short name*, *Date*, and *Filing date* fields
- The *Basic*, *Extra text*, and *Options* tabs

Creating keywording forms

ELO makes it easy to create your own forms and optimize your document filing process. There are two ways of doing this:

- Create a keywording form and edit the keywording form directly in the keywording forms manager.

- Create a keywording form and edit the keywording form with the keywording forms wizard. The keywording forms wizard guides you step by step through the process of creating a form.

In both cases, you need to open the keywording forms manager and create a new keywording form.

Information: You can only create keywording forms when you have the *Edit keywording forms* permission.

1. Open the keywording forms manager in the *ELO menu > System settings > Keywording forms*.

Fig. 215: Keywording forms manager

The *Keywording forms* (keywording forms manager) dialog box opens.

2. Click *New form*.

Alternative: Use the keyboard shortcut: ALT+N
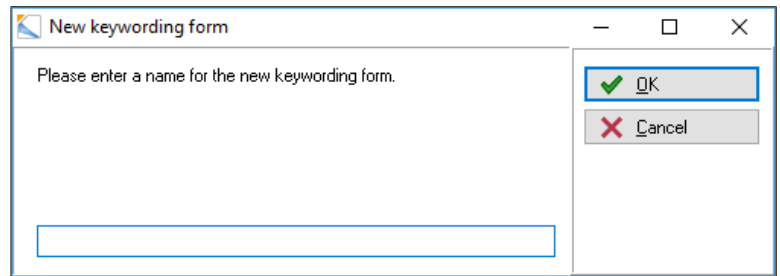
Fig. 216: Defining a name for the keywording form

The *New keywording form* dialog box opens.

3. Enter the name of the new form (e.g. `Invoice`) and click *OK*.

The keywording form will be created. The name you entered is now in the *Form name* field. The other fields are still empty or contain a default value.

The settings and entries you should make in a keywording form will depend on what you use the keywording form for. The following sections will teach you important basics on creating and editing keywording forms.

Information: Use the *Copy* button to adopt the settings from an existing keywording form.

The keywording forms manager

When you create a new keywording form or edit an existing one, you can do so from the keywording forms manager or using the keywording forms wizard.

This section explains the individual fields and settings options for the keywording forms manager. This basic information will help you to create your own keywording forms and to understand the examples that you will find at the end of this chapter.

Fig. 217: Settings for index fields

The top part of the keywording forms manager is where you edit the selected index field.

The section below the fields for editing the selected index field contains a bar with 50 tabs. Click a tab to edit an index field. If you entered a name for an index field, you will see the name of the index field among the tabs.

Fig. 218: General settings for a keywording form

In the lower part of the keywording forms manager, you can make settings that apply for the entire keywording form: These will apply for all documents that are filed with this form.

Fig. 219: Default fields on a keywording form

Information: The first index field of a new keywording form is always the *Short name*, the second is the *Document date*, and the third is the *Filing date*. These are defaults and cannot be changed. This means that the first field that you create for your keywording form is actually the fourth field in the completed form.

Options for index fields

The following settings apply to the selected index field.

Index field: If you, for example, enter `Supplier` here, you will create the *Supplier* field with this. *Supplier* becomes a keywording attribute.

Group: Enter the group name here (maximum of ten characters). The group name is important for universal searches and universal keyword lists. Groups establish a connection between different keywording forms.

Select a group name that matches the type of data to be entered to the index field. The *Supplier* index field can contain the SUPPLIER group, for example. The name of the index field does not have to match the group name.

Here are some recommendations for creating group names:

- No more than ten characters
- Always upper case, if possible
- No spaces
- No special characters
- No dashes
- No underscores
- No numbers at the beginning of the name
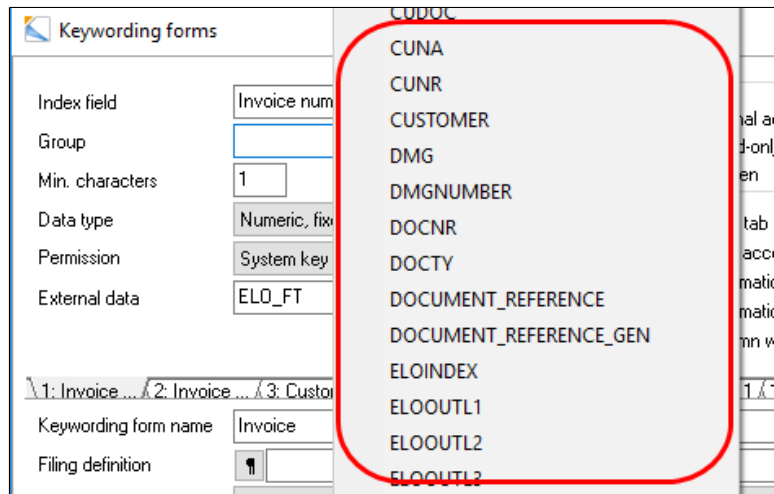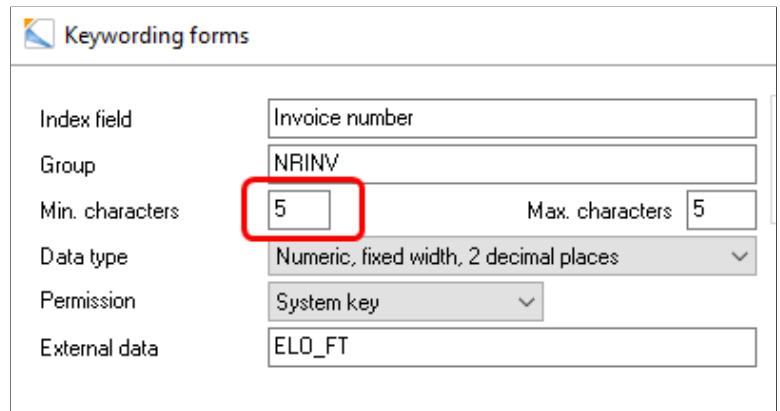
Fig. 220: Context menu with available groups (extract)

Right-click the empty *Group* field to open a context menu that shows all available group names. Select one of the group names to use the global search. This enables you to search for documents which were filed with different keywording forms, but belong to the same group.

If you have already entered a group, the context menu shows you all keywording forms that use the same group.

Fig. 221: Defining the minimum length

Min. characters: Sets the minimum number of characters you need to enter to the current index field for the document to be filed. If you do not enter the minimum number of characters when keywording a document, the document cannot be keyworded and filed. The field becomes mandatory.

Fig. 222: Defining the maximum length

Max. characters: Sets the maximum number of characters you are allowed to enter to the current index field.

Example   This setting is particularly useful in the *Invoice number* field. If, for example, the invoice numbers are always five characters long, enter "5" as a minimum and maximum value. This helps to prevent manual errors.

Fig. 223: 'Data type' field

Data type: Use the drop-down list to determine which kind of entries ELO will expect in the current index field of the keywording form. ELO only accepts entries (i.e. when keywording the document using this keywording form) that conform to your settings: The setting *Text* allows you to enter any characters, *Date* only a date, and only digits and digit separators are allowed with the *Numbers* setting.

> ⚠️ **Please note**: Use the *ISO date* type for the date fields. The *Date field* type is only available for compatibility reasons.

Read the *Index field types in keywording forms* section in this chapter for more information on the different data types.

Fig. 224: Permission settings for a field

Permissions: You can assign different permissions to the individual fields of a keywording form. You need to possess specific rights to be able to edit the field. A user without permission to edit an index field can edit the rest of the keywording form, but not that particular index field.

Fig. 225: 'External data' field

External data: Define which data can be imported automatically from metadata file information (e.g. EXIF information in a JPG file) into the index fields of the keywording form. To extract EXIF data, press SHIFT while opening the keywording in the Intray. Any available information will be written to the *Extra text* tab of the keywording form.

Fig. 226: Access settings

Normal access: The index field is available without restrictions to the user.

Read-only: The index field is write protected and its contents cannot be modified. This can be useful if the name of the person who edited a document is entered automatically by script and does not need to be changed.

Hidden: The index field is not displayed during keywording. Script extensions enable you to use these index fields for internal data.
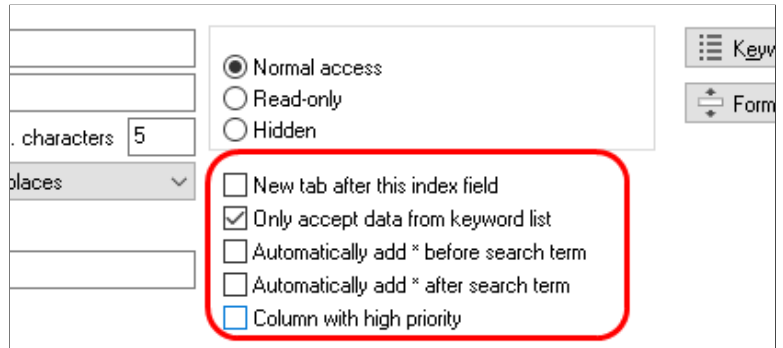
Fig. 227: Additional options for an index field

New tab after this index field: This creates a new tab next to the selected index field in the keywording form. New tabs will be placed after the *Basic* tab in the keywording form.

Only accept data from keyword list: If you enable this function, only terms from the keyword list will be allowed for this index field when you keyword a document. This helps you to structure your keywording and helps prevent manual errors. You can create an individual keyword list for each index field. You can ensure that documents will be keyworded consistently by creating a separate keyword list for each index field on the keywording form.

Automatically add * before search term: Adds the placeholder * **in front of** the query text for an ELO search using this form.

Example   If you enter the query en in this index field of the search form, you will find all documents that have entries in this index field ending in "en" (ELO searches for *en). The search term "room" finds bath-room.

Automatically add * after search term: Adds the placeholder * **after** the search text in the index field when searching with this form.

Example   If you enter the query "15" to this index field on the search form, all documents are found that have an entry in this index field starting with "15" (15* is the search text).
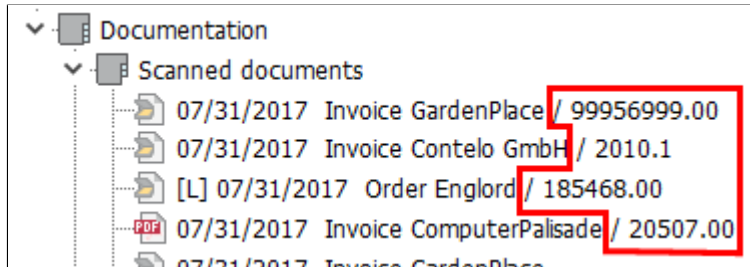
Fig. 228: Column with high priority Here: 'Total amount'

Column with high priority: The *Column with high priority* option displays the keywording information of the selected index field. The contents of the index field appear after the short name of the respective document in the tree view of the repository.
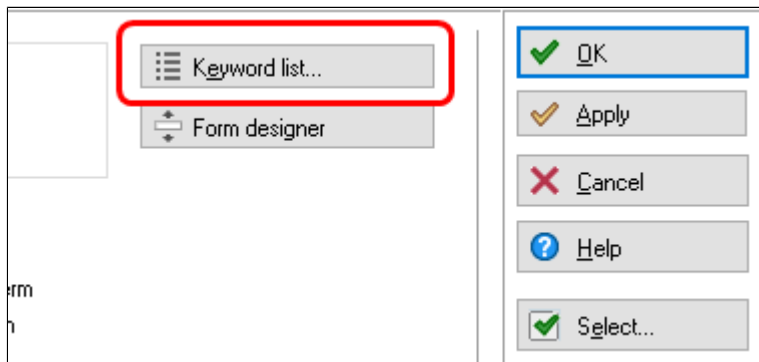
Fig. 229: 'Keyword list' button

Keyword list: Use this button to open the dialog box for editing the index field-specific keyword list. Keyword lists are used to standardize keywording information and help you keyword documents faster.

The keyword list is linked to the group name of the index field. A keyword list is available in all index fields that use the same group.
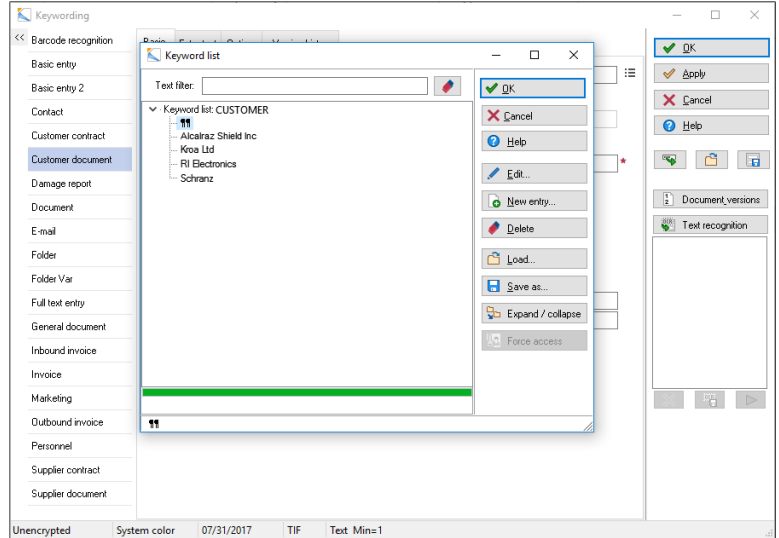
Fig. 230: Keyword list for the 'CUSTOMER' group

Use the following buttons to edit a keyword list:

- **Edit**: Use this button to change an existing entry in the keyword list. If you do not have any entries in the keyword list, this button is deactivated.

- **New entry**: Use this button to enter a new keyword into the list. The keyword is added to the level selected last in the keyword list.

- **Delete**: Use this button to delete the selected keyword.

- **Load**: Use the *Load* button to import external keyword lists. The ELO formats SWL, XML, HTML and TXT are allowed as import formats.

- **Save as**: Use the *Save as* button to save the keyword list to the file system. The ELO formats SWL, XML, HTML, and TXT are allowed as export formats.

- **Expand/collapse**: Click the *Expand/collapse* button to view or hide a keyword list.

Refer to the *Administration* chapter for detailed information on keyword lists.
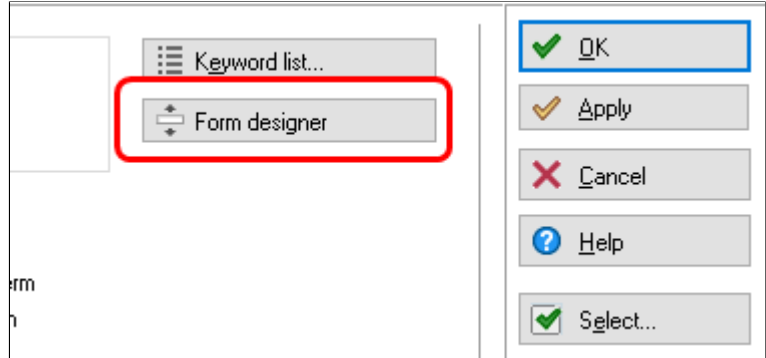
Fig. 231: 'Form designer' button

Form designer: This button launches the form designer, which lets you rearrange the index fields and labels on the keywording form as required. You can find more information in the *Form designer* section.

General keywording form options

The following options in the keywording forms manager apply to the entire keywording form.

Form name: Use this field to change the name of a keywording form.

Filing definition: This field lets you define a new document path. Documents keyworded with this keywording form can be filed automatically using the path entered. Refer to the following sections of this chapter for further information on the topic *Filing definition*, such as in the *Creating complex keywording forms* section.

Form permissions: Use this field to assign a key to a keywording form. Only users who have this key may use the respective keywording form. The *System key* is selected as the standard key. To select another key in the *Form permissions* field, you first need to define additional keys.

Use as folder/document keywording form: When you select *Use as folder/document keywording form*, you can use this keywording form for documents and folders.

Use as search form: If you select the *Use as search form* check box, you can use this form for keywording searches.

Please note: You must select at least one of the two options *Use as folder/document keywording form* or *Use as search form*. You can also enable both options.

Add document to full text database: If you select the *Add document to full text database* check box, the contents of the document you filed using this keywording form will be indexed. This enables you to find document contents when you do a full text search of the repository. This option is available for many formats such as text documents, unencrypted PDF files, Office documents, and scanned documents.

Create path automatically: This field is important if you want to use a filing definition for filing. The document will be filed even when the filing location cannot be found since ELO automatically creates the missing folder.

Create reference paths automatically: This field is important when you use more than one filing definition for filing. In this case, ELO files the original documents using the first filing definition. Each additional filing definition creates references to the original documents. The document will be filed even when the filing location cannot be found. ELO automatically creates the missing folders and references.

Document path: Use the arrow symbol to select the path for saving documents with this keywording form. *No fixed assignment* is set as the default. In this case, the documents are filed using the default filing path (ELO default setting = *BASIS*). Refer to the *Document paths* section in the *Administration* chapter for additional information.

Information: It is sometimes useful or necessary to choose a different storage location for certain document types, such as another server or hard drive. This means you can enter a specific document path that is only valid for documents using this form.

Font color: If you want to mark your documents with a specific color, such as red for invoices, you can set the color here. The default is the *System color*, i.e. your document entry is in black type. To change the color, click the arrow icon next to the index field and choose a color. If the color you want does not exist, you can set additional colors under *ELO menu > System settings > Font color*.

Permission: Here you can assign permissions to the documents filed using this form. These documents can only be accessed by colleagues with the specified permissions.

Information: The permission settings of an entry (document or folder) can be changed at a later point in time. It is therefore possible that users are able to use a keywording form, but cannot see or use certain entries that have been keyworded with the same keywording form.

Fig. 232: 'Document status' field

Document status: This field offers both the settings for versioning documents and settings for sorting within folders. For technical reasons, these two attributes are configured via one field.

The following setting options apply for documents:

- **Version control disabled**: You can change the document. Previous document versions are not retained.

- **Version control enabled**: This creates a new version when there are changes to a document. You can restore previous document versions.

- **Non-modifiable**: If this option is selected, the document can no longer be modified. This is extremely important for invoices or tax assessments, for example.

The following setting options apply to folders:

- **Manual sorting**: The entries are sorted according to the order they were filed to the repository. You can change this order when the folder contents are displayed in the viewer pane. Change the order of the entries by moving them up or down.

- **Alphabetical order**: The entries in the folder are displayed in alphabetical order.

- **External date**: The entries in the folder are sorted by the document date ascending (oldest entry at the top).

- **Internal date**: The entries are displayed by the filing date ascending (older entry at the top).

- **Inverse external date**: The entries in the folder are sorted by the document date descending (newest entry at the top).

- **Inverse internal date**: The entries in the folder are sorted by the filing date descending (newest entry at the top).

- **Inverse alphabetical**: The entries in the folder are displayed in reverse alphabetical order.

Barcode info: This is where you enter barcode information. To use this function, you need to define characteristics for reading barcodes via the *Keywording forms wizard*.

Reminder: You can specify in the form definition whether you want to automatically create a *reminder* during filing. For example, when you file an invoice, you can generate a reminder to check the payment deadline.

Encryption key: In ELO, you can create up to 16 encryption keys to store documents securely. You can set whether you want to file documents in non-encrypted form (the original file) or whether you want to assign an encryption key. This setting only applies to documents that have not been filed to the repository. Once a document has been transferred to the repository from the Intray, the entry can no longer be changed.

Lifetime: Set the lifetime for 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 time frame, enter a + sign followed by the number. Example: +5Y defines a time frame of five years. You can use D for days, W for weeks, M for months, and Y for years for this interval.

Tab name: Use the *Tab name* option to specify individual headings for the tabs of the keywording form. Entries made to this field are separated by a pipe symbol "|" (keyboard shortcut: ALT GR + >). This is only available for tabs that display index fields.

The keywording forms wizard

The *Keywording forms wizard* helps you to create and edit keywording forms. You should nevertheless familiarize yourself with the individual fields of the keywording forms manager (see above) and read the following sections of this chapter carefully.

Open the keywording forms wizard via *ELO menu > System settings > Keywording forms > Wizard*. To enable the button, you first need to create a keywording form or select an existing keywording form.

The keywording forms wizard contains nine different tabs. Use the tabs to edit the selected keywording form step-by-step. Follow the instructions in the wizard.
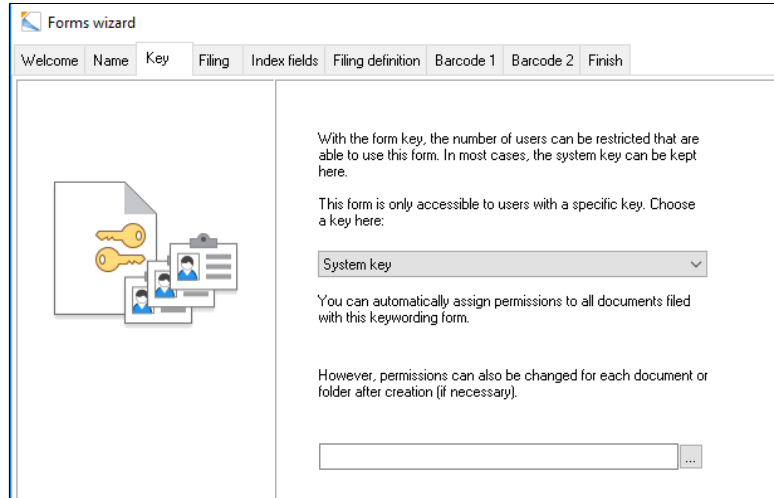
Welcome tab   This tab tells you what the wizard is used for. Click *Next*.

Name tab

Fig. 233: 'Name' tab

Please enter a name for the new form: Name of the keywording form. Change the name, if needed.

If you want to add the document to the full text database, select the corresponding check box. If you want to encrypt a document, select the corresponding entry in the drop-down menu.

Keys tab
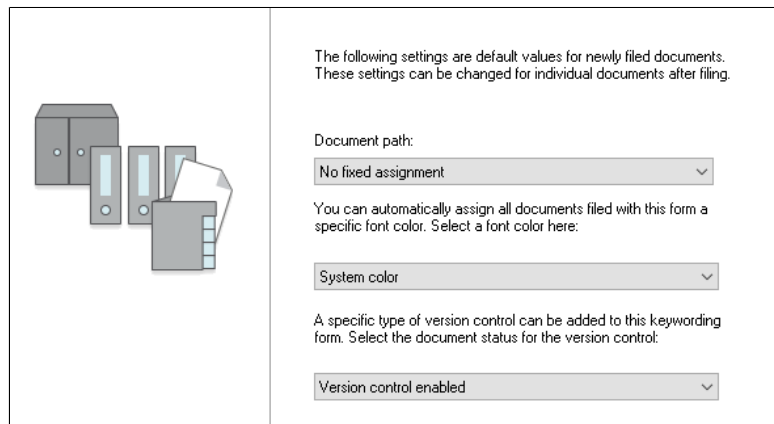
Fig. 234: 'Keys' tab

You can lock or assign permissions to keywording forms to restrict access to specific users. Click the arrow and select a key from the drop-down menu.

Filing tab

Fig. 235: 'Filing' tab

The default entry under document path is *No fixed assignment*. If this is selected, documents will be saved to the default path.

Create new paths by going to the *ELO menu > System settings > Document paths*.

You can also define the font color and the document status in this tab.

Index fields tab

Fig. 236: 'Index fields' tab

You can define up to 50 index fields via the *New index field* button with the help of the wizard.

You can select index fields from the list of available *Index fields* on the left. The options and settings for the index fields are displayed on the right-hand side.

Select an index field to edit it.

Filing definition tab

Use this tab to define the filing definition. There are six different fields to choose from. Each of these six fields allows you to define an element of the filing definition.

The filing definition field is only necessary for documents that will be moved directly from the Intray to the correct position in the repository.

The keywording form filing definition helps ELO automatically recognize the folder to which a document should be filed. This capability can make archiving significantly easier.

Enter your desired filing definition by using the 6 selection fields to make a selection, or enter the filing definition directly to the input field below.

Filing definition:

| ¶Departmer ⌄ | LD(7,4) ⌄ | (¶) ⌄ | L1(1,1) ⌄ | ⌄ | ⌄ |

=

[¶Finance Department¶Invoices]+[LD(7,4)]+[(¶)]+L`

Fig. 237: 'Filing definition' tab

Click the arrow icon to the right of the field. In the drop-down menu, select the index field that you want to refer to and define the area of the index field that you want to transfer to the filing definition.

Use the *Sample text* field to enter sample text to use as a marker for selecting the area of the index field.

Fig. 238: Filing definition for a date field
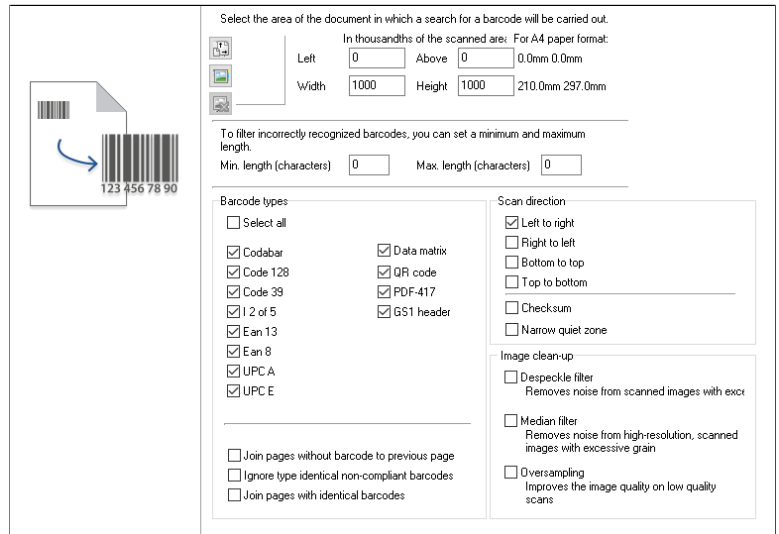
Example   In a date field, select the month, i.e. the fourth and fifth columns. Then click *Apply*.

The filing definition in this case is L3(7,4). That means that in the third index field (keywording attribute, such as invoice date), four characters are used for the filing definition, starting with the seventh character.

All documents will be filed to a monthly folder according to their date.

Refer to the following sections of this chapter for more information on filing definitions.

Barcode 1 tab

Fig. 239: 'Barcode 1' tab

Define the area for barcode recognition on the barcode document on the first barcode tab. Select the corresponding barcode types that you want to be recognized.

Barcode 2 tab
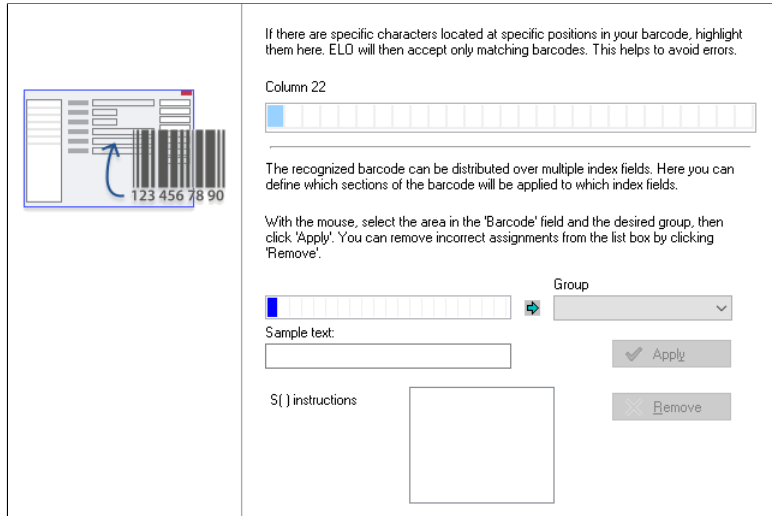
Fig. 240: 'Barcode 2' tab

On the second barcode tab, you can define the selection criteria for applying characters from the barcode information.

Finish tab

After you have made all of the settings, click the *Finish* button.

The changed settings are applied to the selected keywording form.

Index field types in keywording forms

The index fields are a major component of a keywording form.

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 makes it easier for the user to enter the right information to the index field.

Change the type of an index field as follows:

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. Create a new keywording form (*New form*).

Alternative: Choose an existing keywording form (*Select*).

3. Click the *Data type* field.
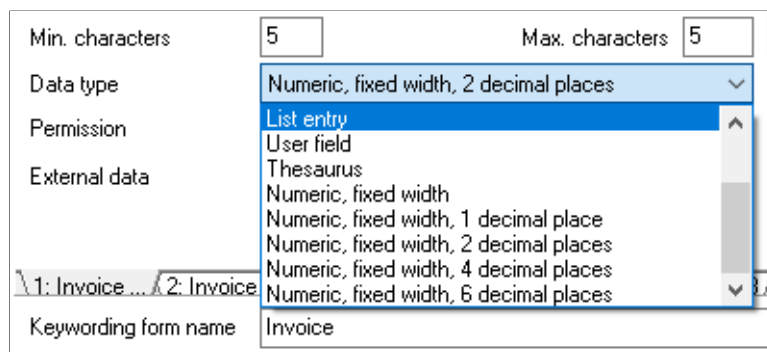
Fig. 241: Drop-down menu with index field types

A drop-down menu shows all available index field types.

4. Choose a type. Consider the following information for this:

Text field	There are no restrictions on the type of characters that you can enter to a *Text* index field.
Date	When you use the *Date* index field type, a button appears next to the field in the keywording form that opens a calendar. Select the date in the calendar when you are keywording a document or folder.

Please note: Use the *ISO date* type for the date fields. The *Date field* type is only available for compatibility reasons.

Number

Index fields of the *Number* type can only accept numbers and appropriate number separators. If you enter any other characters in this field, a warning message will appear. If you see this message, correct your entry.

ISO date

When you use the *ISO date* index field type, a button appears next to the field in the keywording form that opens a calendar. Select the date in the calendar when you are keywording a document or folder.

The difference between this type and the simple date field is that the ISO date is entered to the database as YYYYMMDD. In other words, this input type allows you to carry out a range search or a standardized query. In the keywording form, however, the date is displayed in the format MM/DD/YYYY.

Entry from list

When you use the *List entry* index field type, you must store a hierarchical keyword list in a text file. Right-click the list to select your keywords when keywording a folder or document.

You can assign a text file to an index field by using the name of the index field, which must also be used as the file name. The file with the extension *TXT* is set up in the ELO Postbox directory (`..\Post-Box`) and is structured as follows:

```
Line 1: Control instructions
Line 2-n: List entries in the form:
1;1 ; A
2;1.1. ; Create repository
...
Column 1=Hierarchy level
Column 2=Numbering
Column 3=Text
```

The first line can contain the following control statements. Multiple control statements in the first line of a text file are separated by semicolons.

CONCAT	Enter parent entries 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 repository
2;1.2. ; Delete repository
1;2. ; B
2;2.1. ; Barcode recognition
2;2.2. ; Permissions concept
```

User field   Create a menu in the keywording form for selecting all available users with the *User field* index field type. Right-click the index field to open the menu.
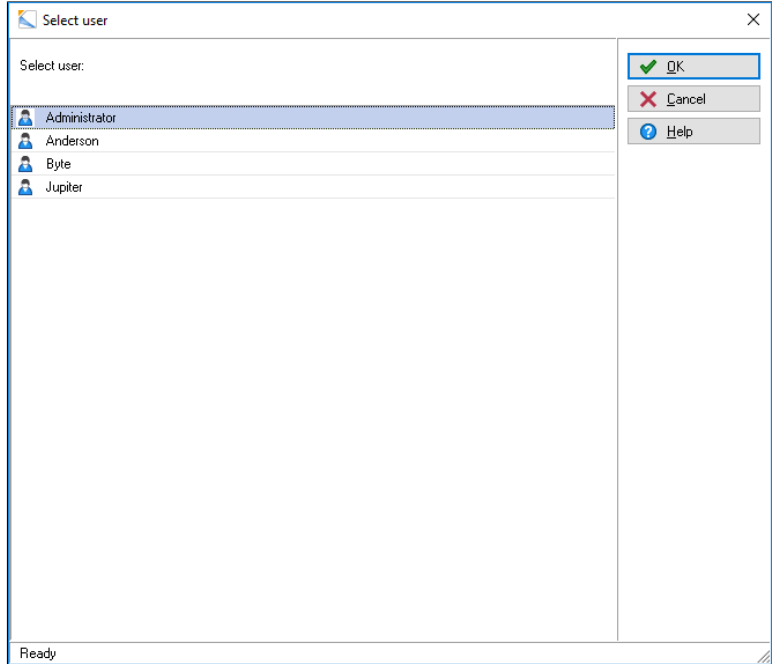
Fig. 242: User field with selection list

Select the corresponding user from the list.

Thesaurus

The *Thesaurus* function enables the user to select word groups from a menu in an index field. Right-click the corresponding index field to open the dialog box.
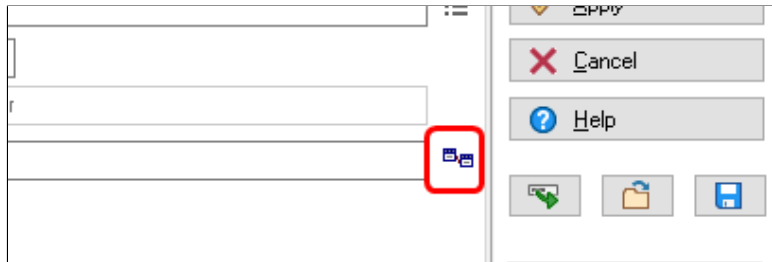
Fig. 243: Thesaurus field

The small icon to the right of the index field indicates that the *Thesaurus* index field type is available.

1. To open a *Thesaurus* for an index field, right-click the index field.
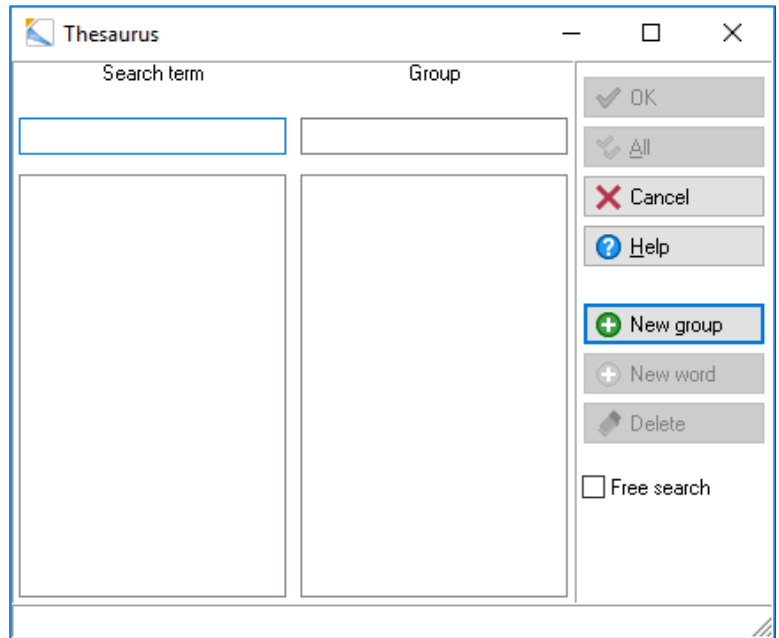
Fig. 244: 'Thesaurus' dialog box

The *Thesaurus* dialog box opens. The thesaurus is currently empty.

2. Click the *New group* button.

The *Create new thesaurus group* dialog box opens.

Enter the new group names and click the *OK* button.

You can create as many groups as you like in the *Thesaurus* dialog box and also assign synonyms to terms. Enter the terms and synonyms for each group.

If you assign a group the name *Printer*, for example, it will contain the various printer names as child terms.

Numeric, fixed width You can only enter numbers and digit separators to a *Numeric, fixed width* index field type. If you enter any other characters in this field, a warning message will appear. If you see this message, correct your entry. You must enter a value greater than zero under *Max. characters* to define the width.

Numeric with fixed width with 1, 2, 4 or 6 decimal places

You can only enter numbers and corresponding digit separators to a *Numeric, fixed width, x decimal places* index field type. You must enter a value greater than zero under *Max. characters* to define the width.

If you enter a number during keywording, it will be automatically be completed according to the following pattern:

- **Number without decimal point**: ELO will automatically add a decimal point and the selected number of decimals. This always adds zeros.

- **Number with decimal point**: ELO will add zeros after the last decimal until the required number of decimals has been reached.

Information: ELO will also add decimals when the maximum number of characters for a field has been reached.

Example 1   The setting *Numeric, fixed width, 2 decimal places* is selected. When a user enters the value "1" to the index field, ELO will adjust it to `1.00`.

Example 2   The setting *Numeric, fixed width, 4 decimal places* is selected. When a user enters the value "`4.2`" to the index field, ELO will adjust it to `4.2000`.

This ensures that entries always have the same number of decimal places.

The form designer

You can change the arrangement of index fields on a keywording form using the Form designer. The following section contains information about customizing and modifying keywording forms.

Information: The default fields (*Short name*, *Date*, *Filing date*, *Current version* and *Owner*) cannot be changed.

Starting the form designer

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. Select the keywording form you want to customize by clicking *Select*, selecting the form, and clicking *OK*.

The data set for the selected keywording form is displayed in the keywording forms manager. We have used the *Invoice* form in our example.
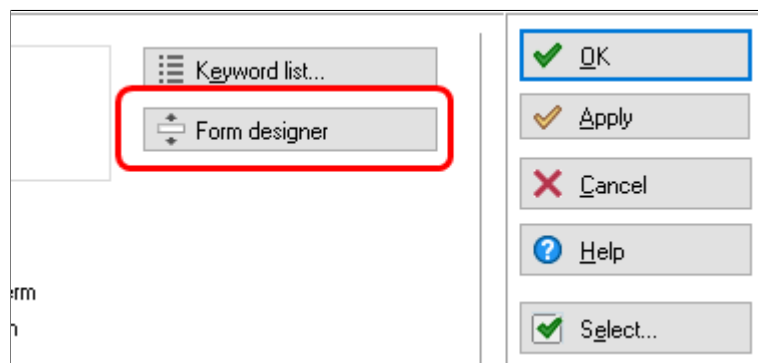
Fig. 245: 'Form designer' button

3. Click the *Form designer* button.
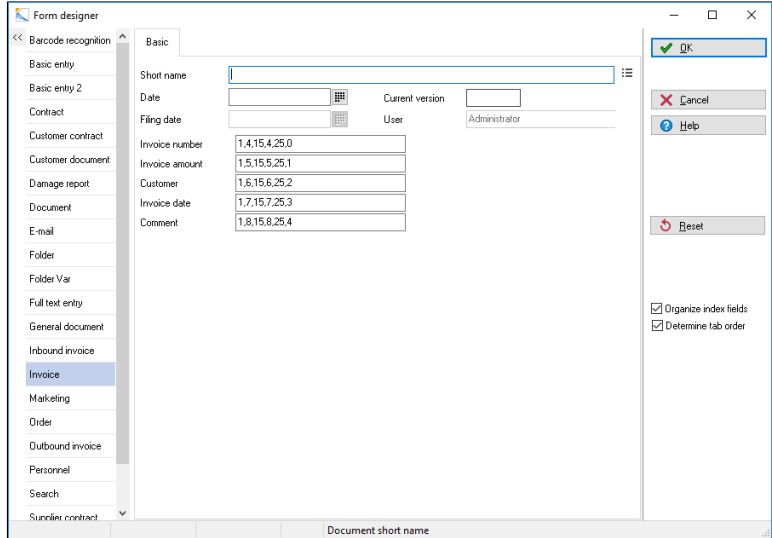
Fig. 246: Editing keywording forms

The *Form designer* dialog box opens. You have the following modification options in the *Form designer*:

- Change the position
- Change the size

Information: The *Organize index fields* option must be selected in order to make changes.

Position index fields

The index fields and names of the fields can be moved using drag-and-drop actions. For example, you can create spaces or position index fields next to each other.

1. Click the element you want to make changes to.

2. Drag it to the new position.

3. Release the mouse button.

Change size

Drag the cursor to change the size of the index fields. This enables you to create index fields that are exactly the right size and make optimum use of the space on your form.
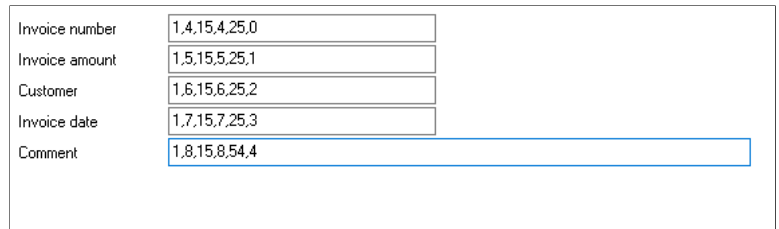
1. Click the field you want to change.

2. Move the cursor to the bottom right edge of the field.

The cursor turns into a double arrow.

3. Hold down the left mouse button and drag the field to make it larger or smaller.

4. Release the mouse button.

Invoice number	1,4,15,4,25,0
Invoice amount	1,5,15,5,25,1
Customer	1,6,15,6,25,2
Invoice date	1,7,15,7,25,3
Comment	1,8,15,8,54,4

Fig. 247: Changing fields in the keywording form

Determine tab order
Enable the *Determine tab order* option to save the new order of the tab positions in the keywording form when you save it. This means that when you are keywording, the tab key jumps from one index field to index field in the right order.

Save changes
To save the changes, click the *OK* button. This closes the *Form designer*. Now click *OK* to close keywording forms manager. This ensures that the new form settings will be saved along with the keywording form data.

Reset
Click the *Reset* button to undo all changes.

Customizing keywording forms means you can fit a great deal more information on a tab because you can arrange the index fields side by side.

Editing or switching keywording forms

You can change existing keywording forms at any time if you need to. You can also replace the keywording form for documents that you have already keyworded.

Edit keywording forms

1. Open the keywording forms manager via *ELO menu > System settings > Keywording forms*.

2. Choose the keywording form that you want to edit by clicking the *Select* button, selecting the form and clicking *OK*.

The keywording form with saved settings is opened in the *Keywording forms* dialog box. You can now modify the keywording form.

3. Click *OK* to confirm your changes.

You can now use the modified keywording form.

Switching keywording forms

If you want to change the keywording form of a document that has already been keyworded, open the *Keywording* dialog box.

Information: Only users that have the right *Reassign form type for entries* can switch the keywording form later on.

1. Open the *Keywording* dialog box for the selected document.

2. Choose another keywording form.

Please note: When you switch a keywording form, the keywording information that is entered to this form will apply. It may be the case that that this keywording information does not match the new index fields.

Optional: Change the keywording if needed.

3. Click *Apply* or *OK* to apply the changes.

Deleting keywording forms

You can delete keywording forms that you no longer require. However, you can only easily remove a keywording form if no entries were keyworded with the form (documents and folders).

Information: If you are still using the keywording form in ELO, search for the corresponding entries and assign them a different keywording form (see below).

Standard deletion process

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. Choose the keywording form that you want to delete by clicking the *Select* button, selecting the form and clicking *OK*.

The data set for the selected keywording form is displayed in the keywording forms manager.

3. Click *Delete*.

ELO will ask whether you really want to delete the keywording form.

4. Click *Yes* to confirm.
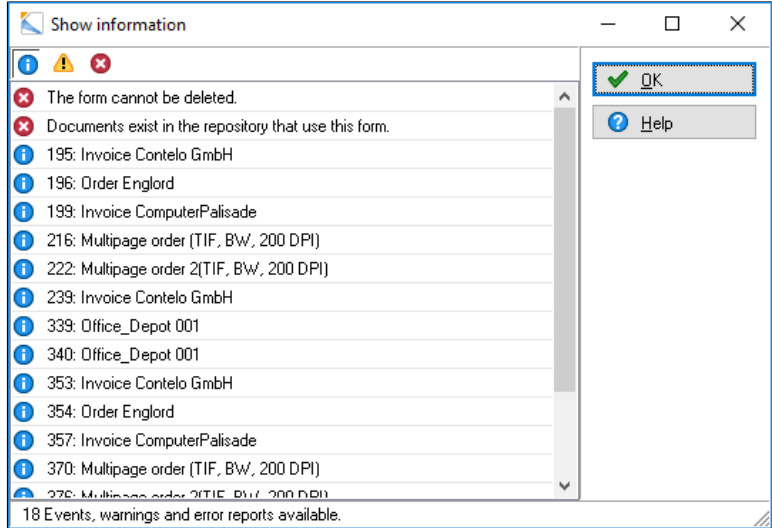
Fig. 248: 'Show information' dialog box

Please note: If the keywording form is still being used in ELO, you cannot delete it. In this case, the *Show information* dialog box, which shows you a list of the entries affected, will appear.

If there are no entries in the repository associated with the selected keywording form, ELO deletes the keywording form.

Searching entries with the keywording form

To delete the keywording form, you need to search the entries that were keyworded with this form. After this, you need to switch the keywording form for the entries in question.
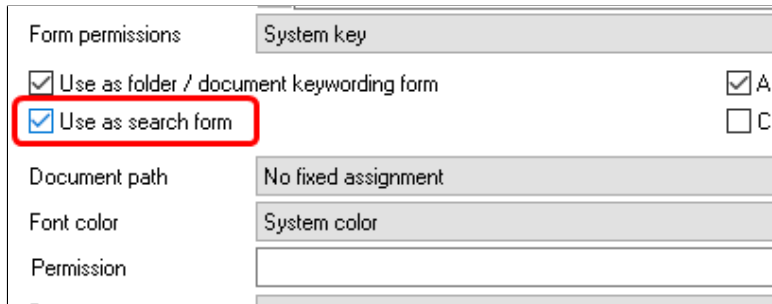
Fig. 249: Enabling the 'Use as search form' option

- To find the entries in question, the keywording form must be available as a search form. If necessary, select the *Use as search form* option in the keywording forms manager.
- You need at least one keywording form that will be used to replace the keywording form that you want to delete.

Search keywording

1. Open the *Search* work area.

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

The *Search keywording* dialog box appears.

3. Choose the keywording form that you want to delete as a search form.

4. Start the search with the *Search* button. Leave all fields empty.

A results list appears displaying all entries created with this keywording form.

5. Select and entry from the list and open the *Keywording* dialog box.

6. Choose another keywording form.

Optional: Modify the keywording of the entry to match the new keywording form, if needed.

7. Confirm with the *OK* button.

8. Repeat steps 5-7 for all other entries in the results list.

9. When there are no more entries tied to the keywording form, delete the keywording form as described above.

The keywording form will be deleted and is no longer available.

The automatic filing wizard

The automatic filing wizard helps you file your documents. The wizard remembers how you filed a document and automatically suggests a filing location when you are filing other documents. The filing wizard will show you as many index fields as possible.

Scenario

You want to sort the invoices in the *Invoices* folder by customer name and file them to separate folders. The filing wizard helps you automate part of this process.

Preparation

Fig. 250: Keywording preparation

1. You will need a keywording form without a filing definition. The option *Create path automatically* must be enabled. We have used the *Invoice* keywording form.

2. You need to have at least two documents. In this case, these are two invoices. They must be filed to the *Intray* work area.
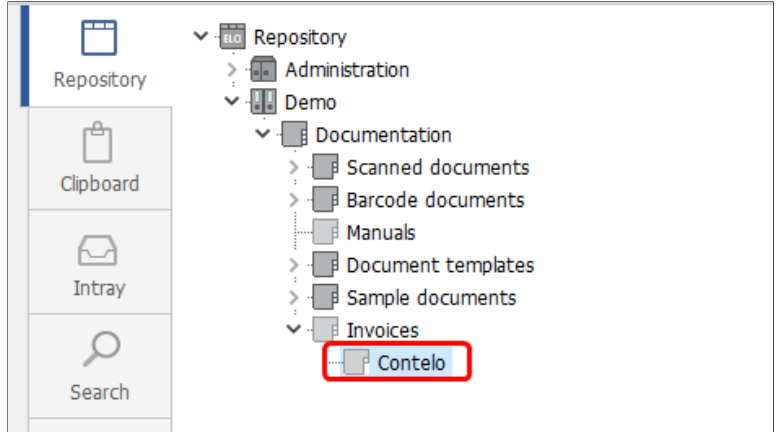
Fig. 251: Create the first folder

3. Create the folder for the first customer in the *Invoices* folder.

File to repository

4. Switch to the *Intray* work area.

Fig. 252: Keywording with the customer name

5. Keyword the first invoice with the keywording form and enter the customer name to the *Customer* index field.

6. Click *Automatic filing* on the ribbon.
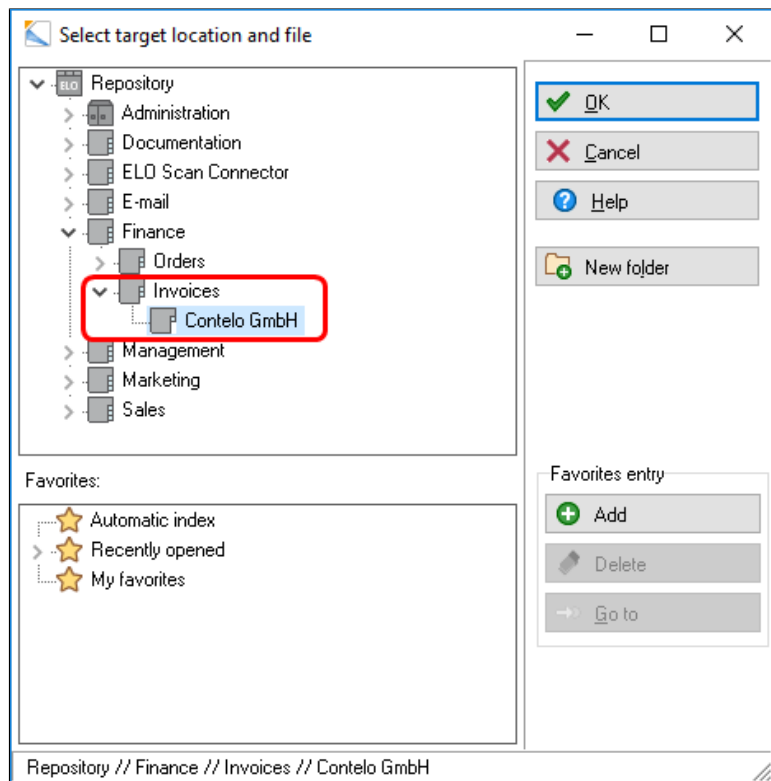
Fig. 253: Selecting the target path

The *Select target location and file* dialog box opens.

7. Select the *Invoices* folder as the filing location, then select the child folder for the first customer. The filing wizard stores the filing information.

8. Click *OK* to confirm.

Automatic filing suggestion

Now file the second invoice to the repository.

9. Repeat steps 4-8 under *File to repository* for the second invoice.
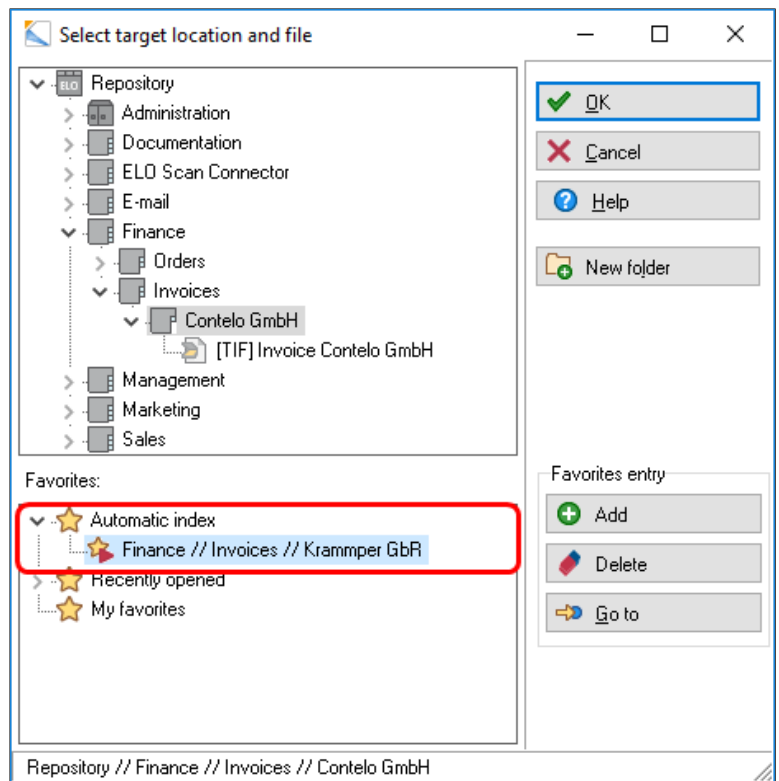
Fig. 254: Suggested filing path

The *Select target location and file* dialog box opens again.

The automatic filing wizard suggests the folder with the name of the second customer within the parent folder *Invoices* as the filing location, even if this folder does not yet exist. In this case, ELO will automatically create the folder when the document is filed.

ELO compares the folder name of the first customer with the keywording information of the filed invoice. ELO determines that the folder name is the same as the contents of the *Customer* index field. From now on, ELO will suggest this folder when you are filing invoices.

10. Click *OK*.
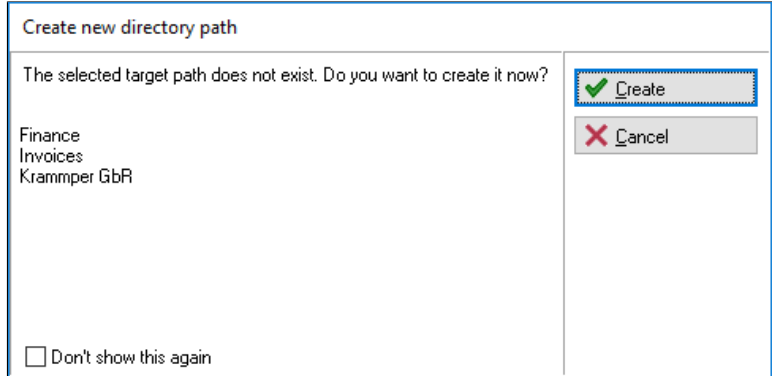
Fig. 255: Create new path

Since the target folder does not exist in the repository, a confirmation request opens, asking you if you are sure you want to create the folder in the repository.

11. Click *Create* to confirm.

Information: You can turn off this message. If the query is turned off, the folder will be created without displaying the message.

The invoice is filed and the filing path is automatically created in the repository.

Information: If a target path is suggested as the *Automatic index* in the *Select target location and file* dialog box, a small arrow will be displayed to the lower right of the icon. If the arrow is green, the suggested filing path exists. If the arrow is orange, the path needs to be created.

Keywording assistance using full text

You can use the full text functions in ELO to help you keyword documents and folders.

> **Information**: You can only automatic keywording assistance on documents that have not been keyworded and that contain machine-readable text. If you are working with scanned documents, make sure they have a minimum resolution of 200 dpi and easy-to-read font.

Preparation

You need:

- At least one document in the Intray
- A specially configured keywording form
- If you want to use multi-page documents, you may have to modify your settings in the *Configuration* dialog box.

Prepare keywording form

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. Choose a keywording form (*Select* button).

Index field	Invoice number
Group	NRINV
Min. characters	5 — Max. characters 20
Data type	Numeric, fixed width, 2 decimal places
Permission	System key
External data	ELO_FT

Fig. 256: Define external data

3. Enter *ELO_FT* to the `External data` field.

Every index field that was assigned this definition will automatically receive assistance for manual keywording.

Configuration settings

1. Click *ELO menu > Configuration > Intray*.

| General | Display | Display filters | Notes | E-mail | Paths | Intray | Scan parameters | Scan p |

Intray folder	C:\ProgramData\ELO Digital Office\ELOoffice\Postbox\
Network scanner	
TIFF printer path	C:\Users\ANDREA~1\AppData\Local\Temp\EloPrint\
Fax printer	
ELO Printer	ELO Tiff Printer,ELO Printerdriver,NUL
PDF printer	ELO Pdf Drucker,ELO PDF Printer Driver,LPT1:
Extensions for backup files	*.!BK *.BAK
Scan file names	Full date and time in block
Join options	Join

☑ Confirm when deleting Intray entries
☐ Refresh Intray when switched to
☐ Automatic filing with complete filing definition
☐ Insert pages: append new page as page 1
☑ Request version information when filing
☐ Rotate all selected documents
☐ Batch keywording in the Intray
☐ Confirm before creating new document paths

1 ⬍ Pages for OCR preprocessing when keywording

Fig. 257: OCR preprocessing settings

2. Define the required number of pages in the *Pages for OCR preprocessing when keywording* spin box.

Information: The setting only affects multi-page documents that contain keywording information after the first page. If you use the setting "1", only the first page is used for keywording.

Start OCR preprocessing

Once you have made the necessary preparations, you can start the OCR preprocessing.
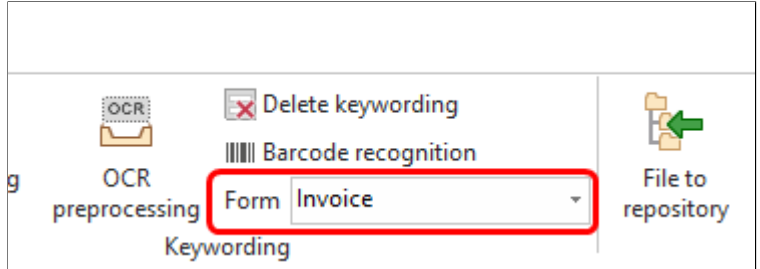
Fig. 258: 'Form' field on the ribbon

1. Select the keywording form as the default in the Intray (*Intray > ribbon > Scan/File > Form*).
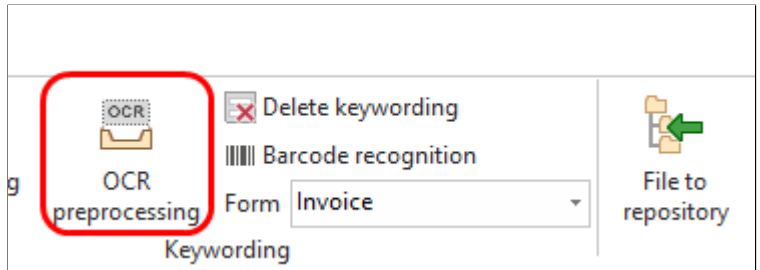
Fig. 259: Start OCR preprocessing

2. Start the OCR preprocessing via *Intray > ribbon > Scan/File > OCR preprocessing*.

Keywording a document

Once processing is complete, you can use the OCR information when you are keywording documents.

1. Select a document you want to keyword.

2. Open the *Keywording* dialog box.

3. Click an index field that you assigned the value *ELO_FT* to in Ex-ternal data.

4. Enter a character to the index field.

ELO checks whether the full text information contains terms that start with the same character. If a term exists, the background color of the index field changes.

Meaning of colors:

- **Green**: ELO has detected one matching term. Apply the term directly by pressing the TAB key.

- **Yellow**: ELO has detected more than one matching term. Open the *Word selection* dialog box with the TAB key, then select the term you want.

- **Red**: ELO did not find a matching term.
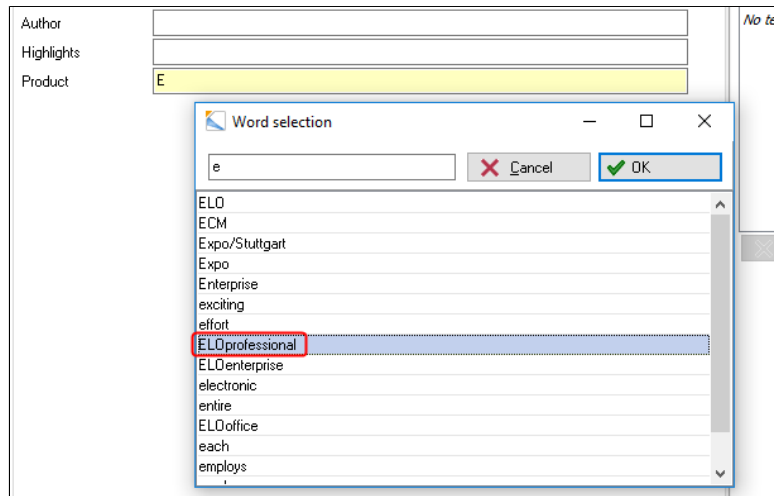
Fig. 260: Applying a term from the 'Word selection' dialog box

5. If you want to apply a term from the *Word selection* dialog box, open the dialog by pressing TAB.

6. Select a term from the list and click *OK*.

The term is copied to the index field.

Apply several terms

If you want to apply more than one term to the index field and you do not want to immediately jump to the next index field afterwards, press the F2 key instead of the TAB key.

Creating a simple target definition

When you create a keywording form, you can enter a condition (target definition) to the *Filing definition* field to file the documents to a specific folder. ELO will then use the keywording form to determine the folder that the document will be filed to.

This is an important function in ELO as it helps you get the most out of the program. We recommend that you read the next few pages carefully. We will use a simple example to start with:

Example   You want to scan all your business cards and automatically file them in a folder using a keywording form.

Information: This example can be applied to any kind of document.

Creating index fields   First, you need to create a keywording form with corresponding index fields (e.g. *Name*, *Company*).

1. Open the keywording forms manager in the *ELO menu > System settings > Keywording forms*.

2. Click *New form*.

The *New keywording form* dialog box opens.

3. Enter a name for your keywording form (e.g. `Business card`), then click *OK*.

Fig. 261: Create 'Name' index field

4. Enter *Name* to the `Index field` and *CONTACT* to the `Group`.

> **Information**: You can use the group name later in the universal keywording search function. This means ELO will not search through the entire repository for the name, just in documents that have the group name *CONTACT*.

5. In the *Input type* field, select the *Text* setting.

6. Click the next tab (*2*) to create a second index field.

7. Enter Company to the *Index field*, and COMPANY to the *Group*.

8. In the *Data type* field, select the *Text* setting.
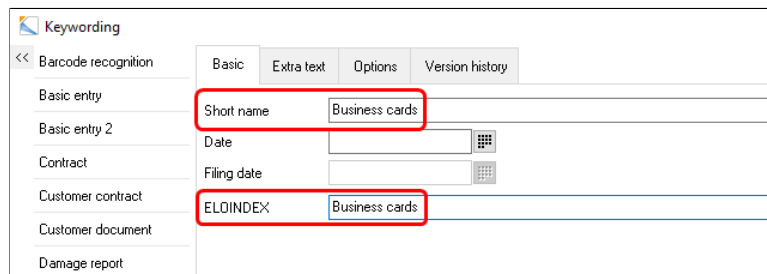
Fig. 262: The 'Company' index field

You have now created all necessary index fields for the *Business card* keywording form.

Preparing the filing location

Create a folder in the repository named *Business cards*.

1. Navigate to the desired location.

2. Select *ribbon > Start > New folder*.

3. Select the *Folder* keywording form.

Fig. 263: Folder with target definition

4. Under *Short name*, enter Business cards.

5. Enter a target definition of *Business cards* to the ELOINDEX field.

Information: *ELOINDEX* is a variable. This variable can be named differently for each keywording form with a filing definition (max. 10 characters). All that matters is that the variable in the target definition of a folder corresponds to a filing definition in a keywording form. You can set the name of the variable in the keywording form.

Filing definition (target definition)

The filing definition in the keywording form is the target definition. It ensures that ELO automatically recognizes the folder that a document needs to be filed to.

1. Open the keywording forms manager again.

2. Select the *Business card* keywording form.

Fig. 264: Entering a filing definition

3. Enter [ELOINDEX=Bcards] to the *Filing definition* field.

> **Information:** The square brackets are required for the keywording form's filing definition. Create these brackets using the buttons to the right of the "P" key.

The filing definition [ELOINDEX=Bcards] files all documents keyworded with the *Business card* keywording form to the *Business cards* folder. This occurs regardless of where the folder is located. What is important is that the keywording of the *Business cards* folder contains the target definition of *Business cards* (without brackets) in the *ELOINDEX* field.

You can keep all other settings on the keywording form (permissions, version control, and so on) or modify them for your requirements.

However, make sure that both *Use as folder/document keywording form* and *Use as search form* are selected.

4 Click *OK* to close the window.

The *Business card* keywording form is now ready to use.

Filing business cards　Now scan a business card, keyword it, and file it automatically to the repository.

1. Scan a business card to the Intray via *Intray > ribbon > Scan/File > Scan pages*.

2. Enter the *Keywording* dialog box for the scanned business card.

3. Select the *Business card* keywording form.

4. Enter the keywording information (*Short name*, *Name*, and *Company*), then click *OK* to confirm.
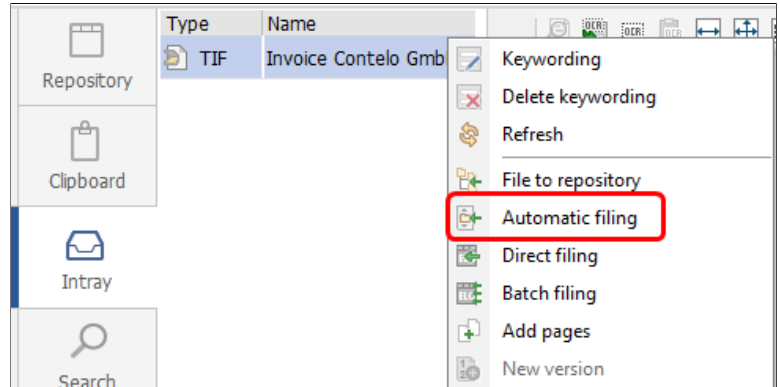
Fig. 265: Automatic filing via the context menu

5. Right-click to open the context menu and select *Automatic filing*.

Result

The business card is transferred directly to the folder that contains the target definition.

The scanned business card has now been filed.
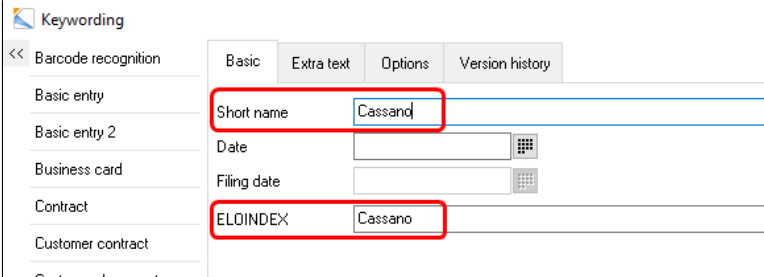
Creating an advanced target definition

In this example, we create a folder for each supplier so that the corresponding invoices are automatically filed to these folders. A filing definition enables you to automate this type of filing process.

Prepare folder

First you need to create a separate folder for each supplier, such as a child folder in your folder for invoices.

1. Create a new folder.

Fig. 266: New folder

2. Enter the name of the supplier to the *Short name* field and the *ELOINDEX* field.

3. Click *OK* to confirm.

4. Repeat steps 1-3 for the rest of the suppliers.

Keywording form with filing definition

To file invoices automatically based on the supplier's name, you need a keywording form with a corresponding filing definition.

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. Open the *Invoice* keywording form (using the *Select* button).

Fig. 267: 'Invoice' keywording form with filing definition

3. Enter [ELOINDEX=]+L1 (without spaces) to the *Filing definition* field.

You can use abbreviations to add the index fields in a keywording form to the filing definition. The default index fields *Short name* (LK), *Date* (LD) and *Filing date* (LA) are followed by the index fields (L1-L50). The screenshot illustrates this. If you enter L1 to the filing definition, the index field *1* (*Customer*) is read and used to file the documents.

Fig. 268: Abbreviations for index fields

Filing invoices

Finally, scan an invoice and file it automatically to the correct folder using the keywording form you just edited.

1. Scan an invoice to the Intray via *Intray > ribbon > Scan/File > Scan document*.

2. Keyword the scanned invoice with the *Invoice* keywording form. Enter the name of the customer to the *Customer* field, e.g. Cassano.

3. Right-click to open the context menu and select *Automatic filing*.

The scanned invoice will be archived in the folder for filing invoices from *Cassano*, which contains the entry *Cassano* in the ELOINDEX field.

Creating a complex target definition

The following example describes how to file delivery notes by supplier name and different monthly folders.

Prepare folders

1. For each of your suppliers, create a folder with a child folder for the current year.

2. In the year folder, create a child folder for each month.

Information: You can use the *Insert default index* function (*ribbon > Repository*) to quickly create folders for each month.

Enter a combination of the supplier name and the number of the month to the *ELOINDEX* field for each monthly folder while keywording.

For the supplier *Smith*, enter `Smith01` for the folder January, enter `Smith02` for the folder for all February invoices, and so on.

Creating the keywording form

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. We will create a *Delivery note* keywording form.

The keywording form must contain at least the fields *Supplier* and *Supplier date*.

3. Enter the following to the *Filing definition* field:

`[ELOINDEX=]+L1+L2(5,2)`

The following rules apply for the filing definition:

Everything you enter in brackets (`[ ]`) following the *ELOINDEX* variable will be applied verbatim. Add an index field by entering a plus sign: `[ELOINDEX=]+L1+L2`.

To apply part of an index field (e.g. the invoice date), use `L2(x,y)` (L2 = second index field, x = first character to be used, y = number of characters to be used in total).

The screenshot below illustrates this.

Fig. 269: Keywording for filing with filing definition

Process: The filing definition of the keywording form instructs ELO to retrieve the customer name from the first index field (L1) = *Range Office Supplies* and the month from the second index field (L2) (5,2 = starting with the fifth character, two characters in length) = *07*. We will start counting at the fifth character, since the date field stores the date in ISO format. The ISO date format is constructed like this: YYYYMMDD. However, ELO shows the date in the keywording form using the format MM/DD/YYYY.

Information: In index fields that use the *Date* data type, the slashes are counted as characters, using the format MM/DD/YYYY. In index fields with the *ISO date* data type, slashes are not counted. The format is YYYYMMDD.

File document

Finally, scan a delivery note and file it automatically to the correct folder using the keywording form you just edited.

1. Scan a delivery note to the Intray via *Intray > ribbon > Scan/File > Scan document*.

2. Keyword the document using the *Delivery note* keywording form.

3. Right-click to open the context menu and select *Automatic filing*.

The document is filed to the corresponding monthly folder for that supplier based on the keywording data.

Simultaneous automatic filing to multiple folders

Scenario

You have two filing structures. The first folder is sorted by the name of the person, while the second folder is sorted by the company name. When you file a document, it needs to be saved in both the folder for person names and the folder for company names.

Creating the keywording form

Create a keywording form titled *Multiple filing*, which references the different target folders:

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).
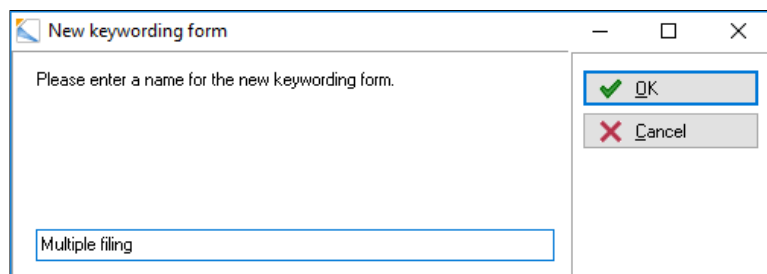
Fig. 270: Create keywording form

2. Create a keywording form called `Multiple filing`.

Fig. 271: Creating the keywording form

3. Enter Name to the *Index field*.

4. Enter PERSON for the group.

5. Enter the following for the filing definition:

```
[ELOINDEX=Test1]|[ELOINDEX=Test2]|
[ELOINDEX=Test3]
```

Information: The keyboard shortcut for the pipe symbol (|) is: SHIFT + \.

In this example, there are three different target folders in the *Filing definition* field. When filing using the configured keywording form, the original document should be saved to the first folder. ELO places references in each of the other folders.
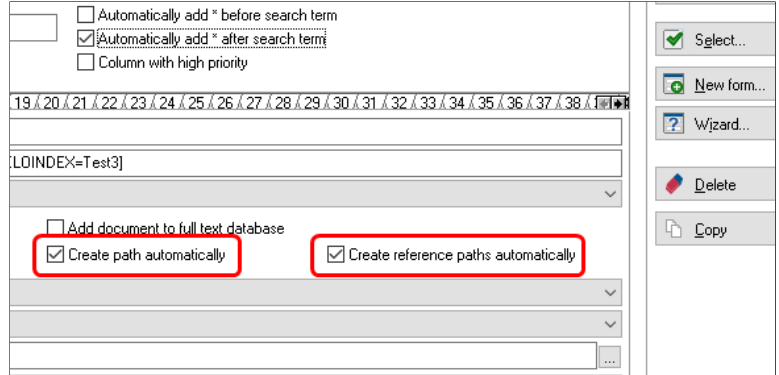
Fig. 272: Options for automatically created paths

Information: If the first filing target does not already exist, an error message will appear. To prevent this, select the option to *Create path automatically* when you are creating the keywording form. Any other filing targets are optional and will be ignored if they do not exist. There is no error message. If you also want to create the references automatically if the paths not not exist, select the option to *Create reference paths automatically* when you are creating the keywording form.

Prepare folders

For ELO to find the folders defined in the filing definition, you must first prepare the folders accordingly.
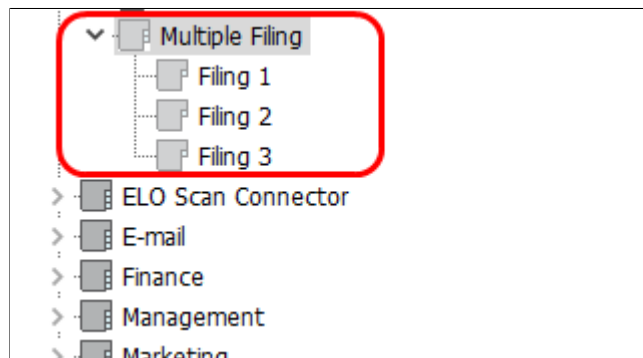
Fig. 273: Define filing folders

1. Create the first folder. In our example: *Filing1*.

2. Use the *Folder* keywording form.
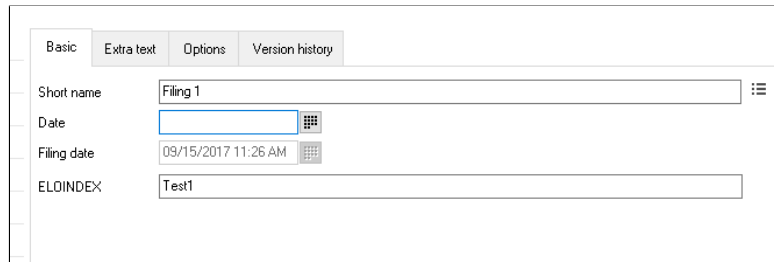
Fig. 274: Create folder with target definition

3. Enter Test1 to the *ELOINDEX* field for the first folder.

Test1 establishes a link with the first part of the filing definition in the multiple filing keywording form.

4. Repeat steps 1-3 for both of the other folders. Enter Test2 to the *ELOINDEX* field for the second folder and Test3 for the third folder.

Filing to multiple folders

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

2. Keyword the document using the *Multiple filing* keywording form.
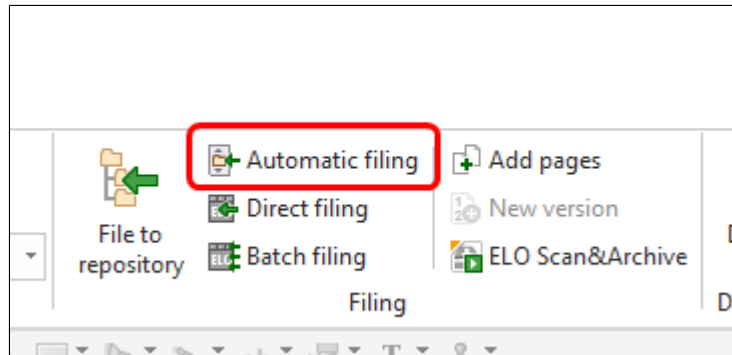
Fig. 275: 'Automatic filing' button

3. Click *Automatic filing* (*Intray > ribbon > Scan/File > Automatic filing*).

The document is automatically filed to the designated folder. The original document is placed in the first folder, while the two other folders get a reference to it.
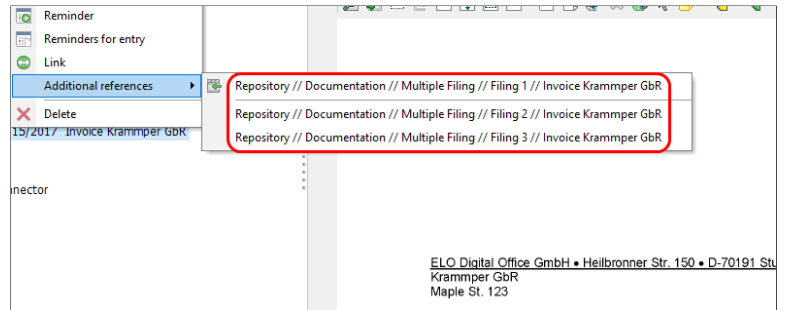
Fig. 276: All filing locations of a document

Information: You can see all references to a filed document by opening its context menu. Right-click the short name of one of your documents in the tree view. Select the *References* menu item to see links to the logical copies of the documents.

Filing definition by longest match

Scenario

Assume you want to use a keywording form to file invoices from your suppliers directly into an alphabetical folder containing S and St. This allows you to file suppliers such as Smith and Stiller separately.

You need a filing definition with the property *Longest match* for this type of filing process. The longest match property means that the document is filed where the longest character string corresponds to the filing definition of a folder. That means Smith is filed to *S*, because only the first letter is a match *S* (there is no *Sm* folder), and Stiller in *St*, because two letters match.

Prepare folders

1. Select a folder in the repository.
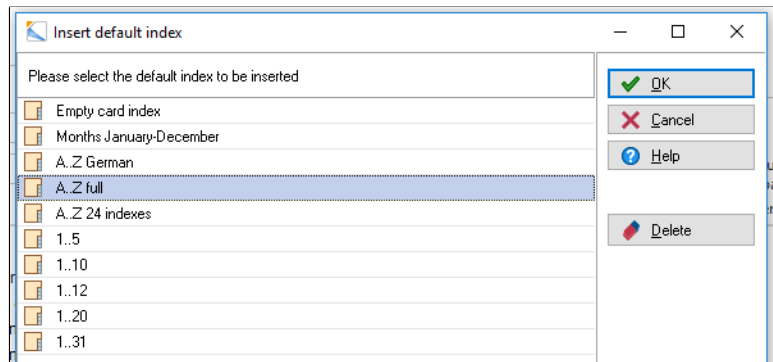
Fig. 277: Insert default index dialog box

2. Create a default index in the selected folder using the *A..Z full* template (*ribbon > Repository > Insert default index*).
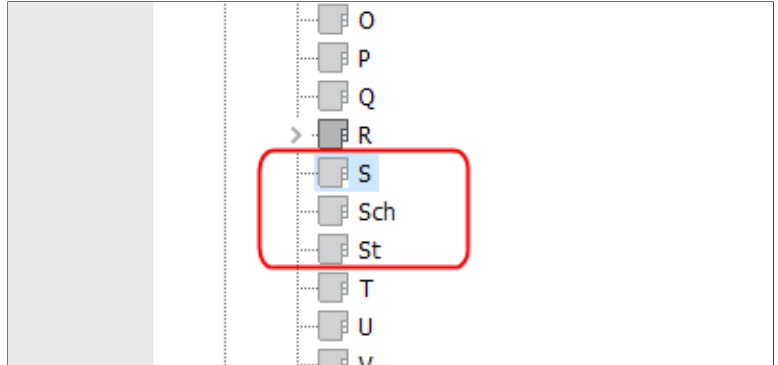
Fig. 278: Create 'St' folder

3. Add a folder named *St*.
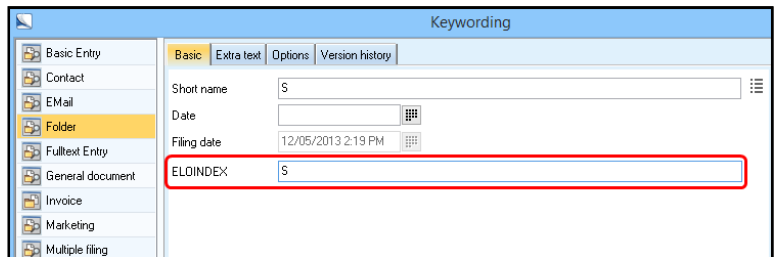
Fig. 279: Keywording form with target definition

4. Open the *Keywording* dialog box for the *S* folder.

Optional: Select the *Folder* keywording form if the folder has not been assigned to the tab by default.

5. Enter *S* to the ELOINDEX field.

6. Click *OK*.

The *S* folder has now been edited and saved.

7. Repeat steps 4-6 for all other folders. Enter the name of the folder into each of the *ELOINDEX* fields.

Information: *ELOINDEX* is a variable. You can also add the field name Customer, Name or Supplier. If you want to use default indexes in various folders, the variable in the *ELOINDEX* field needs to be changed, such as to *Supplier-S* and *Customer-S*.

Prepare filing definition

1. Open the keywording forms manager (*ELO menu > System settings > Keywording forms*).

2. Select the *Delivery note* keywording form (using the *Select* button).

With the following filing definition, ELO decides between S and St:

`[ELOINDEX=]+Lx(v,w)+[%]+Lx(y,z)`

Information: The % sign is required for the longest match.

\ 1: Supplier / 2: Delivery... / 3: Delivery... / 4: Contact / 5: Order / 6: Comment / 7 /	
Keywording form name	Delivery note
Filing definition	¶ [ELOINDEX=]+L1(1,1)+[%]+L1(2,2)
Form permissions	System key
☑ Use as folder / document keywording form	☑
☑ Use as search form	☑
Document path	No fixed assignment

Fig. 280: Longest match filing definition

3. Enter the following filing definition:

`[ELOINDEX=]+L1(1,1)+[%]+L1(2,2)`

- **+L1(1,1)**: ELO first takes the first letter of the first index field into account when filing (here: *Supplier*).

- **+[%]**: Control character for longest match filing.

- **+L1(2,2)**: If the first character does not uniquely identify the name, ELO evaluates the second and third characters of the first index field. (2,2): ELO starts before the second character and takes two characters into account from there.

Filing documents

After preparing the folder and the keywording form, you can automatically file documents to the correct folder. The documents must be in the Intray and must not have been keyworded.

1. Select a document in the Intray.

2. Keyword the document with the keywording form. Here: *Delivery note*. Enter a supplier name, such as Schwarz.
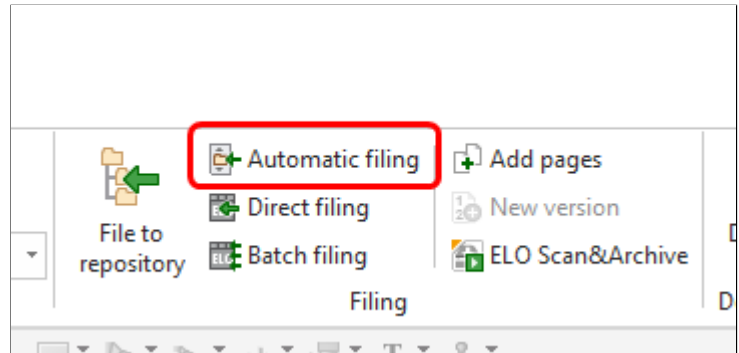
Fig. 281: 'Automatic filing' button

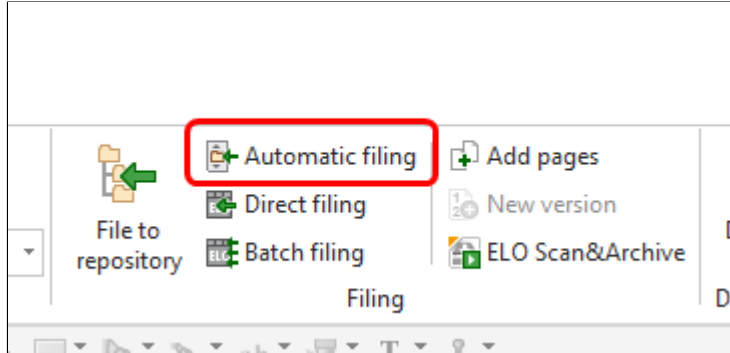3. Click *Automatic filing* (*ribbon > Scan/File > Automatic filing*).

The document is filed to the corresponding folder, such as to the folder *St*.

Filing definition by filing structure

All previous examples of filing definitions require a target definition that you enter to the corresponding folder. By creating a filing definition by filing structure, you can also file documents to a folder that does not contain a target definition.

Information: When you file documents using a filing definition, you should select the option to *Create path automatically* in the keywording form you are using. This means that if a folder does not exist in the repository it will be created automatically.

The standard filing definition is:

`[¶Folder¶Folder¶]+Lx(v,y)+...`

Information: You can create the ¶ character, which is essential for a filing definition by filing structure, either with the ¶ button or ALT +20 or ALT+0182.

Scenario

Let us assume you want to file documents from your customers automatically in an alphabetical folder.
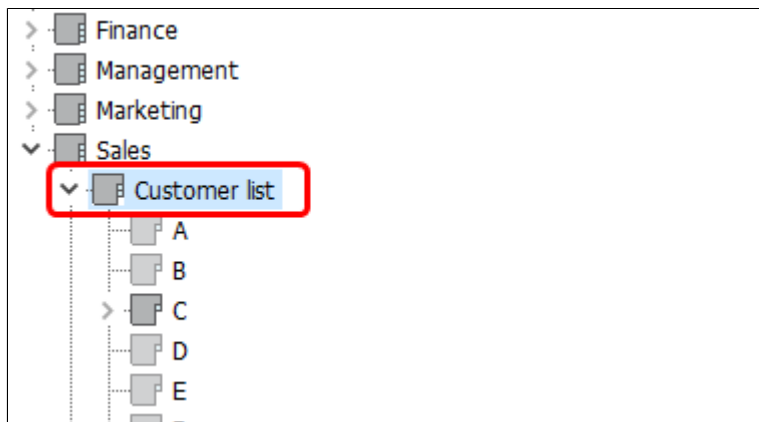
Fig. 282: Prepare folders

Prepare folders
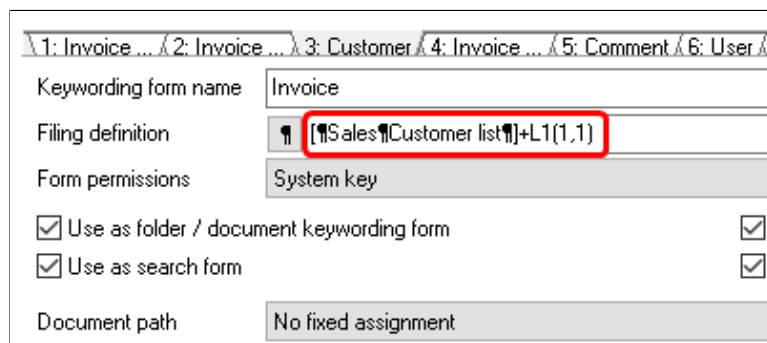
1. Create a new folder. We have used the *Customers* folder as a child folder of the *Sales* folder.

2. In the *Customers* folder, create an *A..Z full* default index.

Prepare filing definition

1. Open the keywording forms manager in the *ELO menu > System settings > Keywording forms*.

2. Select the *Invoice* keywording form (using the *Select* button).

1: Invoice ...	2: Invoice ...	3: Customer	4: Invoice ...	5: Comment	6: User

Keywording form name	Invoice
Filing definition	¶ [¶Sales¶Customer list¶]+L1(1,1)
Form permissions	System key
☑ Use as folder / document keywording form	☑
☑ Use as search form	☑
Document path	No fixed assignment

Fig. 283: Filing definition

Enter the following filing definition:

[¶Sales¶Customers¶]+L1(1,1)

The program retrieves the first letter (1,1) of the first index field (L1) *Customer* from the *Invoice* keywording form.

File document

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

2. Keyword the document with the keywording form. Here: *Invoice*. Enter a customer name, such as Stiller.

Fig. 284: 'Automatic filing' button

3. Click the *Scan/File > Automatic filing* tab.

The document is filed to the corresponding folder, such as to the folder *S*.

Advanced functions

In this chapter, you will get to know the advanced functions in ELO.

This section contains information about the following features:

- Outlook connection
- Version control
- References
- Checking out and editing folders
- Activities and a sample project
- The ELO_REQ and ELO_NOTIFY projects
- Attachments
- TIFF printer
- Creating a default index
- Deleting a repository
- Digital signature
- Creating profiles

Outlook connection

Microsoft Outlook manages e-mail messages, faxes, notes, and so on as objects within folders. Microsoft Outlook integrates seamlessly with ELO. That means you can file incoming e-mails, faxes etc. straight to your ELO repository from Outlook.

You need to be using Microsoft Outlook 2003 or higher for this to work.

You can connect Outlook with ELO in the following ways:

- **Folder connection**: By connecting folders, specific folders in ELO are assigned to a corresponding folder in Outlook.

- **Transfer folder contents to Outlook**: You can also export information and folder contents to Outlook. To do so, you need to define an export path in ELO (*ELO menu > Configuration > E-mail > Link to Outlook*).

- **Via macros**: Another possibility is to file e-mail messages using special macros integrated into Outlook's program interface.

Defining paths for the Outlook connection

For the Outlook connection to work, you need to define the paths to the *Outlook folder* and *Outlook folder for export*. *Outlook folder* is the folder in Outlook that you use to transfer e-mail messages to the ELO repository. *Outlook folder for export* is the folder used to export documents from the ELO repository to Outlook.

In our example, we created three new folders in Outlook. The first folder is named *File to ELO*. We created child folders named *Base* and *Export* within this folder. Once these folders have been created in Outlook, you can define the paths in ELO.

⚠ **Please note**: For the connection to work, you must ensure that the folder contains elements of the type *Mail and Post Items* when you create the folder in Outlook. This option is selected by default for new folders in Microsoft Outlook 2013.

1. Open the *E-mail* tab of the configuration (*ELO menu > Configuration > E-mail*).
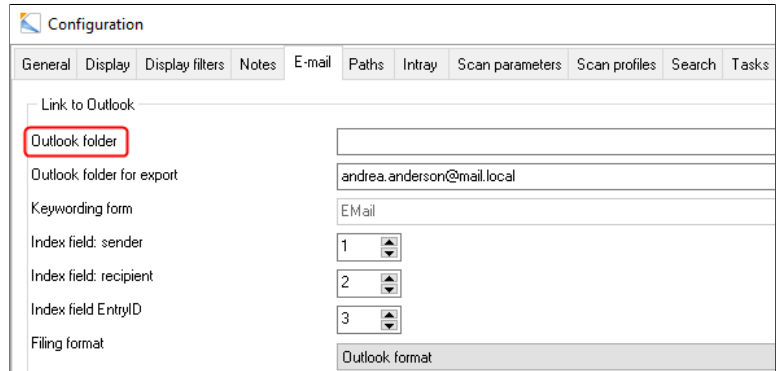
Fig. 285: Outlook folder path

2. Enter the Microsoft Outlook folder that will contain your ELO folders to the *Outlook folder* field. Click the ... button to the right of the *Outlook folder* field.

The *Outlook path* dialog box opens.

3. Double-click the entry with the name of the corresponding user to open the next level of the path structure.

Alternative: Click *Child path* to go to the next level in the path structure. Click *Back* to navigate one level up in the path structure.

You will now see all the available folders for that user in the dialog box.

4. Double-click to open the folder you want to use for the ELO connection. Here: `File to ELO`.

You now see all child folders you created within it.
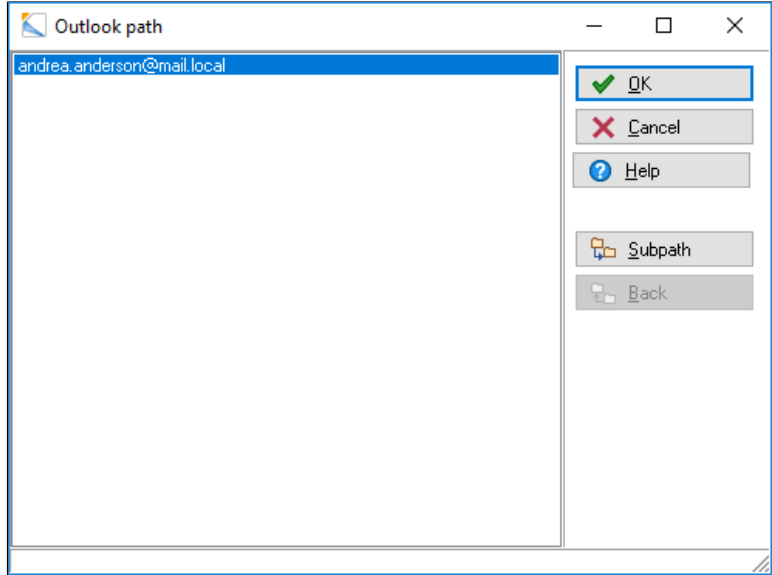
Fig. 286: Selecting a folder in Outlook

5. Click the folder that will serve as the Outlook folder. Here: *Base*.

6. Click *OK* to create the path.
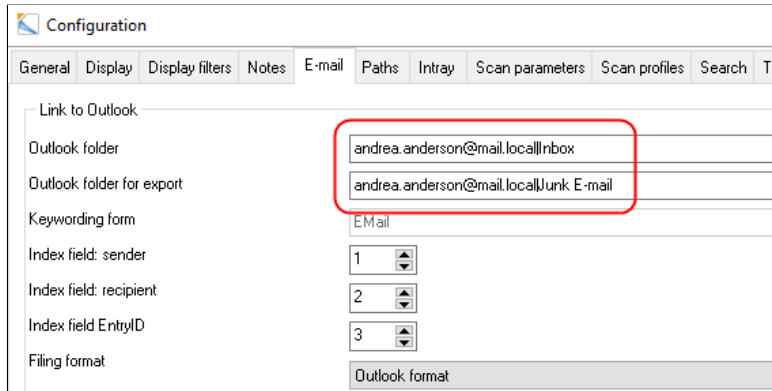
Fig. 287: Configured paths for the Outlook connection

7. Repeat steps 2-6 for the path *Outlook folder for export*. Use the corresponding Outlook folder for the export from ELO.

8. Click *OK* to close the configuration.

You have now defined the paths for the Outlook connection.

Please note: You must close and restart ELO after making this change.

Outlook folder connection

The folder connection function gives you direct access from Outlook to folders in the ELO repository. The folders are created as child folders of the folder defined in the *Outlook folder* path.

In our example, we created the *Inbox* and *Outbox* folders within the *E-mail* folder in the ELO repository.

To add an ELO folder to Outlook, proceed as follows:

1. In the *Repository* work area, select the folder that you want to be available in Outlook - such as *Inbox*.

2. Go to the *Repository* tab on the ribbon and click the lower part of the *Outlook* button (triangle icon).

A drop-down menu appears.
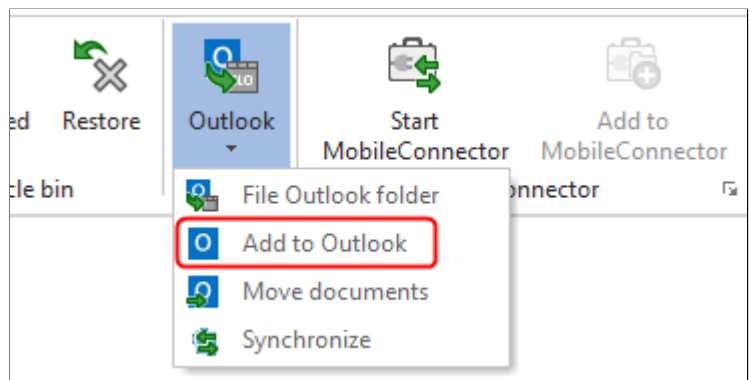
Fig. 288: 'Add to Outlook' menu item

3. Select *Add to Outlook*.

The folder is created in Outlook as a child folder of the Outlook base folder.

Now you can simply drag e-mail messages to your ELO folder from Outlook, or even file the e-mails in Outlook automatically. Read more on the topic of automatic filing in Outlook in the Microsoft Outlook in-program help. You can add more folders to Outlook as needed.

Transfer folder contents to Outlook

Once you have connected ELO and Outlook, you can transfer the full contents of any folder from ELO to Outlook.

Information: You need to define the *Outlook folder for export* path for this function to work.

To export documents from the ELO repository to Outlook, proceed as follows:

1. In the *Repository* work area, select the folder that you want to transfer to Outlook.

2. Go to the *Repository* tab on the ribbon and click the lower part of the *Outlook* button (triangle icon).

A drop-down menu appears.

3. Click *Move documents*.
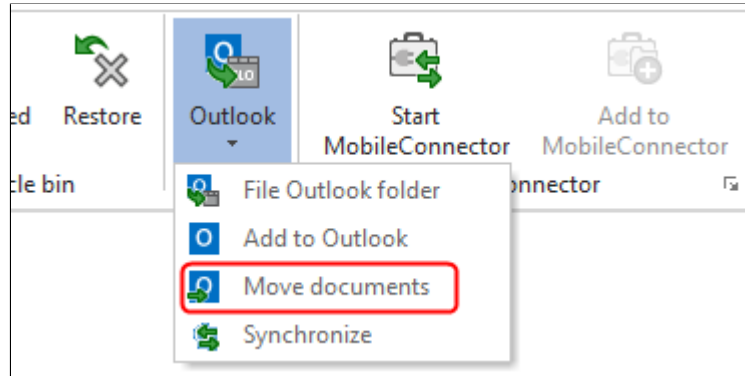
Fig. 289: 'Move documents' menu item

ELO will ask whether you want to establish a connection to Outlook.

Fig. 290: Confirmation upon folder connection

4. Click *Yes* to confirm.

The documents are transferred to Outlook.

Synchronize folder contents with Outlook

Use the *Synchronize* function to synchronize contents between Outlook and ELO. E-mail messages you move to a folder that is synchronized with Outlook will be transferred to the corresponding folder in the ELO repository. Each document you file to the synchronized folder in ELO repository generates a new e-mail message with the corresponding document as an attachment after synchronization.

Information: To enable synchronization between documents in the folders of each program, you need to define the paths for *Outlook folder* and *Outlook folder for export*.

To start synchronization between ELO and Outlook, proceed as follows:

1. In the *Repository* work area, select the folder you want to synchronize with Outlook.

2. Go to the *Repository* ribbon tab and click the lower part of the *Outlook* button.
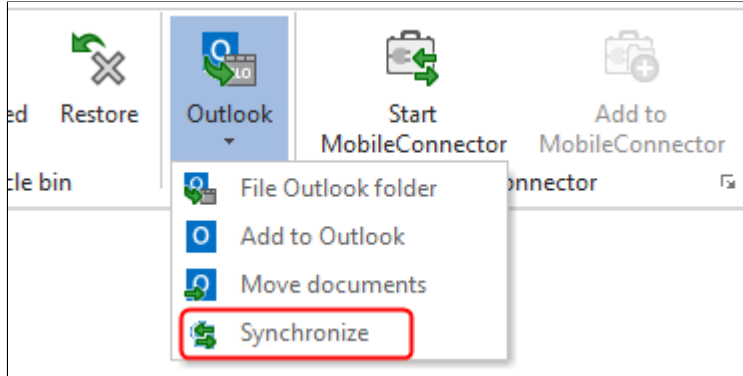
Fig. 291: 'Synchronize' menu item

A drop-down menu appears.

3. Click *Synchronize*.

Only documents that do not match those in Microsoft Outlook are transferred. This saves time when you have substantial folder contents, and you can be sure the documents in ELO and Outlook are identical.
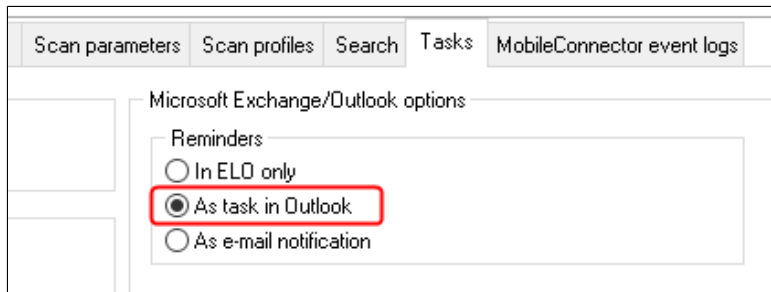
Fig. 292: 'As task in Outlook' option

Information: You can view your reminders, as well as their priority status in ELO, as tasks in Outlook. To do so, go to *ELO menu > Configuration > Tasks > Microsoft Exchange/Outlook options > Reminders* and select the option *As task in Outlook*. This function is only available if you are running a Microsoft Exchange Server and if you have the appropriate rights to do so.

Advanced folder connection

In addition to the previously described folder links for Outlook, you can also use the *Advanced folder connection*.

The advanced folder connection function imports the entire contents of an Outlook folder into ELO, including all child folders. You can also choose whether to retain the imported e-mail messages in Outlook or delete them after they have been transferred to the repository.

Outlook folder for export	andrea.anderson@mail.local
Keywording form	EMail
Index field: sender	1
Index field: recipient	2
Index field EntryID	3
Filing format	Outlook format

Folder synchronization
- ○ Standard
- ○ Extended, leave e-mails in Outlook
- ● Extended, delete e-mails after importing

Time interval (days) 0

Fig. 293: Advanced folder connection

Set up the advanced folder connection by going to *ELO menu > Configuration > E-mail > Folder connection*. Select whether or not to retain e-mails filed to ELO in Outlook.

Time interval

The *Time interval* option allows you to delete e-mail messages after a certain period of time. The messages are immediately filed, but are deleted based on the *Time interval* option.

Example: Assume you want to import all e-mail messages from the folders in Outlook. After a period of seven days, you want the e-mails to be deleted in Outlook. Select the *Folder connection* option *Advanced, delete e-mails after importing* and set the time interval to 7 (days).

Information: If the time interval is set to "0" days, the e-mail messages are deleted immediately once they are imported into ELO.

Version control

Version control enables you to save different versions of a document. This allows you to reverse changes to a document or revert back to the original file at any time.

Furthermore, you can use version control to prevent a document from being edited or changed. This is necessary, and sometimes even a statutory requirement, for some types of documents, such as wills, tax documents, invoices, and so on.

Setting version control   There are two different ways to set version control.

- **When you create a keywording form**: This means that all documents you file with this keywording form will have the same version control settings.

- **When keywording**: You can also define the version control settings when you use an existing keywording form on the Options tab. The version control setting you choose will only apply to this single document.

Warning: If you selected the setting Non-modifiable (in the Document status field), this setting cannot be changed. Documents assigned this status will remain that way. This is a critical security aspect that ensures that documents filed with this status cannot be changed at a later time.

To set or change version control in a keywording form, proceed as follows.

1. Click ELO menu > System settings > Keywording forms.
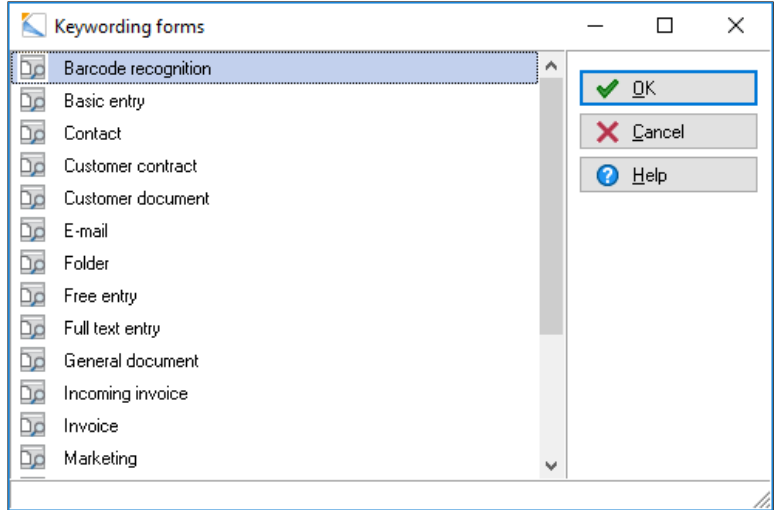
Fig. 294: 'Keywording forms' dialog box

2. Click *OK* to open the keywording form that you want to change the version control settings on.
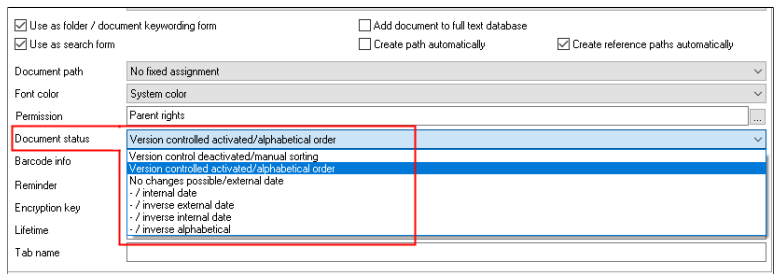
Fig. 295: Selecting a document status

3. In the *Document status* field, choose the type of version control you want. Double-click the field to open a drop-down menu. The following version control options are available for documents:

- **Version control disabled**: You can change the document. Previous document versions are not retained.

- **Version control enabled**: When any changes are made to a document, the previous version is saved. The document has a *version history*. However, only the newest version is shown in the repository.

- **Non-modifiable**: If this option is selected, the document and its keywording can no longer be modified. This is extremely important for invoices or tax assessments, for example.

4. Click *OK* to confirm your selection.

Information: A document filed with the status "Non-modifiable" can still be opened and even edited. If you do so, a copy is generated. You must save the copy under a different name. The original document is retained unaltered.
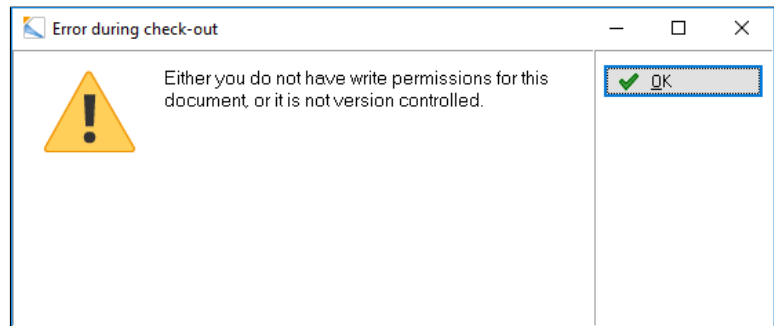
Fig. 296: 'Error while checking out' dialog box

If you attempt to edit and save a document filed with the status "Non-modifiable", you will see a warning message informing you that you cannot edit the document because you do not have the necessary permissions, or because the document is not version controlled.

Example   The following example shows how version control works and how it is used. Select any document in the repository. First check whether version control is turned on for that document.

Check document status   1. Double-click the document entry to open it. The *Keywording* window opens.

2. Click the *Options* tab.
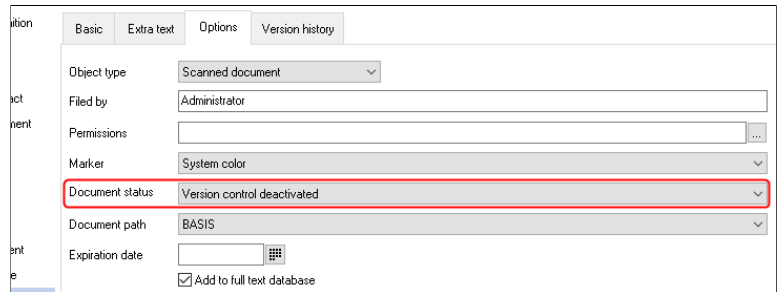
Fig. 297: Edit document status on the 'Options' tab

3. If *Version control enabled* is selected in the *Document status* field, go to step 5. If *Version control disabled* is selected, continue from step 4.

4. Click the *Document status* field, then choose *Version control enabled* from the drop-down menu.

5. Click *OK* to close the window.

You have now enabled version control for that document.

Editing the document   To fully understand the version control feature, you have to edit a document.

1. Right-click the selected document entry in the repository.

The context menu opens.

2. Click *Check out and edit*.

The document opens in a external program. The document is now locked to other users in the ELO repository.

3. Make some changes to the document.

4. Save the document and close the external application.
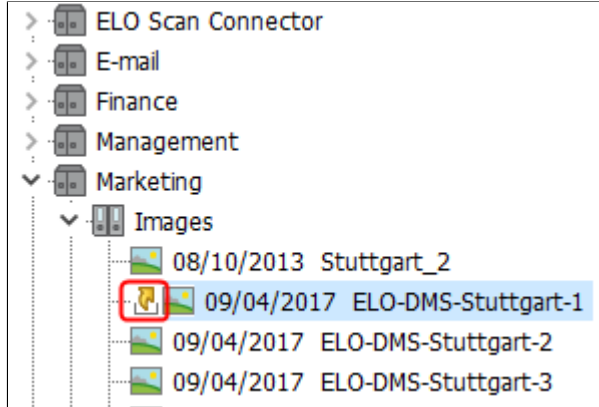
Fig. 298: Checked out document

The main ELO window appears. Your document has been marked with a small arrow, which signifies that the document has been checked out for editing.

5. Select the edited document in the repository and open the context menu.
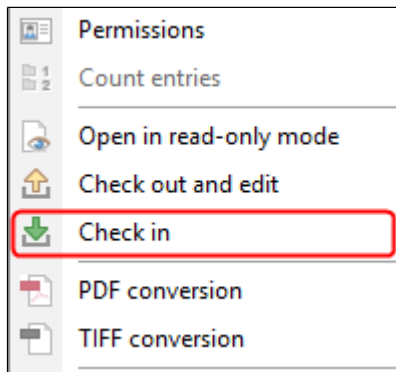
Fig. 299: Checking in a document

6. Click "Check in".

You have created a new version of the document. Click *Document versions* on the *Start* ribbon tab to see a list of versions of a document.

Version history with counter
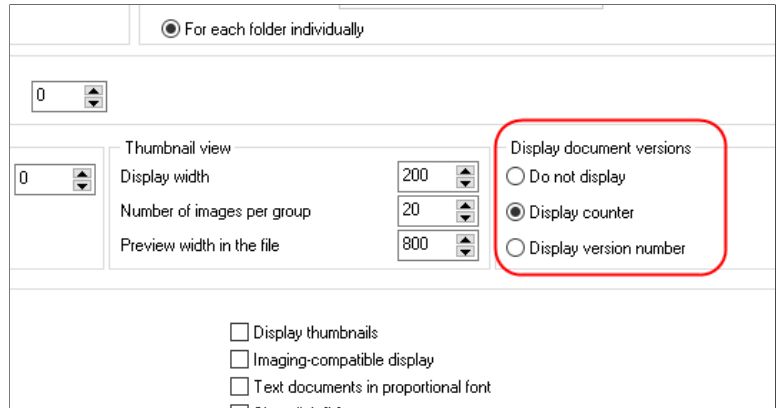
Fig. 300: Configuring the version counter

The version history has an integrated counter that you can activate or deactivate on the *Display* tab of the configuration.
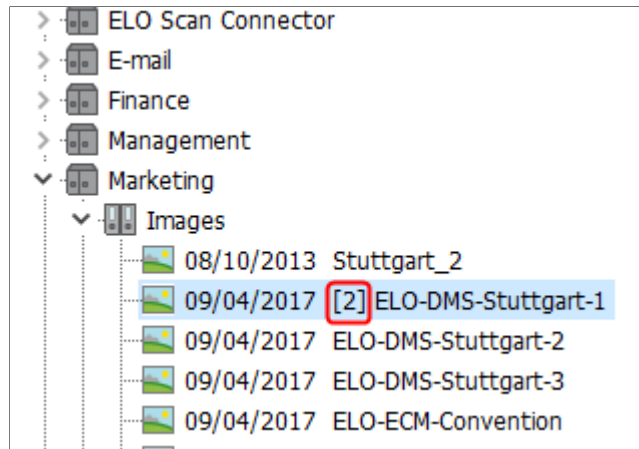
Fig. 301: Document with version counter

If the counter is switched on, the number of document versions is shown in the repository.

Viewing the version history

Use the *Version history* function to view the changes made to documents. The version history enables you to view all edited documents and restore them to an earlier version if needed.

1. Select a document in the repository. Go to the *Start* on the ribbon and click *Document versions*.
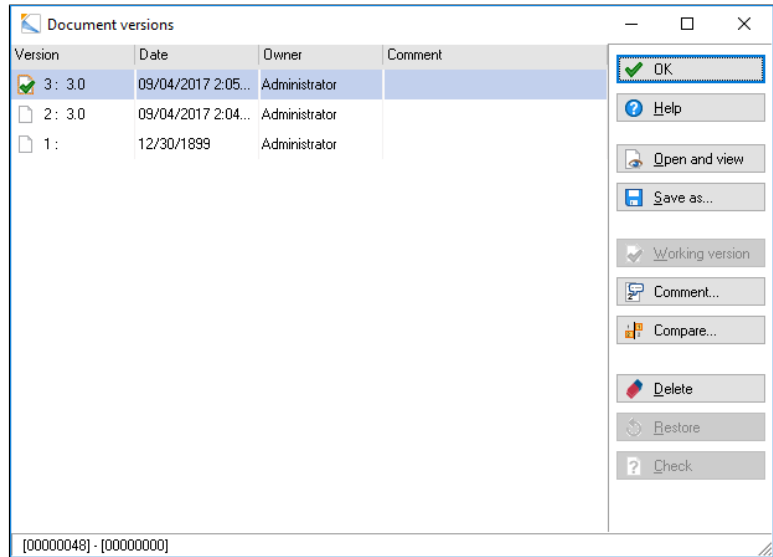
Fig. 302: 'Document versions' dialog box

In the *Document versions* dialog box, you can see all the versions of your document that exist in ELO, including the date and time it was edited and by whom. The document at the top of the list is the newest version. The current working version is highlighted in blue.

The program assigns version numbers automatically. Every version of a document is assigned a new number. If version control is enabled, you will be prompted to enter a version number or an additional version comment when you check in a document.

Click *Comment* to edit comments and version numbers after documents have been checked in, or to enter new comments and numbers.

Click *Working version* to set an older document version as the current working version of the document. This working version becomes the version shown in the repository (and is highlighted in blue in the list).

Before you can make an older version the current working version, you must confirm it in a confirmation request.

Advanced functions

Information: The *Check* button is only available if you have purchased and installed the *ELO Signature* module.

Open document version in read-only mode

Each version of a document in the *Document versions* dialog box can be opened.

1. Select the version you want to view (based on the edit date, for example).

2. Click *Open in read-only mode*.

Alternative: Double-click to open the document.

The document is opened in read-only mode in an external application (such as Microsoft Word).

Information: Write protection is designed to prevent unauthorized persons from editing documents. However, it does not ensure that the different document versions cannot be changed.

If you want to make sure a document cannot be edited, you should change the document status to *Non-modifiable*. This ensures that the document can no longer be modified. The *Version control* function, combined with the version history feature, offers a high level of security while allowing you to remain flexible.

When you open a write-protected document version, it can still be saved under a different name. The original file is retained unaltered.

Compare versions

Click *Compare* in the *Document versions* dialog box to use the *Compare versions* function. Select the document versions you want to compare.
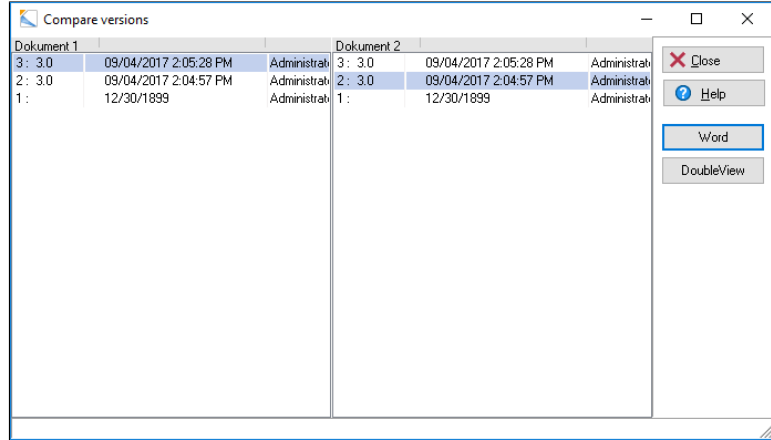
Fig. 303: Comparing document versions

There are two methods for comparison available:

- **Word**: This method uses the comparison function in Microsoft Word. This method can only be used with Word documents.

- **DoubleView**: DoubleView is a graphical tool that allows you to compare documents.

Deleting and restoring versions

Click *Delete* to delete the selected document version from the version history. This assigns a deletion marker to the version. To restore deleted documents, the version history must be set to show deleted entries. To enable this option, go to the *Repository* ribbon tab and click *Show deleted entries*. Next, open the *Document versions* dialog box for the corresponding document. Select the version, which is now marked red, and click *Restore*.

Attachment version history

A version history is also available for document attachments. The method for using them is the same as for document versions. To open the attachment version history, go to the *Document* ribbon tab and click *Attachment*. Now select *Attachment versions* from the drop-down menu.

References

You can create multiple references to a single entry (document or folder) in the repository. This enables you to see the same entry at multiple places in the repository without creating unnecessary duplicates.

Advantages of references

References help prevent your repository from becoming too large, and, changes to one entry are automatically applied to all references at the same time.

Avoiding duplicates

Imagine you send a document which 50 colleagues each file to their own area of the repository, each using a reference to the original document. Instead of there being 50 physical copies of the document, there are just 50 references. There is only one physical copy of the document.

Single update

Let us assume you need to send ISO 9000 regulations to a number of people your company. As soon as these regulations need to be updated, you only need to make the changes to the document at one location in the repository. All colleagues with a reference to the document immediately have the updated version.
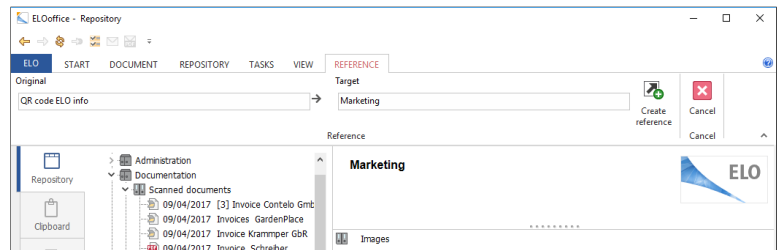
Fig. 304: Creating a reference

Creating references

There are two ways to create references:

- **From the context menu**: Select *Create reference*from the context menu. The *Reference*tab appears on the ribbon. Use this to select the target location and confirm the action.

- **Drag and drop**: When you drag an entry in the ELO repository to another location, ELO will ask whether you want to copy, reference, or move the entry.
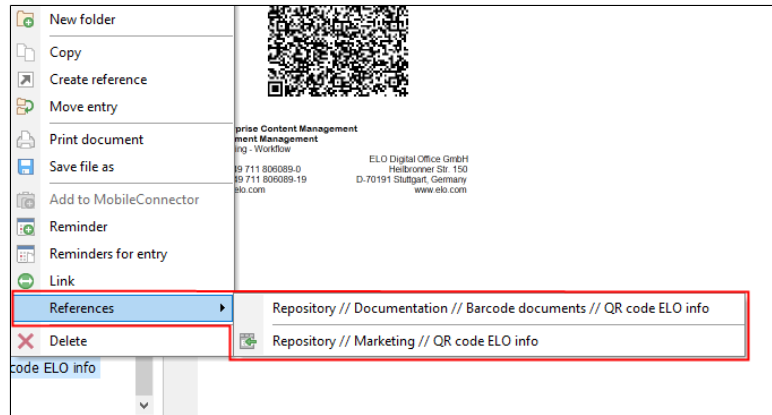
Fig. 305: Showing additional references

Finding references

You can see if there are logical copies of an element (such as a document) and where they exist in the repository if you right-click the document and open the context menu. Move the cursor over *Additional references* to see all references created for the original document.

Checking out and editing folders

You can check out and edit entire folders, along with all documents in them, at the same time.

Information: This function only checks out the documents that the folder contains. If there are any child folders, these will not be checked out as well.

Checking out

Check out a folder as follows:

1. Select the folder in the repository and click *Start > Check out and edit*.

The *Check out and edit folder* dialog box appears and lists the documents that will be checked out.
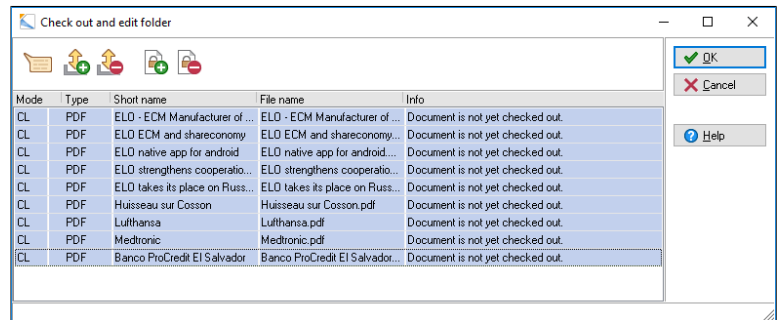
Fig. 306: 'Check out and edit folder' dialog box

Show/hide keywording
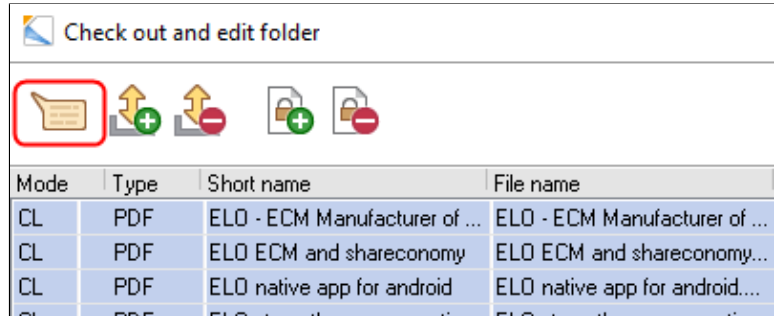
Fig. 307: Show or hide keywording

Click this button to show information about a document as soon as you hover over it with the cursor.

Selecting documents to be checked out
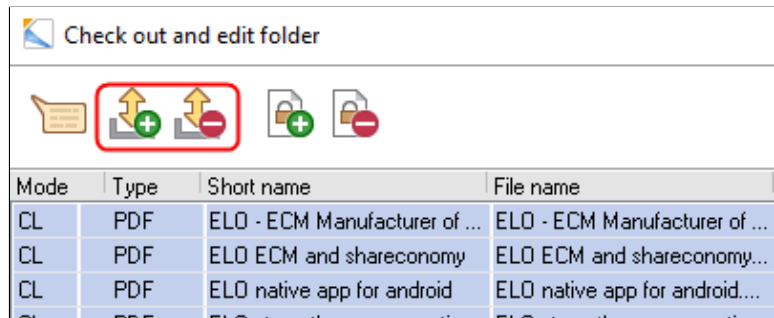
Fig. 308: Selecting documents to be checked out

Use the two buttons at the top of the *Check out and edit folder* dialog box to set or clear the C marker in front of individual documents. If this marker is set, the document is checked out.

Adding a document lock
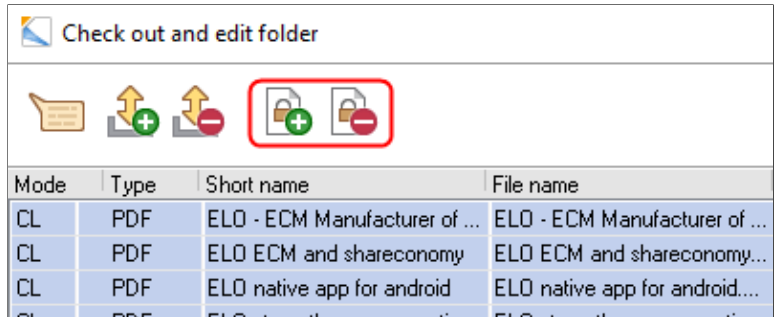
Fig. 309: Adding or removing a document lock

Use these buttons to lock or unlock a document in the repository.

Go to *ELO menu > Configuration > General > Check-out options* to edit the settings for checking out documents.

2. Once you have made your selection, click *OK* to check out the folder.
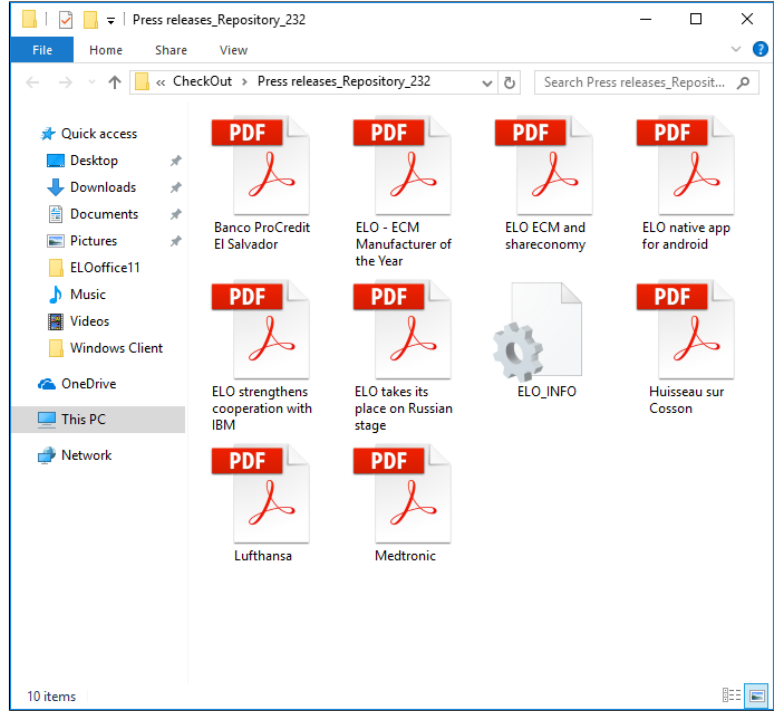
Fig. 310: A checked out folder

A child directory is created for the folder in the *Checkout directory*. The files for all documents are saved under their original file name to this folder. ELO can be configured so that locked documents can be checked out for editing, while references can be set as read-only, but without a repository lock. These settings can also be selected for each document during the checkout process. When you are checking a document out, ELO also stores a list of checksums for the files so that you can see whether it has been modified when you check it back in.

Editing checked out documents in a folder
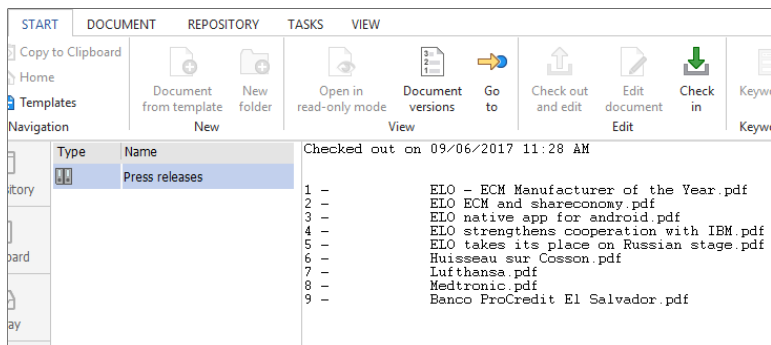
Fig. 311: A checked out folder in the 'In use' work area

The folder is now in the *In Use* work area. If you click the folder, you will see a list containing information about the documents that were checked out.

If you want to edit the documents, double-click the checked out folder in the *In use* work area. ELO opens the folder containing the documents in Windows Explorer, after which you can open and edit them.

Check in
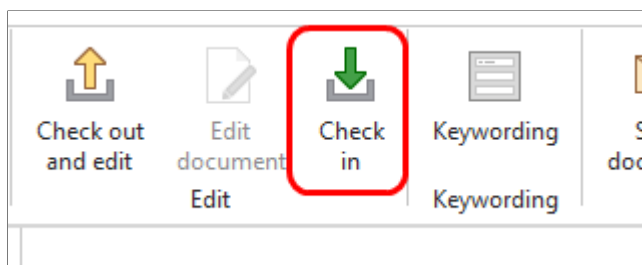
Fig. 312: 'Check in' button

When you are checking in, ELO automatically suggests to only update the modified documents, while keeping the current repository status for all unchanged documents. This setting can also be altered for each document as needed.

You can also retain the document lock after checking in, which creates an intermediate update while still allowing you to make further edits. If new files were created while editing, ELO automatically recognizes them and suggests importing these as new documents.
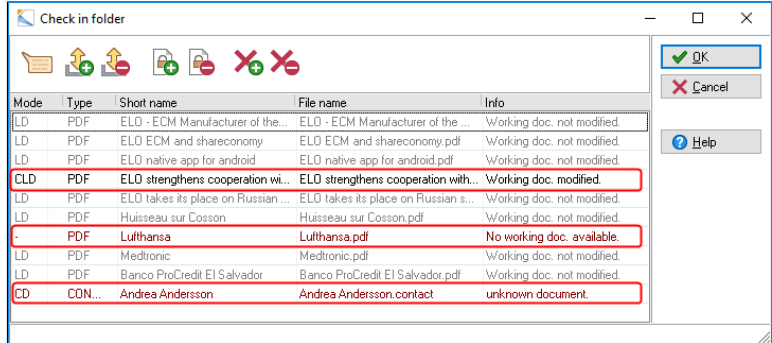
Fig. 313: Checking in a folder

Three documents are highlighted in the screenshot above. In the *Info* column, you can see what changes have been made to the original folder state.

The documents are checked in again. If there are new documents in the folder, you need to enter this keywording information in the keywording dialog box.

Activities

Activities enable you to more closely monitor a document within a work process, as well as to log actions that occur in regard to that document. Activities are always associated with individual documents. Any process that affects an individual document can be logged.

Information: Activities are not deleted, unlike reminders. Activities remain linked to the file and document long-term repository processes.

Creating a project

Activities are always assigned to a project so it is easier to differentiate between them. The data within a project that is to be logged in the respective activities is structured in a form. If you want to use the *Activities* function with a custom activities form, you first need to create an activity project. Activities are always managed in relation to projects and are always linked to a document.

1. Click *ELO menu > System settings > Activity projects*.

2. The *Activity projects* window opens. If there are currently no projects, there will be no entries in the window. Otherwise, existing projects will be shown in the left-hand pane of the dialog box.
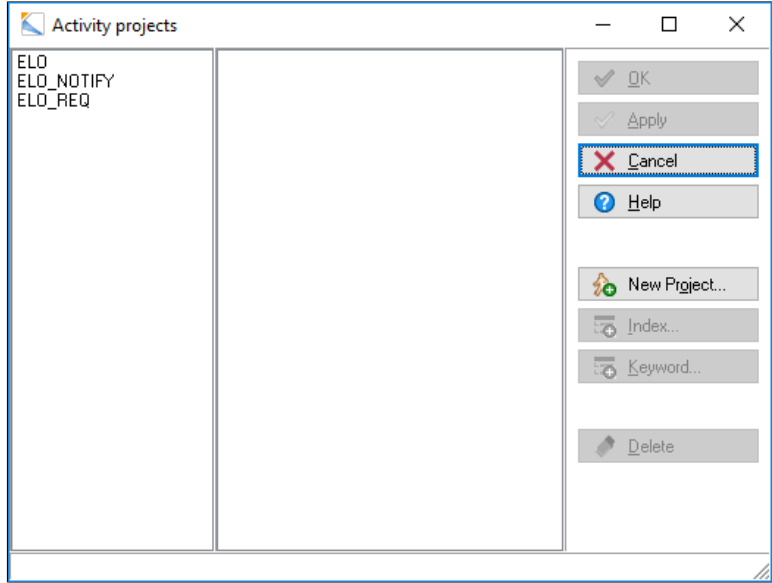
Fig. 314: 'Activity projects' dialog box

3. Click *New project* to open the *New project* dialog box.
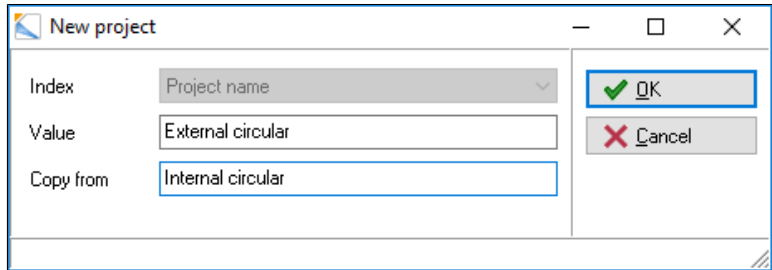
Fig. 315: Creating a new project

The dialog box contains the following fields:

- **Index**: *Project name* is entered here by default. This entry cannot be changed.

- **Value**: Use this field to give the project a name.

- **Copy from**: You can enter an existing project here to import its settings.

4. Once you have made all the required entries, click *OK* to close the dialog box.

The project is created.

5. Next, click *Index* in the *Activity projects* dialog box.

The *Index* dialog box appears. It contains the following fields:

- **Index**: Use the drop-down menu to select the index field you wish to use. You can overwrite standard fields such as *Recipient* or add new fields (*Index field 1*, *Index field 2*, etc.).

- **Value**: Enter the name for the selected index field here.

6. Click *OK* once you have made your changes to the selected field.

The changes are applied to the project. New and newly assigned fields appear in the middle column of the *Activity projects* dialog box.

Optional: Repeat steps 5 and 6 to add further fields to the project.

Editing an index field   As with keywording forms, you can make additional settings for index fields that you add to the activity project.
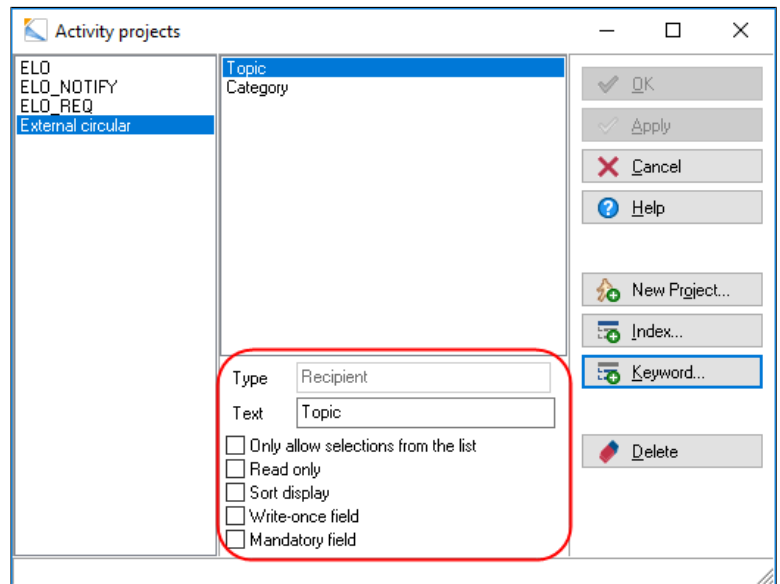
Fig. 316: Options for an activity project

The lower part of the dialog box contains the following fields and settings:

- **Type**: The type of index field selected.
- **Text**: Change the display text of the selected field here.
- **Only allow selections from the list**: You can only select entries from a keyword list when editing an activity.
- **Read only**: You cannot make any entries to the selected field when editing an activity.
- **Sort display**: The entries in the keyword list are shown in alphabetical order.
- **Write-once field**: An entry to the selected field cannot be undone or edited.
- **Mandatory field**: You must make an entry to the selected field when editing the activity.

Adding a keyword list

You can define keyword lists for each index field that you add to the activity project.

1. Select an index field from the middle column of the *Activity projects* dialog box.

2. Click *Keyword*.

The *Keyword* dialog box opens.
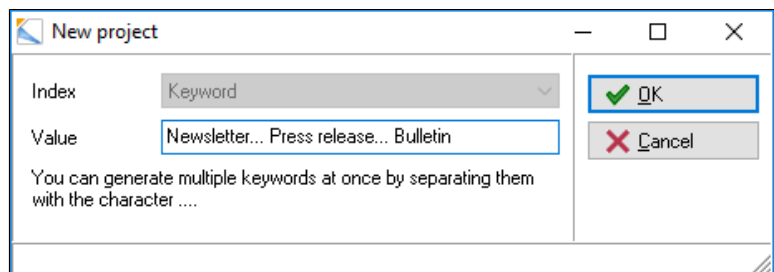
Fig. 317: Adding keywords

3. Enter the keywords for the selected field. Separate the keywords with " **. . .** ".

4. Click *OK* to confirm the keyword list.
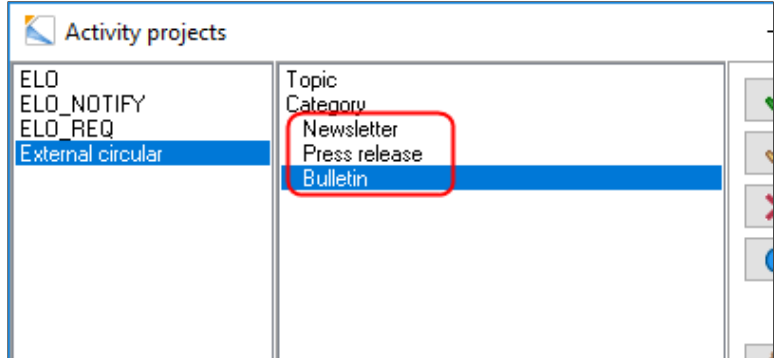
Fig. 318: Entered keywords

The keywords are displayed in the middle column of the *Activity projects* dialog box, indented under the selected index field. The order of the keywords corresponds to the order you entered them in.

Please note: Projects are only saved if data have been defined in the project settings.

Once your administrator has created a project, you can assign an *Activity* to individual documents in the *Repository* work area. You can use them to enter job instructions and send them to colleagues, receive job instructions and messages yourself, or create reminders for documents you need to edit later. The activities are saved in relation to the document. Find additional notes on activities in the section titled *Activities - A sample project*.

Working with activities

Select a document in the repository. Go to the *Tasks* on the ribbon.

You have access to the following functions:

Activity: You can create activities for both documents and folders. Click the *Activity* button to open the *Activity* (activities form) window. This is where you make the settings for the activity or select an activity project you have already created.
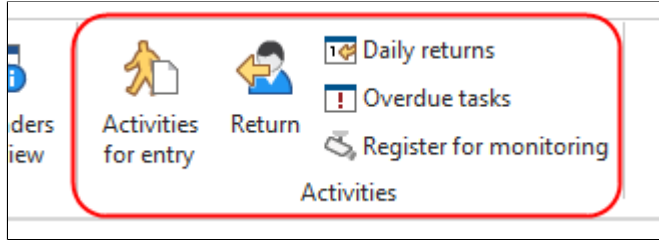
Fig. 319: 'Activities' group on the ribbon

Activities for entry: Click here to see which activities have been created for an entry (document or folder), when and by whom they were created, and so on. All activities created for an entry are shown in an activities list.

Return: View all activities that have not yet been returned. If you do not set a return deadline for an activity, it does not appear in this list.

Overdue tasks: The list in this dialog box shows all overdue activities relating to a particular entry.

Register for monitoring: Use this option to register a document or folder for monitoring. This will automatically create an activity for the selected document. If another user makes changes to the document, you will automatically receive a notification in your tasks area.

Daily returns: In this dialog box, you can see which activities are due today.

The activities list

All functions listed on the *Activities* group of the *Tasks* tab open the *Activities list*. Each of these functions filters the list in a certain way.
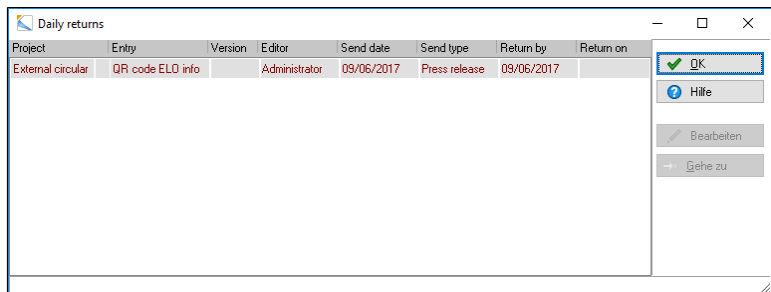
Fig. 320: The activities list; here 'Daily returns'

Click each column header to sort the list.

The colors for each activity have the following meanings:

- **Black**: The expected return date has not been reached and will not occur within the next three days.
- **Green**: The activity has been completed.
- **Blue**: There is no return date set for this activity because it is an event.
- **Dark red**: The activity is due within the next three days.
- **Red**: The return date has passed.

To edit the activity, click *Edit* or double-click the activity.

Information: You can also select multiple activities at once and open them for editing. In this case, all the fields with different entries are disabled in the activities form. They are marked with an asterisk and can only be edited individually. Changes to the remaining fields are saved in all affected data sets.

Click *Go to* to jump to the entry in the repository associated with the selected activity.

The activities list can also contain additional information assigned to an entry when the activity was created, such as the version or status of a document. Since the settings are controlled by the administrator and the configuration of the projects will differ from case to case, your activities list may differ from the one shown here.

Activities - A sample project

Activities are able to log all processes associated with an entry. They are used to control and monitor processes within a repository. Information can be added to the monitored processes either manually or automatically. In the broadest sense, one could describe the activities as a type of "digital transaction file".

Example:
This example serves to explain how activities are used.

Scenario
An institution digitally manages files containing specific information. Copies of these files are sent to external persons, such as lawyers, surveyors, and so on to be viewed and commented upon. These people do not have a copy of ELO.

- The files are printed, e-mailed, or copied to a DVD and then sent out.

- When a document is sent, the activity is recorded in paper form.

- This form is added to the file and the person in the company who is responsible for the file is informed of the processing status via Outlook once a week.

-

Creating a project
Open the *Activity projects* dialog box via the *ELO menu > System settings > Activity projects*.
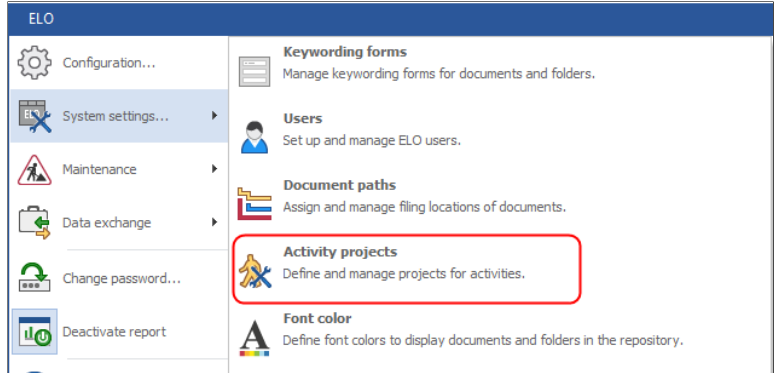
Fig. 321: Starting activity projects

The *Activity projects* dialog box appears. Click *New project* to create a new project named `File management`. Enter the name to the *Value* field. In the *Copy from* field below, you will later be able to choose from existing projects, so that you can use their settings to apply them to a new project. This could be useful if you have already created an extensive keyword list and you want to use it again.

Defining a project name
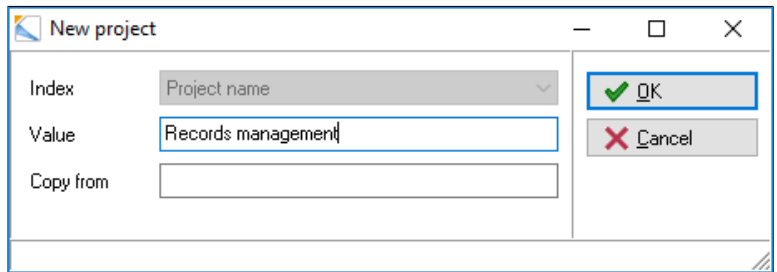
Fig. 322: Defining a project name

The name of your project now appears in the left-hand column of the *Activity projects* dialog box. You now need to select the *File management* project from this list to complete the configuration. Click *Index* to configure the settings for the project form. Enter the names of the individual input fields of the project form here.
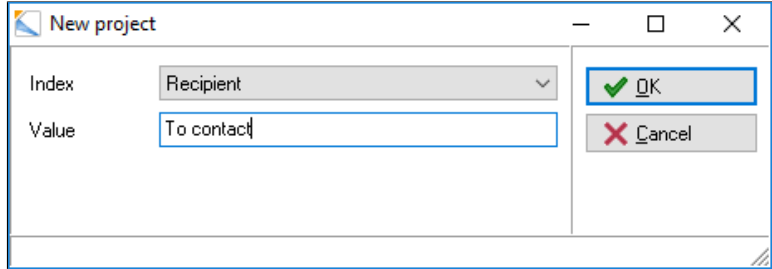
Fig. 323: Rename 'Recipient' field

The *Recipient* field is renamed to *Contact with* in the `Index` dialog box. To do so, select *Recipient* from the *Index* drop-down box at the top.

Rename *ID* to `Occupation` in the same way. You can select a type of occupation later as the recipient of files.

To enter child entries for the selection menus, select *Occupation* in the middle area, then click *Keyword*.
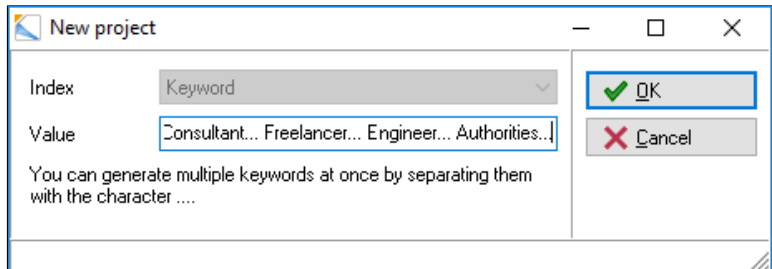
Fig. 324: Entering keywords

You do not need to make separate entries to the *Keyword* dialog box. You can separate the values in a selection list by placing three dots between each one. The keywords are then shown in list form in the selection menu.

To create keywords for the default *Send mode* field, open the *Index* dialog box and select `Send  mode` as the value for the field. This enables you to edit it in the viewer pane of the *Activity projects* dialog box.

The keyword list entries for the *Send mode* field are: `Paper copy`, `DVD`, and `E-mail`. They are used to describe the way in which the files are sent.
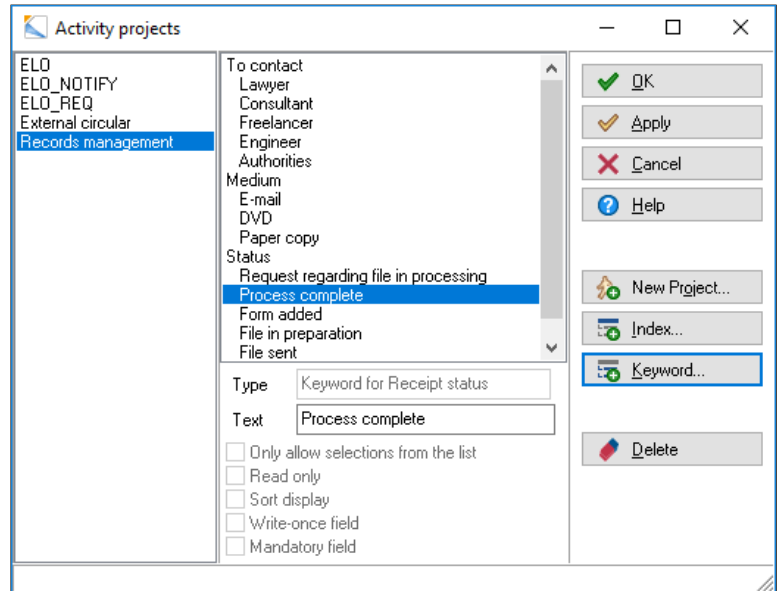
Fig. 325: Adding an additional 'Status' field with keywords

Change the *Receipt status* field name to *Status* in the same way as before. Next, create the keywords `File in preparation`, `File sent`, `Form added`, `Request regarding file in processing`, and `Process complete`.

Click *OK* to close the *Activity projects* dialog box. You can now select the project whenever you create an activity.

Managing files   Now you are ready to lend out a file using your file management system. If a file is requested, a new activity is created which logs this request and accompanies the process.

Fig. 326: Activity data

After receiving a verbal request, an activity is created for the file. Click *Activity* on the ribbon to open the *Activity* dialog box. Enter the corresponding contact data there and a list of job instructions for the employee processing the activity. The activity is then sent to the corresponding employee.

Over the course of the lending process, the corresponding information is entered to the activity form, such as when the file is returned. Over time, a detailed log of the entire process emerges.

The activities (including the lending processes) for each file and each document in the repository are saved and can be examined at a later date.

The ELO_REQ and ELO_NOTIFY projects

Functions

Two projects, *ELO_REQ* and *ELO_NOTIFY*, are installed to ELO by default and belong to the *Register for monitoring* administrative function. These enable you to use activities to control and file any processes relating to a document. As a result, the progress of a document within the repository is documented indirectly.

⚠️ **Please note**: Completed activities are not deleted. They always remain linked to the document. That means all activities stored there will be retained for the entire lifetime of the document in the repository.

Monitoring

1. Go to *ribbon > Tasks > Register for monitoring* to start a monitoring task for an entry in the repository (document or folder).

Click *Activities for entry* to view and edit the created activities. At the same time, a different entry appears in the *Tasks* work area for each activity in the *ELO_NOTIFY* project that has not yet been processed and returned (date entry in the *Returned on* field) - for the corresponding editor.

The *Register for monitoring* function creates an ELO_REQ activity. Afterwards, an ELO_NOTIFY activity is created every time the document is checked in. A *Return by* deadline means the activity is shown in the *Tasks* work area as long as you have not entered a date to *Returned on*.

Please note that activities are only shown in the *Tasks* work area when corresponding entries have been made to the fields. A message is only shown in a user's *Tasks* work area if a deadline and a user are defined.
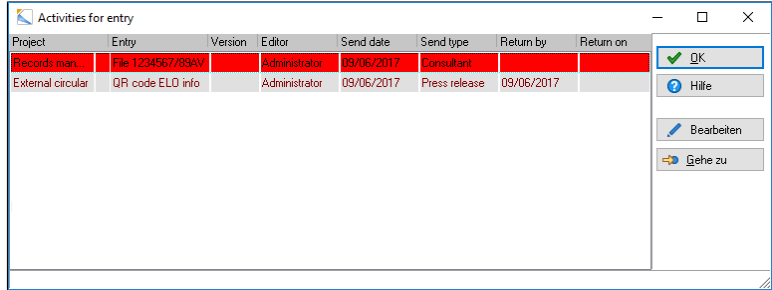
Fig. 327: 'Activities for entry' dialog box

2. After entering all required information, click *OK*.

The activity is assigned to the document (project *ELO_REQ*) and a corresponding activity is created in the *ELO_NOTIFY* project after the document is checked in. At the same time, the recipient of the document (*In use*) will see a message for the activity in their *Tasks* work area.

Please note: You are able to edit the *ELO_REQ* und *ELO_NOTIFY* projects. However, if you make a change, make sure you do so to both *ELO_REQ* and *ELO_NOTIFY* at the same time. This is the only way to ensure that *ELO_REQ* and *ELO_NOTIFY* both work.

Attachment

Any filed document can be combined with an image, sound, or video file by using the *Attachment* function. This means that you can attach any file on your computer (or from another storage device) to a filed document. This allows you to store a wide range of information in ELO. Some examples:

- For a real estate assessment, add a video about the property.

- Dictate some comments regarding a document into your microphone, then attach them to the document in an *mp3* file.

- File a piece of text along with a corresponding photo or graphic.

Attaching files
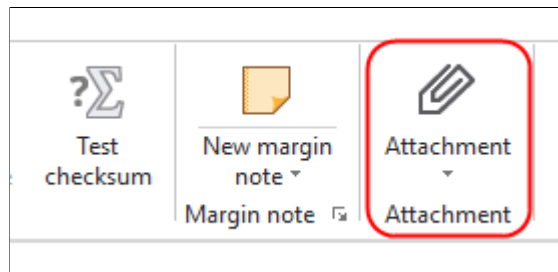
Fig. 328: 'Attachment' button

1. Select the document in the repository that you want to add and attachment to.

2. Go to the *Document* ribbon tab and click *Attachment*.
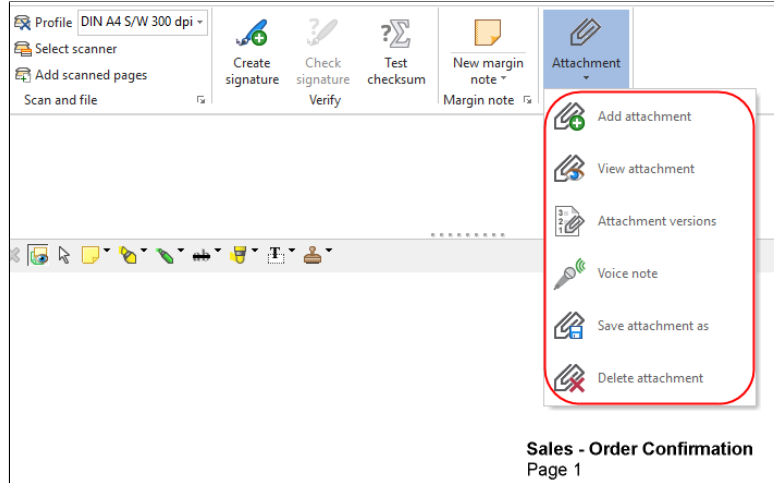
Fig. 329: Attachment drop-down menu

A drop-down menu appears. It contains the following functions:

- **Add attachment**: Click *Add attachment* to open a menu that allows you to choose the file on your computer for attaching to the selected document. A copy of the file is saved in ELO as an attachment. If the document already has an attachment, it is stored to the version history. If the document has the status *Version control disabled*, the attachment is overwritten by the new attachment without requesting a confirmation.

- **View attachment**: Click *View attachment* to open an attached file for viewing or editing. This starts the corresponding application.

- **Attachment versions**: If version control is enabled for a document, its attachment versions are stored as well. Use this function to gain access to previous files (or versions) saved as the document's attachment. The version history is displayed here.

- **Voice note**: If you have a microphone installed, use the *Voice note* function to attach a sound file to a document.

- **Save attachment as**: Click *Save as* to open the *Save attachment* dialog box. You can save the attached file here. This function is designed for attachments you want to export from ELO or for attachments that cannot be opened directly from ELO (such as .EXE files).

- **Delete attachment**: Deletes an attachment. If a document is filed with version control, all versions of the attachment are deleted.

3. Click *Add attachment*.

The *Add attachment* dialog box appears.

4. Select the file on the file system that you want to attach.

5. Click *Open*.

Information: It is not possible to add multiple attachments to a single document. All attached files are managed in an attachment and are available by clicking *Attachment versions*.
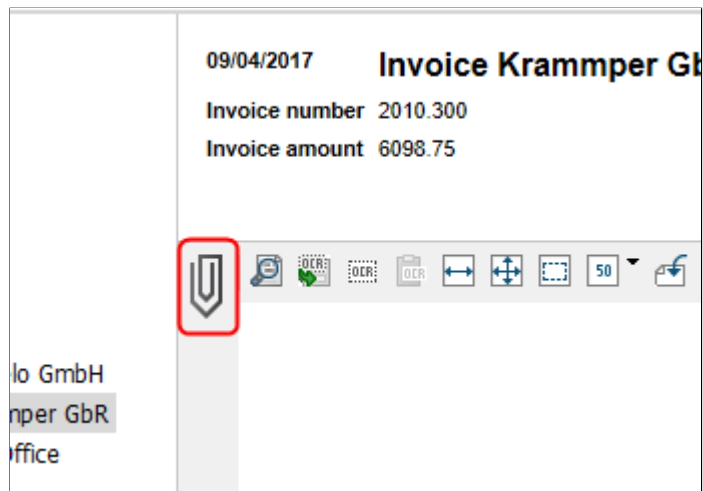
Fig. 330: Document with attachment

There is now a paperclip next to your document on the split bar. It shows that a file is attached.

6. Click the paperclip to open the attached file in read-only mode.

On the other hand, if you hold down the CTRL key while clicking it, the *Save as* dialog box opens instead.

Alternative: If you open the *Attachment versions* dialog box, you can select individual attached files, open them in read-only mode, or save them.

Result   The file is opened in read-only mode.

TIFF printer

By using the TIFF printer, which is automatically installed along with ELO, you can use a third-party program like Microsoft Word to file each document to the Intray or the repository as a TIFF file.

This has the advantage that your document is stored as an image and will be unaffected by any software updates. Furthermore, it cannot be changed later by accident.

1. Start ELO.

2. Open an external application. Create a document in the usual way.
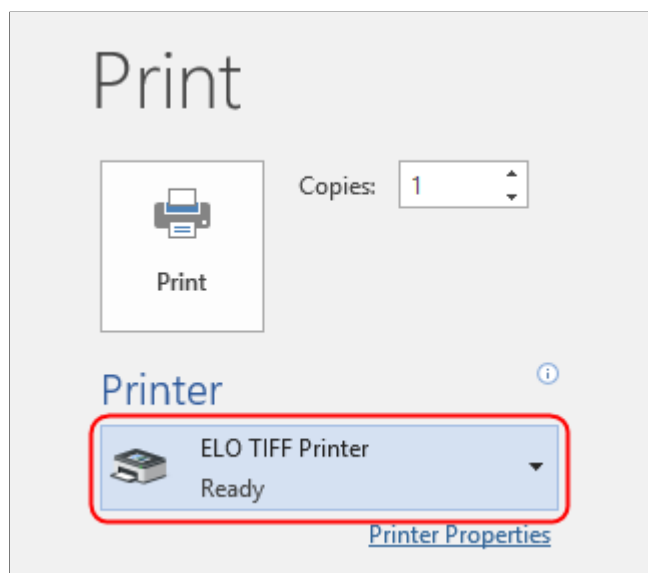
Fig. 331: Select ELO printer

3. Start the print process in the external application, then select the *ELO TIFF Printer*.

Use the virtual TIFF printer to generate a TIFF document and auto-matically save it to the Intray using the default settings. Each document generated in this way is assigned the default short name ELOPrint_[date and time stamp].

Information: You can change the filing location and the automatically generated short name in the *ELO Printer Configuration* dialog box. You can find out more about this in the following section.

Configure printer

1. To configure the *ELO printer*, use the Microsoft Windows Search to find the TIFF printer settings.

2. Click the entry for *TIFF printer settings* in the list of search results.
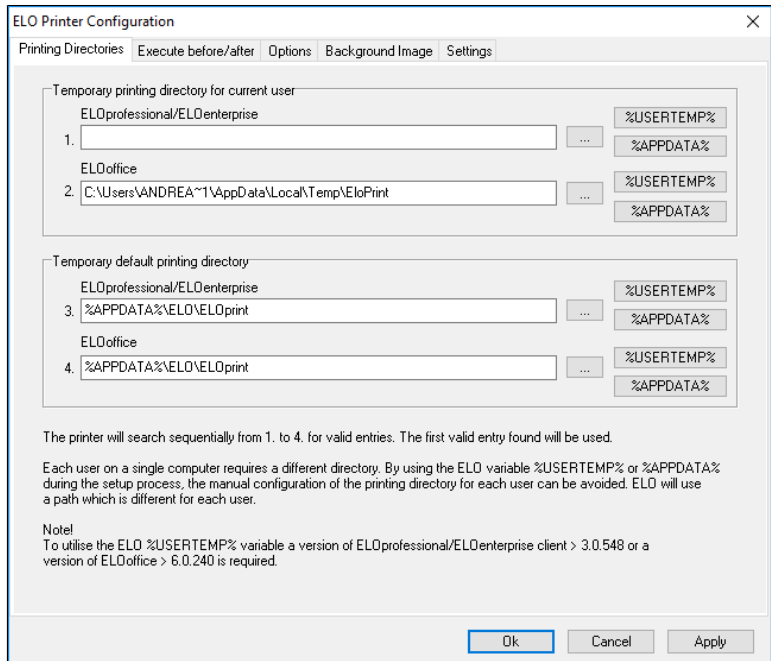
Fig. 332: Selecting a filing location for the new TIFF document

The *ELO Printer Configuration* dialog box appears.

3. Change the settings as needed. Click *Apply* to save the settings.

4. Close the dialog box by clicking *OK*.

Creating a default index

ELO provides you with a number of default indexes automatically, such as A..Z, 1..10, and Months January-December. You can insert a default index into any folder in the repository by clicking *Insert default index* (*Repository* ribbon tab). You can also create custom default indexes.

Defining default indexes

If you regularly create the same folder structures, it makes sense to save them as default indexes.

1. Create a folder with a number of child folders underneath it.

2. Select the folder that you want to define as a default index.
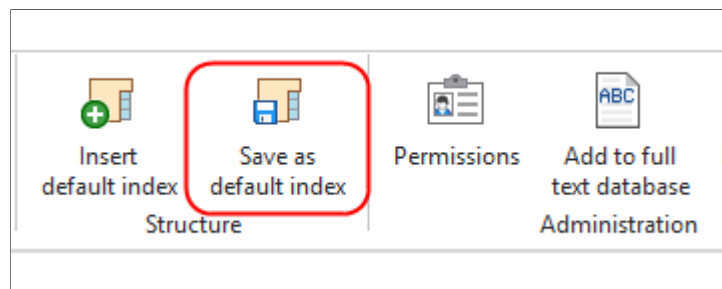
Fig. 333: 'Save as default index' button

3. Go to the *Repository* ribbon tab and click *Save as default index*.
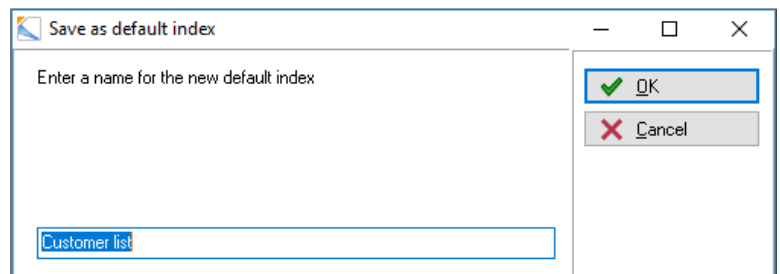
Fig. 334: 'Save as default index' dialog box

The *Save as default index* dialog box appears.

Optional: Change the name of the default index.

4. Click *OK* to confirm the new name.

Result   The default index is now available when you click *Insert default index*.

Deleting a repository

You can have a maximum of four repositories in ELO. You might want to delete an older repository and create a new one with a different name. The following section describes how to delete a repository. If you do so, all data contained in the repository will be deleted permanently and cannot be restored.

Scenario

The following describes how to delete a repository named *DEMO*.

1. First, check through all document paths and back up your data as needed. Next, close ELO or otherwise ensure that the repository to be deleted is not being used by ELO.

2. Open the Windows Search and search for ODBC.

3. In the list of results, click the entry for "Set up ODBC data sources (32-bit)".
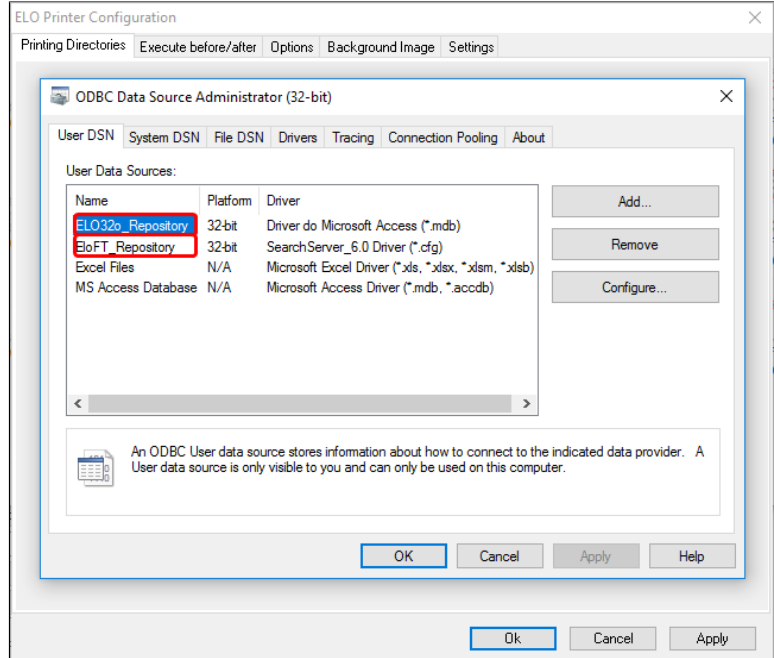
Fig. 335: ODBC data sources (32-bit)

The ODBC Data Source Administrator dialog box opens. The *User DSN* tab is opened by default.

Information: Make sure you open the 32-bit version of the ODBC Data Source Administrator. Although you see the correct drivers in the 64-bit version, the *Remove* button is grayed-out for the relevant entries.

4. Delete the entry called "ELO32o_<Name of repository>" by se-lecting the entry and clicking *Remove*.

Please note: The corresponding entries in the ODBC data sources should be deleted from every computer on the network.

5. You may also have to look for the entry titled "EloFT_<Name of repository>" in the same window and delete it as well. This entry on-ly exists if at least one full text search has been performed or a full text document has been filed.

6. Close ODBC Data Source Administrator and open Windows Explorer.
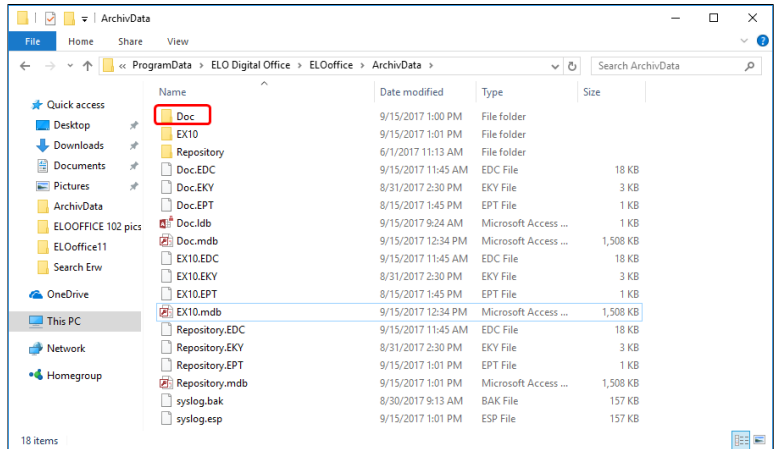
Fig. 336: Delete repository files

7. In the ELO *ArchivData* repository directory (document path in use), delete the child directory with the same name as the repository.
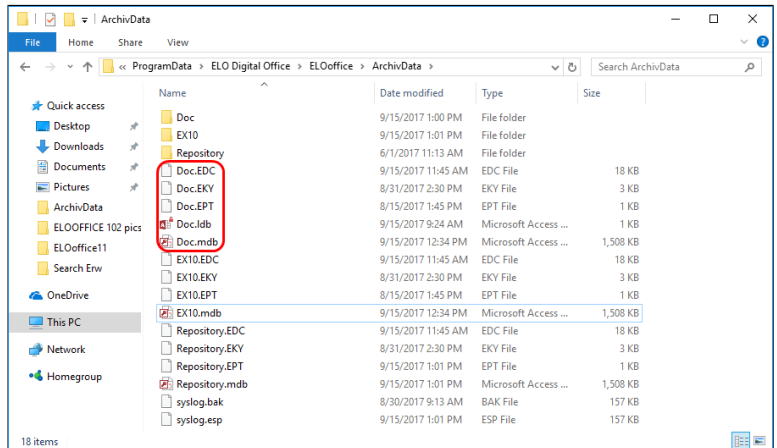
Fig. 337: Deleting repository files

8. While you are still in the *ArchivData* directory, delete all files that have the same name as the repository.

The entire repository has now been deleted.

Digital signature

ELO supports digitally signed documents.

Please note: ELO supports digitally signed documents. To sign documents, you need additional software and hardware designed for document signing, or an additional signature module. You can find more information on our website: **www.elo.com**.

Signing documents

A digital signature allows you to "sign" documents so that you can verify their integrity and authenticity later. This enables you to secure information with the use of a signature card in ELO. To sign documents, you may require an authenticated signature card with your individual data.

Document signing allows you to see changes to documents immediately.
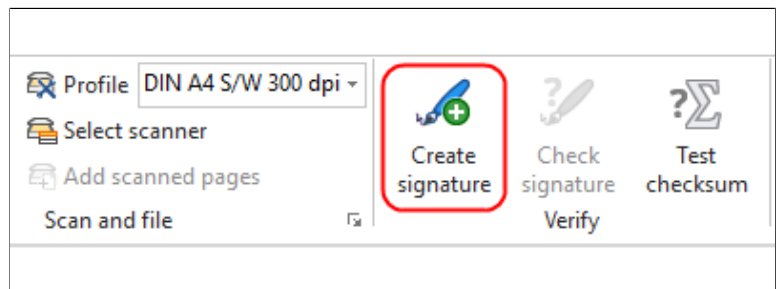
Fig. 338: 'Create signature' button

Enable document signing with the *Create signature* button on the *Document* ribbon tab. This opens the document signing software. If an error message appears at the start of the signature process, the signature components may not have been properly installed.

Creating profiles

Profiles enable you to define various scenarios when you start ELO. For example, profiles enable you to control both a local and server-based repository in ELO. You can create a link to each profile on the desktop.

Example   This example will show how to set up two profiles. One profile accesses an ELO network installation, and the second profile accesses a second repository installed locally on the computer where the profiles are set up.

The local repository, local Intray, and so on cannot be seen on the central server. The Intray and repository data for the local repository are only installed on the user's local computer.

Once the local repository is created, there is:

1. A central repository that all users can access, with Intrays for the users located on the central server.

2. A new, local repository that only users of the local computer can access, with Intrays for the users located on the local PC.

Creating a profile   1. Start ELO to open the logon dialog box.
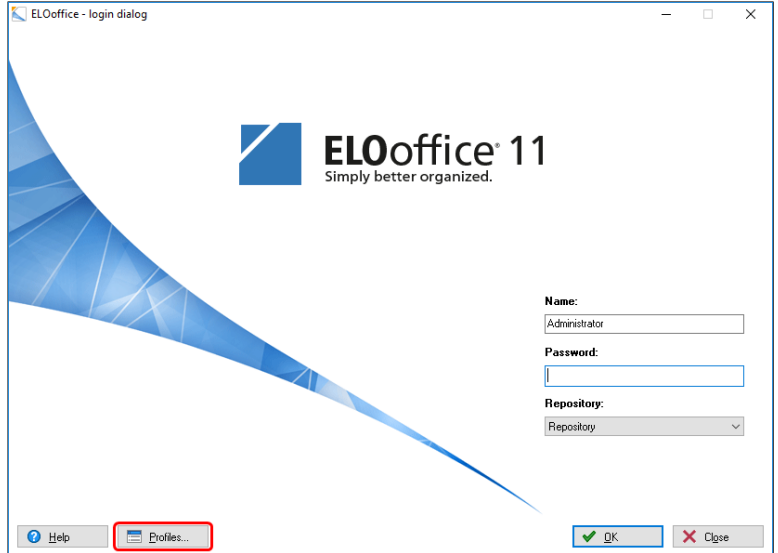
Fig. 339: Logon dialog box with the 'Profiles' button

2. Click *Profiles* or press the keyboard shortcut CTRL+P.

Information: The *Profiles* button will not be shown until you have created profiles. When you start ELO for the first time, you have to use the keyboard shortcut CTRL+P.
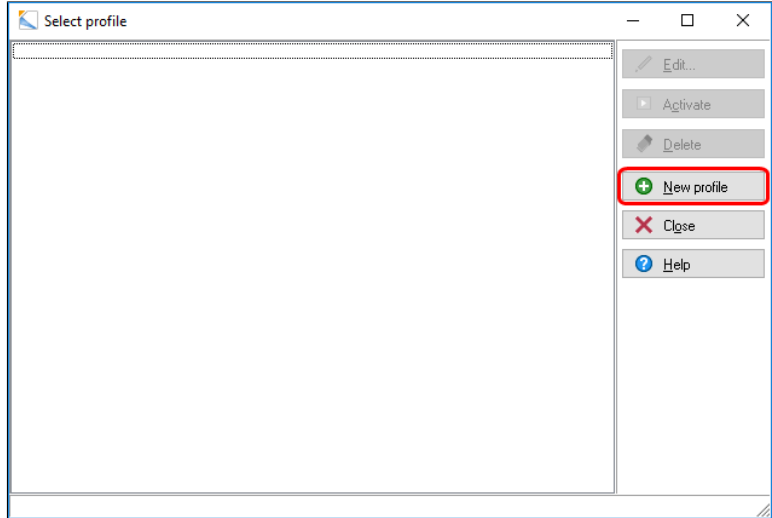
Fig. 340: Creating a new profile

The *Select profile* dialog box opens.

3. Click *New profile* to create a new profile.

The *Create new profile* dialog box appears.
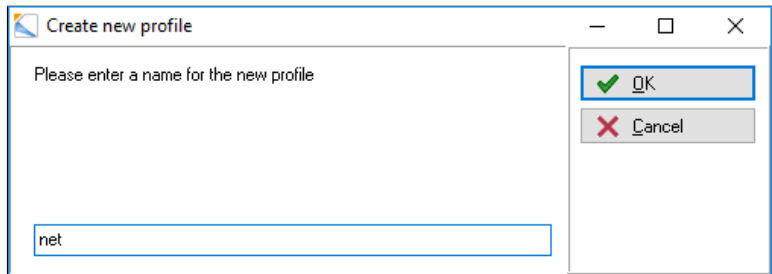
Fig. 341: Entering a name for the profile

4. Enter the profile name. For example, enter a profile for a repository on the network. We name this profile net.

5. Click *OK*.
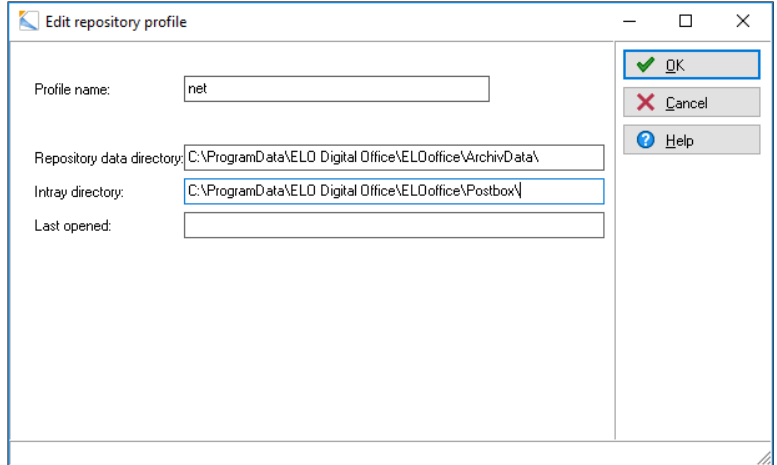
Fig. 342: Editing a profile

The *Edit repository profile* dialog box appears. The dialog box contains the following fields:

- **Profile name**: The profile name is shown here. This cannot be changed once created. If you want to use a different name, delete the profile and create a new profile with the name you want.

- **ArchivData directory**: Enter the path (UNC path) to the central *ArchivData* directory.

- **Postbox directory**: Enter the path to the central Postbox directory here. The path to the syslog file is not entered here. ELO requires the path to the Postbox directory.

- **Last opened**: If you enter the name of a repository here, selecting the profile will also select the repository by default.
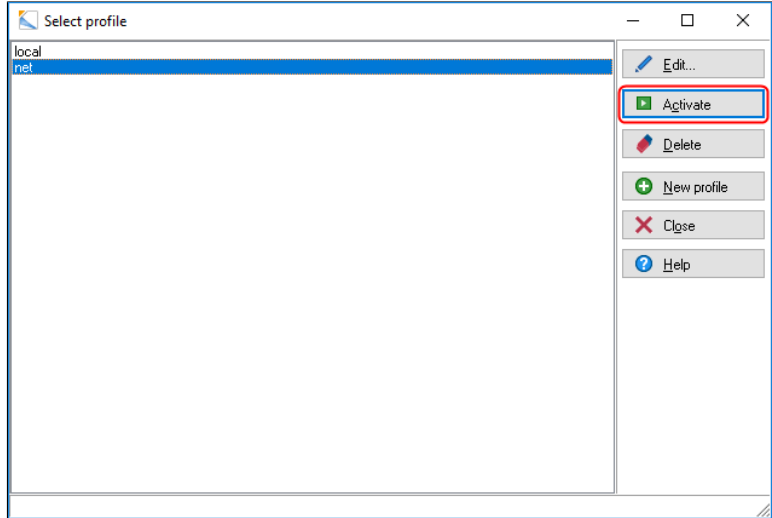
Fig. 343: Activating a profile

6. Click *Activate* to activate the profile and show the ELO logon dialog box.

Local repository

If ELO is installed on a network, you can also create a local repository as well. However, you do need to do some preparatory work.

Preparations

First, you need to create a few folders. Please make sure you have sufficient storage space on the drive.

- Create an ArchivData directory - like `Archive_local` - with two child directories:
- 1. Create an < `ArchivData`> directory for the *ArchivData* directory.
- Copy the *Syslog.esp* file to the *ArchivData* directory. With a standard installation, you can find this file in the *ArchivData* directory.
- 2. Create a directory named < `Intray`> for the area of the users' Intrays.
- Copy all contents of the central Postbox directory into the new local Postbox directory.

Set up local profile	When setting up the profile for the local repository, proceed as described under *Create profile* above. Enter the paths to the directories you just created in the *Preparations* section.
Activate local profile	When you start the *local* profile for the first time, a new repository will be created. The data for this repository and your local Intray are now on the local computer.
Change profile	To switch profiles, open the logon dialog box, click *Profiles*, and in the *Select profile* dialog box, select the name of the profile you want to activate. Next, click *Activate*. The logon dialog box then opens using the start options defined in the profile.
Custom profile link	You can create a link to each profile (e.g. on the desktop). Use this link to start ELO with the selected profile.

1. Create a new shortcut to *ELO32.EXE*.

2. Right-click the link to open the context menu.

3. Select *Properties* from the context menu.

The *Properties* dialog box opens.
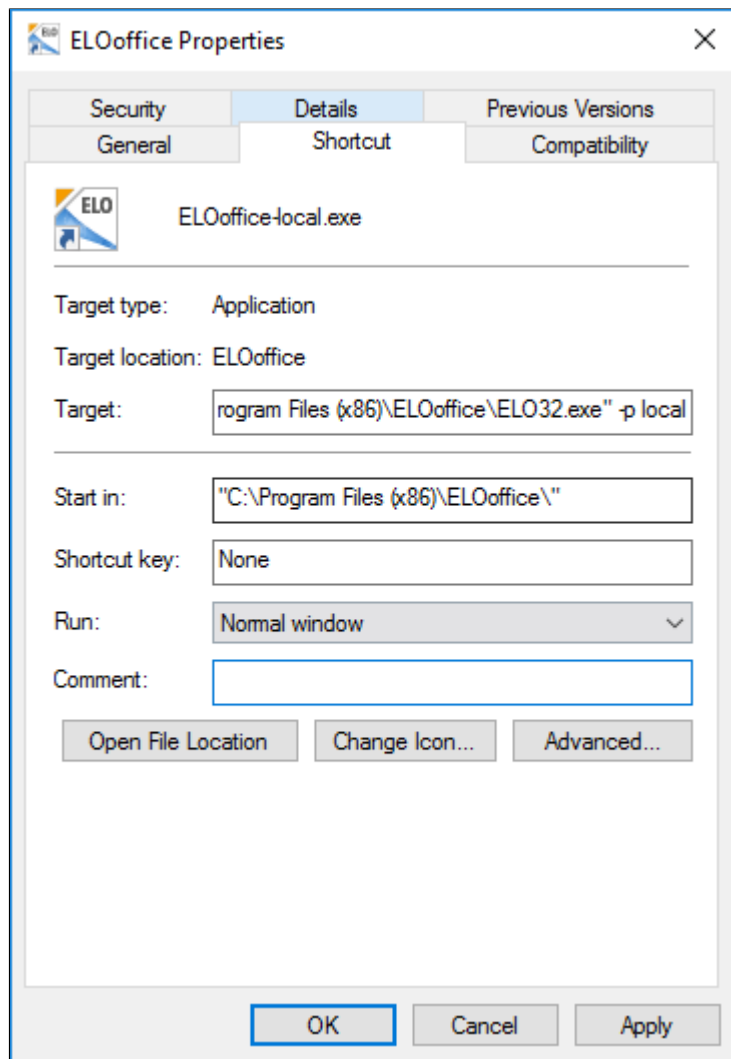
Fig. 344: Connecting the shortcut to a profile

4. Add the following profile to the *Target* field:

```
c:\Program files (x86)\ELOoffice\Elo32.exe -p
[profile name]
```

Advanced functions

Example   For example, for the *local* profile, enter `c:\Program files (x86)\ELOoffice\Elo32.exe -p local`.

If there is a space in the character string to open Elo32.exe, place the call in quote marks:

`"c:\Program files (x86)\ELOoffice\Elo32.exe" -p local`

ELO Print&Archive

Overview

The ELO Print&Archive module connects ELO or an ELO repository with a software program.

> **Information**: The ELO Print&Archive module is only designed for use in combination with other business software as it links ELOoffice with your software. You can skip this chapter if you do not use this kind of software.

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The module receives data from such programs and converts it in the ELO PDF Printer. Alternatively, existing PDF files can be saved to the PDF printer directory. The contents of these PDFs are then read and archived to ELO automatically according to your specifications. It is also possible to print these documents on paper or send them via e-mail.

> **Information**: To use this module, you must first adapt it to your documents and templates and make corresponding settings.

Proceed as follows to use the module:

1. Activate the module in the ELO configuration.

2. Set the ELO PDF Printer folder as the filing path for storing data from your external software.

Alternative: You can save existing PDFs directly to this filing path.

3. Set up the document recognition settings in the ELO Print&Archive configuration. Make the settings for your documents and templates here.

4. In the configuration, set where you want to file or print documents to in ELO.

5. Once you have completed the configuration settings, you can use ELO Print&Archive to print documents from your software program with the ELO PDF Printer.

Installation and configuration

Installation

The ELO Print&Archive module is installed with ELO.

Alternative: Install the ELO Print&Archive module by copying the files from the folder of the same name into the ELO program folder.

Activate module

1. Activate the module by clicking *ELO menu > Configuration > General > Additional modules*, then selecting the *ELO Print&Archive* check box.
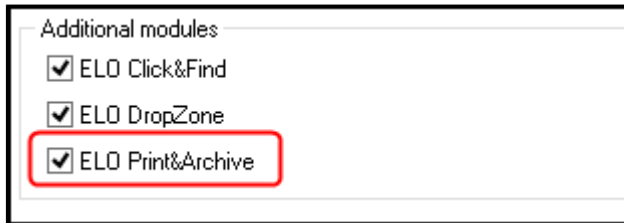
Fig. 345: Activating ELO Print&Archive in the configuration

The module is ready for use after you reboot the computer.

Information: You can see that the module has been activated if the *ELO Print&Archive* icon appears in the taskbar.

Fig. 346: ELO Print&Archive icon on the taskbar

2. Right-click this icon in the taskbar to open the ELO Print&Archive menu.

Alternative: The program icon may be hidden. Click the white upwards-facing triangle in the taskbar to show the icon again. Right-click the Print&Archive icon to open the menu.

Menu
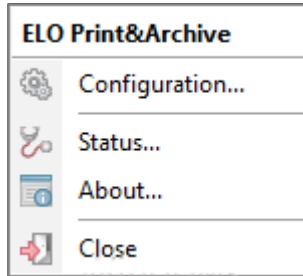
Fig. 347: ELO Print&Archive selection menu

The menu contains four entries:

Configuration: Opens a dialog box for determining the settings for ELO Print&Archive.

Status: View the log files (reports) from the modules.

About: The version number and copyright notes for ELO Print&Archive can be found here.

Close: Closes ELO Print&Archive.

Configuration

1. Click *ELO Print&Archive > Configuration* on the taskbar.
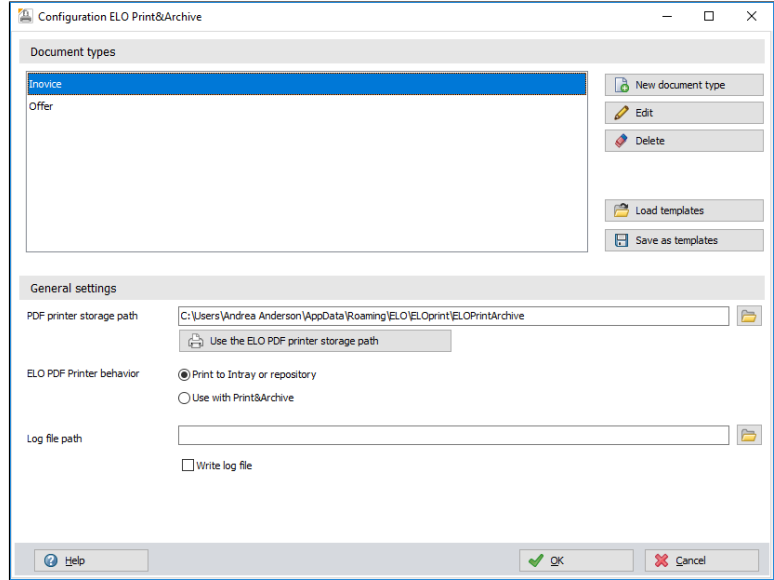
Fig. 348: 'Configuration ELO Print&Archive' dialog box

The *Configuration ELO Print&Archive* dialog box appears.

This is where you can configure and define the required document types, load templates (*Load templates*), and determine the general settings for ELO Print&Archive.

Information: Use the buttons to the right of the *Document types* area to add, configure, change, and delete any number of document types.

New document type: Clicking this button opens a new dialog box to load a new sample document as a template for a new document type.

Edit: Edit an existing document template.

Delete: Delete a template selected in the list of document templates.

Load templates: Opens the *Load templates* dialog box.
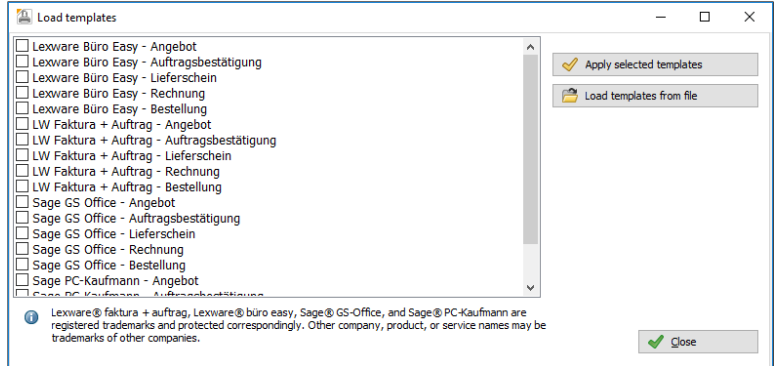
Fig. 349: 'Load templates' dialog box in ELO Print&Archive

This contains a list of document types from different business software programs. You can add entries to this list and configure existing templates. There is a sample document for every template.

Save as templates: Save a new document type as a template in the *Load templates* area.

General settings

PDF printer storage path: The PDFs created by the ELO PDF Printer are initially filed to this directory before they are processed by ELO Print&Archive. Click the button next to the input field to open the dialog box for selecting a directory.

Alternative: You can also enter a different path.

Use the ELO PDF Printer storage path: Use the storage path of the ELO PDF Printer. Click the button to enter the storage location to the input field.

Behavior ELO PDF Printer

Print in Intray or repository: The ELO PDF Printer is used without ELO Print&Archive. You can also use a different printer with ELO Print&Archive.

Use with Print&Archive: ELO Print&Archive uses the ELO PDF Printer.

Log file storage path: Determine the name of the log file together with the filing path. You can use any text file as the log file, such as *logfile.txt*. You can save the log file to any folder.

Please note: There must be sufficient disk space for the log file.

Write log file: A log file can be particularly useful at the setup stage. Select the check box as required.

OK: Click *OK* to apply your changes and close the dialog box.

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

Information: Even if you have already made general settings, you still may have to configure the document types that you use. Otherwise, you can use the templates for your business software that are already configured.

Configuration overview

ELO Print&Archive enables you to automate the document filing process.

The ELO PDF Printer lets you file and process documents straight from your business software.

However, you need to do some configuration work before you can use this function.

General configuration

The first configuration dialog box is used to define filing and storage paths and lists document types.

You also define the settings for the ELO PDF Printer as well as for using log files.

Information: The ELO PDF Printer creates PDFs for ELO Print&Archive, which are then filed to ELO. ELO Print&Archive also takes care of additional steps, such as simultaneously sending a document as an e-mail.

What does ELO Print&Archive actually do?

ELO Print&Archive files documents created in other programs, such as an invoice, as a PDF in ELO. The settings are defined in the ELO Print&Archive *Configuration*. At the same time, the invoice can be sent as an e-mail to the customer or can be printed.

What do you need to keep in mind when configuring a document type?

To ensure that you can use the full functionality of ELO Print&Archive, you need to configure the document types in accordance with the documents you use.

Overview document type configuration

1. You need a sample document to configure the document type.

Alternative: Use the existing template documents in ELO. You should also adjust the settings of these documents. This affects aspects such as how information is transferred from documents to the keywording forms.

2. Enter a name for the new document type.
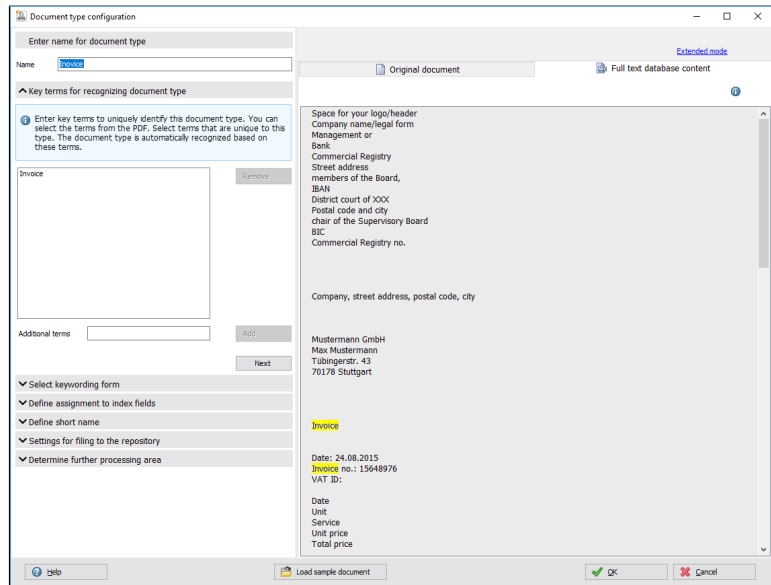
Fig. 350: 'Document type configuration' dialog box in ELO Print&Archive: Process of recognizing contents

3. Identify the document types uniquely with key terms for each document type.

4. Assign a keywording form for each document type.

5. To ensure that information from documents is automatically entered to index fields, assign the corresponding information in the keywording form to one or multiple index fields.

6. Define the variables for automatically creating the ELO short name.

7. Determine the settings for filing your documents to the repository. The documents can be filed to the Intray or to the repository. You can also determine a repository path with variables or use the filing definition in the keywording forms.

8. Specify whether or not you want to just file documents as a PDF. You have two additional options: You can also send a document filed to the repository as an e-mail or print it.

9. Click *OK* to save and end the document recognition configuration.

You have either defined a new document type or adjusted the existing settings of a document type from the list in the configuration.

Information: The following section will provide detailed information on the nine steps for configuring a file type.

Document type configuration

Before you begin

Settings for reading content

Anchor line - read index field value - key term: Use these three settings to determine what information you want ELO to extract from a specific document type. The contents of the document type are read on a line-by-line basis. Determine the lines to be read in *Anchor line* and *Read index field value*. Double-click text to select and apply *Key terms*.

Information: You can also set up terms from the anchor line for recognizing the document type. This improves the accuracy of text recognition.

Anchor line: Text recognition requires clear specifications of where a term is located on a document. This task is solved with *anchor lines*. An anchor line is a fixed line (with specific contents) that must occur on all documents of the document type and from which on all later lines will be recognized. You must first determine an anchor line by clicking the violet horizontal bar and dragging it to the desired line.

Information: ELO Print&Archive does not store the anchor line as a position on the document. Instead, it is saved as a character string containing the selected words and terms. If this exact character string appears in another place on another document, the anchor line moves with it, along with the lines on the document that are subsequently read.

Read index field value: The text read here is assigned to an index field. After defining the anchor line, click the green line and drag it to the position where the corresponding index value should be read on the document. The value is transferred to the selected index field. Determine a read index field value for each index field.

Key term for document type recognition: The selected and read terms are required for recognizing the document type. Double-click to highlight a term. The line you clicked is loaded to an input field. Click to select the text in the input field. Click *OK* to designate the selected text as a key term.

Information: A document type must be configured to the documents you use. You may also need to change the settings on existing document types in accordance with your requirements. Follow the steps for configuring the individual document types.

Starting the configuration

Requirements
Specify the document types that you want to process. Define the differences between the document types.

Start configuration
1. Click *New document type*.

The *Document type configuration* dialog box opens.

You are requested to select a sample document as a template for the document type.

2. Select a sample document for the new document type.

Alternative: Click *Templates*. Select a template and add the template to the list of document types. Click *Edit* and open the document type for configuration.
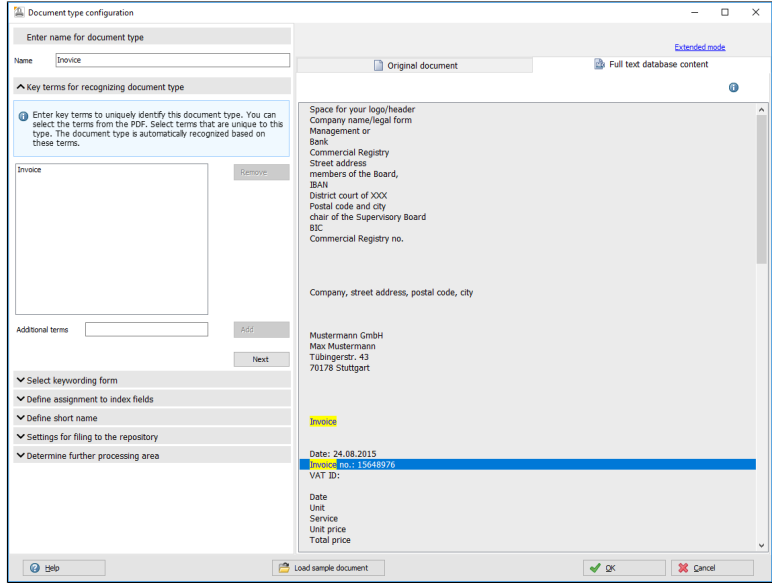
Fig. 351: 'Document type configuration' dialog box in ELO Print&Archive

The *Document type configuration* dialog box opens.

Information: Use the wizard to help you configure the settings for document types.

3. If necessary, enter a name for the document type to the *Enter name for document type > Name* input field.

The sample document is displayed in the right-hand program window.

Alternative: You can click the *Load sample document* button to select a different sample document for that document type.

Full text database content - Original document

Use the *Original document* and *Full text database content* tabs to switch between the original document and the full text content.

Full text database content shows the text of the document. *Original document* displays the original document.

Key terms for recognizing document type

The module uses unique words and phrases to recognize what type of document is being processed. For example, "VAT included" will only appear in invoices. Enter these unique words and combinations of words to the field below *Key terms for document type recognition*. Enter the combination to the *Additional terms* field below and click *Add*.

Fig. 352: Key terms for recognizing document type

Alternative: A faster method is to use word combinations: first, double-click the corresponding line in the full text of the sample document, then select the text you want, and then click OK. Select the text. Click *OK* to confirm your selection.

4. Determine all key terms for the current document type.

Information: Remove unwanted terms from the list by selecting them and clicking the *Remove* button.

5. Click *Next*.

This closes the *Key terms for recognizing document type* area and opens the *Select keywording form* area.

6. Select the keywording form you want to apply for filing the documents to the repository.

7. Click *Next*.

This closes the *Select keywording form* area and opens the *Define assignment to index fields* area.

8. Select an index field and enable the check box.

9. In the right-hand window on the *Full text database* tab, drag the green *Read index field value* line to the information that you want to write to the index field.

Optional: Repeat steps 8 and 9 for all index fields that you want to fill automatically.

10. Click *Next*.

Fig. 353: Defining the short name

This closes the *Define assignment to index fields* area and opens the *Define short name* area.

11. Define a short name for the document type.

Optional: Click the *Variables* button to use the placeholders provided.

Information: Use the variables for the short name. Otherwise, the documents will be assigned the same short name.

Fig. 354: Short name configuration

Example: Project 023 - [DOCTYPE] - [DATE] - [L6]

The text "Project 023" and the three variables [DOCTYPE], [DATE], and [L6] were entered to the input field for the short name in ELO.

The following short name is assigned: "Project 023 - Invoice - 08/23/2015 - 17/1245". "17/1245" is a character string that is included in the "L6" index field.

12. Click *Next*.

This closes the *Define short name* area and opens the *Settings for filing to the repository* area.

Fig. 355: Settings for filing to the repository

13. Determine the filing location for the document type. Keep the following settings in mind.

Settings for filing to the repository

File to Intray: The document is placed in the Intray.

File to repository: Files the document directly to the repository.

File to this repository path: Use the buttons to select a filing location.

Text field with pilcrow button: Determine the filing path. You can also select additional filing rules here. Click the *Variables* button to use the placeholders provided.

Information: Use the variables for determining the filing folder.

Use keywording form filing definition: This is described in detail in another section of the manual. Please refer to the table of contents.

The following options apply for filing to the repository as well as to the Intray.

Show document before filing: The document is displayed before filing.

Show keywording form for Outlook documents dragged to ELO: Shows the keywording dialog box before filing.

The settings for filing the document type are now complete.

14. Click Next after you have finished making the settings.
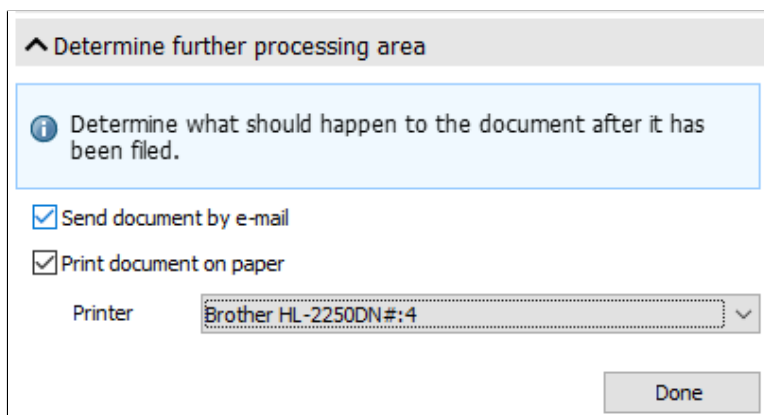
Fig. 356: 'Processing' configuration dialog box

The *Settings for filing to the repository* area closes and the *Determine further processing* area opens.

Determine further processing

Send document by e-mail: The document is also sent by e-mail.

Please note: The option for sending e-mails only works with Microsoft Outlook. Other e-mail systems or web mail providers are not supported.

Print document on paper: The document is also printed on paper.

Printer: Select a printer in the drop-down menu.

15. Click *Finish*.

The *Settings for filing to the repository* and the *Document type configuration area* close.

Result   All settings for the document type have been defined in the configuration.

Please note: You need to repeat this process for all your document types.

Using ELO Print&Archive

Requirements   You must have completed the installation and configuration before you can use ELO Print&Archive.

Execution   1. Start your business software.

2. Create a new invoice, for example.

3. Enter all required information to the input fields.

4. Start the printing process for the invoice you just created.
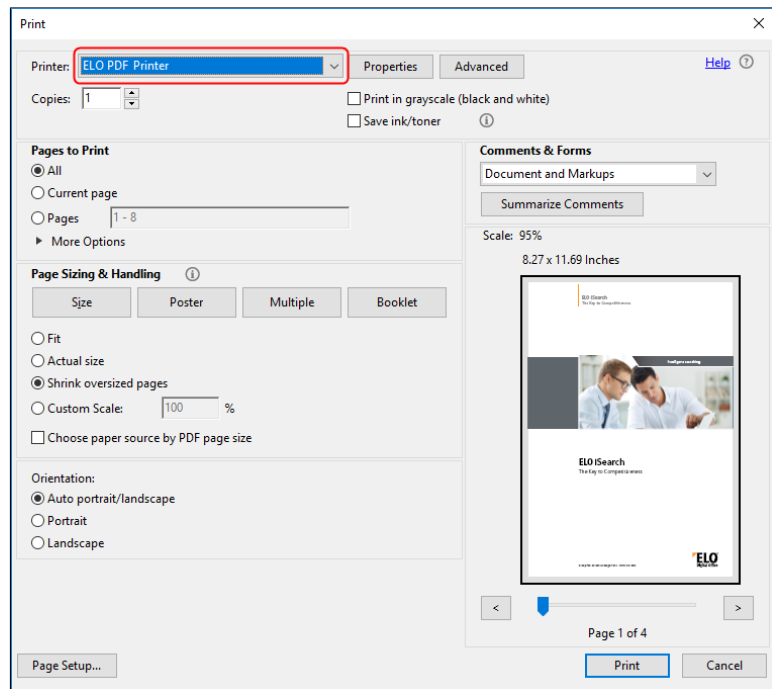
Fig. 357: 'Print' dialog box: Select ELO PDF Printer

5. Select the *ELO PDF Printer* in the 'Print' dialog box (which may differ from the one shown here).

6. Start the print process.

The settings made in the ELO Print&Archive configuration for filing to the repository and processing are applied.

Result   The invoice is filed to the repository and will also be sent by e-mail and printed if you have enabled this setting.

Notes for the administrator

If problems occur while you are working with the module, refer to this section for help.

Log file   You can set up a log file in the central Print&Archive configuration. Log files are important, especially when you have just started using the module. Log files enable your administrator or ELO support staff to find and resolve issues more easily.

ELO Click&Find

Overview

The ELO Click&Find module enables you to copy terms and search for them in the ELO repository.

The ELO Click&Find module allows you to search in two easy steps. In the first step, select words and terms from any digital environment with the mouse. This can be a term from the Internet, from a Microsoft Word document, from a PDF or from an e-mail. ELO searches for this term and automatically opens the search results list using a keyboard shortcut.

We will describe how to install and configure the module, then how to use Click&Find. The chapter ends with notes for the administrator.

Information: Some programs do not allow you do select text with the mouse. You cannot use ELO Click&Find in such programs.

Installation and configuration

Installing files   The module comes with ELOoffice 11. Alternatively, install the Click&Find module by copying the files from the folder of the same name into the ELO program folder.

The program folder is installed by default to `C:\Program Files (x86)\ELOoffice`. The module is now installed. You can then configure the module.

Set up the module   Activate the module by clicking *ELO menu > Configuration > General > Additional modules*, and checking the *ELO Click&Find* box.

The ELO Click&Find icon will now show up in the Windows taskbar.

Fig. 358: ELO Click&Find icon on the taskbar

The next time you run the program, this icon appears in the notification area of the taskbar. Click the upward-facing arrow on the taskbar to view the module icon.

Right-click the icon to open the context menu.
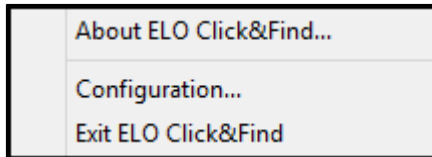
Fig. 359: The Click&Find context menu

Before you use the module for the first time, you will be asked to make five settings in the following configuration dialog:
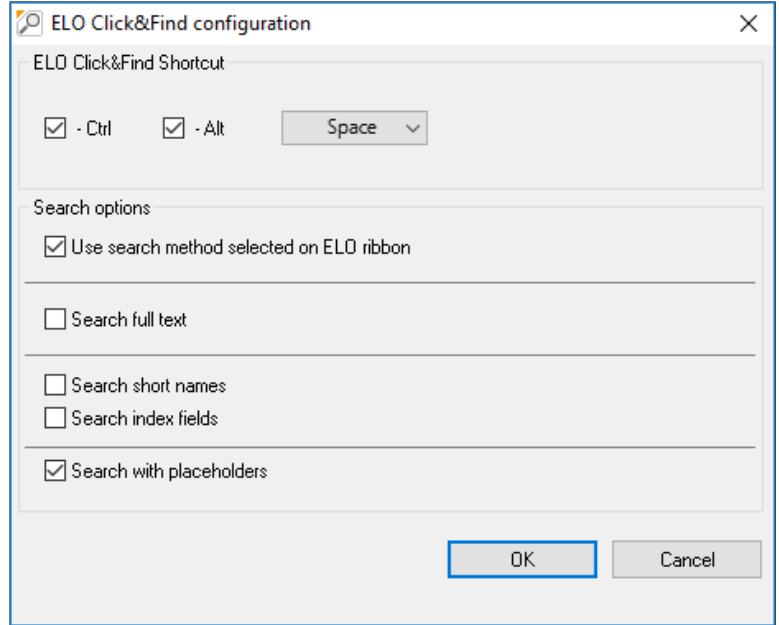
Fig. 360: 'Click&Find' module configuration

Configuration

Keyboard shortcut for activating ELO Click&Find: Enter the keyboard shortcut you want to use for the module. In our example, this is CTRL+ALT+Space.

Please note: Keyboard shortcuts may already be in use by the operating system or by other programs. Please test whether the keyboard shortcut you have selected works.

Search options: As ELO provides various search functions, you can choose to use the search method selected on the ELO ribbon, or can choose different search options.

Search full text: Specify whether you want to search all text in the ELO repository. Please note that you can either search the full text database or the short name and keywording.

Search short names: The short name is name of the entry that is displayed in ELO. It is not saved in the full text database.

Search index fields: Specify whether you want to search index fields (keywording entries).

Search with placeholders: Specify whether you want to run the search with wildcards. Use an asterisk (*) for the wildcard. Searching for *Fruit**, for example, will find: *Fruit salad*, *Fruit bowl* and *Fruition*. This search option is less restrictive, which means it will be slower.

Working with ELO Click&Find

Summary

Once the Click&Find module has been activated, you can select any text on the screen, assuming that it is not part of an image or if you cannot use the module in that particular program. When you enter your chosen keyboard shortcut, the module automatically searches the repository for the selected text.

Procedure

1. Select a word or term with the mouse. If you select more than one term, Click&Find automatically places an *asterisk* (*) before and after the term.

2. Press the keyboard shortcut you entered to the configuration.

The *Search* tab opens in ELO. The search for the selected term is already underway.

The results list appears.

3. Select the document from the search results.

ELO MobileConnector

Overview

The ELO MobileConnector module allows you to synchronize data from a previously selected folder of your repository with an external file system or a mobile device or to create a copy. This means you can take all the documents you need to external appointments, and any changes are then synchronized back to ELO.

ELO MobileConnector checks whether synchronization folders from known cloud service providers are located on your computer. You are then asked if you want to use these folders as counterparts for folders in the ELO repository. However, you can also create your own synchronization folder pairs. This connection automatically synchronizes data from the ELO repository in both directions. In addition to synchronizing documents, it is also possible to display folder structures.

It is possible to access data in your provider's cloud and to edit it from any Internet-ready device. When you log onto ELOoffice, you have the option to transfer changes or new files into the repository.

Warning: As documents can be synchronized in both directions, this may cause documents to be deleted on the computer's file system!

The logs of synchronization and copy actions help the user to maintain an overview. All performed events are displayed in an overview. If there be any errors or conflicts, they are highlighted in the log and can be fixed.

Please note: ELO MobileConnector is not backwards compatible. If you use ELO MobileConnector, you must have the same version of ELOoffice installed on all your computers.

Installation and configuration

Installation The ELO MobileConnector module is installed with ELOoffice and is ready to use.

Permissions You need *Export permission* to use ELO MobileConnector. You need the rights *Edit repository structure* and *Edit documents* to run ELO MobileConnector.

You can find the module in a separate group on the *Repository* ribbon tab.
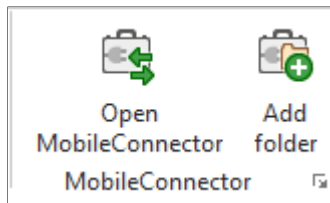
Fig. 361: MobileConnector function group on the 'Repository' ribbon tab

Click the small arrow icon on the lower right to open the configuration.

Configuration The configuration is located under the *MobileConnector* tab.
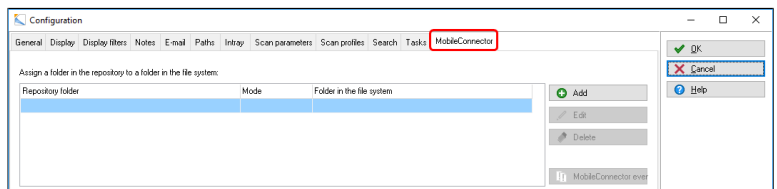
Fig. 362: 'MobileConnector' tab in the configuration

Here, you see a list of assignments between repository folders and folders on the file system.

In the *Repository folder* column, you see the repository folders that external folders have been assigned to. The *Mode* column indicates whether a folder is being synchronized or whether a copy is being created. The *Folder in the file system* column lists the paths of the folders on the file system. There are four buttons to the right of this:

- *Add*: Click this button to add another folder pair for synchronization or for saving a copy. A new dialog box opens.
- *Edit*: You can edit the selected folder pair here. A new dialog box opens.
- *Delete*: Click here to delete the currently selected folder pair.
- *Logs*: This button is only enabled if logs exist. The logs may contain errors and warnings. Warnings often occur when conflicts arise with read and write permissions to synchronized files. A new dialog box opens.

If you have not yet set up any assignments and you start the ELO MobileConnector from the button on the ribbon, a notification will appear telling you that you cannot perform any synchronization or copy actions.
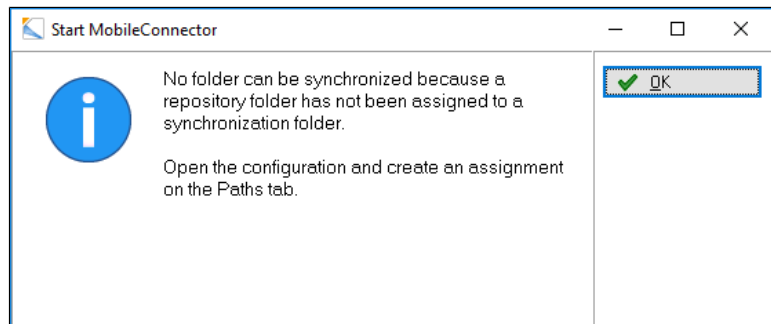
Fig. 363: Dialog box when starting the ELO MobileConnector with missing assignments

Add folder

1. Select a folder in the ELO repository.

2. Click the *Add folder* button on the *Repository* tab of the ribbon.

Alternative: Right-click a document in the repository and select *Add MobileConnector* from the context menu.
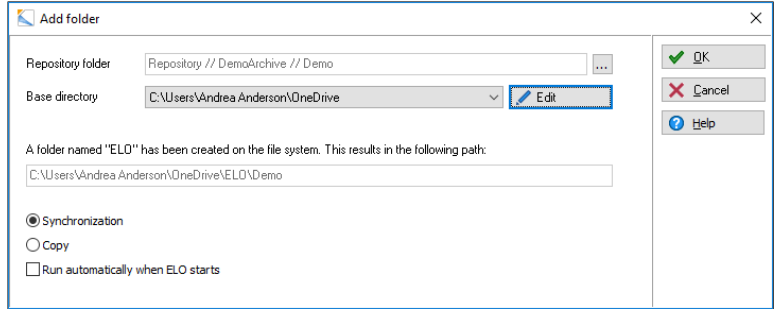
Fig. 364: 'Add folder' dialog box

The *Add folder* dialog box will open. In this dialog box, you can define folder pairs for synchronization or save a copy. The folder you previously selected is automatically entered to the *Repository folder* field.

3. If you want to select a different repository folder, click the button to the right of the *Repository folder* field.
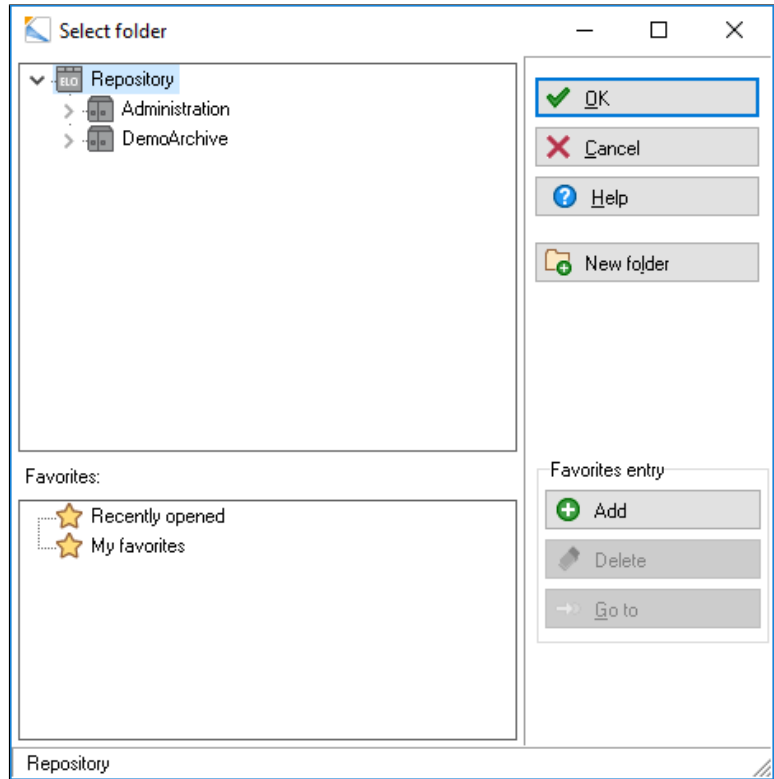
Fig. 365: 'Select folder' dialog box

The *Select folder* dialog box will open.

4. Navigate through the repository tree to select the desired folder and click *OK* to confirm your selection.

The module automatically searches for cloud folders from the following providers: Dropbox, Google Drive, Microsoft OneDrive, GMX MediaCenter, and SpiderOak Hive. If this kind of folder is detected on the computer's file system, ELO automatically registers the detected path in *Base directory*.

Example   `C:\Users\<User>\OneDrive.`

The file system path is displayed in the *Base directory* text field. If multiple base directories have already been set up, select the correct directory from the drop-down menu.

5. Click the *Edit* button to add or delete additional base directories.
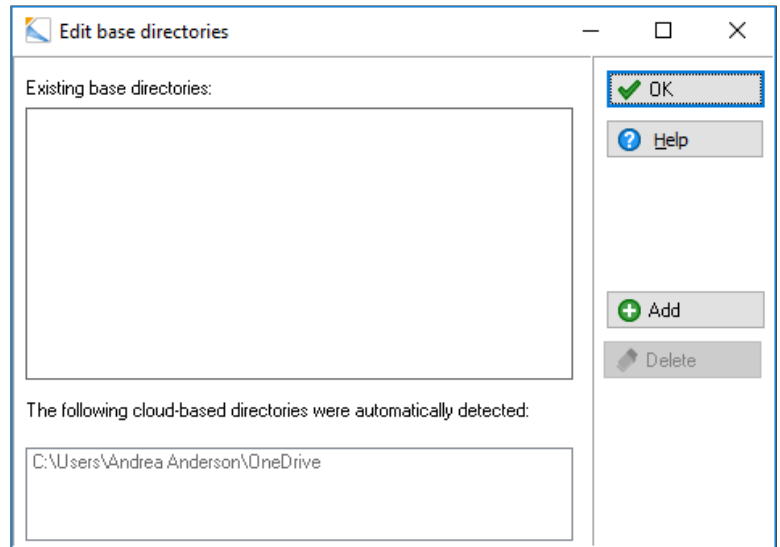
Fig. 366: 'Edit base directories' dialog box

The *Edit base directories* dialog box appears.

The base directories you have created so far are listed here. You can also see which cloud provider base directories ELO MobileConnector has recognized automatically.

6. Click *Add*.
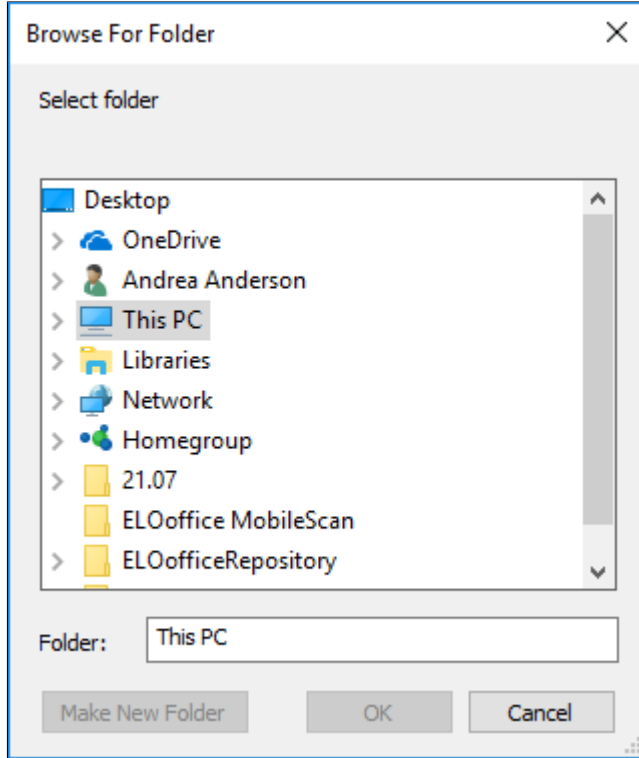
Fig. 367: 'Browse For Folder' dialog box

The *Browse For Folder* dialog box opens.

7. Select the folder and click *OK*.

Optional: Click the *Delete* button to delete the base directory.

A folder named *ELO* has been created on the file system. The actual synchronization folder is located in this directory on the Windows file system. Click *OK* to create this folder.

8. Select whether you want to synchronize the folder pair or save a copy of the repository folder in the Windows file system.

Please note: The option *Save as copy* saves an identical copy of the repository folder to the Windows file system, but without metadata (GUID, keywording information).

ELO MobileConnector

Optional: If you select the option *Run automatically when ELO starts*, the base directory and folder in the repository are synchronized every time ELO starts. This function is only available if you have selected the *Synchronize* radio button.

Please note: If you need to synchronize a large number of folders, this will delay all other processes when starting ELOoffice. For this reason, this function is not recommended for very large directories that do not change very often. In such cases, it makes more sense to create multiple folder pairs and only set up automated synchronization for selected ones.

Configuration complete

The module now has all required information. The configuration is now complete.

Working with ELO MobileConnector

The following synchronization example shows you what the log options in ELO MobileConnector can be used for. Use a folder pair that you set up as described in the *Configuration* section.

Preparation

1. Click *Repository > Open MobileConnector*.
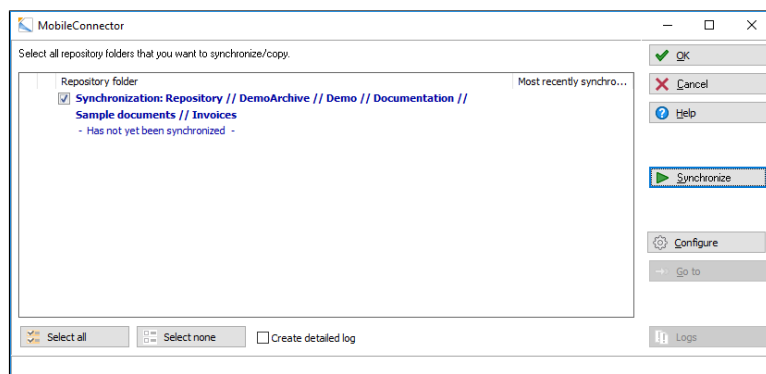
Fig. 368: 'MobileConnector' dialog box

If you set up a folder pair as described in the *Configuration* section but have not synchronized any folders yet, a repository folder appears in the dialog box. The blue color indicates that synchronization has not taken place yet.

Synchronization

2. Click *Start*.
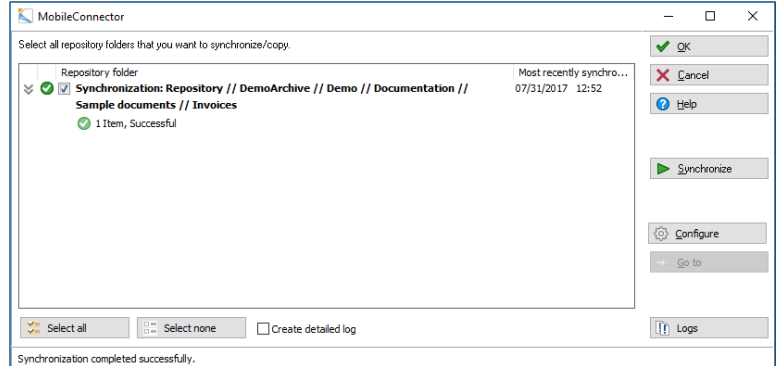
Fig. 369: Initial synchronization result

A message appears saying that the synchronization was completed successfully.

3. Now make some changes to the folder in the ELO repository and to the folder on the file system. The following was changed in our example:

- A document was deleted in the ELO repository folder.

- A new version of a document was filed to the ELO repository folder.

- Two documents were filed to the folder on the Windows file system.

4. Click *Repository > Open MobileConnector* to do another synchronization.

The selection dialog box appears. Select all repository folders that you want to synchronize.
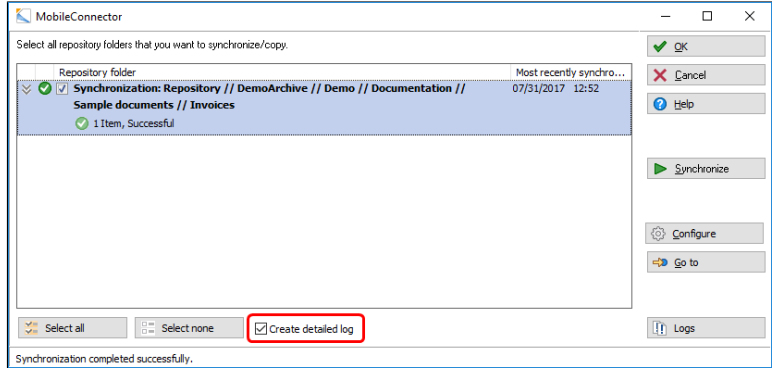
Fig. 370: Synchronization: 'Create detailed log' check box

5. Select the *Create detailed log* check box.

2. Click *Start* to start synchronization again.

Synchronization result
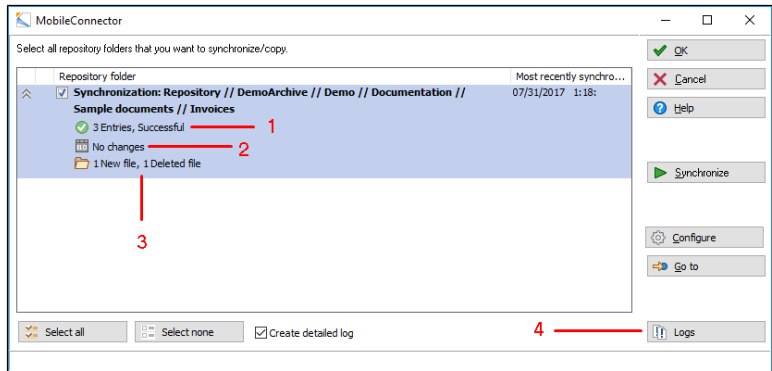
Fig. 371: Log of synchronization

A log overview of the synchronization action appears.

The overview contains the following sections:

- **(1)**: The green check mark indicates that synchronization was completed without any errors or warnings.
- **(2)**: Log of changes to the ELO repository folder.
- **(3)**: Log of changes to the Windows file system folder.
- **(4)**: The *Logs* button opens a detailed log file.

ELO MobileConnector

Logs

7. Click the *Logs* button.
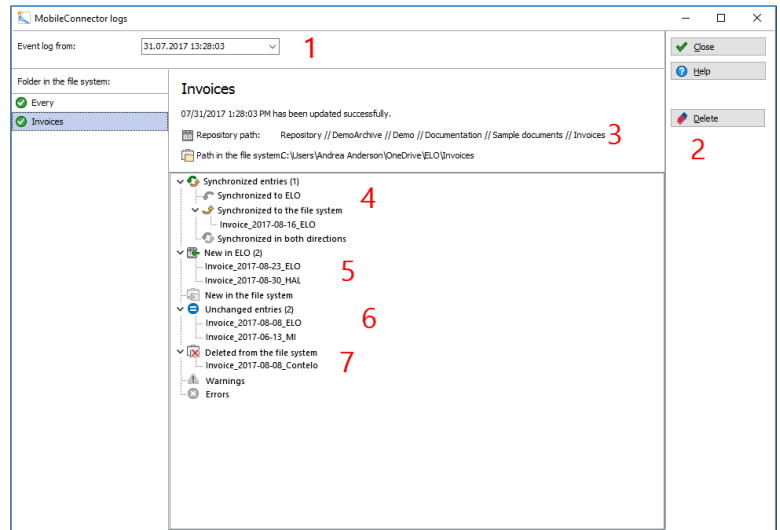
Fig. 372: 'MobileConnector logs' dialog box

The log file contains the following sections:

- **(1)**: Select the log you want to view from the drop-down menu.

- **(2)**: Use this button to delete log files. In the *Delete logs* dialog box that opens, you can delete log files from within a certain period. You can choose from five different options: 1 day, 1 week, 1 month, 6 months, or 1 year. Logs that are older than the period of time you select will be deleted permanently. Once deleted, these logs cannot be restored. If you are sure you want to delete the files, click the *Delete* button.

- **(3)**: This overview shows you when synchronization was completed and where the paths are located in the ELO repository and in the file system.

- **(4)**: A list of entries that were synchronized is shown here. The direction of the arrow indicates in which direction synchronization took place.

- **(5)**: These are the new entries that have been synchronized to ELO. In this case, two files created in the file system were transferred to the repository.

- **(6)**: The equal sign in this list indicates that these entries have not changed.

- **(7)**: These are the entries that have been deleted.

Warnings in the log

A warning can be returned in the following cases:

- When an attempt is made to synchronize an empty file from the file system to the ELO repository.

- There is a child folder on the file system, but not in the repository and the folder does not have the necessary access rights.

- A document was changed on the file system, but was filed to the ELO repository as *Non-modifiable*.

- A document was changed in the repository as well as on the file system.

- A document that was moved was changed on the file system and/or in the repository.

Log errors

An error can be returned in the following cases:

- A document is located on the file system, but not in the ELO repository and has an HTML file with a form name that does not exist.

- A document is located on the file system, but not in the ELO repository and has an HTML file with an index field that does not exist.

- A document is located on the file system, but not in the ELO repository and has an HTML file with an incorrect form name for an existing field ID.

- A folder with the same name was added at the same level.

- A document is located on the file system, but not in the ELO repository and does not have the necessary access rights.

- A document is marked as deleted in the ELO repository but has been changed on the file system.

- A directory containing child files and/or folders is marked as deleted in the ELO repository, a file was changed on the file system.

HTML file

If files are synchronized with ELO MobileConnector, a HTML file containing metadata about the synchronization process is created for each entry. These files can be imported back into the ELO repository. The HTML file contains the following information:

- GUID: The unique ID of the entry.

- MD5 hash: An indicator that something was changed since the last synchronization.

- Keywording information

⚠️ **Please note**: If you delete and edit the HTML files, you will lose important data about the synchronization process. If you cannot fix an error returned in the log, it helps to delete the HTML file and to file a new version of the document to the repository.

Switching mode	You can switch mode in the *Edit folder* dialog box. To avoid problems when you are switching from copy mode to synchronization mode, the existing folder is saved to a child folder using the following naming convention: <Name of file path>_<Date and time mode was switched>. A new folder is created during the next synchronization run. When you are switching from synchronization to copy mode, the documents in the copy folder are moved to the backup folder using the following naming convention: *Deleted_<Date>_<Time>*. This applies to files that are not in the ELO repository and documents that were changed or deleted in ELO.
Simultaneous changes	If an entry is changed both on the file system and in the ELO repository, the last changed entry becomes the working version in the *Tasks* work area. You can access the older version from the version history in the ELO repository.
Encrypted documents	Encrypted documents will not be synchronized. If you set up an encrypted document for synchronization, an entry will be written to the log.
Version control	Synchronized files are incremented in the ELO version control system.
Recursive synchronization	*Recursive procedure*: If the synchronization folder contains additional folders, the entire folder tree within the main folder will be synchronized.
References	References are also imported and filed when you synchronize from the ELO repository to the file system.
Naming conflicts	If two folder trees are synchronized, ELO allows child folders with the same name. However, you cannot assign the same name to two folders in the same location on the Windows file system. For this reason, folders and files with the same name will be changed by ELO MobileConnector when they are synchronized to the file system. A GUID attached in parentheses make folders and files with the same name unique.
Keywording form	When you are filing documents to ELO for the first time, they are filed with the *Free entry* keywording form. They will be filed as version-controlled documents, since it is possible that they might be changed at some point.
Keywording	Documents require the *Free entry* keywording form for the synchronization process.

| **Duplicate check** | The MobileConnector has its own duplicate check. |
| **Logs** | A log is written after every synchronization. They are filed to the following folder with the name *SyncProtocolLog_<date>_<time>* |

C:\Users\<Windows user>\AppData\Roaming\Elo\ELOSync.

The *SyncErrorLog* is written to the same folder. There are only log entries to this folder on the days that an error or warning appears. The log is useful when the client crashes during synchronization and the *SyncProtocolLog* is not written.

ELO Dropzone

Overview

ELO Dropzone makes it easier for you to file incoming documents to the ELO repository. Simply drag documents and files to a defined tile. ELO Dropzone keywords and files your documents and files according to your own rules. This provides the user with easy access to frequently used functions and enables them to file documents more easily to the ELO repository.

You can set up filing tiles, search tiles, and script tiles. A search tile enables you to set up search terms using the index fields of a keywording form. It is also possible to define search tiles that you can activate using keyboard shortcuts. Script tiles are used to call up a script.

You can also create additional variables with regular expressions in ELO Dropzone that can be used to define tiles.

This chapter contains sections on installation and configuration, on usage examples and administration.

Installation and configuration

Installation
ELO Dropzone is a component of ELOoffice and is installed automatically.

Start
After installation, a shortcut to ELOoffice is placed on the desktop.

ELO Dropzone opens automatically when you start ELOoffice.

Deactivate: You can deactivate ELO Dropzone in the configuration.

ELO Menu > Configuration > General > Additional modules.
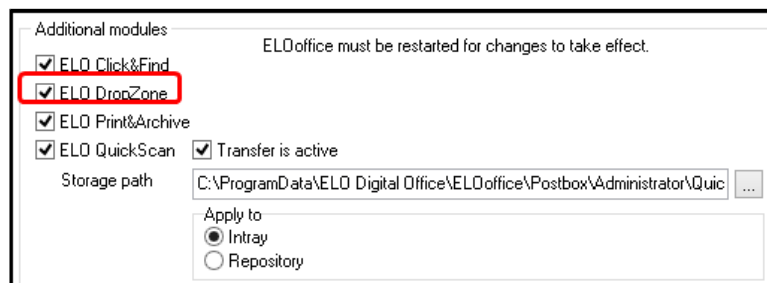
Fig. 373: Configuration - Activating and deactivating ELO Dropzone

Uncheck the box next to *ELO Dropzone*.

ELO Dropzone will no longer open automatically when you start ELOoffice.

Program interface
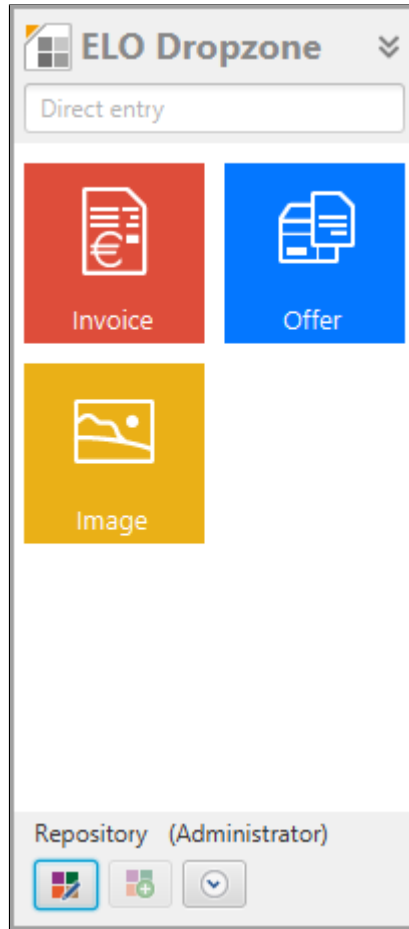
Fig. 374: Program interface with ELO Dropzone - ELO repository template

When you open ELO Dropzone for the first time, it is empty.

Optional: If you select the repository template when you install ELOoffice, ELO Dropzone contains five configured search tiles.

Collapse/expand
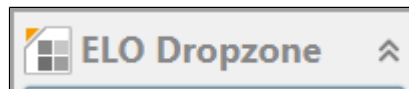
Fig. 375: Minimized ELO Dropzone

You can expand or collapse ELO Dropzone by clicking the header with the *ELO Dropzone* text.

Buttons

Repository (Administrator)
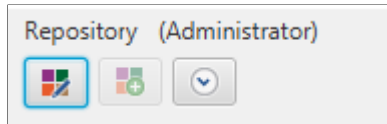
Fig. 376: The ELO Dropzone buttons

The status bar at the bottom shows the following information:

1st row on the left: The currently active repository

1st row on the right: The logged on user

In addition, you will find the following buttons:

Pencil icon: Edit tiles Switches to edit mode for personal tiles. You open the edit mode for global tiles from the context menu.

Plus icon: Create a new tile

Clock icon: View ELO Dropzone history

History

The history shows the last 20 filing processes initiated by a tile. Click one of these entries to open the corresponding entry in the repository.

New folder in the repository

If you create and save a new tile in ELO Dropzone, the processing instructions are saved to a new repository folder under *//Administration//Dropzone*. This folder is set up automatically in the ELO repository. The information is stored there as text files, which can be exported to other repositories.

Context menu
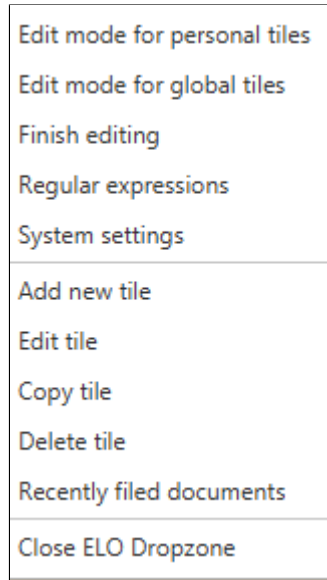
Fig. 377: ELO Dropzone context menu

Edit mode for personal tiles: Switches to the edit mode for personal tiles.

Edit mode for global tiles: Switches to the edit mode for global tiles.

Finish editing: Ends tile editing.

Regular expressions: Switches to the wizard for ELO Dropzone RegEx configuration.

System settings: Switches to the *Edit system settings* dialog box.

Add new tile: Adds a new tile. Depending on whether you select the option *Edit mode for personal tiles* or *Edit mode for global tiles*, a personal tile or global tile will be added. You can create up to 18 personal tiles and 18 global tiles.

Edit tile: Switches to the edit mode of the tile.

Copy tile: Copies a tile and its settings. A new tile is added and the tile configurator opens.

Delete tile: Deletes a tile from ELO Dropzone.

Last filed documents: Shows a list of the last twenty documents filed via ELO Dropzone.

Close ELO Dropzone: Closes ELO Dropzone.

Global and personal tiles

There are global and personal tiles.

Global tile: Created by the administrator. Global tiles can be viewed by all users. These tiles always rank higher in the hierarchy than personal tiles in ELO Dropzone.

Personal tile: Created by the user. Personal tiles can only be viewed by that user. They appear in the hierarchy below the global tiles.

Edit system settings

Open the *Edit system settings* dialog box from the context menu before creating tiles in ELO Dropzone.
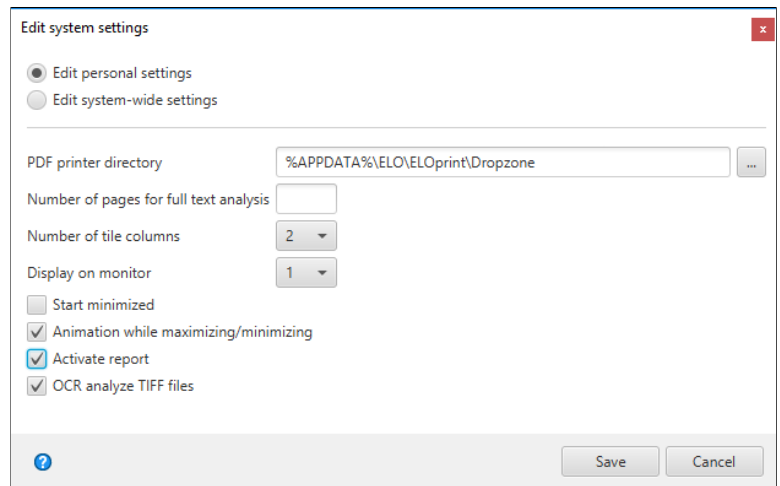
Fig. 378: 'Edit system settings' dialog box

Make all general settings for all ELO Dropzone tiles here. Use the tile configuration to adjust the individual tiles at a later point in time.

Use the radio buttons to select whether you want to make *personal* or *system-wide* (global) settings.

PDF printer directory: Select the file path for monitoring the PDF printer directory in the *PDF printer directory* text field. If there are PDF documents in this directory, they are filed based on the specifications of the tiles created in ELO Dropzone. Define the specifications for the individual tiles in the tile configuration.

Number of pages for full text analysis: Use the value in the *Number of pages for full text analysis* field to determine the maximum number of pages per document to be analyzed during OCR preprocessing. Analyzes documents in PDF and TIFF format.

Number of tile columns: Define how many tile columns you want to have. Choose to show the tiles in one, two, or three columns.

Display on monitor: When you have multiple monitors, you can display ELO Dropzone on a monitor other than the primary monitor. If ELO Dropzone is configured on an invalid monitor, it is automatically switched back to the primary monitor.

Start minimized: Select the *Start minimized* check box to always start ELO Dropzone minimized.

Animation while expanding/collapsing: Select the *Animation while expanding/collapsing* check box to activate an animation when expanding and collapsing ELO Dropzone. If this check box is not selected, the window expands or collapses immediately.

Activate report: When you select the *Activate report* check box, a report file called *ELOdropzoneLog(x).txt* is created in the user's temp directory. The directory is located here: C:\Users\<Username>\AppData\Local\Temp.

OCR analysis for TIFF documents: Enable the *OCR analysis for TIFF documents* option to switch on OCR. Uncheck the box if you do not require OCR and do not want it to affect your system's performance.

Information: Read in the *Administration* section how you can also make changes to the configuration in the extra text of the keywording form.

Tile types

You can create three different tile types in ELO Dropzone:

- **Filing tile**
- **Search tile**

- **Script tile**

The configuration for these three tile types is described in the following.

Setting up a filing tile

Adding a new tile

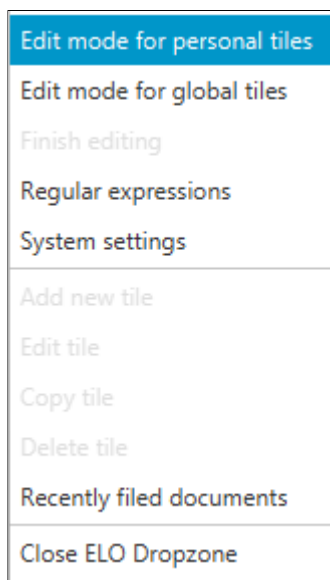1. Right-click the middle window of ELO Dropzone.
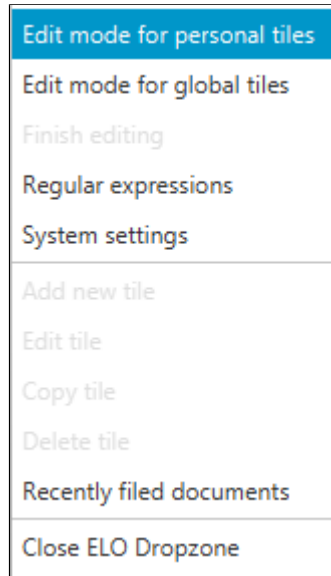
Fig. 379: ELO Dropzone context menu

The ELO Dropzone context menu appears.

2. Click the *Edit mode for personal tiles* menu item.

Alternative: Click *Edit mode for global tiles* to create a global filing tile.

Alternative: Click the button with the pencil icon.

ELO Dropzone switches to edit mode. The sand-colored background indicates that you are in edit mode.

3. Open the ELO Dropzone context menu.

4. Click the *Add new tile* menu item.

Fig. 380: New tile in ELO Dropzone

A new tile appears.

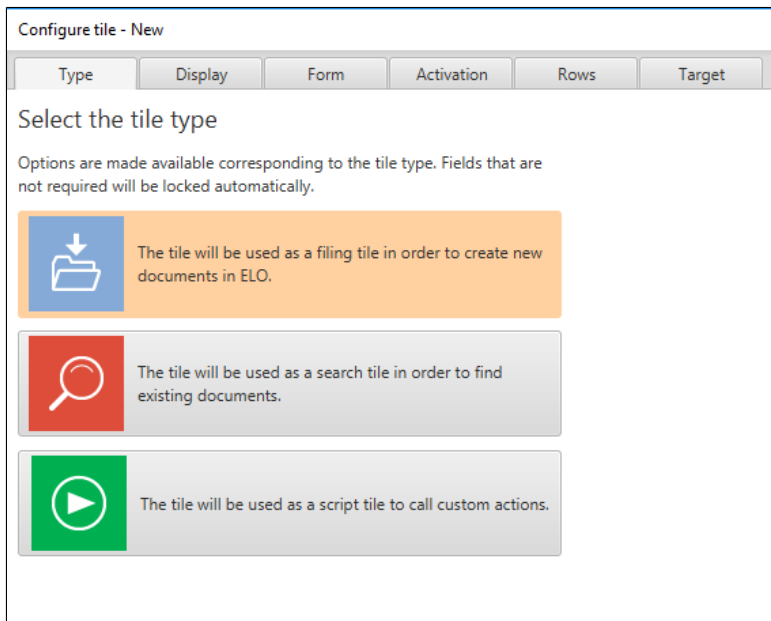**Defining filing tiles**

1. Double-click the new tile.
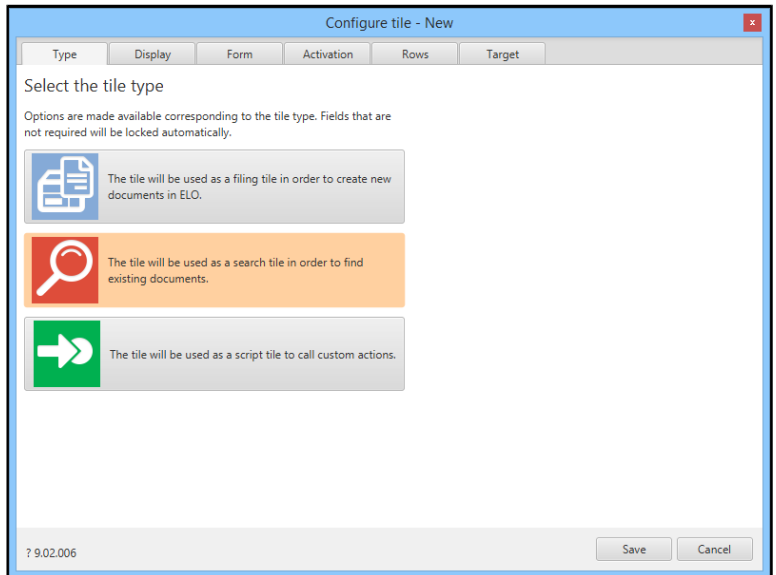
Fig. 381: 'Configure tile' dialog box

The *Configure tile* dialog box appears. The configuration opens at the *Type* tab.
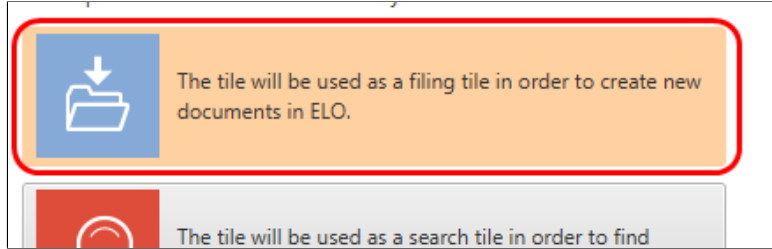
Fig. 382: 'Filing tile' tile type

2. Click the filing tile icon.

The *Filing tile* type is selected.

Display
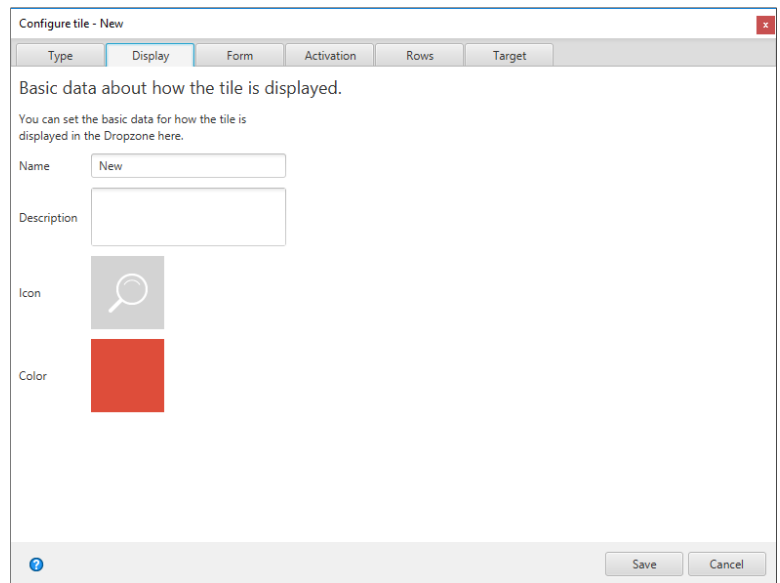
1. Click the *Display* tab.
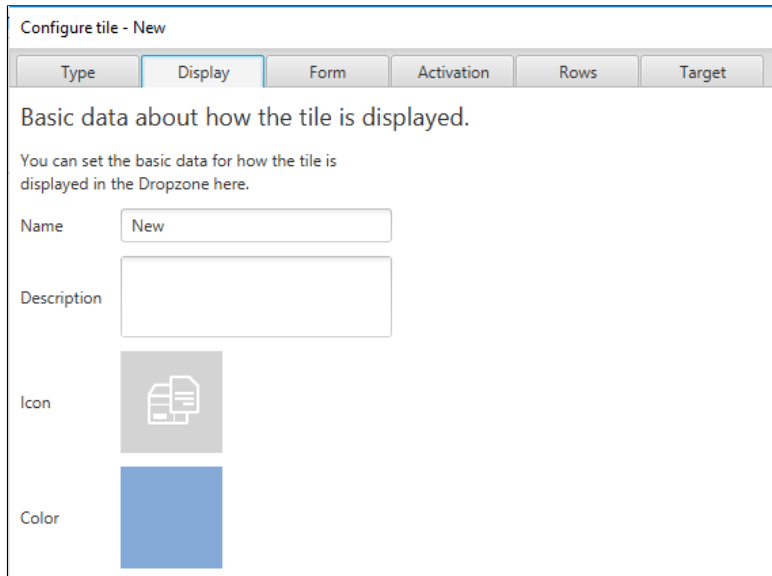
Fig. 383: 'Display' tab

The *Display* tab appears.

2. Click the *Name* field and enter a name for the filing tile.

3. Click the *Description* field and enter what you want to use the tile for.

4. Click the gray tile to change the tile icon.

Fig. 384: Tile icons

The available tile icons appear.

5. Click an icon.

6. Click the colored square to change the color of the tile.
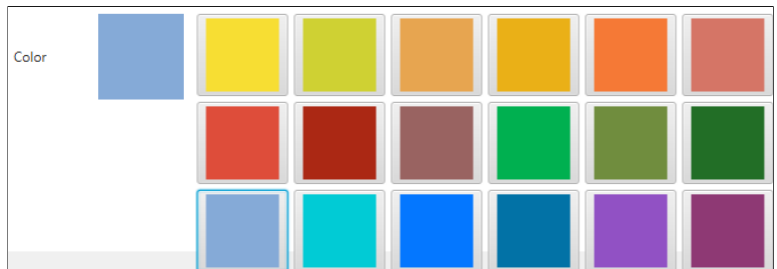
Fig. 385: Tile colors

The available colors appear.

7. Click a color.

You have defined the tile name, tile icon, and tile color.
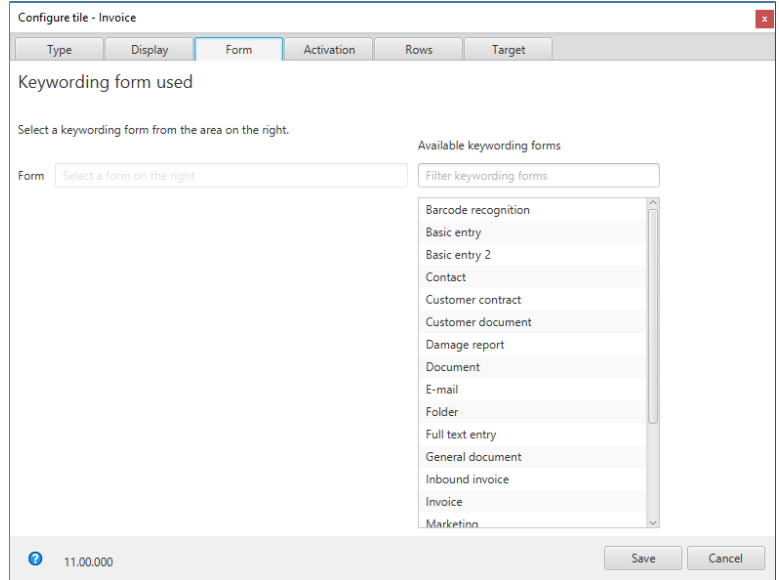
Form
1. Click the *Form* tab.
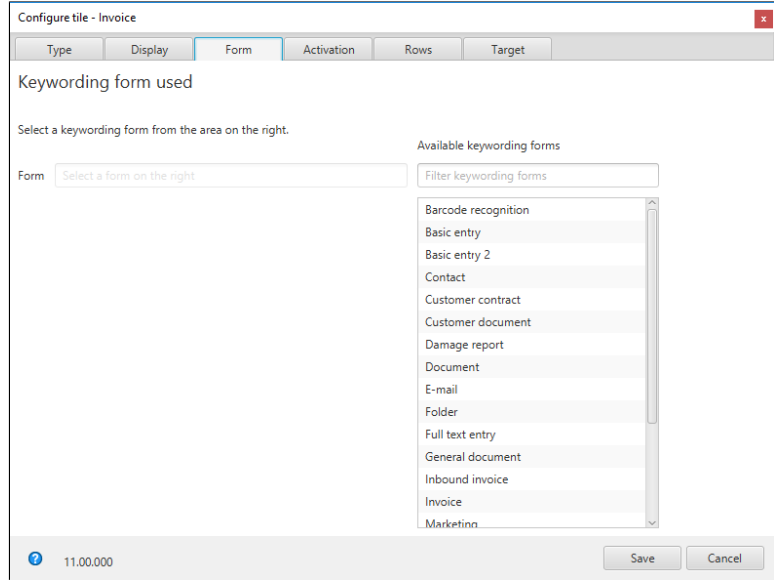
Fig. 386: 'Form' tab

The *Form* tab appears.

2. Click one of the keywording forms.

You have linked the tile to a keywording form.

**Information**: If you use a folder-only form, a folder is created along with the keywording and the document with the *Free entry* keywording form is saved to this folder.

Please note: Keywording forms assigned the document status *Non-modifiable* cannot be used in ELO Dropzone. This is because ELO Dropzone files the logical document and then adds the file.

Activation

The *Activation* tab provides additional options for defining tiles. The choice of options depends on the selected tile type.
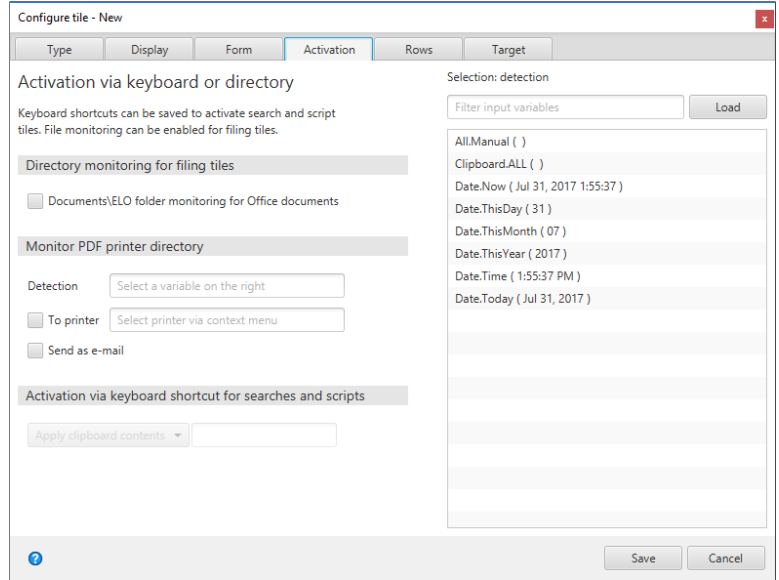
Fig. 387: 'Activation' tab

You can enable directory monitoring for filing tiles.
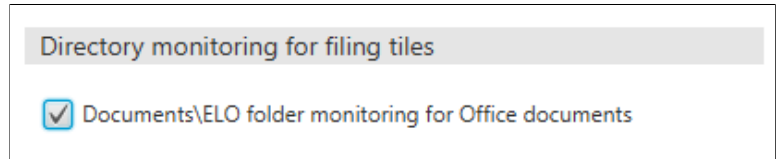
Fig. 388: Option for monitoring tiles

When you select the option *Documents\ELO folder monitoring for Office documents*, the filing tile becomes a monitoring tile.

ELO Dropzone monitors the following path in the Windows file system:
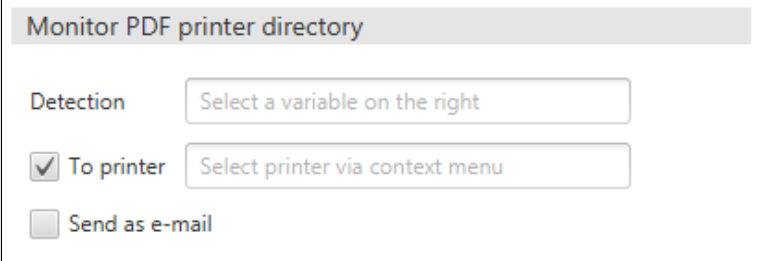
C:\Users\<Windows user>\Documents\ELO\<tile name>

When there are Microsoft Office documents in the directory, they are filed based on the specifications of the tile.

If you click *Cancel* and end the keywording of a document from the folder monitoring, the document is saved to the *Not filed* folder in the file system: C:\Users<Windows user>\Documents\ELO\Not filed.

Under *Monitor PDF printer directory*, you can automatically file documents to an output directory of a virtual PDF printer.

Define the output directory in the system settings: *Dropzone context menu > System settings > PDF printer directory*.

Fig. 389: Options for monitoring a PDF printer directory

1. Drag a regular expression of type *Text* to the *Recognition* field.

The corresponding documents are recognized in the output directory based on this variable. If the *Recognition* field remains empty, the PDF printer directory is not monitored.

Information: Read how to create additional variables with regular expressions in the *Regular expressions* chapter.

Optional: Right-click the *To printer* field to open the list of available printers. You can use this printer to print your document.

2. Select a printer.

Optional: When the *Send as e-mail* option is enabled, the detected documents from the printer directory are attached to an e-mail and sent.

To use this option, you need to create a script with the name *JS.SendMail.VBS* via the *ELO menu > System settings > Scripts*.

The script looks like this:

```
Set ELO = CreateObject("ELO.office")
Set oOutlook=CreateObject("Outlook.Application")
msg = ELO.GetCookie("JS.PARAM")
Data = Split(msg, vbLf)
for i = 0 to UBound(Data)
Line = Data(i)
if Left(Line, 9) = "File.Path" Then
Parts = Split( Line, vbTab )
Set oMail=oOutlook.CreateItem(0)
oMail.Subject = "From Dropzone"
call oMail.Attachments.Add(Parts(1), 0, 1)
oMail.Display
end if
Next
```

Rows 1. Click the *Rows* tab.
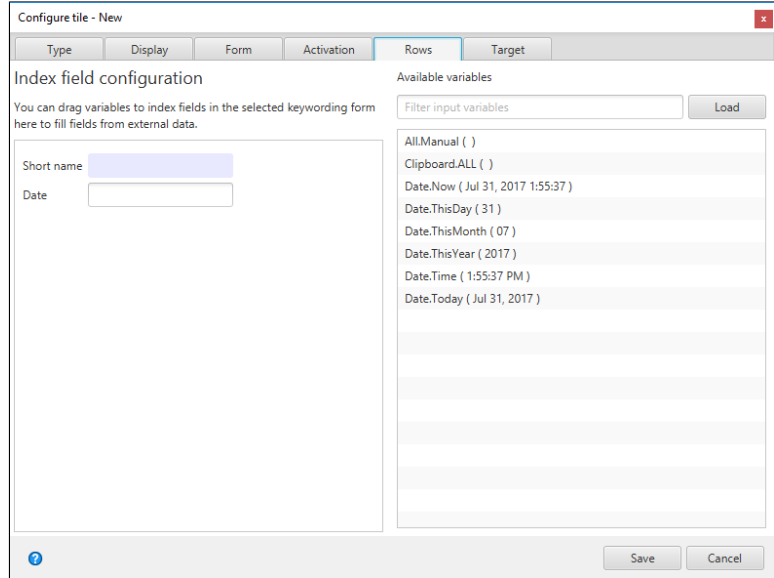
Fig. 390: 'Rows' tab

The *Rows* tab appears.

You see all index fields of the selected keywording form on the left-hand side. You see all the *Available variables* on the right-hand side.

Load a sample document via the *Load* button to import additional variables. For example, if you load a Word document, Word opens briefly to analyze the document. ELO Dropzone then adds the detected metadata to the list of available variables.

In addition to the method described above, there is a more effective method of reading metadata. When you are in edit mode, you can drag and drop the file to the desired tile. The tile configuration menu opens automatically. You now find metadata variables for the file in the corresponding tabs. The number of variables you can choose from depends on the file type.

You can add metadata using the form fields in Microsoft Word, for example. In the form field properties, you can enter a value in the *Text box* field. Afterwards, you can select this value from the list in the tile configuration.

It is also possible to read header data in Microsoft Word documents. Once you have dragged the document containing headers to a tile, the variable *Header.x* shows up in the list of available variables.

2. Now assign or drag and drop the available variables or fixed text to the index fields of the selected keywording form.

The variables are displayed in the index fields in curly brackets. This information means that every time a document is processed using this tile, ELO immediately recognizes which data to read for the keywording.

Information: You can also drag multiple variables to an index field with this method.

You can also read just parts of metadata, such as the first three letters of a first or last name. To do this, enter the position of the first letter to be read and the number of letters to be read after the data inside the curly bracket. For example, entering `{All.Author(1,3)}` only reads the first three letters starting from the first character.

Target

1. Click the *Target* tab once you have defined the assignment of the index fields.
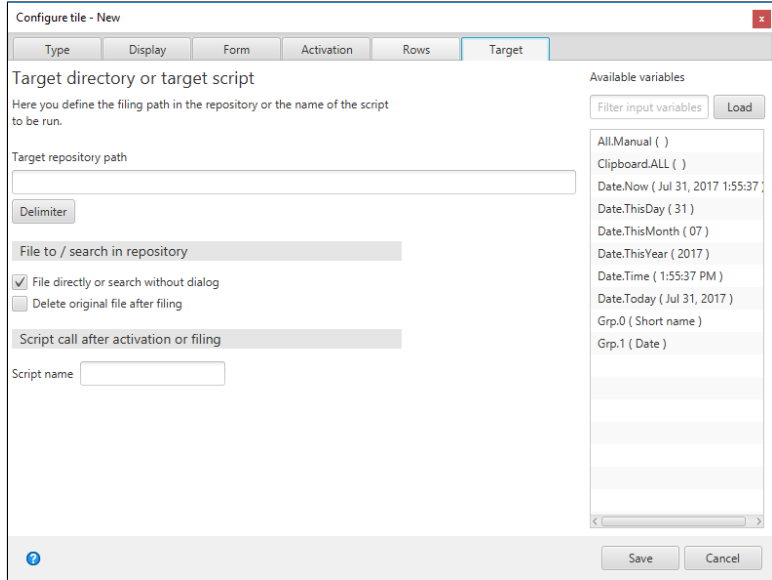
Fig. 391: 'Target' tab

The *Target* tab appears.

2. Enter the filing path/filing definition to the *Target repository path* field.

The following applies for filing definitions in ELO Dropzone:

- Use the *Delimiter* button to create a pilcrow symbol for separating the folder levels.

- The filing definition must start with a separator.

- Do not end a path with a separator as the path will otherwise not be correctly displayed.

- You can enter both full and relative target paths.

- The name for the individual index fields in a keywording form begins with *Grp.*. Accordingly, the short name would be *Grp.0*, the date would be *Grp.1*, the third index field would be *Grp.2* and so on.

- Other available variables include *Clipboard.ALL* for reading the Clipboard or *Date.ThisMonth* for the month of filing.

- If you want to define a second filing target as a reference, separate the first and second filing definition with a pipe symbol ("|").

Here is an example of a target path with a multiple filing definition:

¶Orders¶{Date.This.Year}¶{Date.ThisMonth}|
Orders¶{Grp.2(1,1)}¶{Grp.2}

You see the existing variables in the *Available variables* area. You can drag these variables to the target path in the repository.

Click *Load* to load a sample document to the configuration. ELO automatically reads all the metadata in the document. You can now drag individual metadata to the index fields.

If the filing path does not exist, it will be created automatically.

In the *File to/search in repository* area, the *File directly or search without dialog* option is selected. The file is filed directly without confirmation.

Optional: Select the *Delete original file after filing* check box to delete the original file after filing.

Save

1. Click *Save* once you have made all changes.

The *Configure tile* dialog box closes. The new filing tile appears in ELO Dropzone. ELO Dropzone remains in edit mode.

2. Right-click the context menu and the *Finish editing* entry in ELO Dropzone to finish editing.
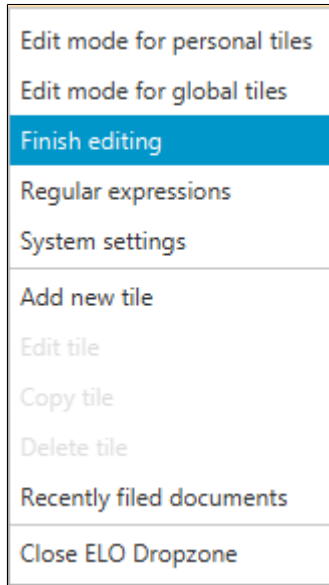
Fig. 392: Finishing editing in ELO Dropzone

Result   You have now created a filing tile and can drag and drop documents
onto tiles to file them to the repository.

Setting up a search tile

Type

A search tile enables you to set up search terms using the index fields of a keywording form. It is also possible to define search tiles that you can activate using keyboard shortcuts. You can create multiple keyboard shortcuts for different searches.

Adding a new tile

1. Right-click the middle window of ELO Dropzone.

Edit mode for personal tiles
Edit mode for global tiles
Finish editing
Regular expressions
System settings
Add new tile
Edit tile
Copy tile
Delete tile
Recently filed documents
Close ELO Dropzone

Fig. 393: ELO Dropzone context menu

The ELO Dropzone context menu appears.

2. Click the *Edit mode for personal tiles* menu item.

Alternative: Click *Edit mode for global tiles* to create a global search tile.

Alternative: Click the button with the pencil icon.

ELO Dropzone switches to edit mode. The sand-colored background indicates that you are in edit mode.

3. Open the ELO Dropzone context menu.

4. Click the *Add new tile* menu item.
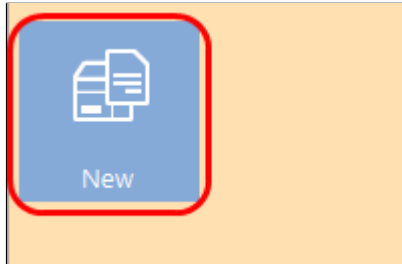
Fig. 394: New tile in ELO Dropzone

A new tile appears.

Defining a search tile

1. Double-click the new tile.

Fig. 395: 'Configure tile' dialog box

The *Configure tile* dialog box appears. The configuration opens at the *Type* tab.
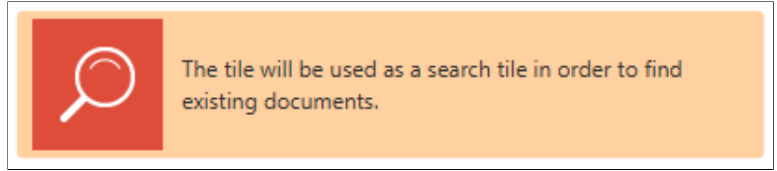
Fig. 396: 'Search tile' tile type

2. Click the magnifying glass icon.

The *Search tile* type is selected.

Display

1. Click the *Display* tab.

Fig. 397: 'Display' tab

The *Display* tab appears.

2. Click the *Name* field and enter a name for the search tile.

3. Click the *Description* field and enter what you want to use the tile for.

4. Click the gray tile to change the tile icon.

Fig. 398: Tile icons

The available tile icons appear.

5. Click an icon.

6. Click the color square to change the color of the tile.

Fig. 399: Tile colors

The available colors appear.

7. Click a color.

You have defined the tile name, tile icon and tile color.

Form 1. Click the *Form* tab.

Fig. 400: 'Form' tab

The *Form* tab appears.

2. Click one of the available keywording forms.

You have linked the tile to a keywording form.

Rows

1. Click the *Rows* tab.
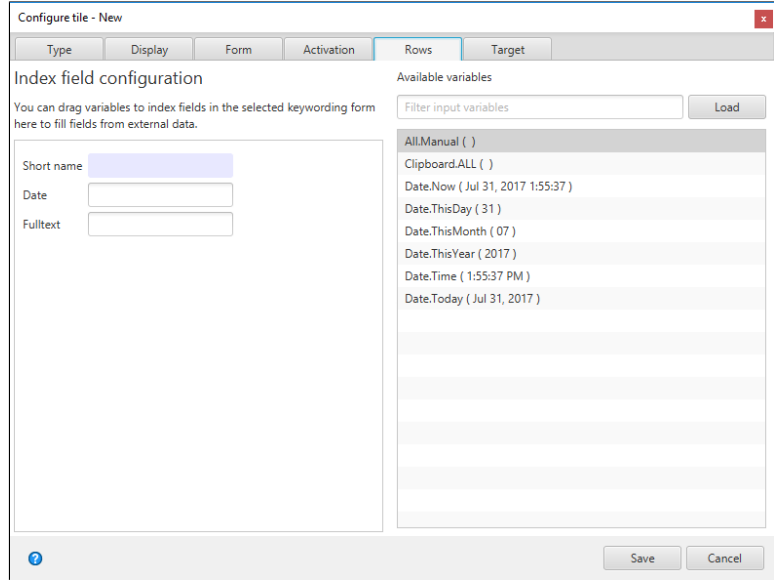
Fig. 401: 'Rows' tab

The *Rows* tab appears. You see all index fields of the selected keywording form on the left-hand side. You see all the *Available variables* on the right-hand side.

Information: Load a sample document via the *Load* button to import additional variables.

Optional: Use the index fields of the selected keywording form to specify search terms. You have the following options:

- Enter a search term.
- Drag a variable to an index field.

Information: You can use a combination of both methods.

Target

1. Click the *Target* tab once you have defined the search terms.
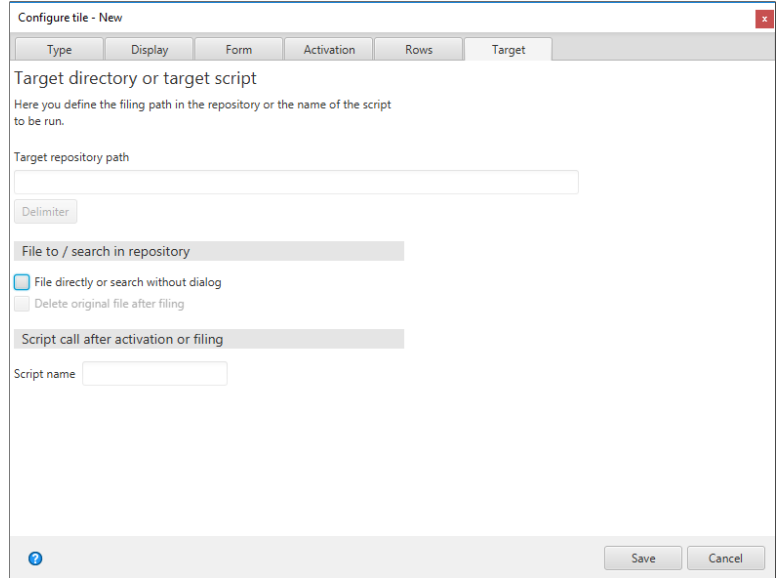
Fig. 402: 'Target' tab

The *Target* tab appears.

Optional: If the *File directly or search without dialog* option is enabled, the search is automatically run with the information entered to the *Rows* tab. The search results appear directly in ELOoffice.

When the option is disabled, the *Search keywording* dialog box appears in ELOoffice when you activate the search tile. In this case, you can enter or change search terms manually.

2. Click *Save* once you have made all changes.

The *Configure tile* dialog box closes. The new search tile appears in ELO Dropzone. ELO Dropzone remains in edit mode.

3. Right-click the context menu in ELO Dropzone to finish editing.

You have now created a search tile and can run a search from it.

Alternative: Activation via keyboard shortcut

The *Activation* tab provides additional options for defining tiles. The choice of options depends on the selected tile type.

You can create keyboard shortcuts for search tiles. The following applies:

- The keyboard shortcut activates the search.
- The search is carried out and the respective contents are transferred as a variable.

⚠️ **Please note**: Keep in mind when selecting keyboard shortcuts that some may already be in use by other programs.

You can choose one of the following actions from a drop-down menu when setting up a keyboard shortcut for the search.

- Apply Clipboard contents
- Copy with CTRL+C
- Copy with double-click
- OCR window contents

Apply Clipboard contents

The contents of the Windows Clipboard are transferred.

1. Select the menu item *Apply Clipboard contents* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.

Activation via keyboard shortcut for searches and scripts

Apply clipboard contents ▼   ALT+CTRL+U
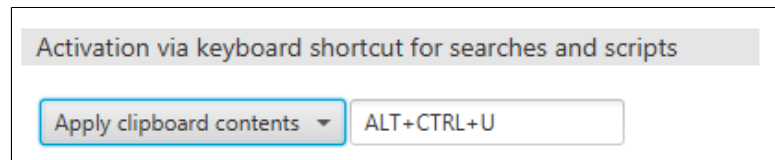
Fig. 403: 'Activation via keyboard shortcut' area; apply Clipboard contents

The keyboard shortcut is displayed in the field.

4. Switch to the *Rows* tab.

5. Assign an index field with the variable *{Clipboard.ALL}* to the short name in the *Entries to index fields* area. In this example, we want to search the *Short name* index field.
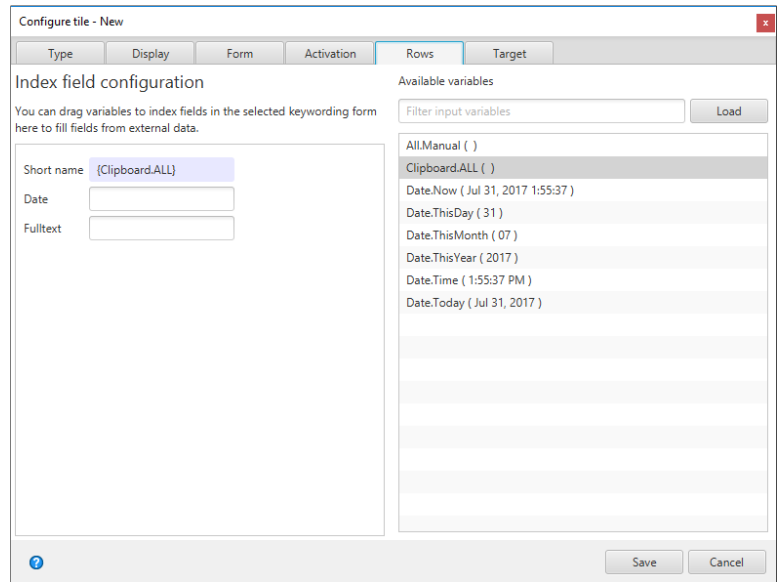
Fig. 404: 'Rows' tab; entering the variable

You have now activated the search from the *Clipboard*.

Copy with CTRL+C

Simulates a copy process with CTRL+C.

1. Select the menu item *Copy with CTRL+C* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
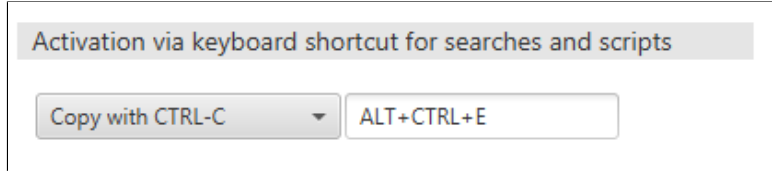
Fig. 405: 'Activation via keyboard shortcut' area; copy with CTRL+C

The keyboard shortcut is displayed in the field.

4. Switch to the *Rows* tab.

5. Assign an index field with the variable *{Clipboard.ALL}* to the short name in the *Entries to index fields* area.

You have now activated the *CTRL+C* search.

Copy with double-click

Simulates a copy process with double-click from the current mouse position.

1. Select the menu item *Copy with double-click* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
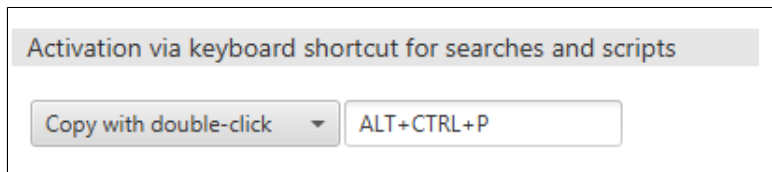
Fig. 406: 'Activation via keyboard shortcut' area; copy with double-click

The keyboard shortcut is displayed in the field.

4. Switch to the *Rows* tab.

5. Assign an index field with the variable *{Clipboard.ALL}* to the short name in the *Entries to index fields* area.

You have now activated the *double-click* search.

Information: Please keep in mind that a double-click simply highlights a word at the cursor position. Therefore, it is not possible to search for multiple words.

OCR window contents

Evaluates the current window contents, e.g. of TIFF or JPG images, using OCR.

1. Select the menu item *OCR window contents* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
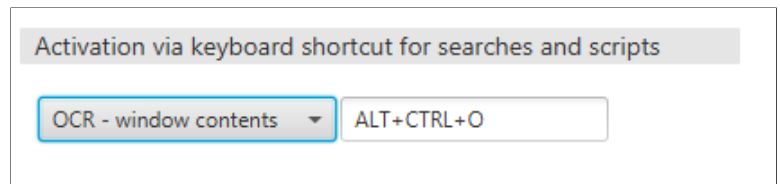
Fig. 407: 'Activation via keyboard shortcut' area; OCR window contents

The keyboard shortcut is displayed in the field.

4. Switch to the *Rows* tab.

5. Assign an index field with the variable *{Clipboard.ALL}* to the short name in the *Entries to index fields* area.

You have now activated the search using *OCR window contents*.

Setting up a script tile

Adding a new tile

1. Right-click the middle window of ELO Dropzone.

Fig. 408: ELO Dropzone context menu

The ELO Dropzone context menu appears.

2. Click the *Edit mode for personal tiles* menu item.

Alternative: Click *Edit mode for global tiles* to create a global script tile.

Alternative: Click the button with the pencil icon.

ELO Dropzone switches to edit mode. The sand-colored background indicates that you are in edit mode.

3. Open the ELO Dropzone context menu.

4. Click the *Add new tile* menu item.

Fig. 409: New tile in ELO Dropzone

A new tile appears.

Information: There are only a few settings that you can make when configuring a script tile. Only the tabs *Type*, *Display*, *Activation* and *Target* are available.

Defining a script tile

1. Double-click the new tile.
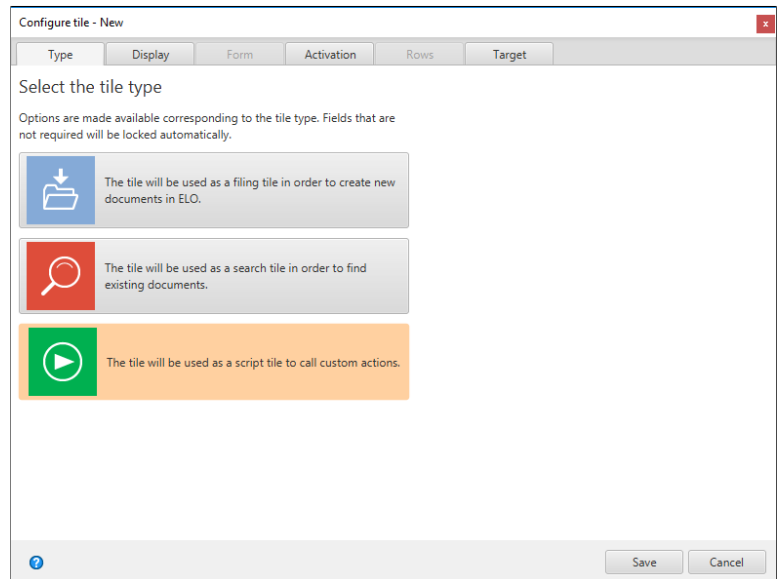
Fig. 410: 'Configure tile' dialog box

The *Configure tile* dialog box appears. The configuration opens at the *Type* tab.
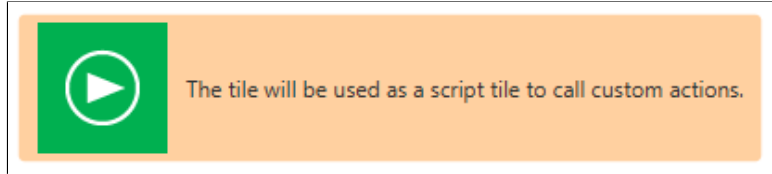
Fig. 411: 'Script tile' tile type

2. Click the icon for script tiles.

The *Script tile* type is selected.

Display

1. Click the *Display* tab.
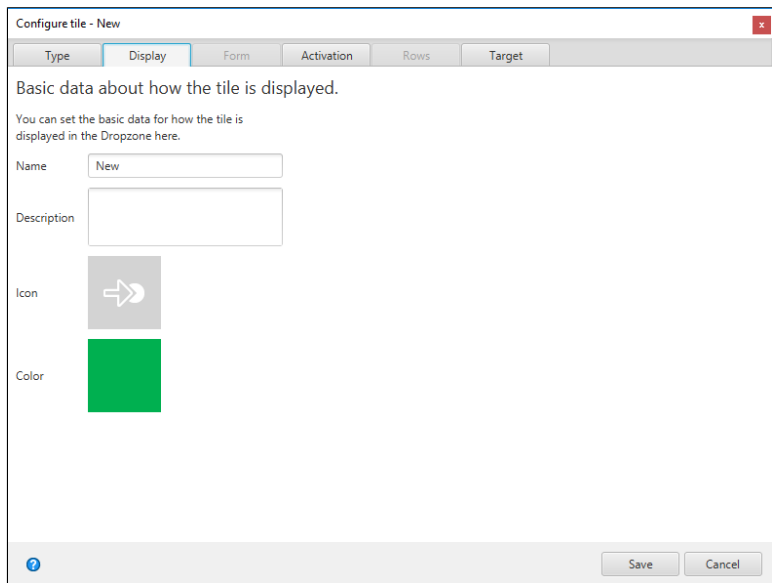
Fig. 412: 'Display' tab

The *Display* tab appears.

2. Click the *Name* field and enter a name for the script tile.

3. Click the *Description* field and enter what you want to use the tile for.

4. Click the gray tile to change the tile icon.

Fig. 413: Tile icons

The available tile icons appear.

5. Click an icon.

6. Click the color square to change the color of the tile.

Fig. 414: Tile colors

The available colors appear.

7. Click a color.

You have defined the tile name, tile icon and tile color.

Activation

The *Activation* tab provides additional options for defining tiles. The selection of options depends on the selected tile type.

Keyboard shortcuts can be entered for script tiles. The following applies:

- The keyboard shortcut activates the script.

- The selected action is run and the respective contents are transferred as a variable.

⚠ Please note: Keep in mind when selecting keyboard shortcuts that some may already be in use by other programs.

You can choose one of the following actions from a drop-down menu when setting up a keyboard shortcut for the script.

- Apply the Clipboard contents
- Copy with CTRL+C
- Copy with double-click
- OCR window contents

Apply Clipboard contents

The contents of the Windows Clipboard are transferred.

1. Select the menu item *Apply Clipboard contents* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
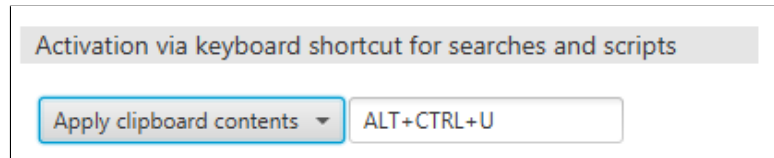
Fig. 415: 'Activation via keyboard shortcut' area; apply Clipboard contents

The keyboard shortcut is displayed in the field.

4. Switch to the *Target* tab.

5. Enter the desired script name to the *Script call after activation or filing* area. Make sure you enter the name of the method and not the file name of the script.
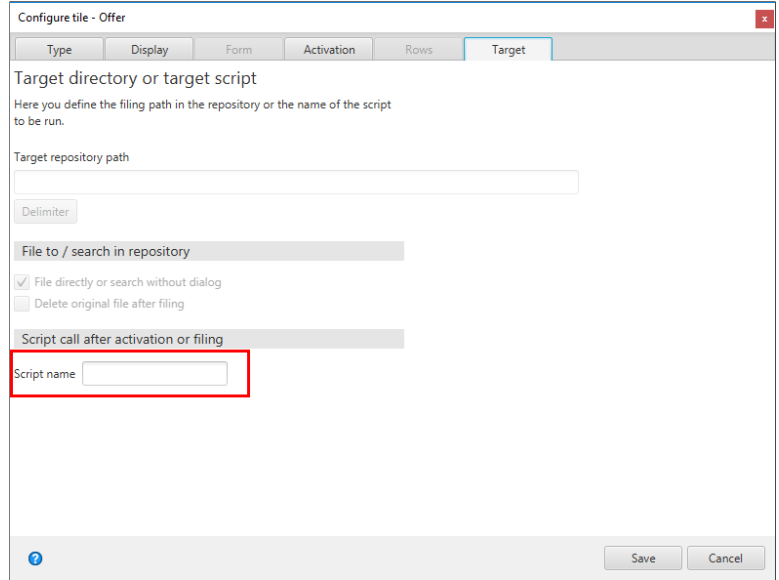
Fig. 416: 'Target' tab: Enter the script name

You have now activated the script from the *Clipboard*.

Copy with CTRL+C

Simulates a copy process with CTRL+C.

1. Select the menu item *Copy with CTRL+C* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
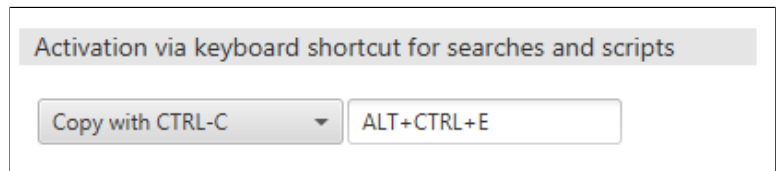
Fig. 417: 'Activation via keyboard shortcut' area; copy with CTRL+C

The keyboard shortcut is displayed in the field.

4. Switch to the *Target* tab.

5. Enter the desired script name to the *Script call after activation or filing* area.

You have now activated the script via *CTRL+C*.

Copy with double-click

Simulates a copy process with double-click from the current mouse position.

1. Select the menu item *Copy with double-click* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
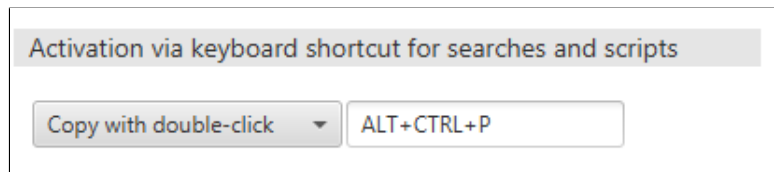
Fig. 418: 'Activation via keyboard shortcut' area; copy with double-click

The keyboard shortcut is displayed in the field.

4. Switch to the *Target* tab.

5. Enter the desired script name to the *Script call after activation or filing* area.

You have now activated the script via *double-click*.

OCR window contents

Evaluates the current window contents, e.g. of TIFF or JPG images, using OCR.

1. Select the menu item *OCR window contents* in the drop-down menu of the *Activation via keyboard shortcut for search and scripts* area.

2. Click the field in the *Activation via keyboard shortcut for search and scripts* area.

The cursor blinks in the field.

3. Enter the desired keyboard shortcut.
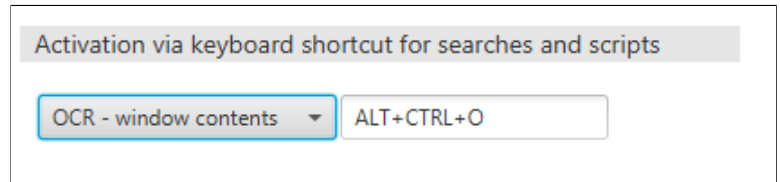
Fig. 419: 'Activation via keyboard shortcut' area; OCR window contents

The keyboard shortcut is displayed in the field.

4. Switch to the *Target* tab.

5. Enter the desired script name to the *Script call after activation or filing* area.

You have now activated a keyboard shortcut for scripts via *OCR window contents*.

Script call   The name of the executing script can be stored in the *Target* tab.
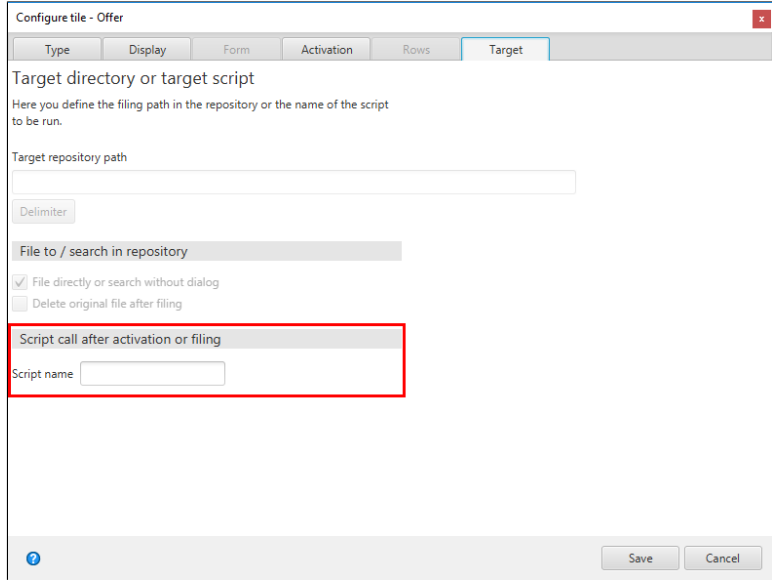
Fig. 420: Configuring a script tile

1. Enter the desired script call to the *Script call after activation or filing* area.

The script call uses the following convention:

```
JS.<name>
```

The script files must be located in the script folder C:\ProgramData\ELO Digital Office\ELOoffice\Postbox\ELOScripts.

A script file can include multiple functions for multiple script tiles.

Example   The script call *JS.Test* activates the following function:

```
function fromVBS_Test(param) {

workspace.showInfoBox("ELO", param);

}
```

⚠️ **Please note**: Because there is no scroll function ELO Dropzone, there is a limit to the number of tiles you can create. The number of tiles you can create depends on your screen resolution settings.

Regular expressions

You can also create additional variables with regular expressions in ELO Dropzone that can be used to define tiles. Regular expressions can be used as filter criteria in the text search by comparing the text with the pattern of the regular expression. For example, it is possible to select all words from a list of words that start with the letter S and end in the letter D – without having to explicitly specify the words in between or the number of letters. This section guides you through the wizard for creating regular expressions.

Opening the wizard

Open the wizard for regular expressions as follows:

1. Open the ELO Dropzone context menu.

Edit mode for personal tiles
Edit mode for global tiles
Finish editing
Regular expressions
System settings
Add new tile
Edit tile
Copy tile
Delete tile
Recently filed documents
Close ELO Dropzone
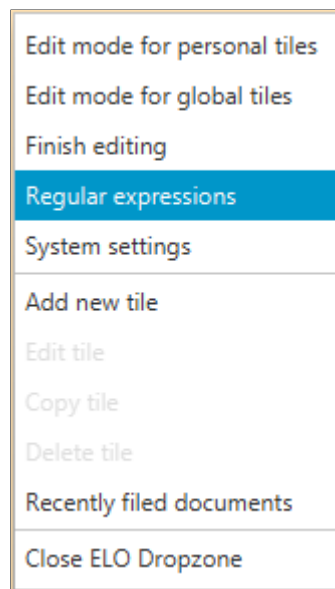
Fig. 421: ELO Dropzone context menu

2. Click the *Regular expressions* menu item.
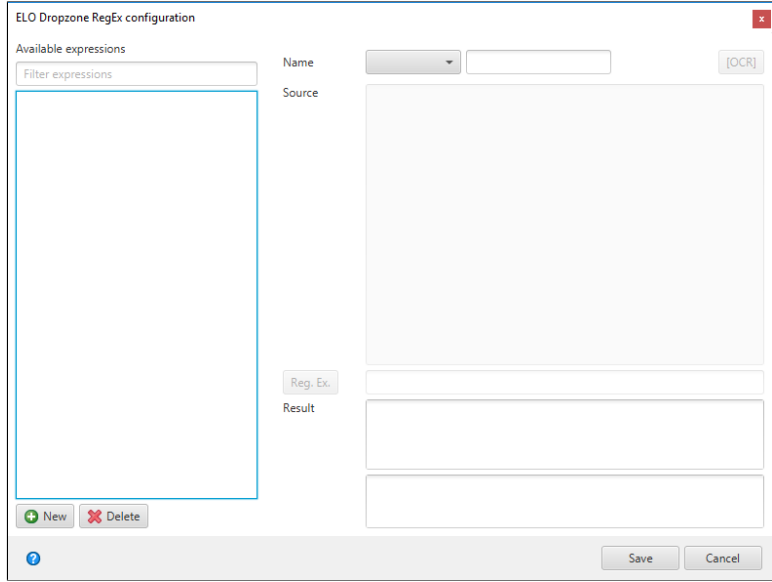
Fig. 422: 'ELO Dropzone RegEx configuration' dialog box

The *ELO Dropzone RegEx configuration* wizard for creating regular expressions opens.

ELO Dropzone

Available expressions
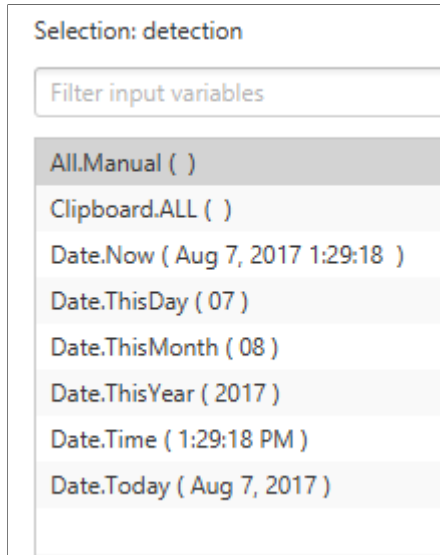
Fig. 423: 'Available expressions' column

You see all regular expressions defined so far in the *Available expressions* column.

New
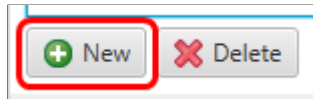
Fig. 424: 'New' button

Use the *New* button to add a new regular expression.

Delete
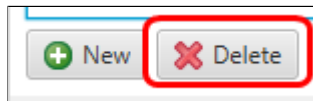
Fig. 425: 'Delete' button

Use the *Delete* button to delete the selected regular expression.

Type, name and source
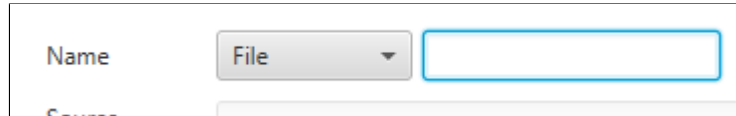
Fig. 426: 'Name' input field

Select the type of regular expression and enter a name to the *Name* field. Use the *Source* area to load sample documents or enter sample information.

You can select the following types from the drop-down menu.

Text: Refers to information from the full text contents of a file (PDF or Microsoft Word document). To see which information can be read, drag a sample document to the *Source* area. **Alternative**: Copy the required full text contents to the *Source* area.

Title: Refers to information that can be extracted from the window titles of all running programs. The extracted window titles are displayed in the *Source* field.

File: Refers to a file path. To see which information can be read, drag a sample document to the *Source* area.

Clipboard: Refers to information that can be extracted from the contents of the Windows Clipboard. The contents of the Windows Clipboard are displayed in the *Source* area.

OCR: If you click *[OCR]*, you can also evaluate the current window contents with OCR.

1. Open the OCR-readable file (e.g. a TIFF image) you want to evaluate.

2. Click *[OCR]*.

3. Click the window contents of the file.

THE OCR text is displayed in the *Source* field.

Reg. Ex. and result

Fig. 427: 'Reg. Ex.' area

Put together the desired regular expression in the *Reg. Ex.* area once you have selected the name, entered the name and loaded a sample document.

You have the following options:

- Entries via a submenu
- Direct entry via the *Reg. Ex.* input field

The following will describe the path via the submenu:

1. Click the *Reg. Ex.* button to create the regular expression.
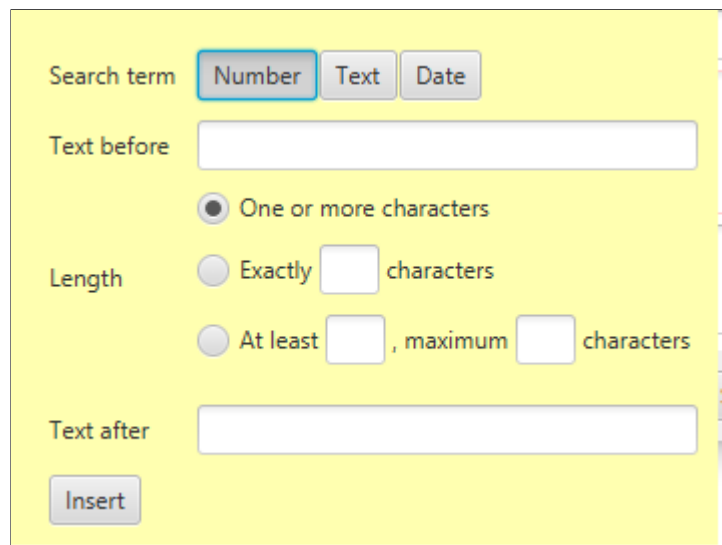
Fig. 428: Submenu for regular expressions

The submenu for creating the regular expression opens.

2. Determine the type of character (numbers, text or date) that you are looking for using the buttons in the *Search term* area. Different settings area available depending on the selected type.

Fig. 429: Examples for a search for the name of a website

3. Define the regular expression via the fields in the submenu.

Example To search for the name of a website that you know uses a specific domain, define the expression as in the figure above.

4. Click *Insert* to apply the regular expression that you created.

Fig. 430: Regular expression in the 'Reg. Ex.' field

The regular expression is entered to the *Reg. Ex.* input field.

Information: Click the area below the submenu if you want to stop creating the regular expression.

Fig. 431: Result for the regular expression entered

In the *Result* area, you see the search result found for the regular expression you entered.

Information: This only returns the character string determined via the part of the regular expression in parentheses.

Optional: Manually adjust the regular expression in the *Reg. Ex.* input field until the regular expression returns the desired result.

Save

5. Click *Save* to save the regular expression once you have defined the regular expression.

The *ELO Dropzone RegEx configuration* dialog box closes.

Using tiles

Newly defined regular expressions are saved to the ELO repository in the extra text of the *Global* folder.

(//Administration//Dropzone//Global)

The regular expressions can be used to define tiles as additional variables.

Information: If required, load a sample document to see all existing variables.

Additional display
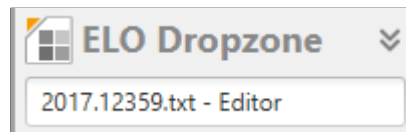
Fig. 432: Display in the header area of ELO Dropzone

In the header area of ELO Dropzone, you see the window title of the last program you opened if it matches the last regular expression you created for the *Title* type.

Using filing tiles

The following section describes how to file documents to ELOoffice with the help of an ELO Dropzone filing tile.

1. Drag a document to the desired filing tile.
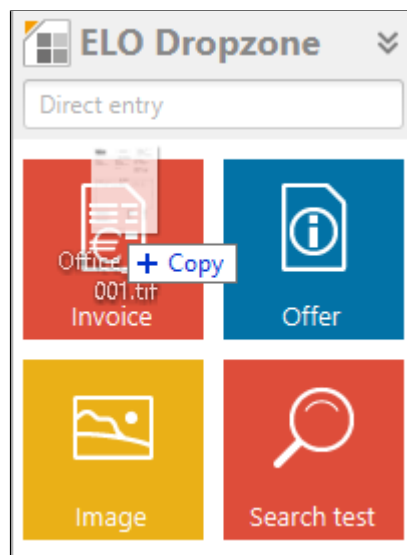
Fig. 433: Dropping a document on a tile

For example, if you drag a Word document to a filing tile, Word opens briefly to analyze the document.

The document is filed to the repository if all required fields were recognized.
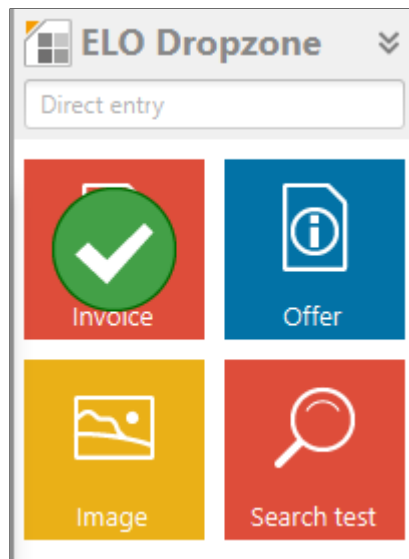
Fig. 434: Document filed successfully

The check mark indicates that the document was filed to the repository.

Alternative: The keywording form opens if not all required fields were recognized. Once you have completed the mandatory fields and clicked *OK* to confirm, the document is filed to the repository.

Information: Click a tile to open the repository at the last document filed with that tile.

Using search tiles

The following section describes how to run the search in ELOoffice with the help of an ELO Dropzone search tile.

You have configured a search tile in ELO Dropzone as described in the *Setting up a search tile* section. You can now trigger a search by clicking the set up search tile.
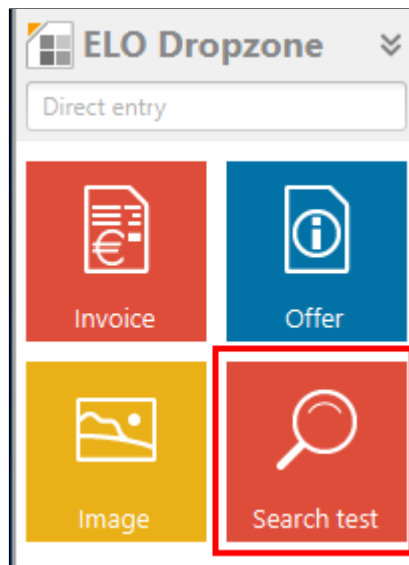
Fig. 435: Triggering a search via the search tile

1. Click the search tile you set up.
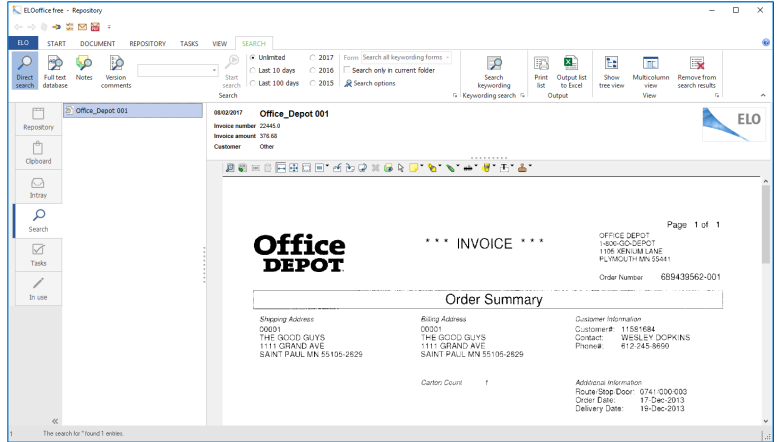
Fig. 436: Result of a search query triggered via the tile

The search result is displayed in ELOoffice.

Activation via keyboard shortcut

Three keyboard shortcuts are available to you for performing searches with ELO Dropzone. To do so, you must have configured a search tile in ELO Dropzone as described in the *Setting up a search tile* section. You entered the keyboard shortcut in the *Activation via keyboard shortcut for search and scripts* area.

Applying the Clipboard contents

1. Press CTRL+C to select a search term in any application with machine-readable text (Microsoft Word, PDF-Reader, browser, ...).

The search term has now been placed on the Windows Clipboard.

2. Enter the keyboard shortcut that you previously defined for *Apply Clipboard contents* in the search tile.

The search result is displayed in the client.

Copy with CTRL+C

1. Press CTRL+C to select a search term in any application with machine-readable text (Microsoft Word, PDF-Reader, browser, ...).

2. Enter the desired keyboard shortcut that you defined for *Copy with CTRL+C* in the search tile.

ELO Dropzone simulates copying with CTRL+C. The search result is displayed in the client.

Copy with double-click

1. Mouse over a search term in any application with machine-readable text (Microsoft Word, PDF-Reader, browser, ...).

2. Enter the desired keyboard shortcut that you defined for *Copy with double-click* in the search tile.

ELO Dropzone simulates a double-click. The word is selected and applied as a search term. The search result is displayed in the client.

Notes for the ELO Dropzone administrator

Administration folder

The module automatically creates a folder named *Dropzone* within the Administration folder in the ELO repository. Child folders are created within this folder for individual users, which then contain the settings for individual tiles. The settings in this folder can be exported so that other users have access to them.

(//Administration//Dropzone//User.<User-ID>)
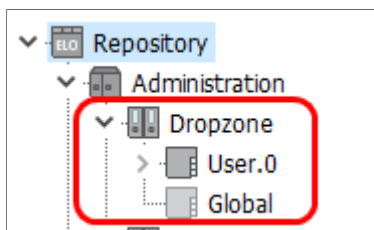
Fig. 437: Administration folder in the ELO repository

Please note: In order to file documents via ELO Dropzone, the *Dropzone* folder must be stored in the Administration folder. If not, add the folder manually.

Configuring ELO Dropzone

Make general settings for all ELO Dropzone tiles under *System settings* in the context menu (see *Installation and configuration* section). Alternatively, you can enter configuration settings to the Administration folder in ELOoffice. You can also configure additional settings here that are not available in the *System settings* dialog box.

1. Open the ELO Dropzone Administration folder in ELOoffice.

- *(//Administration//Dropzone//Global)* for global settings
- *(//Administration//Dropzone//User.<user ID>)* for personal settings

2. Open the keywording form for the folder and switch to the *Extra text* tab, then enter various parameters there.

Start ELO Dropzone minimized: In the keywording form, switch to the *Extra text* tab and enter: `start=minimized`. By default, ELO Dropzone starts expanded, the parameter for this is: `start=normal`.

Select an animation mode: In the keywording form, switch to the *Extra text* tab and enter: `animation=<setting>`. 0, 6, and 8 are possible values for this setting. If 0, ELO Dropzone determines an appropriate animation mode when maximizing or minimizing its display. If 6, the size is continually recalculated during the animation. If 8, there is no animation and the window immediately switches from expanded to collapsed, or vice versa.

PDF printer output directory: In the keywording form, switch to the *Extra text* tab and enter: `Printer.Dir=<PDF printer directory>`. This parameter specifies the PDF printer output directory. It does not need to use the ELO PDF Printer. Any source for PDF files is allowed.

PDF and TIFF file OCR evaluation: Open the *Extra text* tab in the keywording form and enter: `maxfulltextpages=<setting>`. Use this parameter to determine the maximum number of pages per document to be processed during OCR preprocessing. Recommended setting: ten pages.

Information: To comment out a line, enter a # in front of it.

Restoring deleted tiles	You can restore deleted tiles in two steps. Click *Repository > Show deleted entries* in the ELO client. The tile configuration folder reappears in the Administration folder, but it will be shown in square brackets, meaning it is not currently active. Click *Restore* in the same group. Result: After restarting ELO Dropzone, the folder is reactivated in the repository and the tile is restored.
Deletions	Monitored folders that still contain data will not be deleted along with their tile.
Tiles: global/personal	Administrators create global tiles, which are seen by all users. Users create personal tiles. These tiles are only seen by those users specifically. Global tiles are always shown at the top of the Dropzone, while personal tiles will appear further down.

Language	The language of ELO Dropzone will depend on your language settings in ELO. If the settings are not recognized, the fallback language in ELO is English.
Log files	To generate log files for ELO Dropzone, you need to copy *ELO Dropzone.log* from the Dropzone installation directory to the corresponding Windows user directory.
	The default path for the Dropzone installation directory is `C:\Program Files (x86)\ELOoffice\Dropzone`.
	A sample path for the Windows user directory is `C:\Users\Brent Byte`.
	The next time ELO starts, ELO Dropzone creates multiple log files.
Java	ELO Dropzone includes a self-contained version of the Java Runtime Environment, which is started when you run ELO and receives the configuration and functions from ELO.

ELO Scan&Archive

ELO Scan&Archive speeds up the scanning and filing process. The module allows you to read information from scanned documents using OCR and save it automatically to the ELO repository. Many documents, such as invoices from your principal supplier, leases or delivery notes will have a similar pattern. You can create templates and assign document types to recurring documents. You can define different zones for each document type, which are then read automatically.

ELO Scan&Archive performs the following tasks for you:

- Classification and keywording with OCR
- Automatic filing to the ELO repository
- Passing on to the script interface for processing

Requirements

Before you use ELO Scan&Archive, you need to take note of the following:

- TIFF and PDF are the only file formats currently supported.

- You need to have high-quality images for OCR to work properly. Black and white images should be scanned at 300 dpi resolution, and color images can be scanned at 200 dpi maximum.

- If you have documents with multiple pages, OCR is only performed on the first page of the scanned document.

- In order to define text rules, you need an advanced understanding of pattern recognition rules in character strings.

Starting ELO Scan&Archive

1. To start ELO Scan&Archive, go to the *ELO menu > System settings > Configure ELO Scan&Archive*.
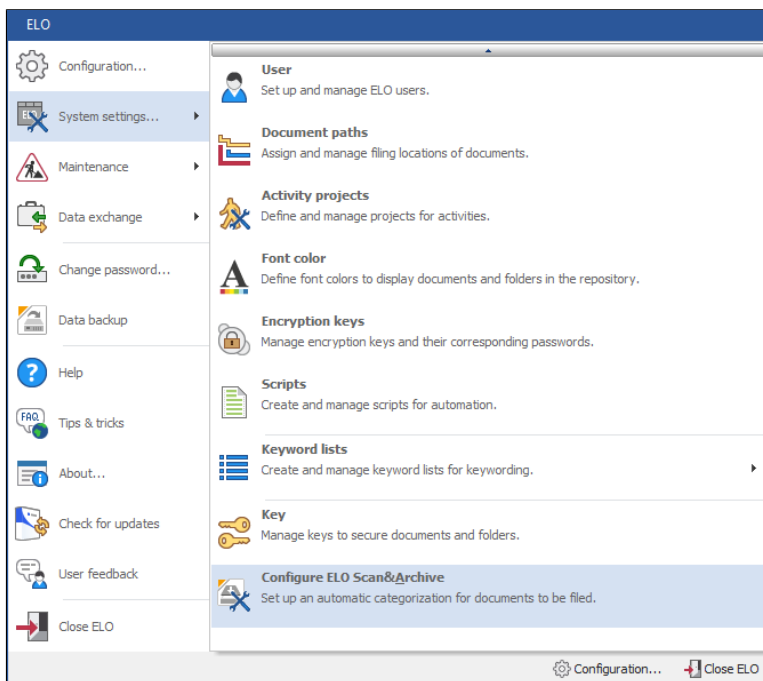
Fig. 438: 'Configure ELO Scan&Archive' dialog box

2. Click the entry *Configure ELO Scan&Archive*.
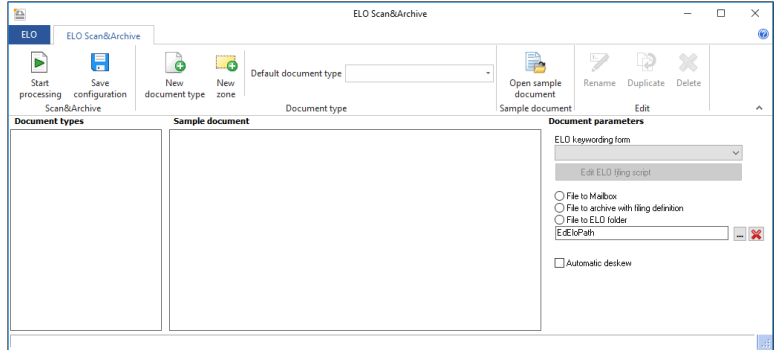
Fig. 439: 'ELO Scan&Archive' program interface

The ELO Scan&Archive configuration program starts. When you run ELO Scan&Archive for the first time, it starts out empty.

Alternative: Start the ELO Scan&Archive module outside of the ELO client. The file *ELOCONNECTOR.exe* is located in the installation folder of ELOoffice. This module differs from the integrated version in two ways: Firstly, it enables you to monitor an additional folder on the Windows file system besides the Intray. Secondly, you can check in the ELO client whether the ELO Scan&Archive configuration is how you need it to be. However, you need to close the integrated module first before you can check the configuration in the client.

Configuration
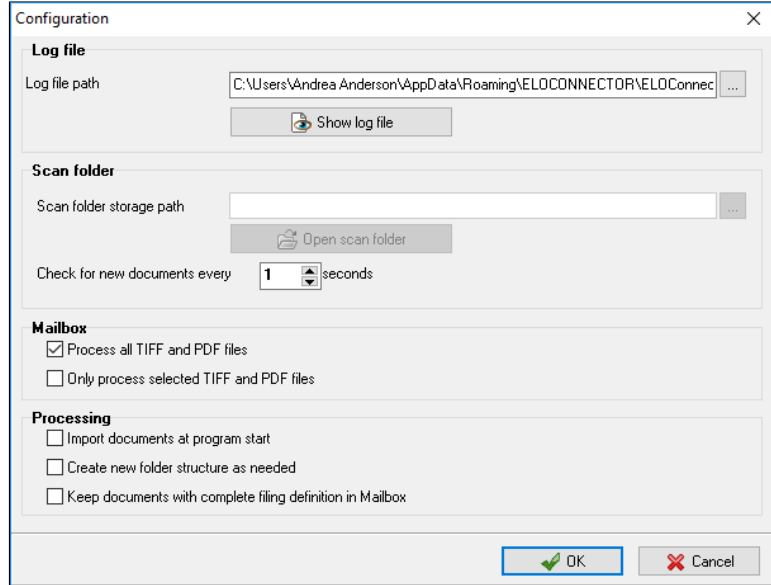
Fig. 440: 'Configuration' dialog box in ELO Scan&Archive

Open the ELO Scan&Archive configuration from the ELO menu on the ribbon.

Log file

Log file storage path: Enter a log file for recording events and actions when documents are processed. Please note that log files may become quite large.

Show log file: Click this button to open the log file.

Scan folder

Scan folder storage path: Define a directory that ELO Scan&Archive checks regularly for scanned documents to be processed. This enables you to scan to a shared directory on the network from anywhere, as well as to transfer scanned files to this directory and to process them with ELO Scan&Archive.

Open scan folder: This button opens the scanned documents directory. You can inspect the documents in this directory before they are processed.

Check for new documents every ... seconds: Enter how often you want the directory to be monitored.

Intray	**Process all TIFF and PDF files**: Process all TIFF and PDF files from the ELO Intray.
	Only process selected TIFF and PDF files: Only process TIFF and PDF files that have been selected in the ELO Intray.
Processing	**Import documents at program start**: Use this option to automatically import the new documents to the repository when you start ELOoffice.
	Create path automatically: If a folder does not exist in the repository when a document is filed, it will be created automatically.
	Keep documents with complete filing definition in Intray: Keep documents in the Intray even if they are ready to be filed to the repository.

Information: There are some settings that you can only configure in the external ELO Scan&Archive application *ELOCONNECTOR.exe*. This includes the option to define a scan folder on the Windows file system and the option to import documents when you start the program.

ELO Scan&Archive interface

The following section explains the ELO Scan&Archive program interface.

Functions

You have access to the following functions on the ribbon:
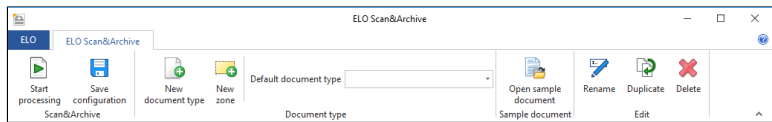
Fig. 441: ELO Scan&Archive ribbon

Start processing: Start processing documents in the Intray.

Save configuration: Save the configuration settings after every change you make.

New document type: Define a new document type.

New zone: Define a new zone on the selected sample document.

Default document type: This document type is assigned to documents that have not yet been categorized.

Open sample document: Open a sample document from the Windows file system for the active document type.

Rename: Rename a selected entry in the list of *Document types*.

Duplicate: Copy the selected document type and paste its settings into the list under a different name. Adjust the settings to suit the new document type.

Delete: Delete a selected entry from the *Document types* area.

Document types
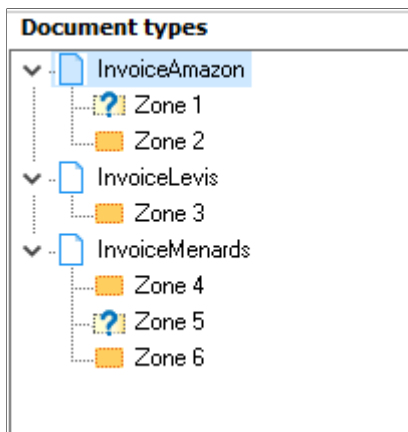
Fig. 442: 'Document types' window in ELO Scan&Archive

The *Document types* window contains a list of all the document types that were created as well as the defined zones.

Sample document in viewer pane
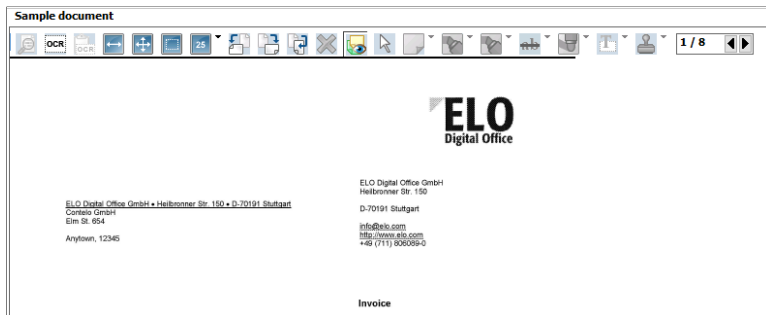
Fig. 443: 'Sample document' window in ELO Scan&Archive

The *Sample document* for the selected document type is shown in the ELO Scan&Archive viewer pane. The toolbar above the viewer pane gives you access to various editing options.

Document parameters

ELO keywording form

Basic entry ▾

📝 Edit ELO filing script

○ File to Mailbox
○ File to archive with filing definition
◉ File to ELO folder

¶DemoArchive¶Demo¶Documentation¶Sample ⌷ | ... | ❌

☐ Automatic deskew

Zone parameters

☐ Classification zone   OCR ⤴

Identified text

Text pattern

[   ] 🔧

Transfer text segment   1 ⬆⬇

Apply to index field

<Short name> ▾

Fig. 444: 'Document parameters' and 'Zone parameters' in ELO Scan&Archive

Enter the parameters for the sample document and the zones to the fields on the right.

Document parameters

ELO keywording form: Select the keywording form from the drop-down menu that you want to link to each document type.

Edit ELO filing script: Use a filing script to edit a document when it is being filed. Clicking the button opens the *Edit script* dialog box.

File to Intray: The document type is transferred to the Intray.

File with filing definition: Use the ELO filing definition to file document types to a precise location ELO. Find more information about this feature in the chapter on keywording forms and filing definitions.

File to ELO folder: Select the filing path in the field below this option. Click the button to the right of the field to select the filing path. The *Select folder* dialog box opens. To remove the filing path, click the delete button.

Automatic deskew: Use this option to automatically realign the scanned documents. This helps to reduce distortion in the scanned images, which can create errors during text recognition.

Zone parameters

Classification zone: The zones defined as classification zones are used to automatically recognize the document type. Define the rules used to assign a document to a specific document type.

OCR: Click this button to enable the text recognition function.

Identified text: The parts of the text recognized in the classification zone after an OCR run are shown here.

Text pattern rule: Enter the text import rule here. Click the tool button to open the *Text pattern rule* dialog box for defining a text import rule.

Transfer text segment: Select the line in the *Identified text* area that you want to import as the text segment. The selected text is transferred to the field.

Reference text: If you selected the *Classification zone* option, the specifications for text recognition are entered to the *Reference text* field.

Apply to index field: This drop-down menu appears when you have selected a keywording form. Select the index field that you want to transfer the defined text segment to.

Configure ELO Scan&Archive

Preparation

Before you start with the configuration, pick out a scanned document for a frequently used document type, such as invoices from your principal supplier. We recommend that you create a separate Windows directory for these documents. This makes it easier for you to define a document type for each sample document.

Add document type

Now create a document type based on your sample document.

1. Click the *New document type* button.
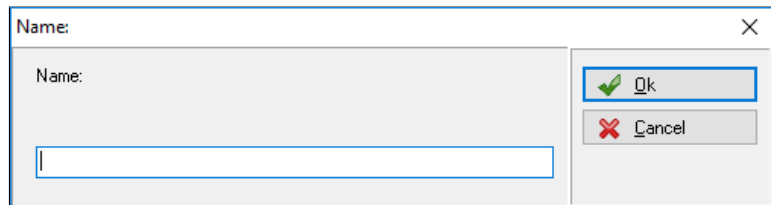
Fig. 445: 'Name' dialog box in ELO Scan&Archive

The *Name* dialog box appears.

2. Enter a meaningful name for the document type, such as the type of document and name of the supplier, and click *OK* to confirm.

The new document type appears in the list of *Document types* on the left.

3. Click the *Open sample document* button.

4. In the *Select sample document* dialog box, select the appropriate document from the Windows file system.

The sample document opens in the viewer pane of the ELO Scan&Archive configuration.

You need to define at least one unique identifier for each document type.

5. Click the *New zone* button to define a zone on the sample document.

6. Enter an appropriate name for the zone, such as *Invoice number* or *Date* and click *OK* to confirm.

7. Click the *OCR* button on the toolbar above the *Sample document* in the viewer pane.

8. Define a classification zone on the sample document. Drag the mouse to draw a rectangular field over the area you want to select.
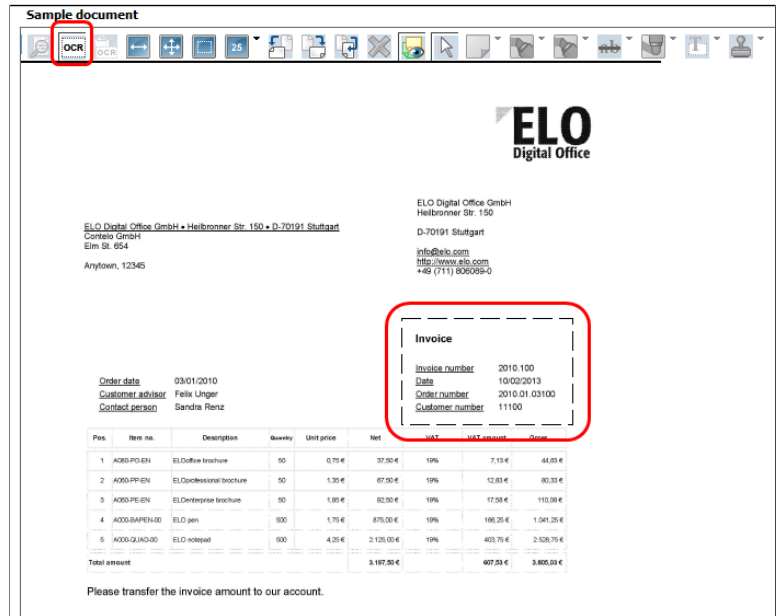
Fig. 446: Defining a zone on a sample document in ELO Scan&Archive

In our example, we want to extract the invoice number and transfer it to the index field in the appropriate keywording form.

9. Select the keywording form you want to use from the area on the right. We have used the *Invoice* keywording form.

10. Define the filing path for this document type in the File to ELO folder option field.

The *Select folder* dialog box opens.

11. Select the filing path and click OK.

12. As we want to transfer the invoice number straight to an index field, we do not select the Classification zone check box.

13. In the Zone parameters area, click the OCR button.
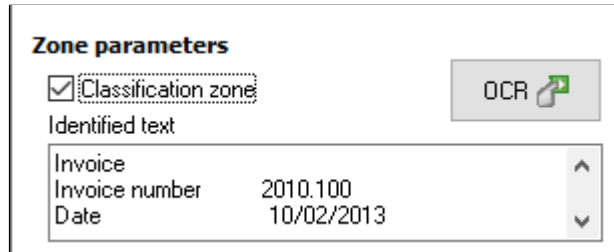
Fig. 447: 'Zone parameters' area in ELO Scan&Archive

The recognized text is transferred to the *Identified text* field.

14. Now click the tool button to define the text import rule for extracting the text segment.
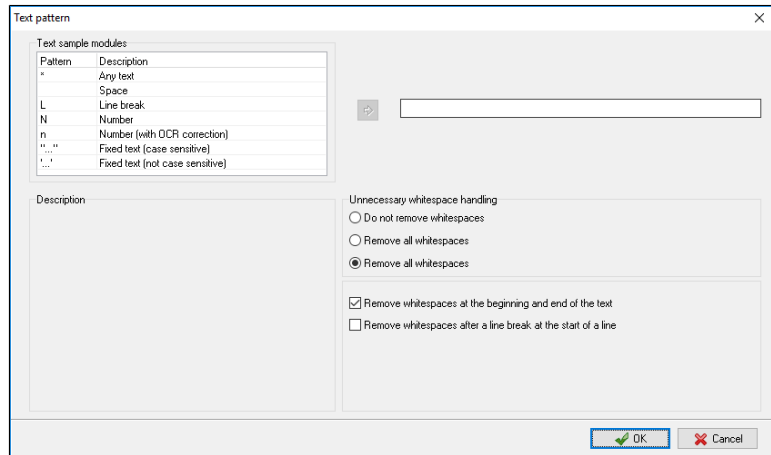
Fig. 448: 'Text pattern rule' dialog box in ELO Scan&Archive

The *Text pattern rule* dialog box appears.

Define the text transfer pattern in this dialog box. The text recognized during OCR is also used to identify the document in a classification zone. If there are text patterns that match the recognized text, the document can be assigned a document type. This document type is archived using defined rules.

Text pattern modules: Here is an overview of the text patterns that can be used to process recognized text. Use the placeholders to create a text pattern. After selecting a pattern, you can click the right-facing arrow to transfer it to the input field on the right.

Unnecessary whitespace handling: Define how whitespaces are handled within the text.

Delete whitespaces at the beginning and at the end of a text: Remove whitespaces before and after recognized text.

Remove whitespaces after a line break at the start of a line: Remove the whitespaces after a line break at the beginning of the next line.

15. Once you have defined an appropriate text pattern rule, click the OCR button again.

Fig. 449: Text pattern rule in ELO Scan&Archive

The individual text segments are transferred to the field below *Transfer text segment*. The invoice number has been extracted as a separate segment.

16. Click the line in the field that contains the text segment you want and then click the Save configuration button.

You have created your first document type. The next time you process a batch of documents with ELO Scan&Archive, the documents that match that document type will be filed to the ELO repository.

Using ELO Scan&Archive

Information

Once you have configured ELO Scan&Archive and defined the filing paths, you can automatically file documents to the ELO repository based on the settings you made. The documents are filed according to the settings made.

> **Information**: You must configure ELO Scan&Archive for it to be available on the *Scan/File* tab.

Requirement

Scanned documents must be located in the incoming folder of ELO Scan&Archive.

1. Switch to the *Intray* work area.

2. Click the *ELO Scan&Archive* button on the *Scan/File* tab of the ribbon.
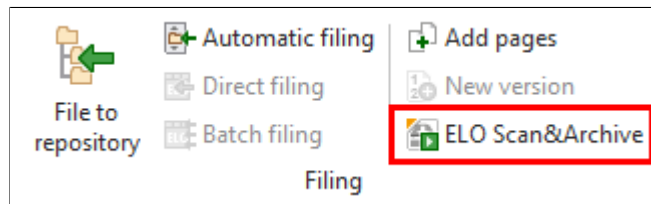
Fig. 450: Starting 'ELO Scan&Archive' from the Intray

The program starts to process documents in the ELO Scan&Archive incoming folder.
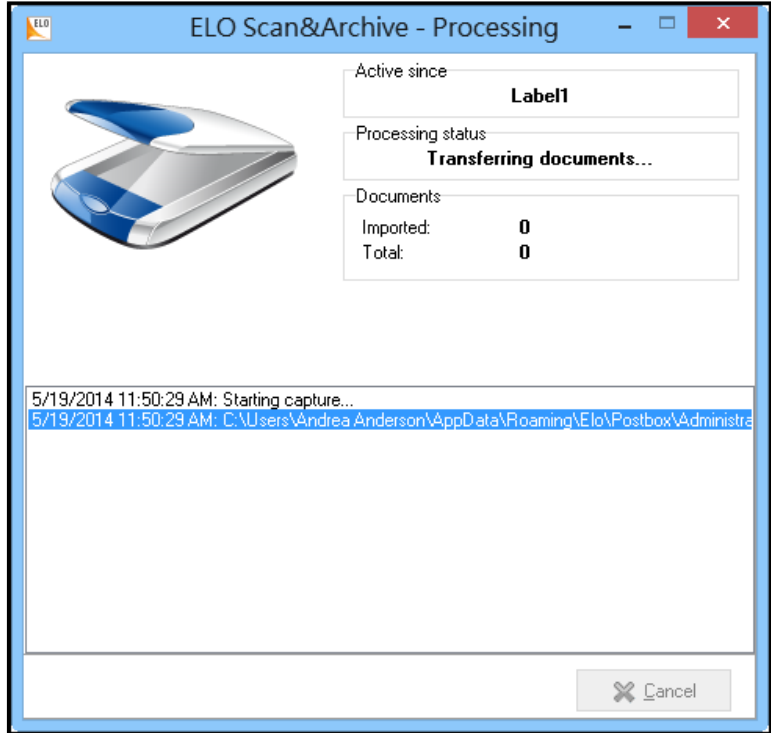
Fig. 451: Document processing status window in ELO Scan&Archive

The *ELO Scan&Archive - Import documents* dialog box opens. Processing starts. The status window shows how far along the process is.

Another dialog box appears to tell you whether the process was completed successfully and how many files were imported.

After processing, the documents are placed in predefined directories in the ELO repository.

Data backup

This chapter shows you how to set up and run the ELOoffice backup function.

About ELOoffice data backup

ELOoffice data backup is an incremental backup function, which only backs up changes to data that were made since the last backup.

Warning: Documents that you delete from ELOoffice before you perform a backup cannot be restored with the ELOoffice backup function.

Please note: As the ELOoffice backup is not an automatic function, it needs to be executed manually by the user. It is important that you have a backup concept in place. Read the following information about the different backup options.

Backup criteria

- **Regular backups**: Regular backups are the only way to minimize the risk of losing data.

- **Redundant backups**: Save your backups on multiple devices (e.g. a USB drive or a cloud directory). Perform a backup multiple times and select a different storage location during each backup. Doing so ensures that you have at least one backup if your other backups fail.

- **Separate locations**: Use external backup media and keep them separate from the PC that you have installed ELOoffice on or from the ELOoffice server. This ensures that your backups are protected in the event of local hardware failure, malware, theft, fires and natural disasters.

The ELOoffice data backup program always backs up all existing ELO repositories. It backs up the following data:

- Postbox directories of all users

Warning: If you have a network installation, the Postbox directories are only backed up if they are administered centrally in the network.

- Repository directories
- Databases
- Basic configuration entries in the Microsoft Windows Registry

Please note: If you are using different profiles on your ELOoffice, you need to perform separate backups for each profile.

Setting up data backup

The ELOoffice data backup program needs to be installed on top of ELOoffice. There are two ways to open the ELOoffice data backup:

- From the ELO menu
- From the entry in the Microsoft Windows start menu

We will install the program from the ELO menu.

1. Open ELOoffice.
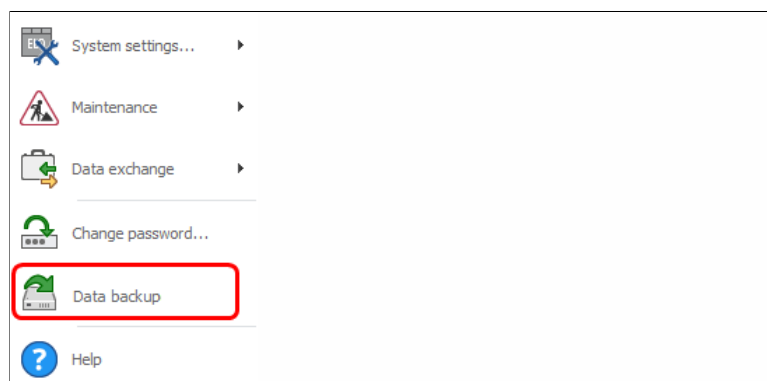
2. Open the ELO menu.

Fig. 452: ELO menu

3. Click *Data backup*.

ELOoffice closes and the standard browser opens.

Information: For technical reasons, you need to close ELOoffice before you run the ELOoffice backup function. In addition, no users should access ELOoffice during this time.
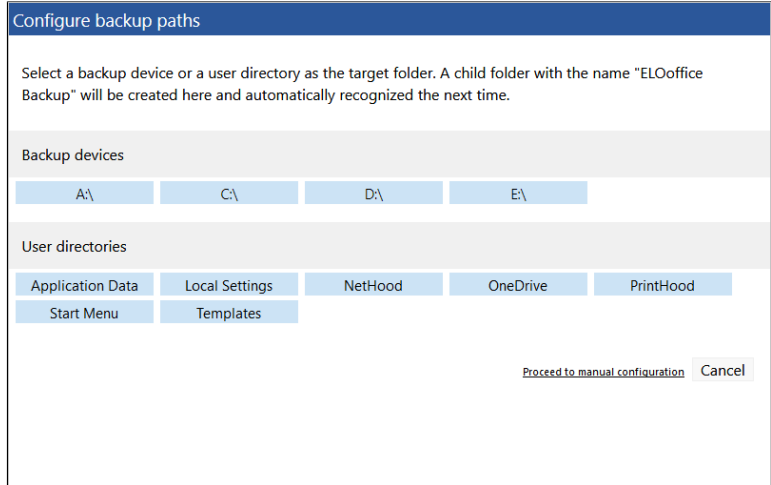
Fig. 453: 'Configure backup paths' dialog box

When starting the ELOoffice backup program for the first time, the *Configure backup paths* dialog box opens. Select a backup device or backup directory.

Information: You need to define at least one target directory before you can use the ELOoffice backup function.

The backup program supports the following media and directory types:

- **Cloud directories**: The backup function automatically recognizes cloud-based directories if they are integrated with the Windows user directory of the user performing the backup.

Please note: The ELOoffice data backup only backs up to the cloud provider's local directory. Make sure that you have sufficient storage in your cloud space. It is also important that you wait until the synchronization is complete. If you disconnect the Internet or switch off your computer too early, you could lose data.

- **USB storage**: Use external hard drives or USB sticks.

Please note: After backup, make sure you disconnect the drive or USB stick from the computer and keep it in a separate location.

- **Network drives**: You can also use network drives or directories for backup purposes.

Please note: Make sure that your network connection is enabled the entire time during backup. You should also keep the computer and the network server at different locations to ensure that you have the backups on at least one system in the event of damage to one.

- **Microsoft Windows user directory**: Besides cloud-based directories, you can also use other directories on the Microsoft Windows user directory as backup directories.

Please note: It is not advisable to use a local directory as the backups would be lost in the event of a system failure.

- **CD-ROM**: If you wish to back up data on a CD-ROM, read the following information.

Please note: Make sure your CD-ROM has sufficient capacity to store the data.
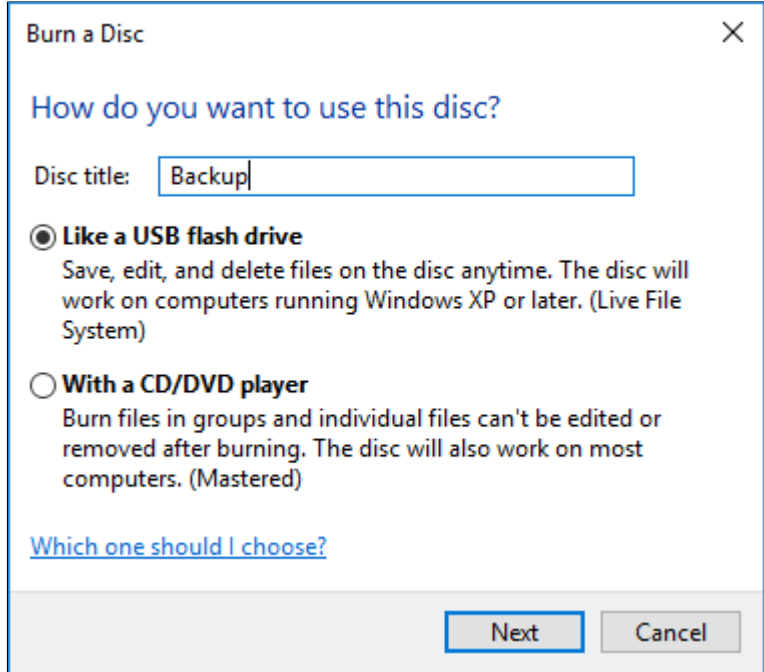
Fig. 454: Storing data on a CD-ROM

Information: If you want to store data on a CD-ROM, you need to select the Microsoft Windows option *Like a USB flash drive*.

4. Click the medium or directory you want to use.
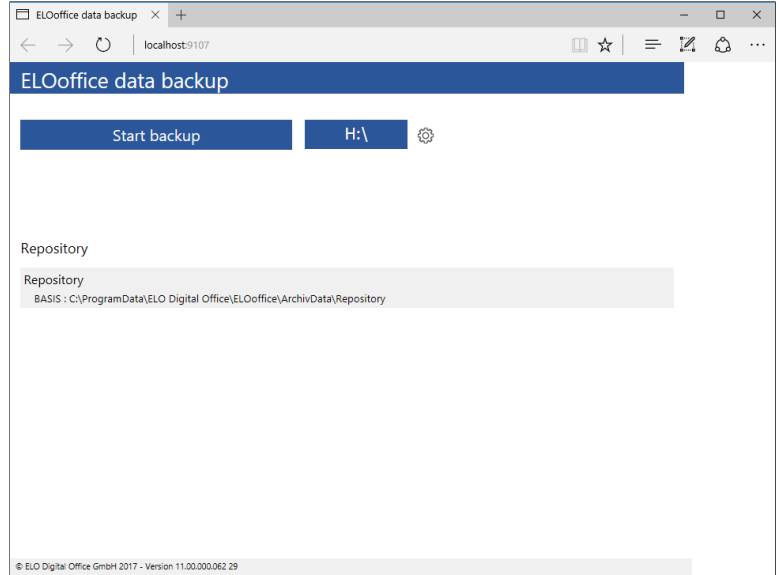
Fig. 455: Selected directory

The dialog box now closes. The folder *ELOoffice Backup* is created on the selected device or directory and can be used for the ELOoffice backup. You can now begin the backup process.

Other directories
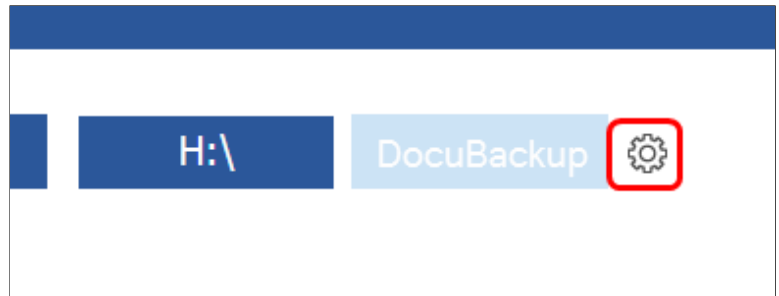
Fig. 456: Gearwheel icon

Optional: To set up additional backup directories, click the gearwheel icon on the ELOoffice data backup home screen and repeat step 4 (see above).

Information: You cannot back up data to multiple directories simultaneously. If you want to back up repository data to multiple directories, you need to run the ELOoffice backup function on each of these directories.

Starting data backup

The ELOoffice data backup program needs to be installed on top of ELOoffice. There are two ways to open the ELOoffice data backup:

Information: You need to define at least one target directory before you can use the ELOoffice backup function. You can find additional information about this in the *Setting up data backup* section above.

- From the ELO menu
- From the entry in the Microsoft Windows start menu

We will install the program from the ELO menu.

1. Open ELOoffice.
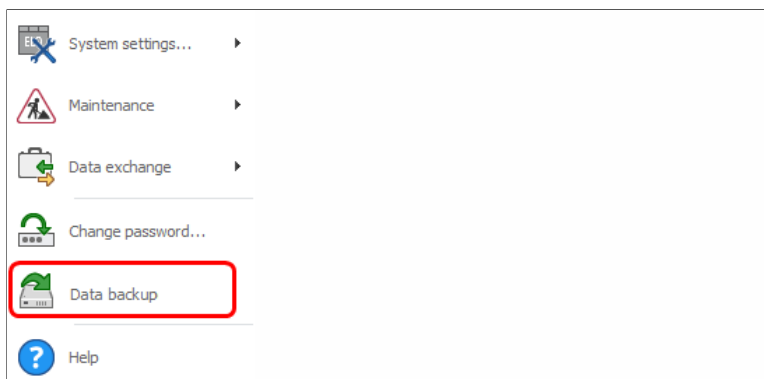
2. Open the ELO menu.

Fig. 457: ELO menu

3. Click *Data backup*.

ELOoffice closes and the standard browser opens.

Information: For technical reasons, you need to close ELOoffice before you run the ELOoffice data backup function. In addition, no users should access ELOoffice during this time.
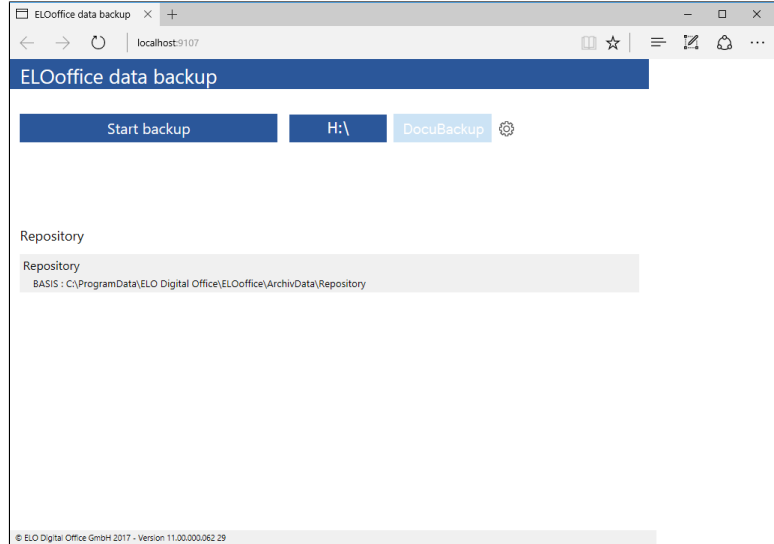
Fig. 458: ELOoffice backup home screen

The ELOoffice backup home screen opens.

A target directory is selected (colored dark blue).

Information: You can only use one target directory for each backup.

Optional: If there are multiple directories available, you can click the corresponding button to select a different one.

2. Click the *Start backup* button.
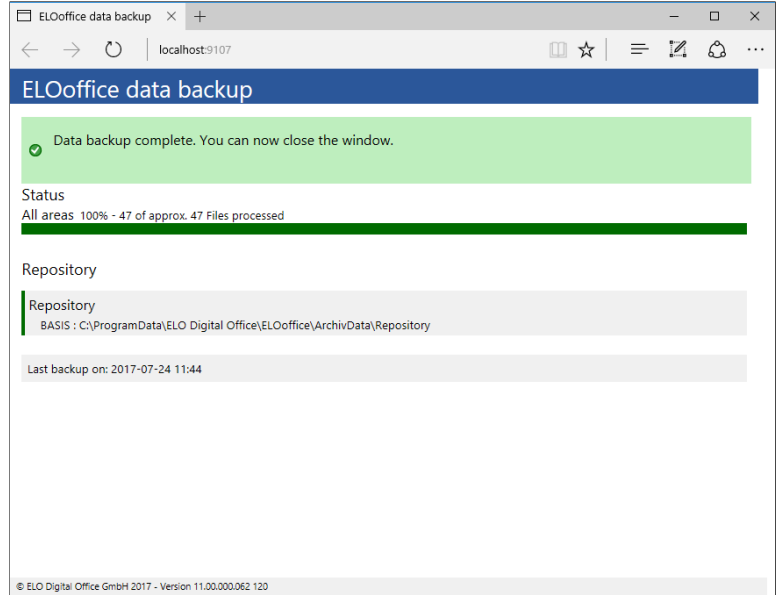
Fig. 459: Data backup successful

The backup function is executed. A message will appear indicating that the backup is complete.

> **Please note**: In rare cases, you may see an error message. This can be caused by a temporary network problem, or an antivirus program obstructing the backup, or if data is temporarily locked. Determine the source of the error and then run the ELOoffice backup again.

3. Close the browser window or browser tab.

Restoring a backup

In this section, we explain how to restore a backup. Read the following information carefully before you attempt to restore data from a backup.

Scenario

To perform a data recovery, let us assume the following scenario:

You need to perform a clean install of ELOoffice because of hardware problems or some other unexpected issue. After installation, you need to restore the data from an existing backup.

Please note: Once you have reinstalled ELOoffice, do not create a new repository or import a repository template or sample documents until you have run the data recovery function.

The new ELOoffice installation must use the same path structures as the previous ELOoffice installation. For example, if ELOoffice was installed on a network, users must be able to access the new installation on the same network path.
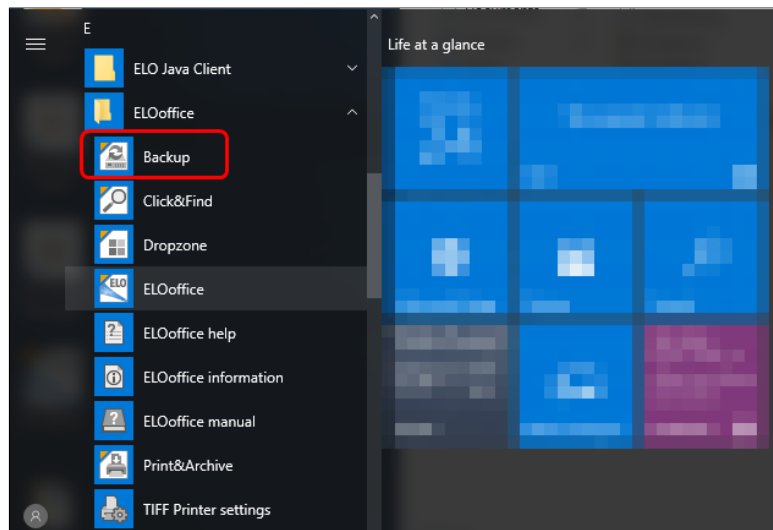
Fig. 460: 'Data recovery' entry in the Microsoft Windows start menu

1. After installation, start the ELOoffice *Data recovery* function from the Windows Start menu.
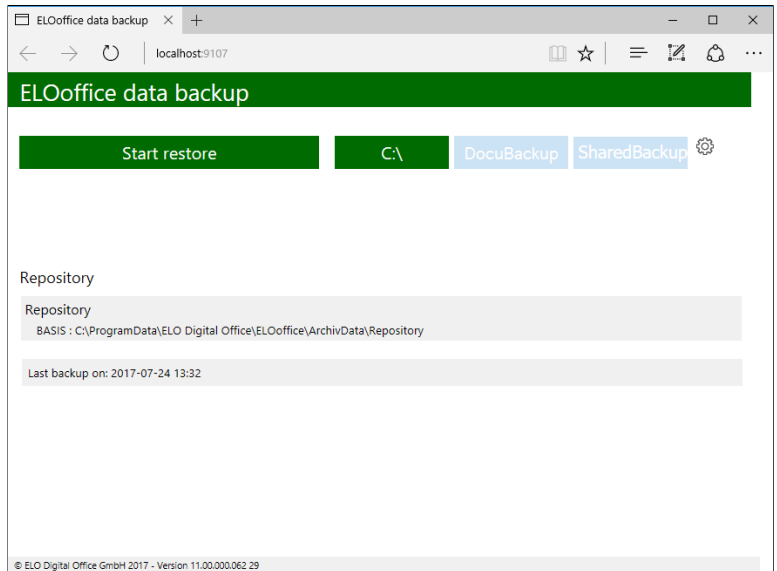
Fig. 461: Recovery mode home screen

The ELOoffice backup home screen appears in recovery mode.

Optional: If you have multiple backup directories, select the one you want to use.

2 Click *Start restore*..

The recovery process starts.
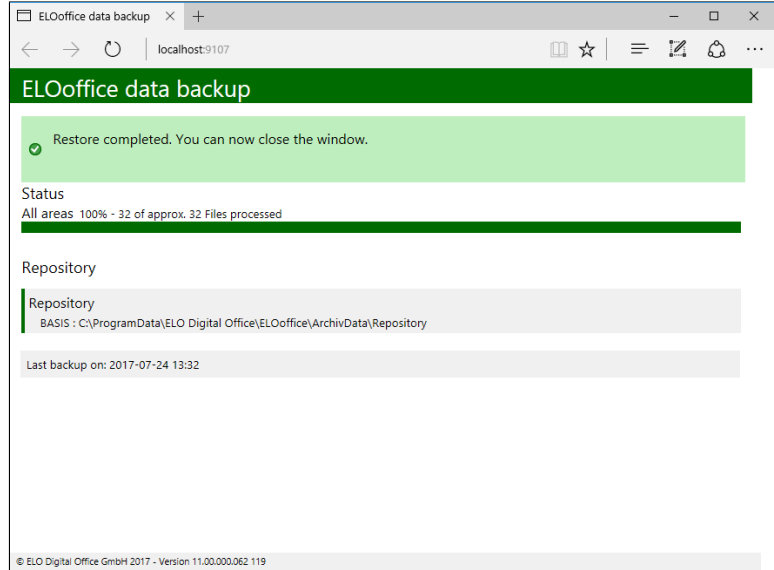
Fig. 462: Data restore successful

Once the process is complete, a message pops up to say that the data restore was successful.

3. Close the browser window or browser tab.

Network drive information

If the network drive that your ELOoffice data is stored on fails, you do not need to reinstall the program because ELOoffice is still installed on the client computers. In this case, create the directories that you need to restore manually.

Please note: You are not allowed to change the names of drives or servers.

1. Create the ELOoffice base directory and the child directories *Postbox* and *ArchivData* on the network drive. Make sure you create the directory in the location it was originally.

2. In the *ArchivData* directory, create the file *syslog.esp*. The contents of this file are not relevant as they will be overwritten during the recovery.

3. Restore the backup as described above.

Manual configuration

Alternatively, you can assign backup directories manually.

Information: It is not usually necessary to assign directories manually.

1. Create the target directory on a storage medium of your choice.
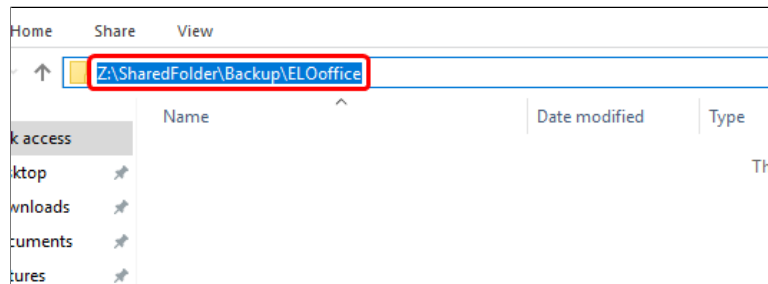
Fig. 463: Address bar in Microsoft Windows Explorer

2. Copy the path of the target directory in the Microsoft Windows Explorer address bar and paste it to the Microsoft Windows Clipboard.

3. Open ELOoffice.

4. Open the ELO menu.
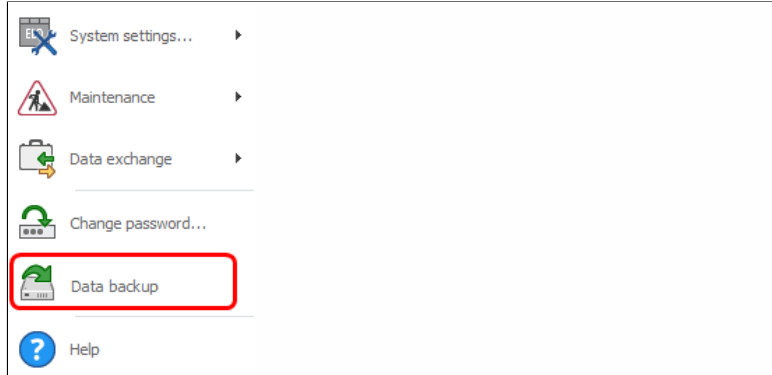
Fig. 464: ELO menu

5. Click *Data backup*.

ELOoffice closes and the standard browser opens.
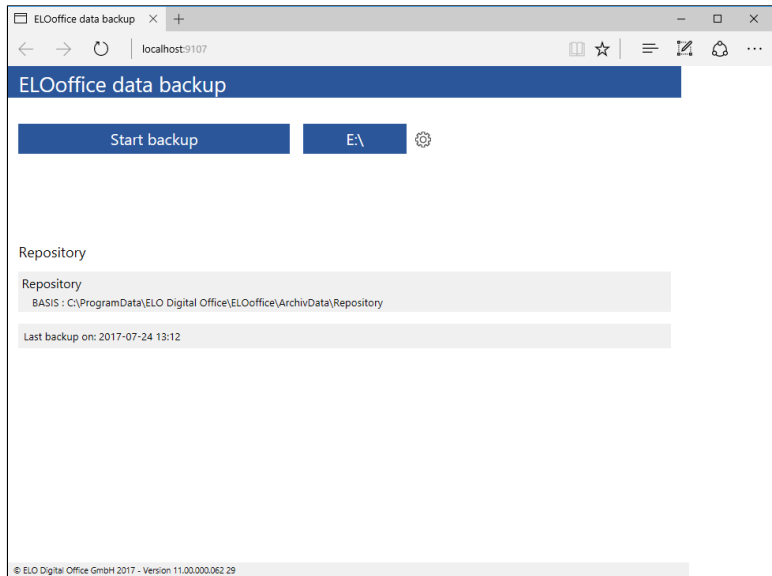
Fig. 465: ELOoffice backup home screen

The ELOoffice backup home screen opens.

Fig. 466: Gearwheel icon

6. Click the gearwheel icon.

The *Configure backup paths* dialog box opens.
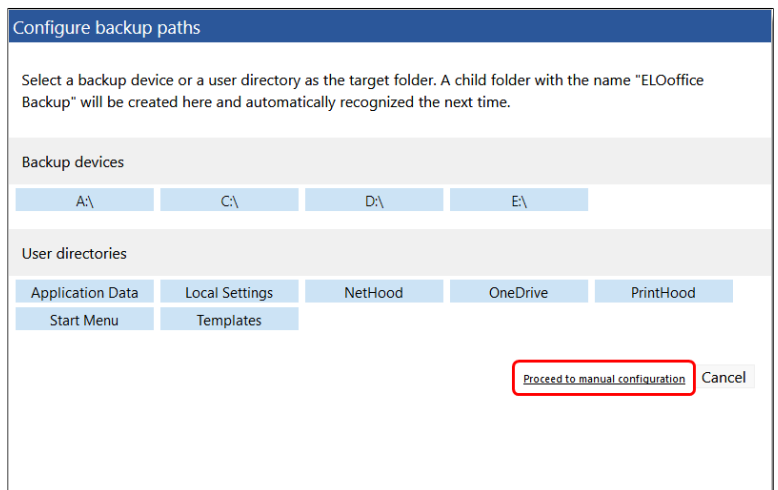
Fig. 467: 'Proceed to manual configuration' button

7. Click *Proceed to manual configuration*.
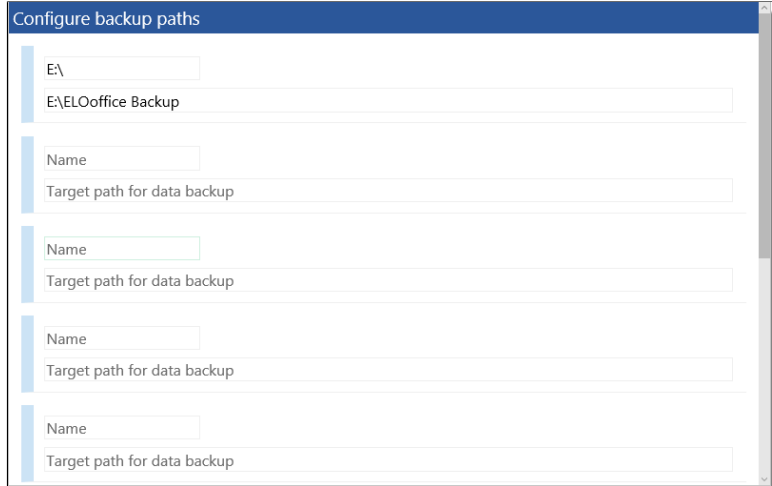
Fig. 468: 'Configure backup paths' dialog box, 'Manual configuration' mode

The *Configure backup paths* dialog box switches to *Manual configuration* mode.

8. Click an empty *Name* field.

9. Enter a name for the directory.

10. Click the empty field below that to enter the Target path for data backup.
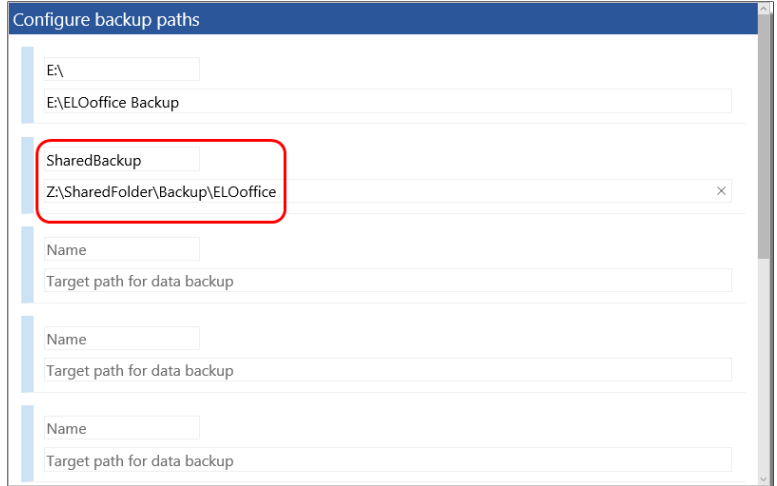
Fig. 469: Data backup path

11. Enter the path you copied to this field.

12. Click *Save*.
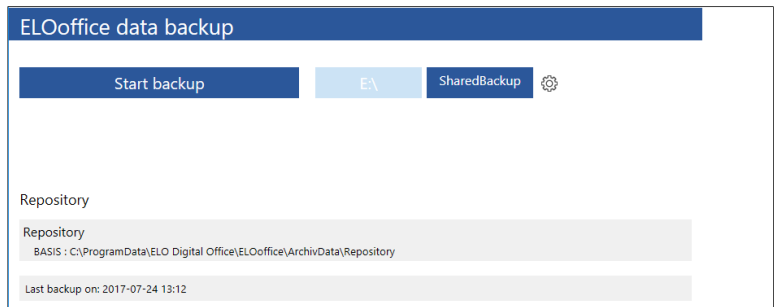
Fig. 470: Manually entered backup path

The *Configure backup paths* dialog box closes. The new target directory is available for use.

Scripting

This chapter will give you a broad outline of how ELO works with the Visual Basic scripting language.

Please note that we can only provide a few general notes on scripting in this document. However, after working through this section, you will be able to add a few basic functions to the *Scripting* area. For further information, see our more detailed *ELOpress* publications. You can find more information about these publications on our website.

This chapter contains information about the following topics:

- Areas of the script manager
- General information about scripting
- Starting scripts
- Linking ELO functions with scripts

ELO script manager

A sequence of commands that are always used in the same order can be saved as a script. Whenever you run a script, all the commands it contains are performed automatically. That means you can use scripts to control ELO and other applications and access their data. This function can also be used to automate and simplify a number of tasks.
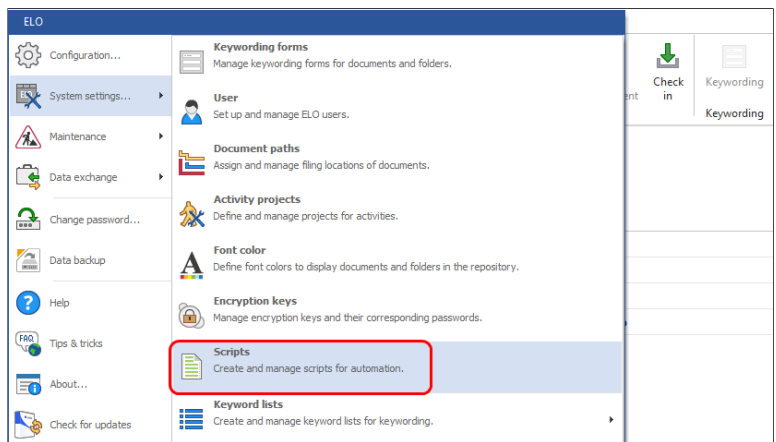
Fig. 471: 'Scripts' menu item

Open the script manager via the *ELO menu > System settings > Scripts*.

Using scripts

Several scripts are installed along with the program, but you can also add your own custom scripts if you wish. ELO supports the Microsoft VBScript scripting language.

There are two way to run the scripts in ELO:

Running scripts

1. Point the mouse cursor to the top of the ribbon, then click the right mouse button.
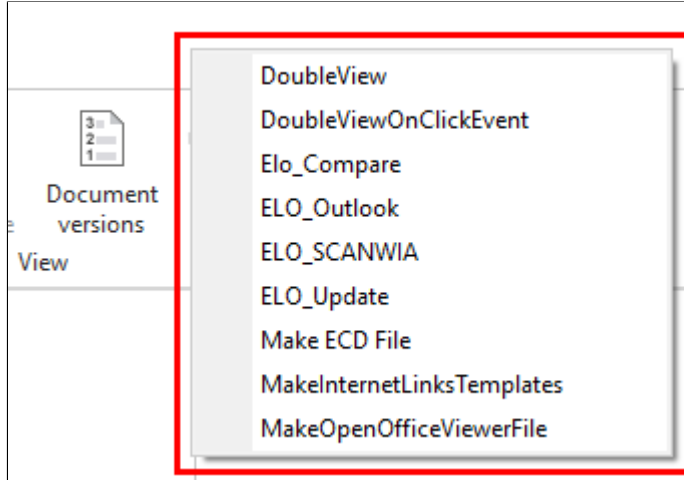
Fig. 472: Available ELO scripts

A context menu appears that shows all available scripts.

2. Select a script from the list to run it.

Please note: Only run scripts if you know what they do.

Running a script from a custom button

On every ribbon tab, you can add buttons that each run a single ELO script. If a button is used to run a script, the script name will be displayed as a tooltip when you mouse over the button. Click the button to start the script.

Placing a script on a button

1. Select the tab you want to add a script button to.

2. Hold down the CTRL key and right-click the top of the ribbon to open the menu of available scripts.

3. Keep the CTRL button pressed and click the script that you want to assign to a button.
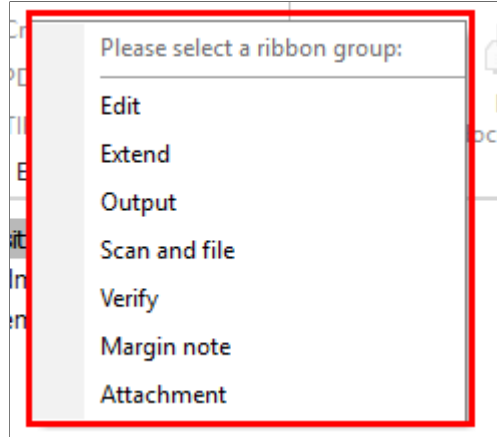
Fig. 473: Menu for selecting a group on the ribbon

A menu appears that lists the groups on that ribbon. Select a group to add the button to that group.

4. Click to select the group.

The script then appears as a button in that group on the ribbon.

Removing an ELO script button

1. Click the script button while holding down the CTRL key.

After a confirmation request, the script is removed from the ribbon.

Information: You can define the buttons that appear on the ribbon. Script buttons can be assigned to any ribbon group or tab.

Creating and managing ELO scripts

Use the script manager to create and manage scripts to automate tasks.

1. Click the *ELO menu > System settings > Scripts*.

The *Scripts* dialog box appears.

Script name: This column shows all of the available scripts. Click a script to view its code in the *Script* field. There is information telling you what all the installed scripts can be used for.

To change a script's name, open an edit dialog box by double-click-ing the script name. In the *New script* window, you can enter a new name for the script.

Script (VBScript): Enter the script code to the *Script* field. You need to be familiar with the VBScript scripting language to do this.

Information: You can find information about VBScript in tutorials and books on the subject. It is not possible to give an in-depth review of this topic in this manual. We do, however, refer to the publications in the *ELOpress* series. You can find more information about these books on our website.

Load: Click this button to add an external script file to the list of available scripts.

Save: Click this button to save the currently selected script as a file. This also enables you to make a copy of the script and transfer it to another installed copy of ELO.

New script: This function creates a new script. First of all, you will be asked to enter a name for the new script. Next, enter the code for your new script to the *Script* field.

Delete script: Select a script on the left-hand side and click to delete it. A confirmation window will appear.

Test: This function lets you run the selected script and test the code.

Permissions: You can assign individual permissions to the various scripts. Only users who have read permissions to a script are able to select and run it. If a user wants to edit a script, they require write permissions to it as well.

Script events: You can run scripts when various actions occur in the repository. You can manage these script events here.

Print: The current script is sent to the printer.

Font: Select the font you want to print the script in.

View last script: If this option is selected, the most recently viewed script will automatically appear when you open the dialog box again. This can be useful when creating a new script or when trou-bleshooting an existing script, since you will need to return to the same entry repeatedly.

Script events

Certain events in ELO can be set to automatically run a script when they occur. An event occurs when a certain stage is reached in the course of using ELO. A script can be executed here if you have set it up to do so.

1. Click *Script events* in the script manager.
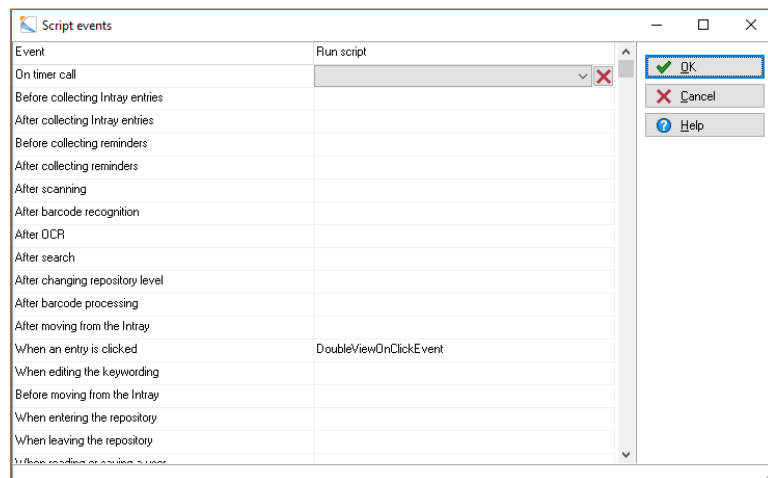
Fig. 474: 'Script events' dialog box

The *Script events* dialog box appears.

The ELO events are shown in the *Event* column on the left.

2. To assign a script to an event, click the row in the script.

A drop-down menu opens in the *Run script* column on the right.

3. Select one of the available scripts from the drop-down list.

4. As soon as you click a script, it is assigned to the event.

Optional: To remove the assignment, simply click the red X to the right of the drop-down list.

Example 1

To edit scanned pages with editing software after scanning, write a script that starts the software (etc...) and assign it to the *After scanning* event.

Example 2

Once the text has been recognized, you can send the information on to another program by linking a corresponding script to the *After OCR* event.

Administration

The administrator is responsible for the *Configuration*. This means "normal" users will not generally have anything to do with these settings or only to a small degree. If you are not a system administrator, you may not have access to all areas anyway. You should nevertheless read this chapter carefully, because some of the system settings will affect your day-to-day work. Above all, it will tell you about the functions in the *Configuration*:

- The *Configuration* tabs
- Document paths
- Read-only copy of the repository
- Export wizard
- Import wizard
- Print repository summary
- Key management
- Encryption keys
- Color management
- User manager
- Setting permissions
- Reports
- Keyword lists
- Passwords
- Remove old documents
- Lifetime and expired documents

Options

The configuration dialog box in ELO contains the following tabs: *General*, *Display*, *Display filters*, *Notes*, *E-mail*, *Paths*, *Intray*, *Scan parameters*, *Scan profiles*, *SearchTasks*, and *MobileConnector*.

The settings on these tabs let you make adjustments to ELO. This enables you to configure the program tailored to your business needs.
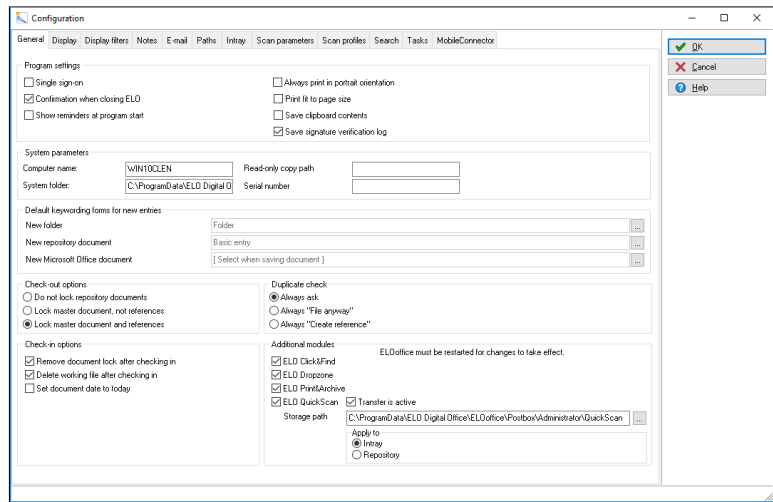
Fig. 475: Configuration - 'General' tab

1. Click the *ELO menu > Configuration*.

The *Configuration* window appears. The *General* tab will be active.

General tab
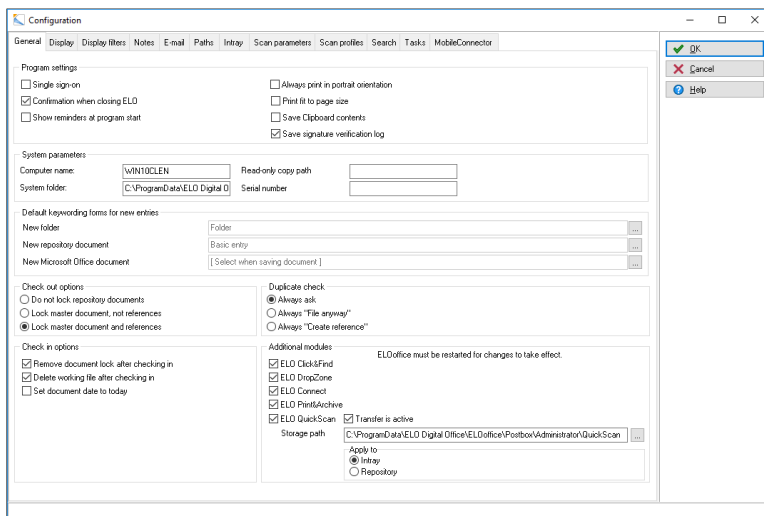
Fig. 476: Configuration - 'General' tab

Program settings

Single sign-on: Enables users to log on without requesting a user name and password. ELO starts automatically using the logon name used to sign on to Windows.

Please note: To use the single sign-on feature, the ELO user name must be the same as the user name of the user signed on to Windows. The user must be created in ELO without a password.

Confirmation when closing ELO: Select this option to show the logon dialog box after closing the main ELO window. You can now switch repositories and log on again.

Show reminders at program start: Select this option to show active reminders in the *Tasks* work area automatically when ELO starts.

Always print in portrait orientation: Documents with mixed page formats (portrait and landscape) will be automatically printed in portrait orientation.

Print fit to page size: Documents are usually saved in their original dimensions. ELO uses these values when printing. Some scanners and image documents do not store this information correctly. In such cases, the document will either be printed in the wrong size or not correctly. Select *Print fit to page size* to ignore this information. ELO will attempt to adjust the document to fit the printed page.

Save Clipboard contents: The contents of the Clipboard are retained after the program restarts, instead of being cleared when you close ELO.

Save signature verification log: The signature verification log will be saved.

System parameters   These parameters are mainly drawn from main system settings.

Computer name: The computer name is entered automatically.

Read copy path: Enter the path to a DVD drive, such as "E:\". This allows you to view repositories in ELO that have been copied to a DVD.

System folder: Shows the path to the repository data folder.

Serial number: Shows the serial number (important for support requests, for example). To prevent any problems, make sure that each serial number is only used on one computer.

Default keywording forms for new entries   Use these settings to configure filing options for documents.

New folder: Define the keywording form for a new folder. This keywording form is selected by default when a new folder is created. However, you may select a different form.

New repository document: Define the keywording form for new documents added to the repository. The entry determines the default selection, which you can change for each document.

New Microsoft Office document: Define the keywording form for a new Microsoft Office document that is imported via the Office macros.

Checkout options   Define options for the checkout process here.

Do not lock repository documents: Documents are not locked in the repository when they are checked out for editing.

	Lock master document, not references: Select this option to lock the main document when it is checked out, but not its references.
	Lock master document and references: Documents and their references are both locked, preventing them from being edited by other users.
Check-in options	Select options for the check-in process here.
	Remove document lock after checking in: This option removes the document lock after checking in a document.
	Delete working file after checking in: When a document is checked out, a temporary working version is created and saved locally for the user to edit. Select this option to delete the temporary version after the document is checked in.
	Set document date to today: Select this option to update the document date for a document, when it is checked in, to the current date.
Duplicate check	**Always ask**: If a document already exists in the repository, a warning appears to ask if the document should be duplicated, referenced, or the filing process canceled.
	Always "File anyway": Select this option to always save documents to the repository again when a duplicate is detected.
	Always "Create reference": Select this option to automatically create a reference to the original document when a duplicate is detected.
Additional modules	This is where you define which of the following five modules you want to start with ELOoffice:

- ELO Click&Find
- ELO Dropzone
- ELO Print&Archive
- ELO Connect
- ELO QuickScan

Information: Separate documentation is available for ELO QuickScan and ELO Connect on the ELOoffice website www.elooffice.com (*My ELOoffice*, *Documents* area).

Transfer is active: Select the *Transfer is active* check box so that ELO QuickScan can establish a connection to the ELO repository.

Storage path: Determine the storage path for the ELO QuickScan module here. The folder *QuickScan* is selected in the Intray path by default. Use the *Browse* button (button with the three dots) to open the *Browse For Folder* dialog box. You can select an alternate storage path here.

Apply to: In *Apply to*, select whether you want to file the scan to the *Intray* work area or to the *Repository* work area.

Information: You need to restart ELOoffice for changes to the *Additional modules* area to take effect.

OK: Click *OK* to apply your changes and close the dialog box.

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

Display tab
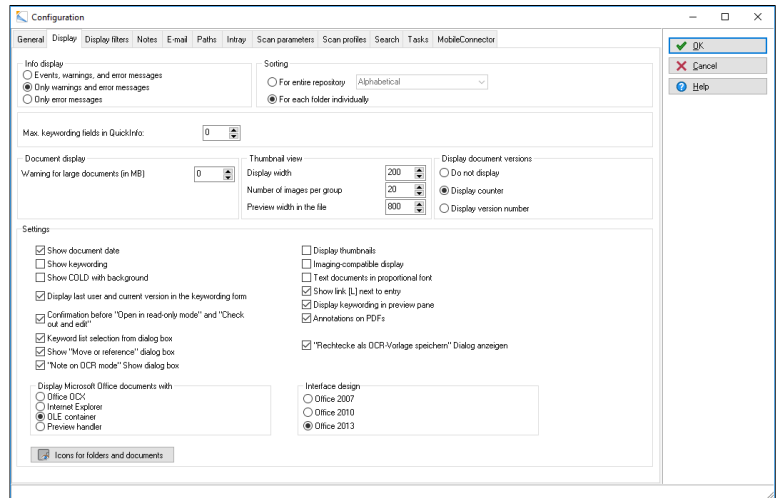
Fig. 477: Configuration - 'Display' tab

Info display

Define the information and messages that should be displayed when events occur in the repository. You can define whether to show the info display every time (*Information, warnings and error messages*), for serious messages only (*Only warnings and error messages* or even *Only error messages*).

Sorting (for folders)

For entire repository: Define sort settings for the repository as a whole.

For each folder individually: Define the sort settings on a per-folder basis.

Max. number of keywording fields: Define the number of index fields to be shown in the QuickInfo. Select "0" to show all index fields in the QuickInfo.

Document display

Warning for large documents: Define the document size for a warning to be issued before displaying the document. The warning will be displayed if the document is larger than the size you have defined.

Thumbnail view	**Display width**: Define the width of the thumbnails here.
	Number of images per group: Define the number of thumbnail images that appear in a group here.
	Preview width in the file: Define the width of a preview file here.
Display document versions	When the version history is shown in the repository, you can choose whether to show the internal ELO counter (number of checked in document versions) or the version number entered manually.
	Do not display: Only the short name and the date are shown in the repository. You will not see any information about the version history.
	Display counter: Shows the internal ELO document version counter.
	Display version number: Shows the version information you entered manually.
Settings	**Show document date**: The document date is shown in addition to the name in the repository.
	Show keywording: Shows QuickInfo for each entry in the repository. This contains the keywording information from the index fields and date entries.
	Show COLD with background: For COLD documents, the background forms can be optionally shown or hidden. Disable this option if you have very large background forms (such as full color scans) or if your computer is slow.
	Display last user and current version in the keywording form: The last editor of a file is shown in the keywording form for documents.
	Confirmation before "Open in read-only mode" and "Check out and edit": Define whether to show a confirmation request before a document is opened in an external program.
	Keyword list selection from dialog box: Set whether to allow selection of keywording information from keyword lists only.
	Show "Move or reference" dialog box: Before moving a document, show a dialog box with options that ask the user whether they want to move the document or create a reference.

Display thumbnails: If you want to view a multi-page TIFF document in ELO, for example, select this option to see an overview of the pages in the document on the border of the viewer pane. This makes it easier to navigate through multi-page TIFF documents. This setting only affects full screen mode.

Imaging-compatible display: Image documents are adjusted to the format used by Wang Imaging. Otherwise, specific types of TIFF documents are shown upside down.

Text documents in proportional font: ELO displays text documents and e-mail messages in Courier font by default. If this option is selected, they will be displayed in a proportional font. This enables you to see more text on the screen.

Show link [L] next to entry: Select this option to see linked documents in the repository tree.
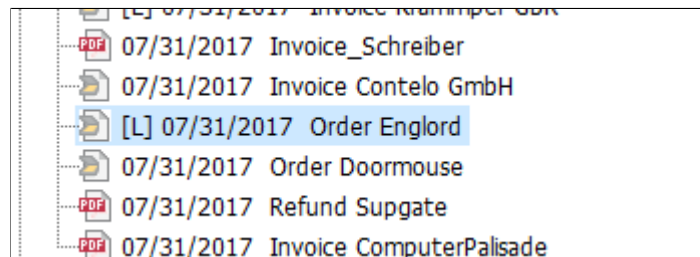
Fig. 478: Show link [L]

The [L] next to the short name shows that a document is linked to another document in the repository. Click *Link* on the *Repository* ribbon tab to view the linked documents.

Display keywording in preview pane: Show the keywording above the document contents.
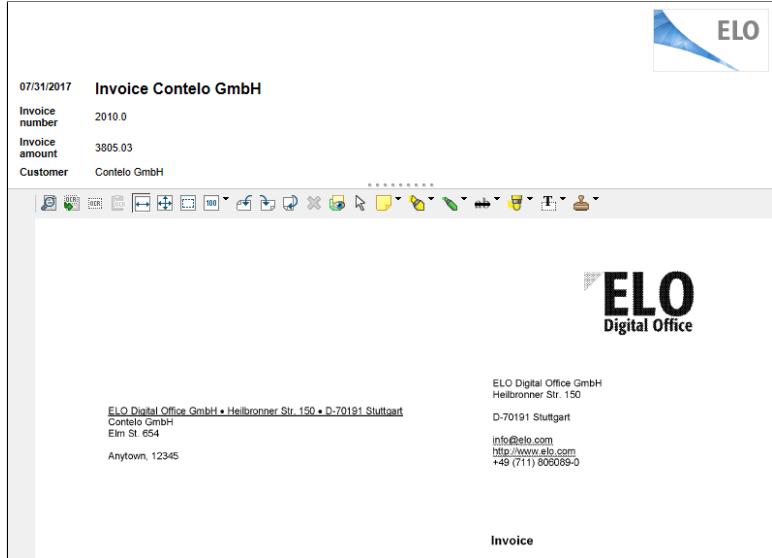
Fig. 479: Keywording display in the preview pane

Information: If the option *Display keywording in preview pane* is enabled, ELO looks for a file named `templ_default.htm` in the Postbox directory, which is used to display the keywording information above the document. You can create a separate HTML file for each keywording form that shows custom information for each document type. You can also include images, links etc. in these HTML files. The file names of the associated HTML files refer to the form IDs of the keywording forms. For example, the file `templ_6.htm` is used to display the direct keywording information for the documents keyworded with the keywording form with an ID of 6.

Information: You can find the keywording form ID by clicking the *ELO menu > System settings > Keywording forms > Select*. Select the name of a keywording form in the list. The form ID is shown in the dialog box status line.

Annotations on PDFs: If the option *Annotations on PDFs* is selected, the functions of the document viewer toolbar are also available for PDF documents. Alternatively, you can select this option via *ribbon > View*.

Show "Save rectangle as OCR template" dialog box: If you modified the OCR template in the *Keywording*, the *Save rectangle as OCR template* dialog box will open. In this dialog box, you have the option to save the changes to the OCR template. Uncheck the box if you want to deactivate this dialog box.

Show "Note on OCR mode" dialog box: This dialog box opens in the *Keywording* if you click the *Text recognition* button. Uncheck the box if you don't want this message to appear.

Display Microsoft Office documents with: The Windows COM subsystem is highly complex, which means that certain display options may not be available on some systems. ELO makes every effort to offer as many alternatives as possible so that users have the best display settings for their systems. There are four different tools available for viewing Microsoft Office documents:

- *Office OCX*
- *Internet Explorer*
- *OLE container*
- *Preview handler*

The default setting is *Office OCX*. This viewer, developed by ELO, shows Office documents in a "lifelike" way, while the comprehensive toolbar for Office documents can be moved around the screen as a context menu. However, not every operating system supports this function.

The *Internet Explorer* is less dependent on the type of operating system. It lets you scroll through the documents and see all sections of forms. A disadvantage of Internet Explorer, however, is that it occasionally keeps files locked for long periods. This is why the option should only be used for workstations used primarily for searches.

If you select the *OLE container*, ELO provides a type of frame for the preview. Microsoft Windows then finds the appropriate program for the file extension and displays it in the container. The program must support OLE functionality. The default tool for Office documents is *Office OCX*. If you have selected *OLE container* and Office OCX is not installed, the Office programs themselves will be shown.

Windows uses the *Preview handler* solution even in Explorer for previewing file contents. A preview of the file is opened in read-only mode without using the corresponding program for the file extension.

Interface design: Select the design for the ELO interface. The examples and screenshots in this manual were created with the *Office 2013* design option.

Icons for folders and documents: Click this button to define custom icons and names for individual elements in the ELO repository. For each folder, you need three 16x16 pixel icons for the statuses *Normal*, *Reference* and *Empty*.
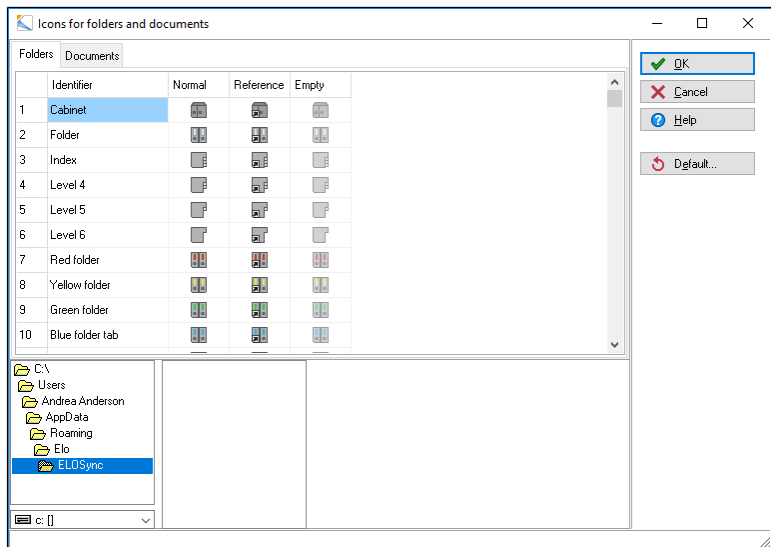
Fig. 480: Icons for folders and documents

Display filters tab

You can define display filters for the documents displayed in the In-tray. These are created on the *Display filters* tab. You can define up to six filters in the *Name* column. In the second column, you can set which file types to display when using this filter. Select a filter to only show the defined file type.
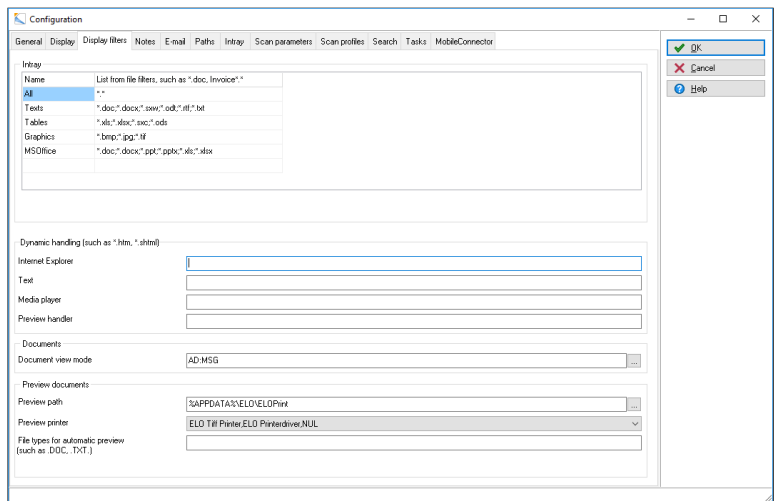
Fig. 481: Configuration - 'Display filters' tab

Intray

Define filters for displaying documents in the Intray. You may add other file extensions to the list if you wish.

Dynamic assignment (such as *htm, *shtml): Use the *Dynamic assignment* option to show files with the file extensions entered (such as *.pl) in Internet Explorer or in ELO. If you want to show a Perl file (*.pl) as a text file in the repository, enter *.pl to the field next to "Text". Separate each entry with a semicolon.

Documents

Document view mode: Click the button with three dots. This opens a configuration dialog box where you can define the view mode for documents.

ELO distinguishes between two types of selection.

- If you click the short name

- If you click the document icon

You can define how ELO reacts to the corresponding selection for each file extension.

Each document is shown in preview mode by default. If you have a slow network connection or if you have very large documents, you can prevent these documents from being displayed automatically. Select the keywording to be displayed instead.

Select *Show keywording* for the option *Action when text is clicked* and *Show document* for the option *Action when icon is clicked*.
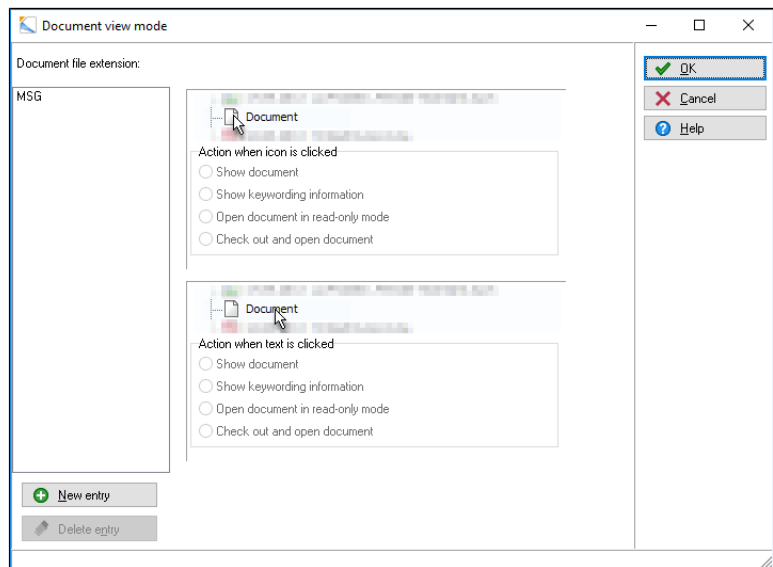
Fig. 482: Configure behavior when certain file types are selected

1. First, click *New entry*.

The *New entry file extension* dialog box appears.

2. Enter a file extension for the data type you want to change the behavior settings for.

Administration

Information: If you enter a star "*" here, the setting is used for all data types.

3. Next, select the desired behavior for *Action when icon is clicked* and *Action when text is clicked*.

The new file extension is added to the list. You can apply the desired settings.

The selection you make in the *Document view mode* dialog box is applied to each file extension in the *Document view mode* field on the *Display filters tab*. The character strings in front of the file extensions (AD, DD, AT, etc.) refer to the options selected in the *Document display mode* dialog box.

Preview documents

Preview path: The path to document previews is entered here. You cannot select a path that differs from the default printer path. The preview data is created when documents are filed to the repository.

Preview printer: Select the printer for previews. It may be useful to select a printer other than the default TIFF printer if you want to use a lower resolution for preview files, for example.

File types for automatic preview: Enter the file types to apply the automatic preview to. These file types will be displayed by ELO as a TIFF preview instead of the original document.

Notes tab

Use the *Notes* tab to define colors, sizes, and text formatting options for *Margin notes* and *Annotations*.
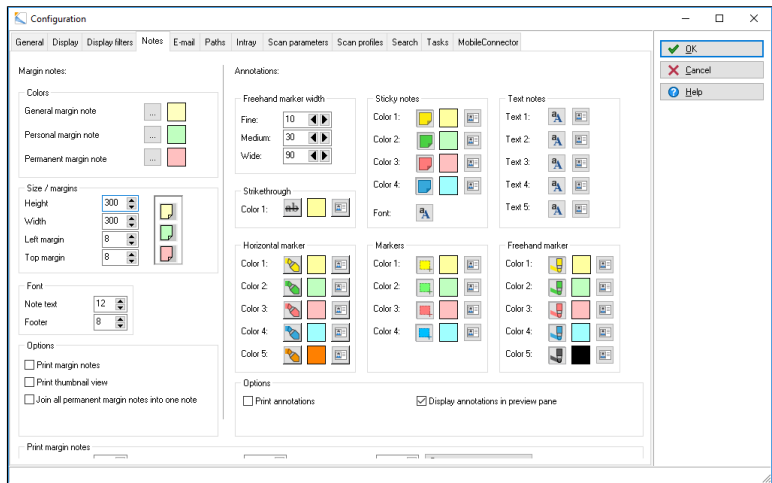
Fig. 483: Configuration - 'Notes' tab

You can define whether you want to print margin notes and thumbnails along with documents.

Administration
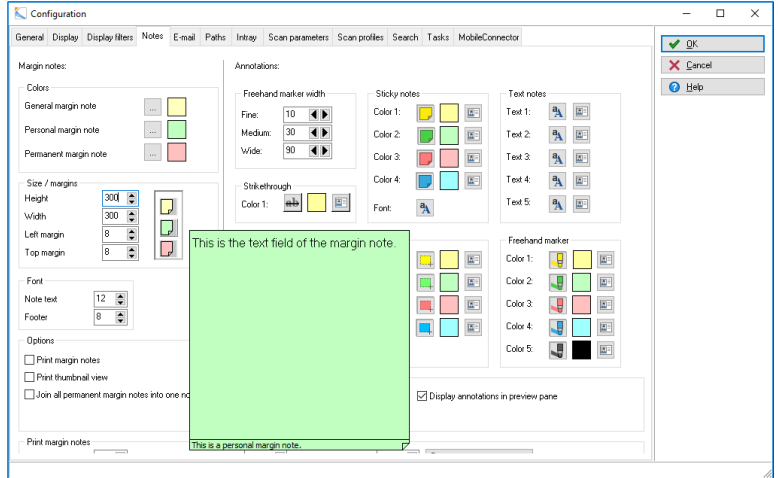
Fig. 484: Margin note configuration

You can also view the current size of margin notes in the *Configuration* by moving the cursor over the margin note icons.

Annotations   You can configure all types of annotations and assign permissions to them.
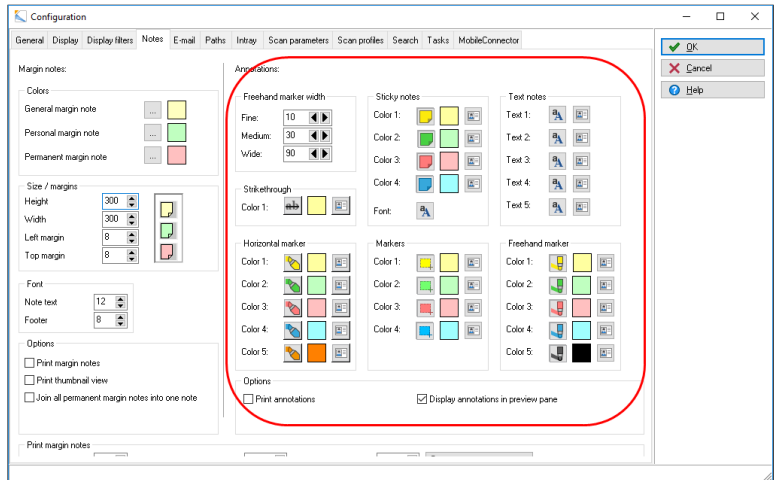
Fig. 485: Annotation configuration

Define settings for annotations here. The settings affect what is shown in the viewer pane. You can define colors, line widths, and permissions to the various types of annotations.

Options

Print annotations: Define here whether to print annotations along with documents.

Display annotations in preview pane: Define whether to show annotations in the preview pane.

Join all permanent margin notes into one note: Combine all permanent margin notes into one note.

Print margin notes

Define print settings for the margin notes here. They only have an effect if you have also selected the option to *Print margin notes* above.

The E-mail tab
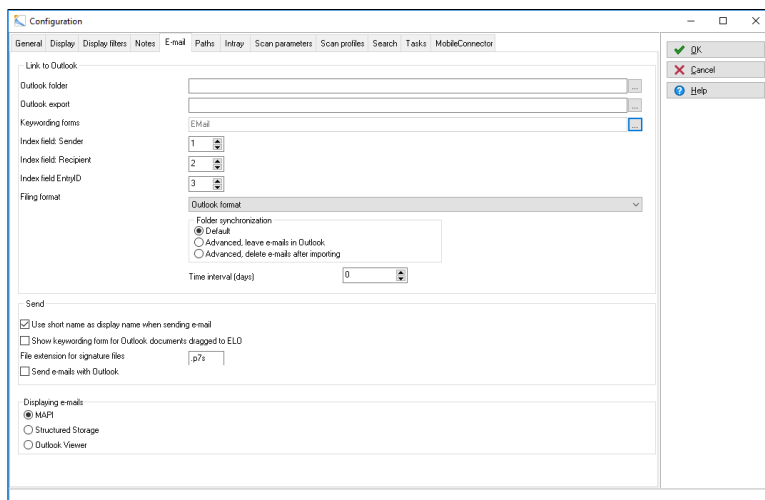
Fig. 486: Configuration - 'E-mail' tab

Information: You must close and restart ELO for changes made on this tab to take effect.

Link to Outlook

Outlook folder: Enter an Outlook path for the base address of the folder connection. Additionally, create a separate folder in Outlook (such as ELO) for e-mail entries. The folders for the folder connection are created within this folder in Outlook.

Outlook folder for export: Enter an Outlook path for transferring ELO documents to Outlook. Please note that these paths must be different, as otherwise all documents sent to Outlook will be immediately transferred back to ELO.

Keywording form: Define the keywording form for e-mail messages filed to ELO by the Outlook macro.

Index field: Sender: If you enter a value greater than 0 here, the Outlook macro enters the sender's name to the corresponding index field.

Index field: Recipient: If you enter a value greater than 0 here, the Outlook macro enters the sender's name to the corresponding index field.

Index field: EntryID: If you enter a value greater than 0 here, the Outlook macro enters the unique e-mail ID from the Exchange server to the corresponding index field.

Filing format: Different formats are available for filing emails in ELO.
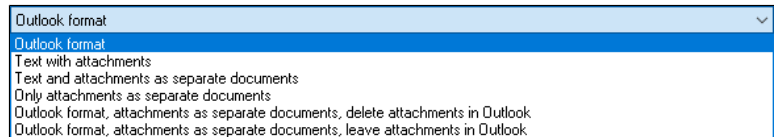
Fig. 487: Outlook filing formats

- **Outlook format**: ELO imports the e-mail messages in their original Outlook message format. The filed e-mail messages retain their status as e-mail documents, and can be opened and edited directly from ELO.

- **Text with attachments**: ELO will store the body of the e-mail messages as text documents in the repository. The attachments are appended to each document. Please note that the e-mail keywording form must be set to *Version controlled* for this function to work. If more than one attachment exists, the others are placed in the attachment's version history.

- **Text and attachments as separate documents**: The e-mail message is converted to a text document. Each attachment is saved as an additional ELO document containing the attachment file.

- **Only attachments as separate documents**: Creates a document from the attached file for each attachment. The body of the e-mail text is not filed.

- **Outlook format, attachments as separate documents, delete attachments in Outlook**: E-mail messages are stored in the same way as with the *Outlook format* option, but attachments are filed separately and deleted in Outlook.

- **Outlook format, attachments as separate documents, leave attachments in Outlook**: E-mail messages are stored in the same way as with the *Outlook format*, but attachments are filed separately and left in Outlook.

Folder connection

In addition to the folder links for Outlook described earlier, you can also use *Advanced folder connection*.
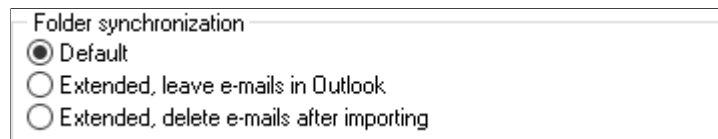
Fig. 488: Folder connection options

The advanced folder connection option imports the complete folder structures in Outlook into ELO. You can also choose whether to retain the imported e-mail messages in Outlook or delete them after they have been transferred to the repository.

Time interval

The *Time interval* option allows you to delete e-mail messages after a certain period of time.

Example: Assume you want to import all e-mail messages from the folders in Outlook, then delete all e-mails in Outlook afterwards. You only want to import e-mails that are more than 7 days old. Select the *Folder connection* option *Advanced, delete e-mails after importing* and set the time interval to 7 (days).

Send

Use short name as display name when sending e-mail: When an e-mail is sent, the short name is used as the display name.

Show keywording form for Outlook documents dragged to ELO: Shows the keywording dialog box when filing from Outlook.

File extension for signature files: Define the file extension for importing signature files. The default file extension is *.p7s*.

Send e-mails with Outlook: If this option is set, e-mails are sent with Microsoft Outlook.

Displaying e-mails

MAPI: The e-mail is displayed via the MAPI interface developed by Microsoft. This is used for sending/receiving/analyzing MSG files via Microsoft Outlook and Microsoft Exchange.

Structured Storage: Select this option if you don't have Microsoft Outlook or Microsoft Exchange installed and work with Mozilla Thunderbird or Tobit programs instead.

Outlook Viewer: The e-mail is displayed in Microsoft Outlook. You must have Microsoft Outlook installed. This option makes it easier to view e-mails.

Paths tab
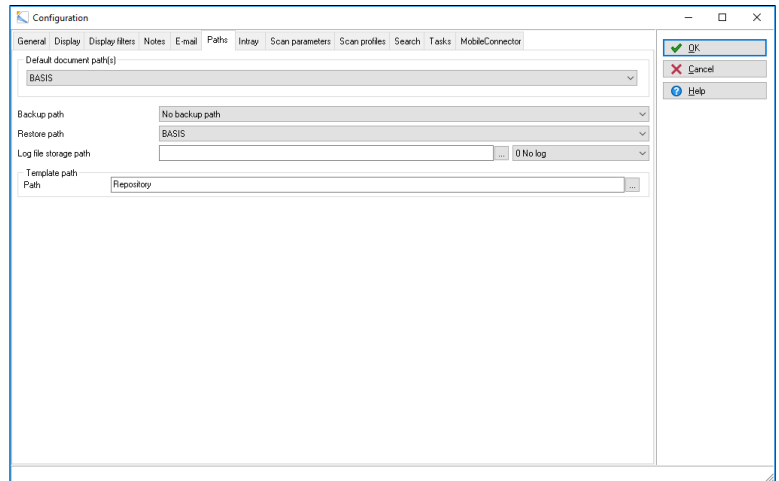
Fig. 489: Configuration - 'Paths' tab

Default document path   Enter the default document path for all ELO objects here. Under normal circumstances, the only entry here is the base path.

Backup path   You can copy each document directly to a second medium when the document is filed. Set this in the backup path. Prior to this, you must set up the path by going to the *ELO menu > System settings > Document paths*.

Restore path   You only need to use this setting if you work with backup paths. If you don't enter anything here, documents are copied from the backup to the base path as needed. Alternatively, you can also set up a separate backup location for these types of documents.

Log file storage path   If you enter a file path here, ELO creates a log file for certain processes that details the commands performed. The contents of this file are defined by the numeric code selected at the end of the line. Entering 1 logs the OLE Automation interface, 2 logs the TWAIN commands, 4 logs stages and errors when filing documents, and so on. You can also use any combination of these values.

Document templates path   Define a folder in the repository here that contains document templates.

Intray tab
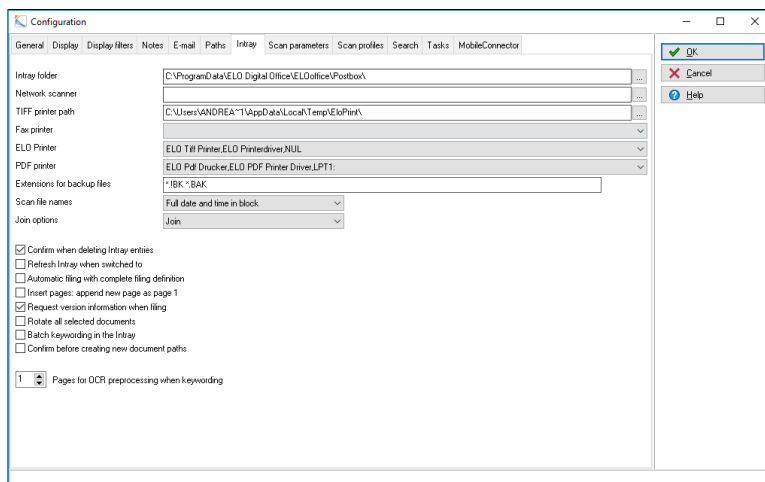
Fig. 490: Configuration - 'Intray' tab

Postbox directory: The path to the user Intrays is entered here during program installation. You should not alter this setting after installation.

Network scanner: ELO supports network scanners. Select the folder on the network here that contains the scanned documents.

Enter a network scanner path along with the type of document generated by the network scan server, such as \\Server\Data\Anderson\;*.tif. If various types of files are generated (such as TIFF and PDF), separate the file extensions in this field with a semicolon. In our example, we could enter `\\Server\Data\Anderson\;*.tif;*pdf`.

TIFF printer path: The ELO TIFF Printer is a separate program that saves the images it generates to an exchange directory. This directory is registered during installation and does not need to be changed later.

Fax printer: This offers you another option for printing in addition to the printer button, which suggests the default printer in Windows. The function is only available if a fax device is available.

ELO printer: Define the current ELO printer in use. You should only change the settings here if you have subsequently installed an ELO printer and if two different ELO printers are in use. If you want to enter a printer here, you should first set it as the Windows default printer. If you select the printer from the drop-down list here, ELO will apply the printer as the *ELO printer*. Afterwards, you can set your preferred printer as the default printer in Windows again.

PDF printer: The ELO PDF Printer is a separate program. Select the PDF printer you want to use with ELO.

Extensions for backup files: The entry for "*.!BK *.BAK *.~tx" defines all files with the extensions !BK, BAK, and ~TX as backup files. A backup file in the Intray will be displayed, but it cannot be edited, filed to the repository, or deleted. If the original document is filed to the repository, all backup files are removed automatically. This prevents data loss.

Scan file names: Define the format for the file name after scanning here.

Join options: Define how your scanned documents will be joined together.

Confirm when deleting Intray entries: A confirmation message appears when deleting entries from the Intray. It is recommended to keep this option selected to prevent data loss. If you need to delete several entries at once without wanting to confirm every time, you can select multiple documents for deletion at once. The confirmation request will only appear once if you click "*Delete all*".

Refresh Intray when switched to: Select this option to refresh the Intray whenever you switch to it from another work area.

Automatic filing with complete filing definition: After saving the keywording information in the Intray, ELO checks whether sufficient information has been entered to file the document to the repository using a specific filing definition in the keywording form. If so, the document is automatically filed to the repository. If you disable this option, you can achieve the same result if you mark several documents and select *Automatic filing* from the Intray context menu.

Insert pages: Add new page as page 1: Normally, a new page is added to a document in the repository as the last page at the end of the document. If you turn on this function, each new page is added to the document as a cover sheet.

Request version information when filing: Define whether to request version information when filing a version-controlled document.

Rotate all selected documents: All documents selected in the In-tray will be rotated at the same time.

Confirm before creating new document paths: Define whether to show a confirmation request before filing documents and creating document paths.

Pages for OCR preprocessing when keywording: Define how many pages of a document will be preprocessed by OCR for keywording purposes. Enter the number of pages to this field.

Scan parameters tab

Define scanner settings in the *Scan parameters* tab. The primary purpose of the settings on this tab is to compensate for errors caused by non-standard TWAIN drivers. You may need to try out various combinations of settings to get your particular scanner model to work. However, the settings only need to be changed if your scanner is not working properly.
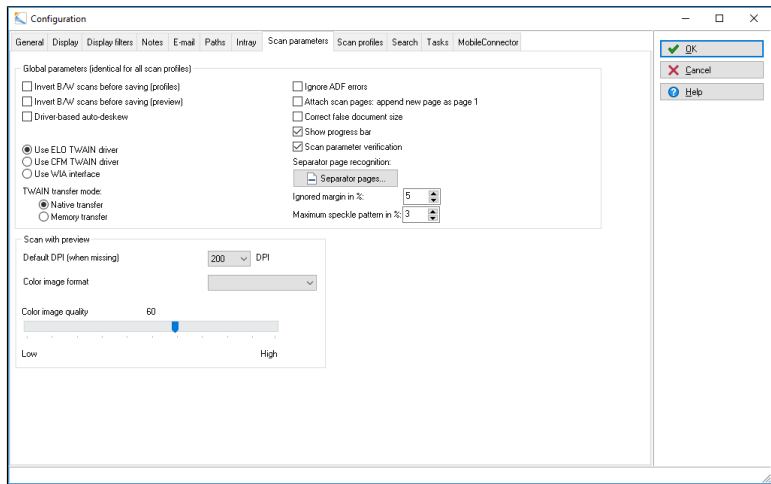
Fig. 491: Configuration - 'Scan parameters' tab

Global parameters

Invert B/W scans before saving (profiles): Not all scanner models adhere to the standard method for displaying black and white pixels. If the scanner configuration conflicts with ELO, black pages are displayed with white letters. This option corrects the error if the scanner itself does not provide such a setting. This setting affects the scan profiles and the *Profiles* option.

Invert B/W scans before saving (profiles): Not all scanner models adhere to the standard method for displaying black and white pixels. If the scanner configuration conflicts with ELO, black pages are displayed with white letters. This option corrects the error if the scanner itself does not provide such a setting. These settings refer only to the scan profiles and the option *Scan after preview*.

Driver-based auto-deskew: If this is supported by the scanner driver, ELO will automatically detect and align pages correctly.

Ignore ADF errors: Some scanner models do not correctly report that pages remain in their document feeder trays. This causes the scanning process to end earlier than intended. Activate this option for ELO to explicitly check whether the paper feeder is empty at the end of a scan process, then restart the scanning as needed.

Correct false document size: Some scanners can only scan the maximum document surface area, regardless of the section that was selected. Enable this option to allow ELO to crop the image according to your settings.

Show progress bar: Displays a process bar during scanning so that you know how long the process will take. Some scanner software shows an additional dialog box with a progress bar that you must confirm multiple times.

Use ELO TWAIN driver: If errors or malfunctions occur while running the scanner, you can select another driver here.

Use CFM TWAIN driver: This is an alternative driver for the scanner if the other options do not work.

Use WIA interface: This is another way to operate the scanner if the other options do not work.

TWAIN transfer mode: *Native transfer* or *Memory transfer* – various TWAIN drivers support one or the other data transfer mode. The *Memory transfer* mode requires less RAM.

Separator page recognition

You can also use dedicated separator pages to separate documents. Special pages with a horizontal strip are normally 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 (*Configuration > Scan profiles*) at the same time.

Separator pages   Use this dialog box to print separator pages and test that the function works.
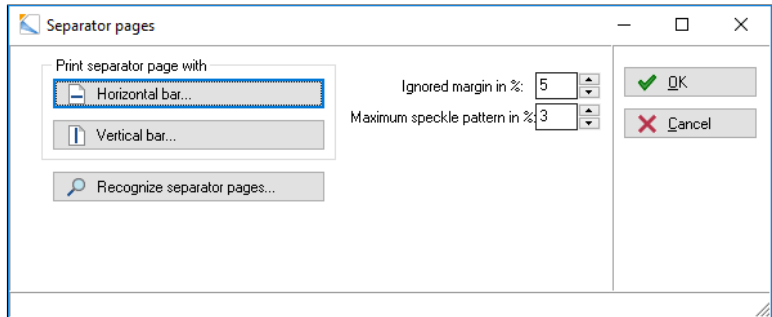
Fig. 492: Print and test separator pages

Scan with preview   Define the settings for scanning with a preview.

Default DPI (when missing): Some scanners do not provide any information about the DPI values. In this case, you can define a value to be used by ELO.

Color image format: Define the format for color images when *Scanning with previews*. Black and white images are always stored in fax G4 format.

Color image quality: If you chose to save scans in JPEG format, you can select the image quality here. A high value keeps the images very accurate, but also results in large files. A lower value may make it difficult to recognize all information in the image, but the files will be smaller. In practice, you should find a compromise to best meet your needs.

Scan profiles tab

You can define up to eight scan profiles. First, click through tabs 1-8 at the bottom of the configuration to select a profile. If profiles have already been set up, the profile name is shown instead of a dash.

ℹ️ **Information**: The parameters shown in the following are part of the TWAIN standard, but they may not be supported by all scanners.

Fig. 493: Configuration - 'Scan profiles' tab

Scan profile name: Enter the name of the scan profile here. You can use this name to find the profile in a menu on the ribbon.

Resolution (DPI): Define the resolution that the scanner will use here. Please note that not every scanner supports every resolution. You should normally select 300 dpi, since it represents a good compromise between quality and file size.

Scanner format: Define the scan area. In addition to a number of standard sizes, you can also enter custom values by selecting *User defined*.

Format: If you selected the *User defined* option, define the scanned area here.

Number of colors: Define the color resolution. Choose between black and white pages and photo quality pages with 24-bit color depth. It does not usually make sense to use the intermediate formats, since they will be expanded to 24-bit color depth anyway during JPEG compression. Grayscale formats are also not supported by every printer driver.

Brightness, contrast, and threshold: These parameters are not supported by all scanners. In addition, the values have very different ranges. The default value of 0 applies the default scanner settings. Normal ranges are between 1 to 8, 1 to 100, -127 to 127 or -1000 to 1000.

Wizard

Use the wizard to define scan profiles using a dialog box.

Image format: Define the file format for scanned files. You can save the scanned files in TIFF or PDF format.

Compression: Define the compression level for scanned files.

Discard blank pages: ELO has an intelligent blank page recognition feature. You can use it to automatically discard blank pages.

Automatic document feeder: Switches from flatbed scanning to automatic document feeder (ADF). Only enable this option if your scanner has an automatic document feeder. If this is not the case, errors may occur during scanning.

Duplex scanning: Scan both the front and back page of a document.

Deskew automatically: Documents that have been scanned at an angle will be automatically aligned to the page borders. This is not supported by all scanners.

Enhanced B/W scanning: Automatically enhances black and white scans.

Scan document

If you always scan documents with a fixed number of pages, this option allows you to perform automatic document separation. Use *Scan document* to scan the stack of pages. ELO will start a new document after the defined number of pages.

Separator page recognition
Define whether to enable separator page detection during scanning. The function uses the separator pages to generate separate documents from multiple scanned pages.

Search tab
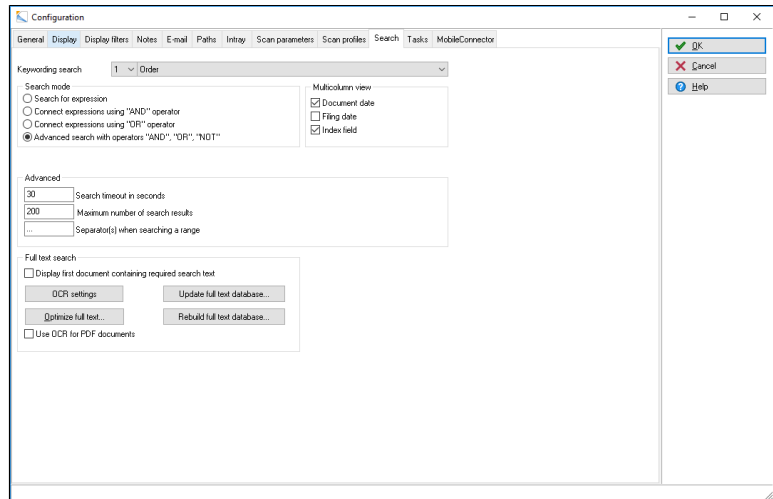
Fig. 494: Configuration - 'Search' tab

Keywording search

You can define up to four different buttons for the Search work area and use them to perform custom searches based on the keywording form. For example, if you want to assign button 1 to the invoice search, select *1* from the list on the left, then the *Invoice* keywording form from the list on the right. This search is available in the *Search* work area.

This runs a keywording search with the selected keywording form, shown as a button on the *Search* ribbon tab. You can remove this button by selecting the number of the button from the drop-down menu on the left, then selecting *No fixed assignment* from the drop-down menu on the right. The button is then removed from the ribbon.

D: You can also select *D* from the left-hand drop-down menu. The setting selected here is assigned to the *Search keywording* button. You can also change the default setting according to your requirements.

Search mode   This option only affects the "Short name" and "Extra text" fields.

Search for expression: If you search for the text "ELO Digital", ELO will return as matches all documents that contain exactly this term. However, a document containing the text ELO Digital will not be returned as a match.

Connect expressions using *AND* **operator**: Returns all documents containing all of the words in the list. The list will include both the document with " ELO Digital" in it, and one with "ELO ... digitization".

Connect expressions using *OR* **operator**: Returns all documents containing any one of the words in the list. In our example, it would be sufficient for "ELO" or "digital" to appear anywhere in a document.

Query with operators *AND*, *OR*, *NOT*: You can combine individual queries here. The individual expressions have to be explicitly linked with the operators and/or/not. Example: ELO and DMS or not REPOSITORY.

Multicolumn view: ELO shows the search results in a multicolumn list in the Search work area. Define which columns you want to be displayed here. The *Index fields* option should always be enabled, as otherwise the multicolumn view is not really useful.

Search timeout in seconds: The search may take a very long time to complete if the search query is complex and the repository is large. To prevent the user from getting the impression the computer has crashed, a query will be automatically terminated after a set period of time.

Maximum number of search results: A very general search query - such as "all documents with an E in the short name" - may generate an extremely large list of search results. You can limit the number of results to prevent it from taking too long to load.

Separator(s) when searching a range: You can search index fields for individual terms and for ranges of data. To run the range search, enter the start and end of the range, separated by this symbol. Example: 2000...4000. The separator symbol may be any character string. The default value is an ellipsis.

Display first document containing required search text: Sets the full text search to switch immediately to the list of results after performing a search. The matching expressions can also be highlighted in color on the page. This option is only available for TIFF documents.

OCR settings

You can define the settings for text recognition (OCR) and full text search here.
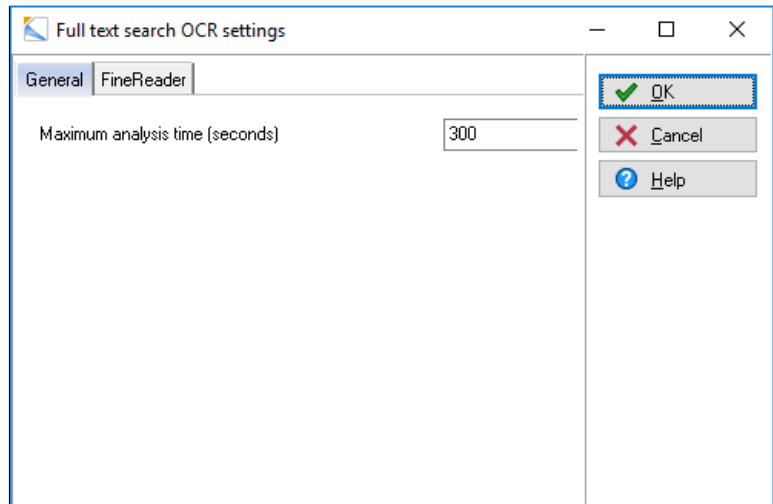
Fig. 495: Full text search OCR settings

ELO uses the text recognition software (OCR) ABBYY FineReader.

General: Set the maximum time for OCR on each document page on the *General* tab.

FineReader: Select the languages to be used by the text recognition (OCR) software on the *FineReader* tab.

Update full text database

If you do not want to perform full text OCR when importing large data sets, you can postpone it to a later time.

Click *Update full text database* to start the process.

Optimize full text

Reduce the amount of memory required for full text information in order to speed up the search.

Rebuild full text database

This function deletes the entire full text database, then adds all relevant documents to a new full text database.

Use this function if the full text database is damaged or corrupted.

Use OCR for PDF documents This option is used to transfer PDF files to the full text database using OCR.

Tasks tab
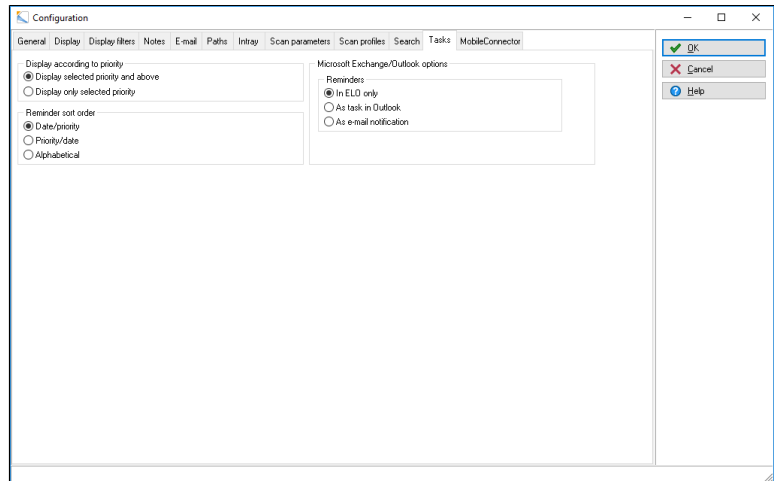
Fig. 496: Configuration - 'Tasks' tab

Show by priority Define whether to display tasks with the exact priority selected, or all tasks with the selected priority and above.

Reminder sort order Define the order in which to show reminders in the list of tasks.

Microsoft Exchange/Outlook options **Microsoft Exchange/Outlook options**: E-mail notification is only available using a special script (*http://www.elo.com*). You can only synchronize reminders with Outlook if you have an Exchange server.

> **Information**: Reminders are only available in Outlook 2000 and newer versions. Microsoft Exchange must also be installed and configured. The ELO user name must be exactly the same as the Exchange user (alias). You can find the alias names in the Microsoft Exchange configuration.

MobileConnector tab
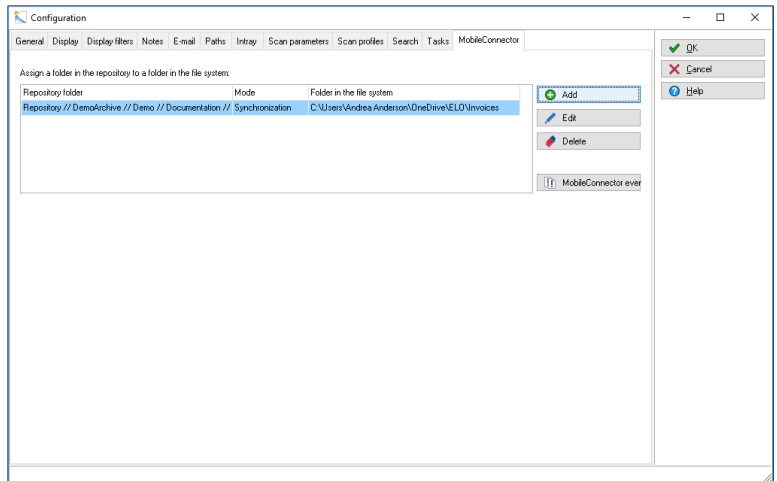
Fig. 497: Configuration - 'MobileConnector' tab

Repository folder: This contains the path in the ELO repository for every synchronization action.

Mode: This column shows you whether a folder is being synchronized or whether a copy is being created.

Folder in the file system: This contains the path in the file system for every synchronization action.

Add: Click this button to add another folder pair for synchronization or to save a copy. A new dialog box opens.

Edit: You can edit the selected folder pair here. A new dialog box opens.

Delete: Click here to delete the currently selected folder pair.

Logs: You can view the log files here. A new dialog box opens. You see whether there are warnings or errors or if entries were added or deleted. The button is only enabled when logs are available.

OK: Click *OK* to apply your changes and close the dialog box.

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

Document paths

Manage document paths by going to the *ELO menu > System settings > Document paths*. ELO uses document paths to manage documents. Use document paths to define new storage media for documents, restore moved media to a location, or to monitor the amount of free disk space. The document path specifies the physical storage location of the documents. Normal users do not need to worry about the document paths, since it is entered automatically to the keywording forms – e.g. as the default path *Basis*.
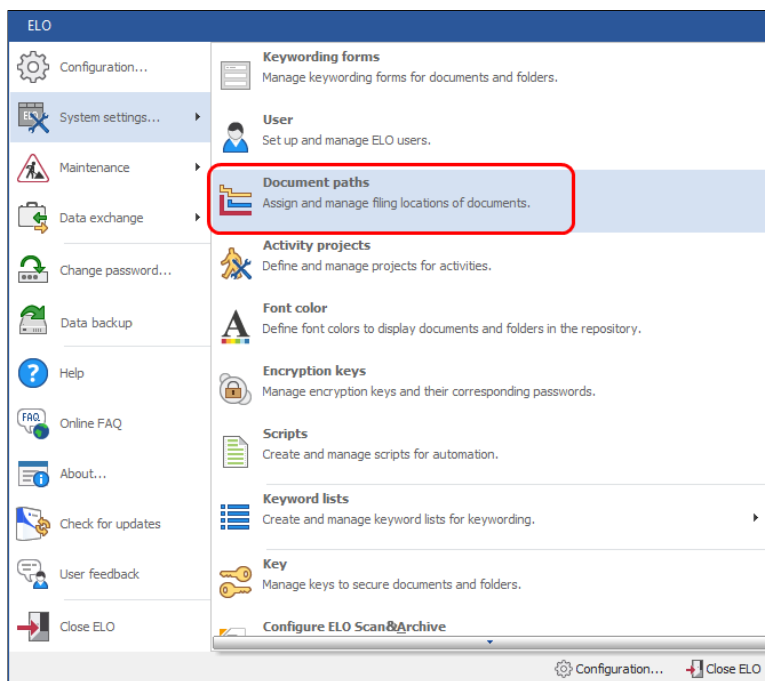
Fig. 498: Editing document paths

It can be a good idea to define multiple filing paths, for example, to save certain documents on another hard drive for backup purposes. There are two main types of paths:

- Document paths
- Backup paths
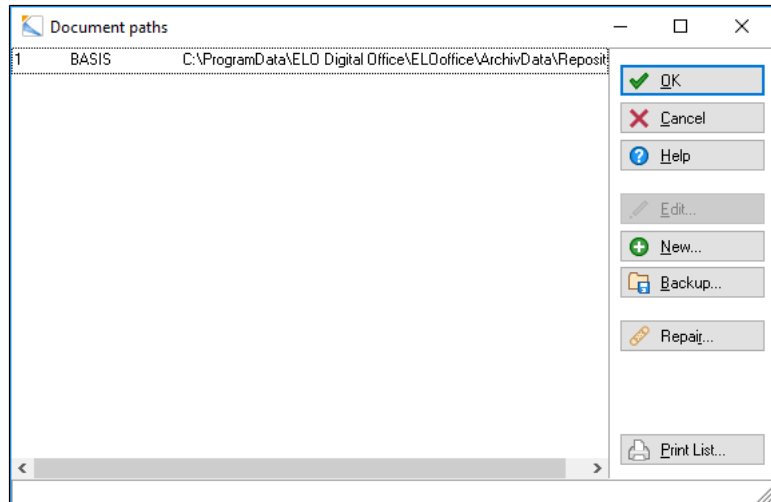
Fig. 499: 'Document paths' dialog box

Manage document paths by going to the *ELO menu > System settings > Document paths*.

- **Document path**: This is specified while creating a key-wording form. It is the physical path on the file system and the default setting for all documents filed using that key-wording form.

- You can also specify the document path for any document while you are keywording it. However, this is only possible if you selected *No fixed assignment* as the document path when the keywording form was created.

There is also a backup path. This is a document path that can be used to continually back up data, such as to an external drive.

Creating a new path
Create a new document path by going to the *ELO menu > System settings > Document paths*. You can also edit an existing path there. The system administrator will decide whether to assign you the rights required to create or change paths. Assign the paths by opening the *Configuration > Paths* tab.

Administration

1. Click the *ELO menu > System settings > Document paths*. The *Edit document path* window appears.
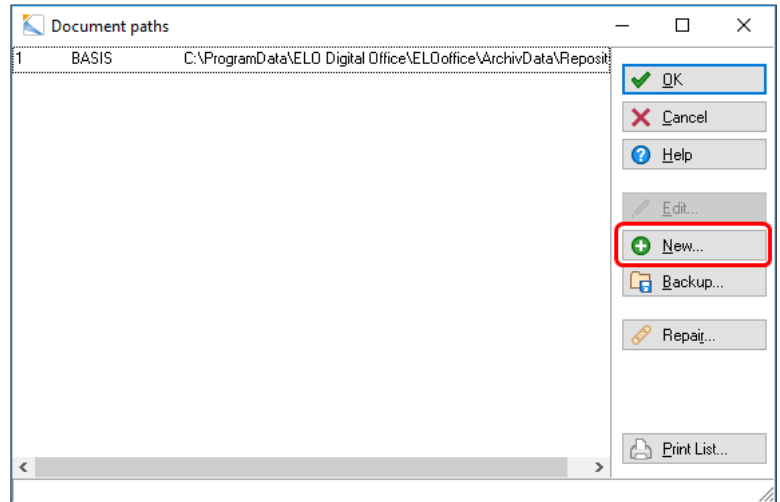
Fig. 500: 'New' button

2. Click *New*.
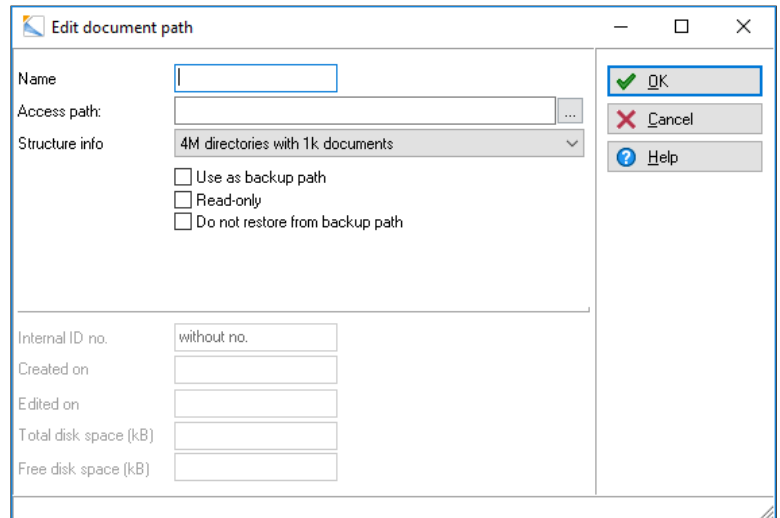
Fig. 501: Defining properties of the document path

Name: Enter a name for the new path, such as Invoice. The name can then be used to set the path in the keywording forms. When making backups to removable media, it is a good idea to use a sequential number with a code for the media type, such as *MO001* or *DVD001*. This identifier code should also be written on the medium.

Access path: Enter the complete path here.

Examples   D:\Invoice

\\Servername\Elo\Invoice.

Information: The access path must be the same for all connected computers. It is not advisable to use the drive letter to specify the name; instead, use the shared directory name on the medium. Otherwise, depending on the configuration of the client computer, errors may occur if changes are made locally. The path should therefore be a complete UNC path to the storage location.

Structure info: Define the filing structure for the data here. Open the drop-down menu to view the options.

- Select *Flat, no child directories* for ELO to store all documents in a single directory with no limits.

- With *64k directories with 64k documents*, ELO will file a maximum of 64,000 documents in any one of up to 64,000 directories.

- *ELOoffice compatibility mode*: Applies the structure from earlier versions of ELO.

Information: The best setting depends on your preferred directory structure and on the storage medium. If you are filing documents on a Windows server, we recommend the setting *4M directories with 1K documents*.

Use as backup path: If you select the check box, the path can be used to back up data. View this in the *Configuration > Paths > Backup path*.

ELO enters information to the following fields automatically.

- Internal ID no.
- Created on
- Changed on
- Total disk space (kB)
- Free disk space (kB)

It shows the internal identification number, the date the path was created or changed, and the size of the connected media as well as the amount of free space, allowing you to check the available storage capacity of the medium.

3. Confirm your entries with *OK*.

The new path is displayed immediately in the *Document paths* window.

4. Click *OK* again.

Repair

Filed objects are given an internal document identifier by ELO.

If ELO no longer works correctly, such as after an update or it crashes, use the *Repair* function in the *Document paths* window. This refreshes you existing settings and restores lost information regarding document paths. However, the function is unable to restore deleted documents or eliminate inconsistencies.

Create backup path

You need to define a backup path manually if doing so for the first time.

1. Click the *ELO menu > System settings > Document paths > New*.

The *Edit document path* window appears.

2. Enter a name, such as DVD001, and a path to the DVD drive, such as \\ELOServer\DVD\DVD001. Select the option *Use as backup path* and close the window with *OK*.

3. Create multiple backup paths, e.g. *DVD002*, *DVD003*, and so on.

Information: You need to create multiple paths because paths cannot be deleted. Click *OK* to confirm your entries.

4. Click the *ELO menu > Configuration > Paths*. Select your backup path, DVD001, here.

Additional backup paths are easy to set up: in the *Document paths* window, select the next (created path (such as *DVD002*), then click *Backup*. ELO automatically selects the new backup path (*Configuration > Paths*).

Modifying document paths

A document path can be edited.

1. Click the *ELO menu > System settings > Document paths*.

The *Edit document path* dialog box appears.

Select the document path you want to edit.

2. Click *Edit*.

The *Edit document path* dialog box appears.

3. Make the desired changes.

Information: Document paths cannot be deleted.

4. Click *OK* and close the dialog box.

Creating a read-only copy of the repository

Use this function to export your repository to a DVD. The data on the DVD can be viewed without an installed copy of ELO. This portable repository includes the ELOviewer, which lets you access all the documents stored on the DVD. Additional information on the ELOviewer is available in the corresponding chapter on the *ELOviewer*.
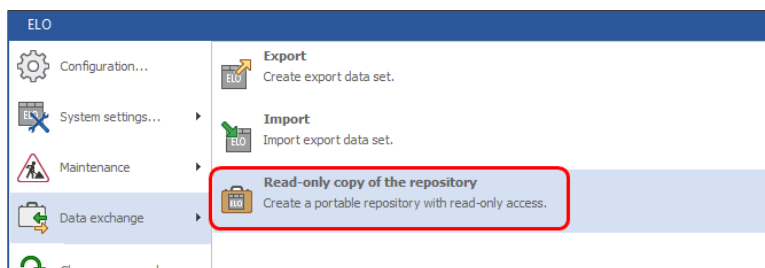
Fig. 502: ELO menu with the function 'Read-only copy of the repository'

1. Click the *ELO menu > Data exchange > Read-only copy of the repository*.
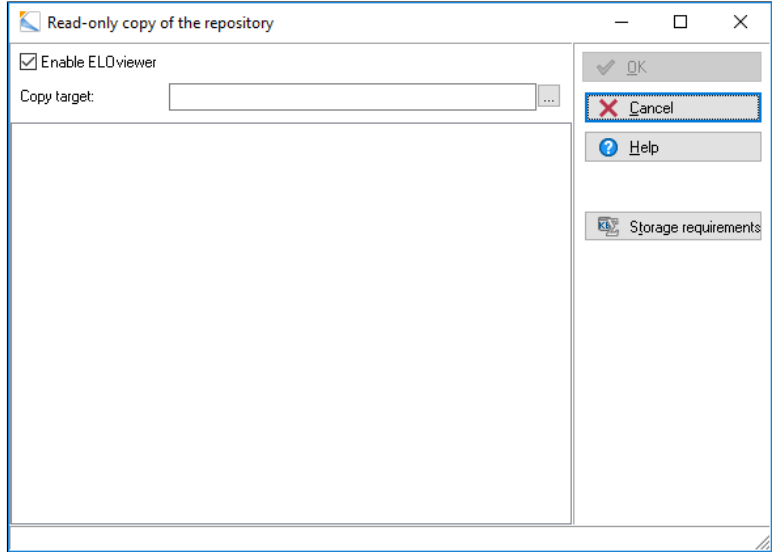
Fig. 503: Creating a read-only copy of the repository

The *Read-only copy of the repository* dialog box opens.

2. Select the option *Unlock repository for ELOviewer*.

3. Click *Storage requirements*.

The program shows a report on the size of your repository in the window.

4. Make sure the size of the repository does not exceed the capacity of your storage medium.
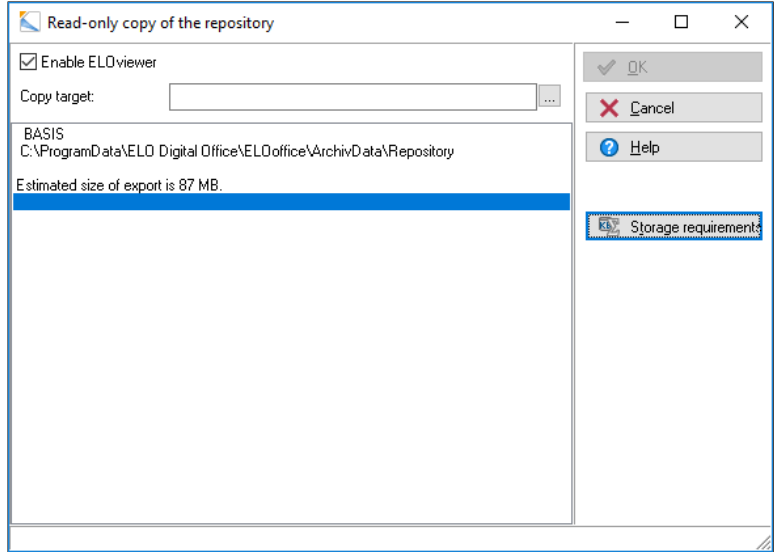
Fig. 504: Determining the storage requirements of a repository

5. Click the button with the three dots to select the folder that you want to temporarily store data to.
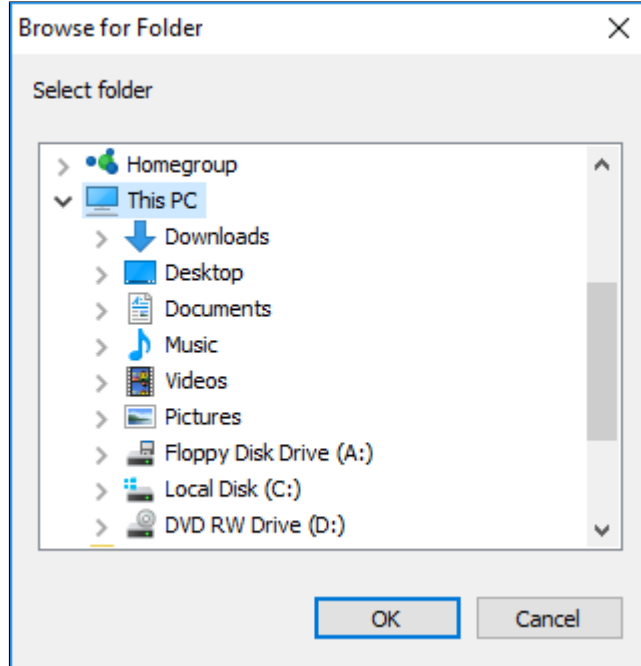
Fig. 505: Select folder for read-only copy

The *Browse For Folder* dialog box opens.

6. Select an empty folder for the *Copy target* field. The files for the repository you are creating will be saved temporarily to this folder.

Warning: Make sure sufficient space is available on your hard drive.
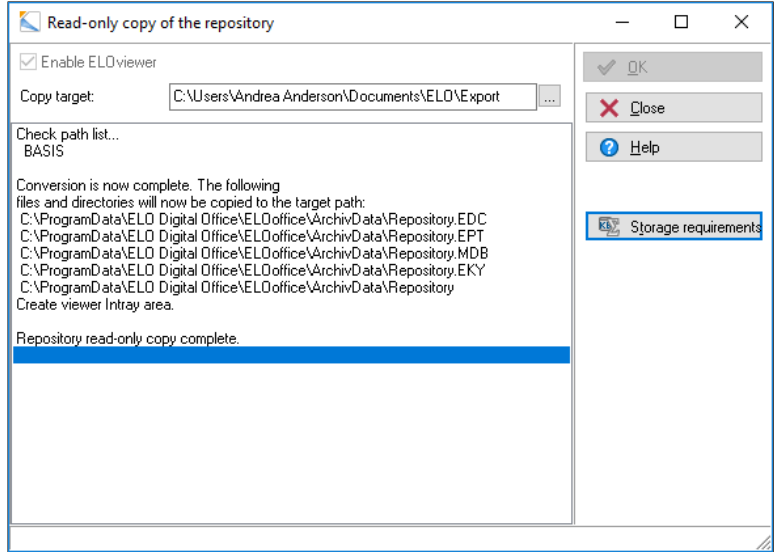
Fig. 506: Defining a target folder for the repository

7. Click *OK*.

Information: The ELOviewer is copied to the selected folder along with the read-only repository copy.

A report is displayed in the dialog box window.

8. The read-only copy of the repository is now located on your hard drive.

9. Copy the repository to a DVD with a DVD burning program.

Information: Use the documentation that came with your DVD drive or DVD burning software to burn your repository to the medium. Once the DVD has been created, you can view the repository and the documents it contains on any computer running Windows. The ELOviewer gives you full access to your documents on any computer with a DVD drive.

Export wizard

General

Use the export wizard to transfer folders and documents from a repository to an external data storage device. You can also move parts of your repository to another storage medium or remove them from the repository, for example after a retention period has expired.

> **Please note**: The *Import* and *Export* functions are not a substitute for regular backups.

1. In the repository, select the folder that you want to export.

2. Click the *ELO menu > Data exchange > Export*.

The *Export wizard* dialog box opens. The *Start* tab is active.

Start tab

Fig. 507: Export - 'Start' tab

3. Click the button to the right of the field to select the folder that you want to export data to.

The path to the folder is entered to the *Target path* field.

Information: If the selected directory already contains data, the program shows a confirmation request and then creates an empty directory that you can export the data to.

4. Click *Next*.

Selection tab
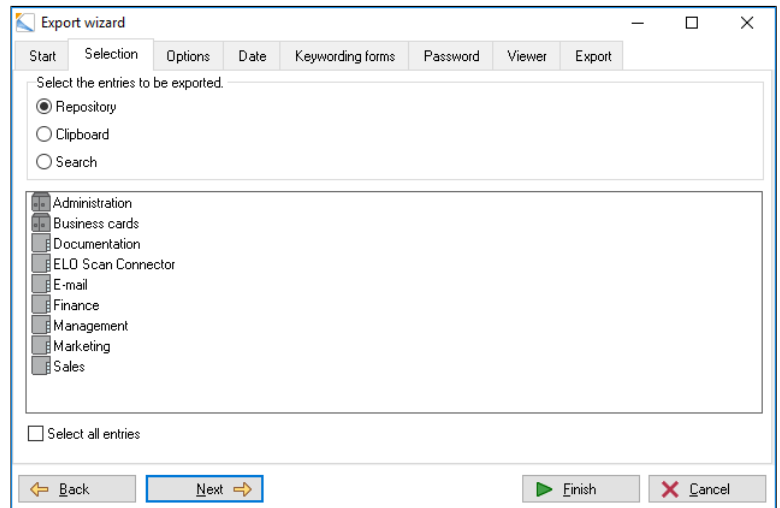
Fig. 508: Export - 'Selection' tab

The *Selection* tab appears.

Information: You can view the contents of the *Clipboard* or *Search* work areas. You can also export data from these work areas.

Information: Click *Back* to go one step back in the export process. You can make changes to the settings at any time.

5. Select the folder or folders that you want to export, or click *Select all entries*.

6. Click *Next*.

Options tab
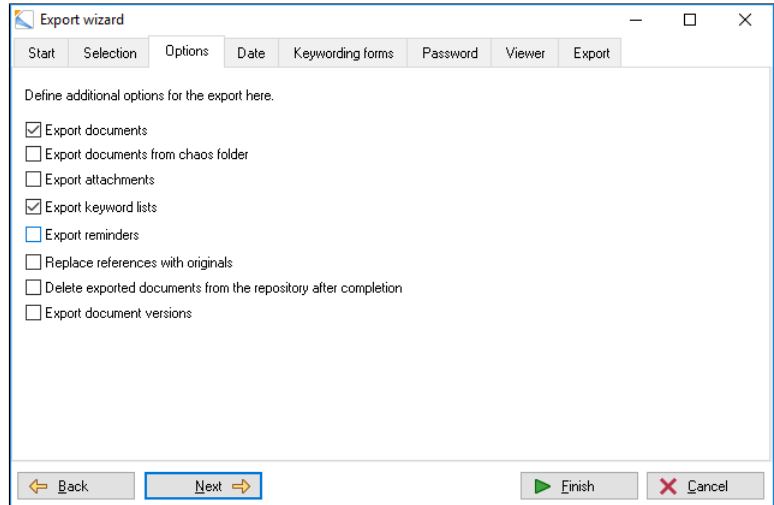
Fig. 509: Export - 'Options' tab

The *Options* tab appears.

7. Select the corresponding settings.

Information: You need to select the *Export documents* option if you want to export documents.

Export documents: The documents are exported from the selected areas of the repository.

Export documents from chaos folder: The documents in the chaos folder, which cannot be seen in the repository tree, will be exported.

Export attachments: Attachments will be exported.

Export keyword lists: All keyword lists will be exported.

Export reminders: All reminders will be exported.

Replace references with original documents: References are replaced with the original files in the export data set.

Delete exported documents from the repository after completion: All exported documents will be deleted. Only the administrator has this option.

Export document versions: All document versions will be exported.

> **Information**: Click *Finish* to end the export process. The Export wizard applies the settings and copies the data to the selected folder.

8. Click *Next*.

Date tab
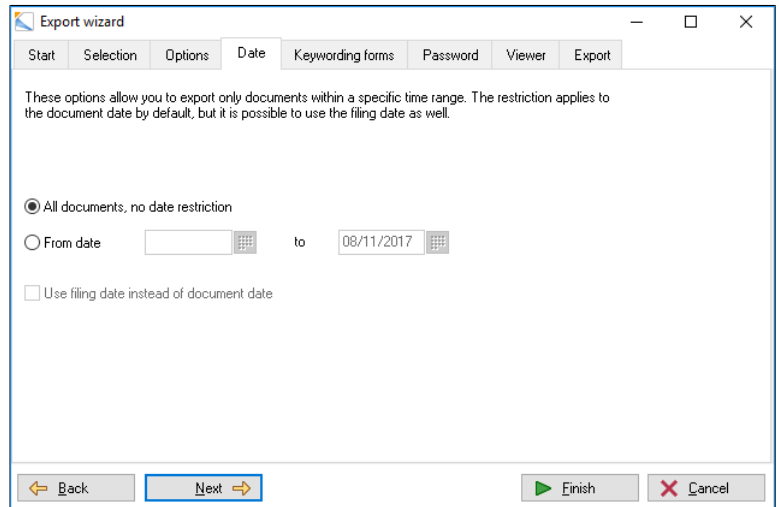
Fig. 510: Export - 'Date' tab

The *Date* tab appears.

All documents, no date restriction: All documents are exported.

From date ... to ...: Enter the time frame. All documents with a date within the specified time range will be exported.

Use filing date instead of document date: Select this option to use the filing date instead of the document date for the previous option.

Optional: Restrict the data selected for export by entering a date range.

> **Information**: ELO automatically sets the filing date when a document is keyworded. You enter the document date to the *Date* field of the keywording form when you are keywording a document.

9. Click *Next*.

Keywording forms tab
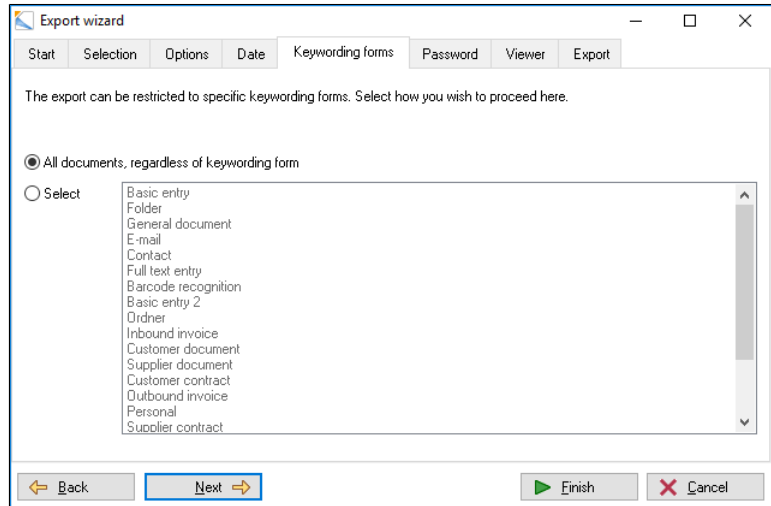
Fig. 511: Export - 'Keywording forms' tab

The *Keywording forms* tab appears.

10. Select individual keywording forms for export as needed. Restrict the exported data to specific document types.

All documents, regardless of keywording form: All documents will be exported from the selected area of the repository.

Select: Specify the keywording form(s). Only documents with the selected keywording forms will be exported.

Information: Select multiple keywording forms at once by holding down the SHIFT or CTRL key during selection.

11. Click *Next*.

Password tab
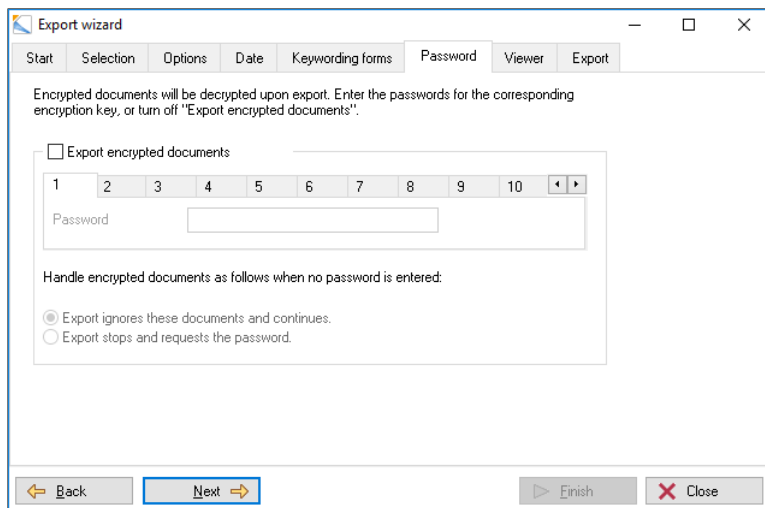
The *Password* tab appears.

Some documents in your repository may have been encrypted (assigned an encryption key). This means that various documents have been locked with a password. These files will be decrypted during export. This means you must enter the password for each encryption key if you want to use the *Export encrypted documents* function.

Password: Enter the password for the encryption keys.

Please note: If you have encrypted documents without a password, you should choose an option to determine how the program behaves during export.

Information: If you do not want to export encrypted files, select the *Export ignores these documents and continues* option.

12. Click *Next*.

Viewer tab

Fig. 513: Export - 'Viewer' tab

The *Viewer* tab appears.

Optional: If you want to create a read-only copy of your export data set, enter a repository name and a folder here. Select the folder by clicking the button to the right of the target directory field.

Information: If the *Target directory for read-only copy* field remains empty, a read copy will not be created.

13. Click *Next*.

Export tab
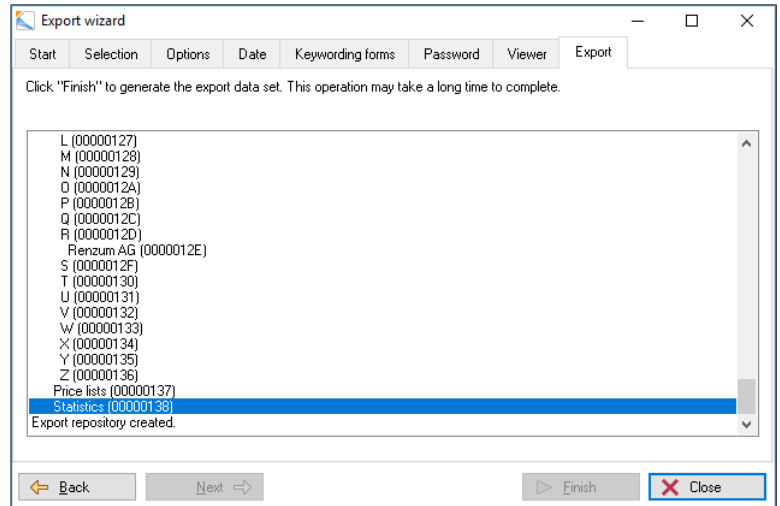
Fig. 514: Export - 'Export' tab

The *Export* tab opens.

14. Click *Finish*.

The export data set is created. A report is displayed in the window.

15. Click *Close* to complete the export process.

Result

The read-only copy is located in the previously selected folder.

Import wizard

The import wizard helps you to import exported parts of repositories back into ELO.

Please note: The *Import* and *Export* functions are not an adequate substitute for regular backups.

1. Click *ELO menu > Data exchange > Import*.

Source tab
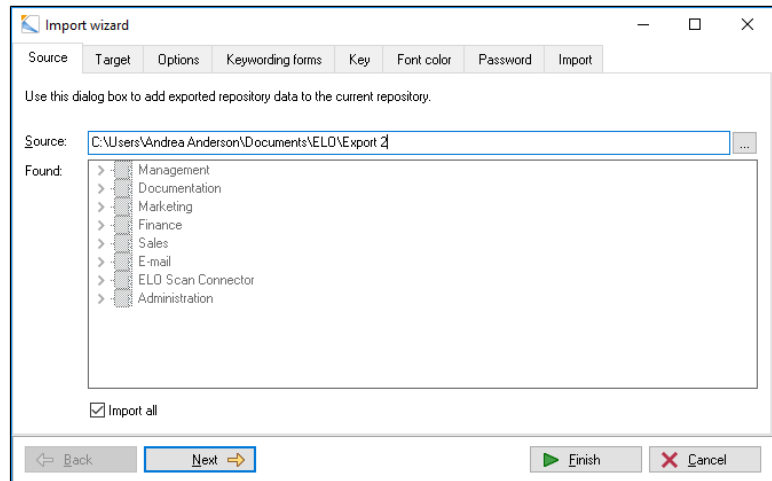
Fig. 515: Import - 'Source' tab

The *Source* tab appears.

2. Click the button with the three dots.
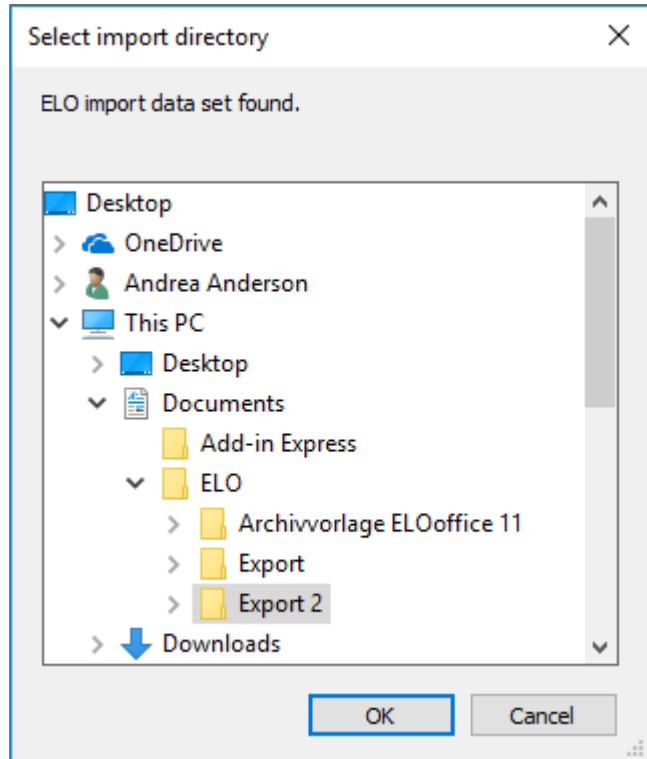
Fig. 516: Select import directory

The *Select import directory* dialog box appears.

3. Select the folder that contains the exported repository section.

4. Click *OK*.

The path to the import data is entered to the *Source* field.

Information: All repository sections contained in the folder are shown on the tab. Clear the option *Import all* if you only want to import specific entries, then select the desired repository entries.

5. Click *Next*.

Target tab
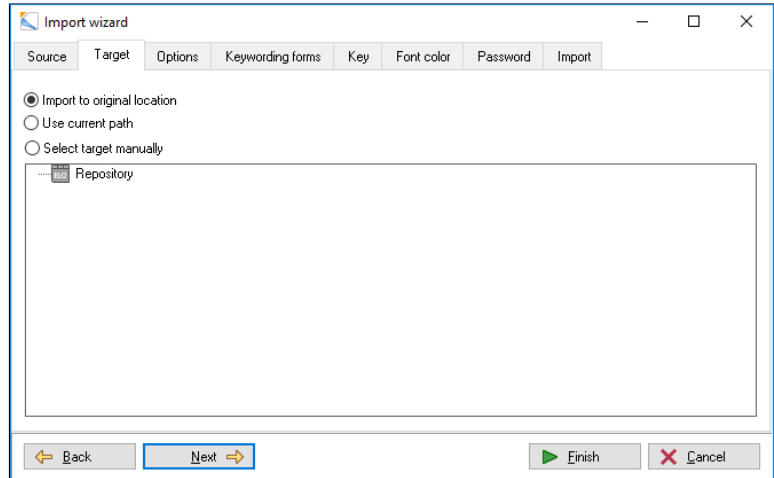
Fig. 517: Import - 'Target' tab

The *Target* tab appears.

6. Select the repository folder that you want to import the data to.

You have the following options:

- **Import to original location**: This setting enters the imported data into its original location in the repository.

- **Use current path**: This inserts the repository section into the currently selected location in the repository.

- **Select target manually**: Choose a location in the repository from the box below to import the data.

7. Click *Next*.

Options tab
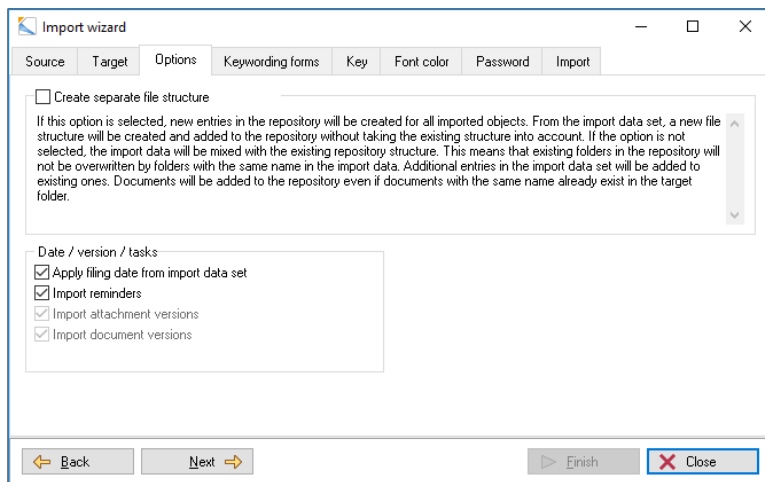
The *Options* tab appears.

8. Define the import options.

Create separate file structure: New entries are created in the repository for all imported folders and documents. The existing file structure in the repository will not be affected. Otherwise, the imported data will be integrated into the existing repository structure. Entries already in the repository will not be overwritten. All documents are added to the repository, potentially creating duplicates.

Apply filing date from import data set: Select this option if you want the imported elements to retain their original filing date.

Import reminders: Import the reminders contained in the imported data set.

9. Click *Next*.

Keywording forms tab
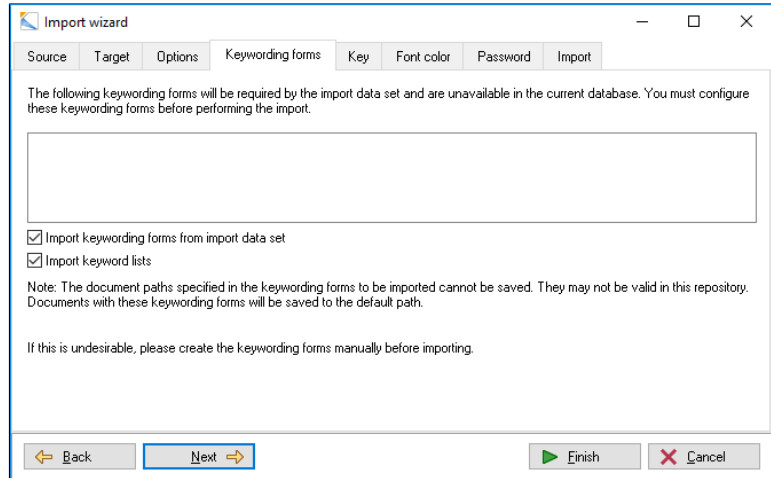
Fig. 519: Import - 'Keywording forms' tab

The *Keywording forms* tab opens.

This tab shows any keywording forms detected in the import package that do not exist in the target repository. These keywording forms must be created before import.

Import keywording forms from import data set: The keywording forms will be imported from the import data set. The keywording forms must exist in the target repository after import.

Information: Document path settings in the imported keywording forms will not be imported, since they may not be valid in the target repository. Documents using these keywording forms will be filed to the default path. If you do not want to import the forms, create them in your repository before performing the import.

10. Click *Next*.

Keys tab
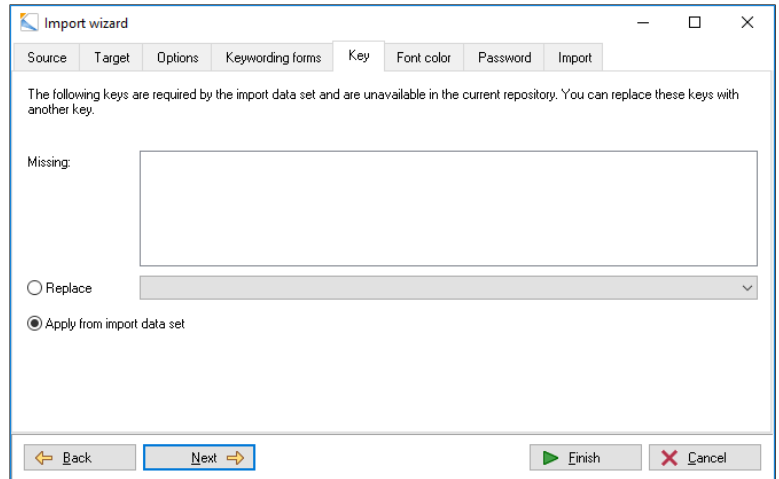
Fig. 520: Import wizard - 'Keys' tab

The *Keys* tab shows the keys that are missing the repository.

11. Click *Next*.

Depending on the settings selected, any missing keys will be replaced.

Font color tab
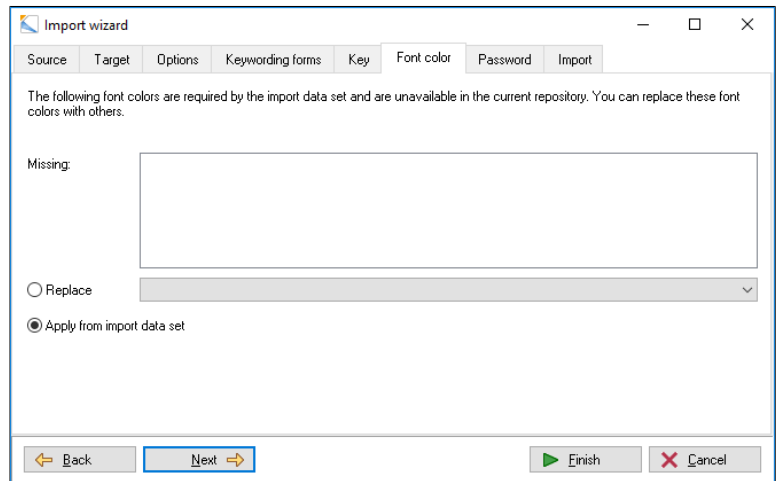
Fig. 521: Import - 'Font color' tab

12. The *Font color* tab shows any missing colors. If necessary, select *Replace* to choose an alternative for missing colors.

13. Click *Next*.

Password tab
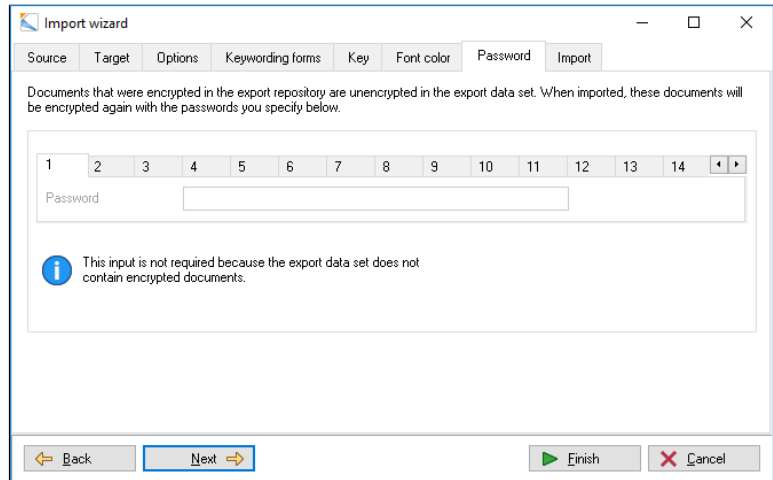
Fig. 522: Import wizard - 'Password' tab

The *Password* tab appears.

Documents that were encrypted in the exported repository are not encrypted in the export data set. These documents are encrypted again using the password during import. If your import data set contains encrypted documents, you must enter the password here. This means you will have to enter the password for every encryption key associated with the documents you want to import.

Information: You can skip this step. However, you will be asked for the password during import when the program encounters the first encrypted document.

14. Click *Next*.

The *Import* tab appears.

15. Click *Finish*.

Import tab
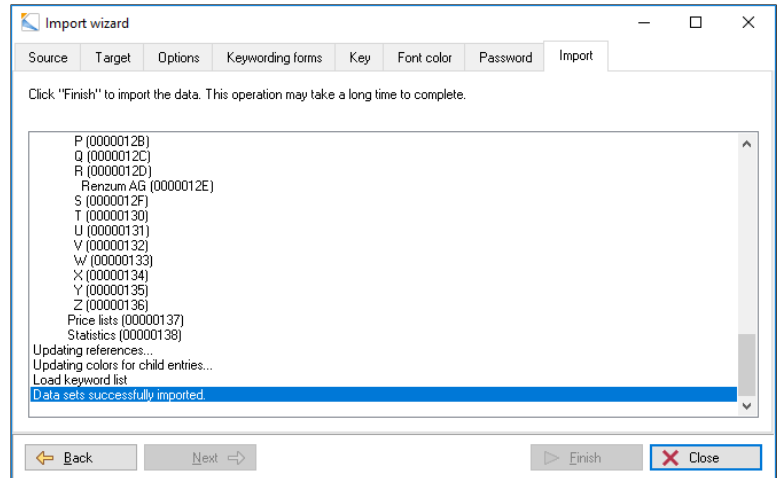
Fig. 523: Import complete

The *Import* tab shows the results of the import.

16. Click *Close*.

Result   The data has been imported into the repository.

Print repository summary

Use the *Print repository summary* function to print a list overview of your repository. Use this feature to check the repository structure.
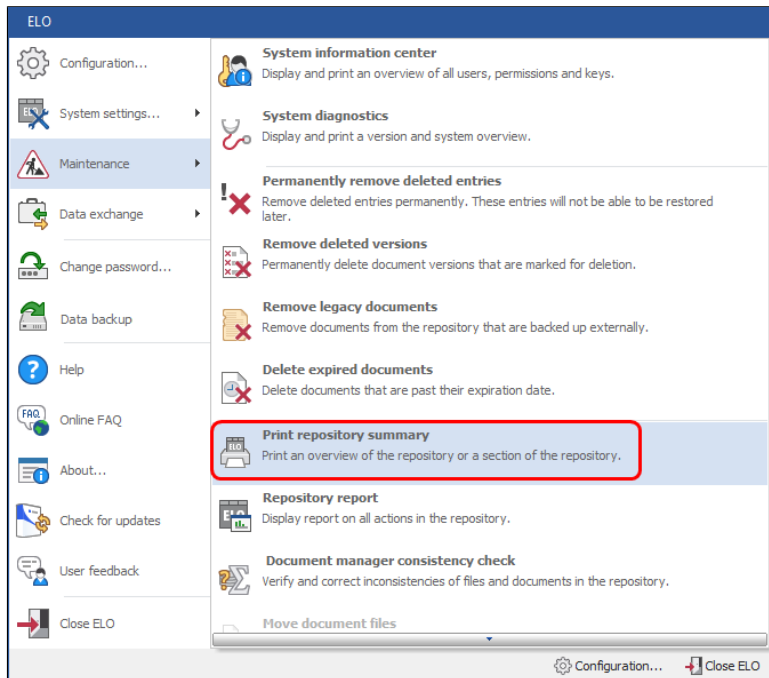
Fig. 524: 'Print repository summary' menu item

Open the *Print repository summary* function in the *ELO menu > Maintenance > Print repository summary*.
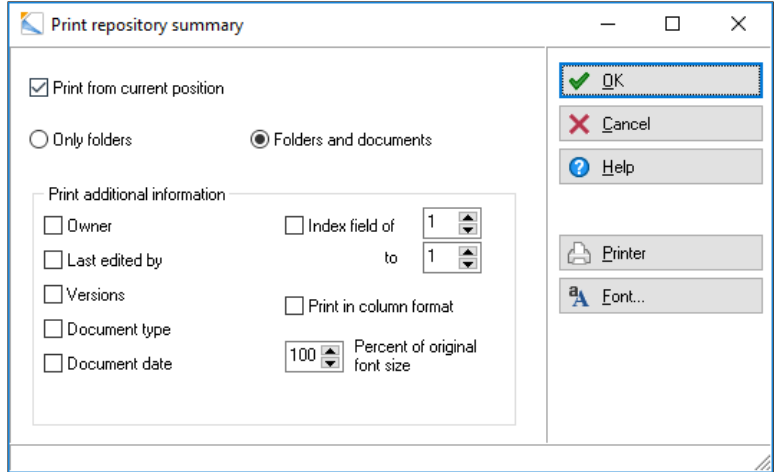
Fig. 525: 'Print repository summary' dialog box

The following options are available:

Print from current position: If you only want to print part of the current repository, select this option. This creates an overview of the selected folder. If you have not selected an entry in the repository, an overview of the repository as a whole is printed.

Information: Before starting the print job with this option, check that the correct entry is selected in the repository.

Folders only: Only folders will be included in the report.

Folders and documents: The report will only include folders and documents.

Print additional information: This option prints an overview that contains additional information about the repository.

Information: Please bear in mind that the reports can be very extensive depending on the option you selected.

- **Owner**: The *Owner* option prints the owner information for each document.

- **Last edited by**: The option *Last edited by* prints information about who edited the document last.

- **Versions**: The *Versions* option prints all version information and version comments for each document.

- **Document type**: The *Document type* option prints information about the type of document.

- **Document date**: The *Document date* option prints the date of the last document version for each document.

- **Index field from ...**: The option *Index field from ...* defines which index field to start printing out keywording information from.

- **to ...**: The option *to ...* defines which index field to stop printing out keywording information from.

- **Print in columns**: The *Print in columns* option prints the repository overview in column form. The options *Document date* and *Index field from ... to ...* are the only options for additional information that are enabled in this view.

Information: To prevent overlaps, you should not select more than one additional information option and if necessary minimize the size of the text using the option *... Percent of original font size*.

- **... Percent of original font size**: The function *... Percent of original font size* allows you to print in a smaller font. This only applies for the additional information options.

OK: Click *OK* to apply your changes and close the dialog box.

Cancel: Click *Cancel* to close the dialog box without printing an overview of the repository.

Printer: To print an overview of the repository, you first need to select the printer.

Font: Choose the font you want to print the repository overview in.

Result   The repository summary is printed.

Information: If you want to see a different or a more detailed overview, change your settings and repeat the above process.

Key management

The system administrator can define and assign to users up to 255 access keys. Users can only see the contents of the repository that they have a key for. If you have questions about *Keys*, contact your system administrator.
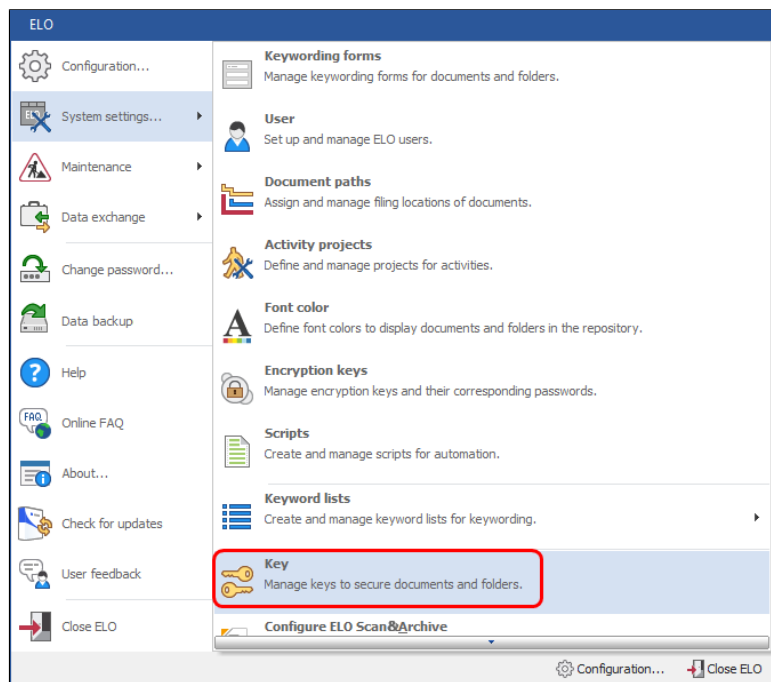
Fig. 527: 'Keys' menu item

Defining keys
1. Click the *ELO menu > System settings > Keys*.
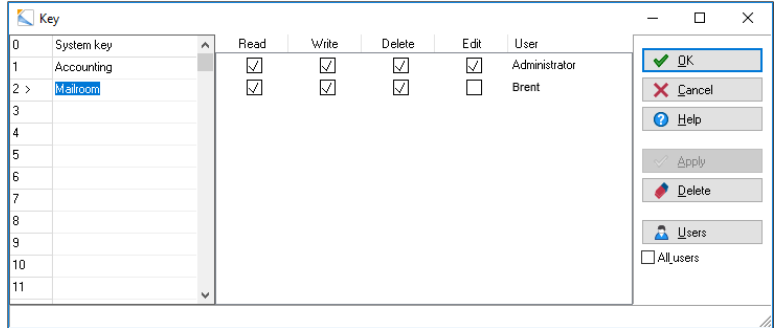
Fig. 528: Defining keys

The *Keys* dialog box appears.

2. Enter the key name to the next free line on the left-hand side of the dialog box.

Click *OK* to save the new key.

Information: The new key is available for keywording forms. The keys can be used to lock entries.

Assigning keys

Locked entries are only visible to those users with the key that was used to lock the entry.

1. Click the *ELO menu > System settings > Keys*.
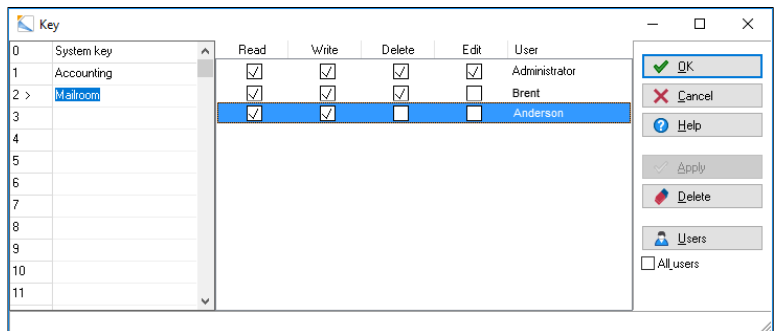
Fig. 529: 'Keys' dialog box

The *Keys* dialog box appears.

2. Select the key you want to assign.

On the right, you can see the ELO users who have already been assigned the key.

3. To see all users, click *All users*.

All users are displayed.

For each key, you can assign four user rights to a user:

- **Read**: The user can read documents.
- **Write**: View or edit the keywording for a document.
- **Delete**: The user can delete documents and folders.
- **Edit**: The user can edit documents.

Information: A user may have permission to view and edit locked documents without having the ability to lock documents with the same key.

4. Assign permissions by clicking the corresponding check boxes for the users.

5. Click *Apply*.

The keys are assigned.

Information: To assign additional keys, repeat the process.

6. Click *OK* to complete the assignment of keys.

Optional: If you select another key without saving first, a dialog box appears with a warning.

7. Click *OK* to save the changes.

Information: Only one permission needs to be activated to assign a key. It is therefore possible to give multiple users the same key, but not the same permissions.

Information: You can also assign keys in the *ELO menu > System settings > Users*. Select a user from the list on the left. Assign *Keys* as needed.

Removing a key

It may be necessary for you to withdraw a key or right from a user.

1. Click the *ELO menu > System settings > Keys*.

The *Keys* dialog box appears. All users that have this key are listed on the right.

2. Select the key you want to remove.

3. Next, select the user and remove the *X* from the check box to remove the permission for that key.

4. Click *Apply*.

The key is removed.

5. Click *OK* to finish the process.

From now on, the user no longer has access to entries locked with this key.

Deleting keys

1. In the *Key management* dialog box, select the key you want to delete.

2. Click *Delete*.

A confirmation request appears.

3. Confirm the request by clicking *OK*.

The key has been deleted.

Encryption keys

ELO enables you to safeguard your document files using 128-bit encryption. To do this, you must assign the documents one of the 16 encryption keys. Each key has its own password.

Please note: When creating the document, you must define the encryption key you want to use for that document. For security reasons, this cannot be changed later. Since the full text database cannot be encrypted, encrypted documents will not be stored in the full text database.
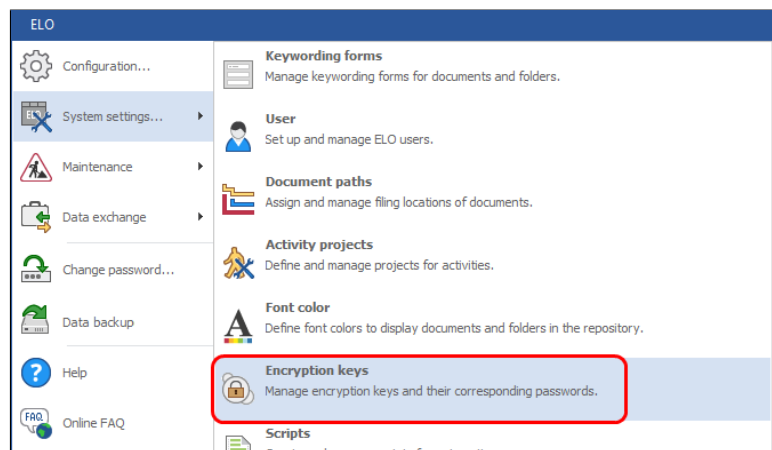
Fig. 530: 'Encryption keys' menu item

1. Open the encryption keys manager in the *ELO menu > System settings > Encryption keys*.

The *Encryption keys* dialog box opens.
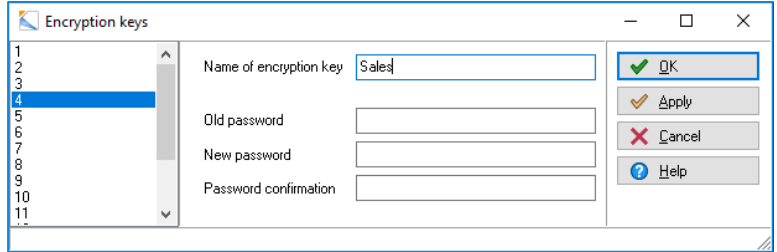
Fig. 531: Encryption keys manager

The 16 encryption keys are created when ELOoffice is installed. They are numbered from 1 to 16 and all have the password "elo" by default.

Information: You should change the default password. Select the encryption key. Enter the old password, then the new password twice.

2. Select an encryption key.

3. Enter a new name for the encryption key to the input field.

Assigning encryption keys

1. Encryption keys are assigned from the keywording form.

2. An encryption key is assigned automatically when a document is filed by selecting the corresponding option on the *Options* tab of the keywording form.

Assign an encryption key to a keywording form selected in *ELO menu > System settings > Keywording forms* in the *Encryption key* selection field.

The documents filed with the keywording form will be encrypted when they are filed to the repository.

Warning: Documents will be encrypted when they are filed.

Color management

You can highlight individual entries in the repository with the *Font color* function.
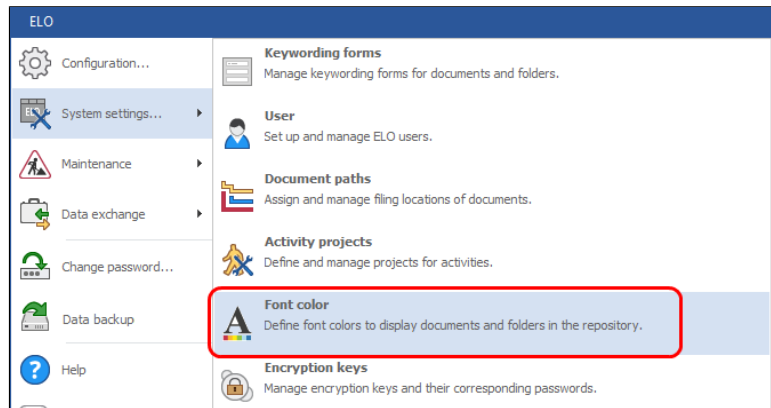
Fig. 532: 'Font color' menu item

You can define the *Font color* on the *Options* tab (in the *Edit keywording* dialog box) while keywording an entry.

You are able to define the number of colors available here.

Defining colors   1. Click *ELO menu > System settings > Font color*.

The *Font color* dialog box appears.
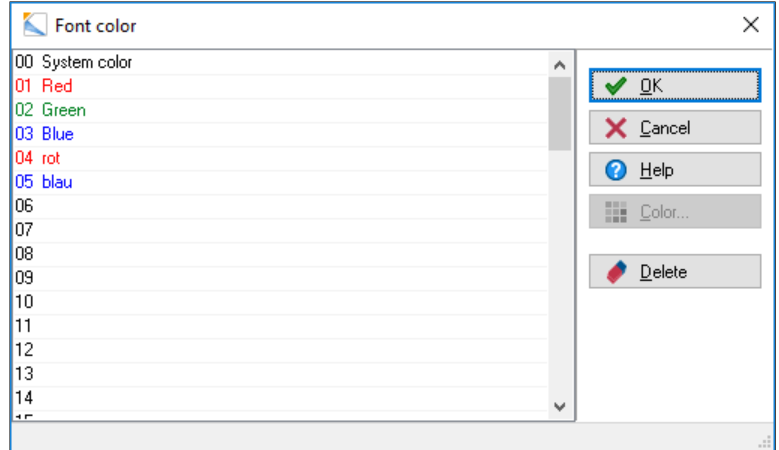
Fig. 533: Font color

2. Click the first line without a color name.

The line can be used as an input field.

3. Enter a color name. Select an appropriate name for the color, such as `Purple`.

4. Click *Color*.
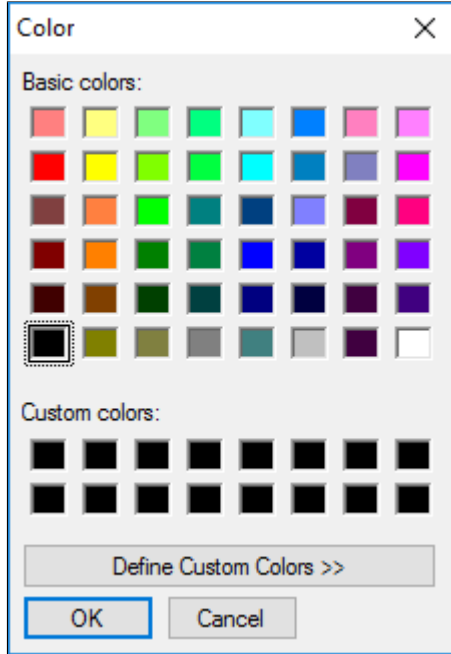
Fig. 534: Color selection dialog box

The *Color* window opens.

5. In the *Basic colors* area, click a color to select it.

6. Click *OK* to confirm your selection.

Information: To change the color, select the color and continue from step 4.

7. Have you defined all the colors you need? Click *OK* to complete the action.

Information: Font colors can be deleted. Open *ELO menu > System settings > Font color*, select the color and click *Delete*.

The user manager

The administrator is responsible for managing users. For security reasons, most ELO users will not be able to access the user manager. If you are your own administrator, please read the following.
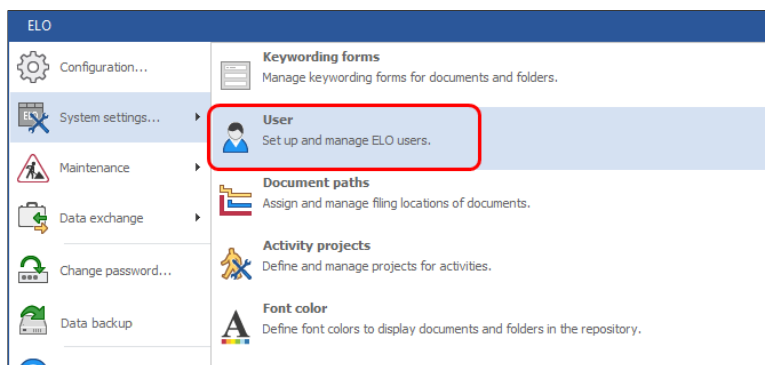
Fig. 535: 'Users' menu item

User management means:

- Creating new users in ELO as well as assigning permissions and keys.

- Assigning different keys or permissions to existing users.

- Deleting users from ELO.

Creating a new user   1. Click *ELO menu > System settings > Users*.
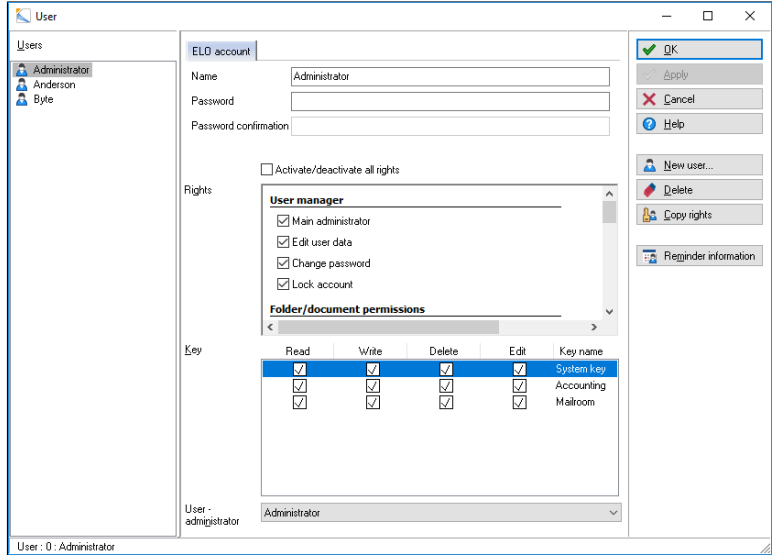
Fig. 536: User manager

The *Users* dialog box opens.

2. Click *New user*.
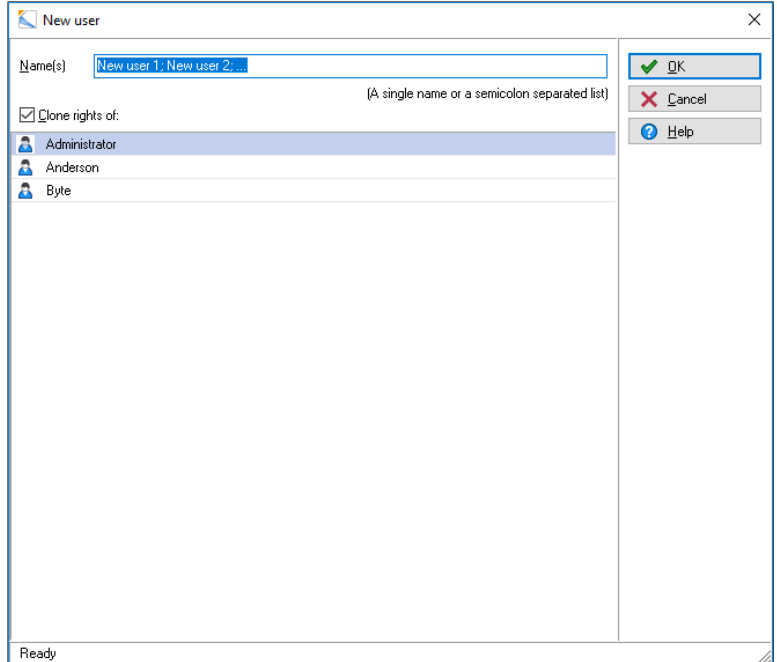
Fig. 537: Select user

The *New user* dialog box appears.

Name(s): Enter the new user or users. You can enter multiple new users by separating their names with a semicolon.

Clone rights of: Select this function to give a new user the same rights and permissions as the user selected in the list below.

3. Click *OK*.

The user is created with the assigned rights.
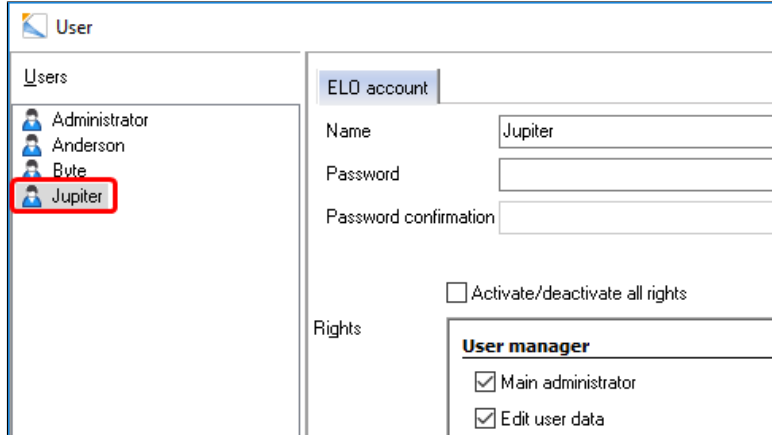
Fig. 538: New user in the user manager

The *Users* dialog box opens.

The new user is entered to the *Users* field.

Password: Every user needs to log on with a password. Enter the password here. The password is case sensitive.

User rights
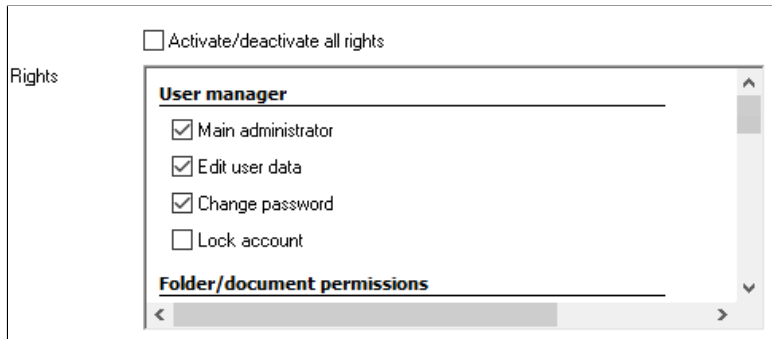
Fig. 539: Permissions, define

Rights: You can assign rights for every user, which controls how they are able to administer and edit repositories and repository data.

You can assign the following user rights under **User manager**:

- **Main administrator**: Only give this right to the system administrator. This right permits a user to change the rights of all users, create new users, and delete existing users.

- **Edit user data**: The user can create and manage other users. This only applies for users with the same (or fewer) rights.

- Change password: The user is able to change their password with the option **ELO menu > Change password**.

- **Lock account**: If the *Lock account* right is set for a user, that user is unable to log on to the system, even though the user is still registered in ELO.

Folder/document permissions

- **Edit repository structure**: This option option permits a user to edit the folder structure of the repository or create new folders.

- **Edit documents**: The user may edit or create new documents.

- **Edit permission settings**: The user is able to change the permissions to entries in the repository.

- **View all entries, ignore permission settings**: This right means that all documents and folders are shown to the user, even if the user does not have the right to view them.

- **Import permission**: The user is able to import an export data set into the repository.

- **Export permission**: The user is able to create an export data set.

Folder/document options

- **Reassign form type for entries**: The user is able to assign another keywording form to a document, even after it has been keyworded and filed. Please note that doing this may cause keywording information to be lost.

- **Edit keyword lists**: The user is able to edit keyword lists.

- **Edit expiration date**: The expiration date for documents can be edited.

- **Change document editing status**: The user may change the document status of entries (version control disabled, version control enabled, non-modifiable).

- **Edit document paths**: This right enables the user to edit the path settings under *ELO menu > Configuration > Paths*.

Delete

- **Delete folders**: The user may delete folders.

- **Delete documents**: The user may delete documents.

- **Delete non-modifiable documents**: Attention! This right permits a user to delete documents filed with the status "Non-modifiable".

- **Delete versions**: The user is able to delete individual versions from a document's version history.

System settings

- **Edit master data**: The user may accomplish all maintenance tasks in the repository (such as manage keys, create keywording forms, and so on).

- **Edit scanner settings and profiles**: This right allows the user to change the settings in *ELO > Configuration > Scan parameters* and *ELO > Configuration > Scan profiles*.

- **Create activity projects**: The user may manage activity projects by clicking *ELO menu > System settings > Activity projects*.

- **Edit scripts**: The user may create, edit, and delete scripts.

- **Edit keywording forms**: The user may edit keywording forms.

4. Once you have entered the required settings, click *Apply* to save them. If you click *OK*, the settings are saved and the dialog box closes.

Editing a user

The settings for existing users can be edited.

1. Click the *ELO menu > System settings > Users*.
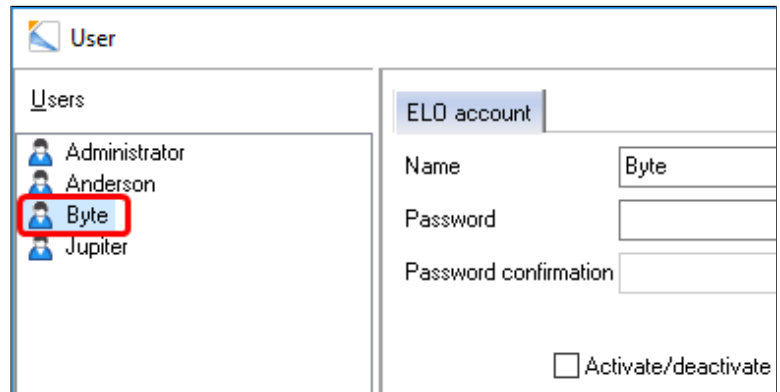
Fig. 540: Selecting users

The *Users* dialog box opens. The users are listed on the left-hand side. The repository rights are shown in the middle.

2. Select a user on the left-hand side.

All rights and keys assigned to the user are now shown in the *Users* dialog box.

3. Make your changes to the keys and rights.

4. Click *OK*.

Copy user rights

In practice, multiple users will usually have the same rights, such as all employees in a department.

If a user needs to have the same rights as another user, you can transfer the rights to the new user.

1. Click the *ELO menu > System settings > Users*.

The *Users* dialog box opens.

2. In the list field on the left, select the user that you want to transfer rights from another user to.

The current permissions are displayed.

3. Click *Copy rights*.
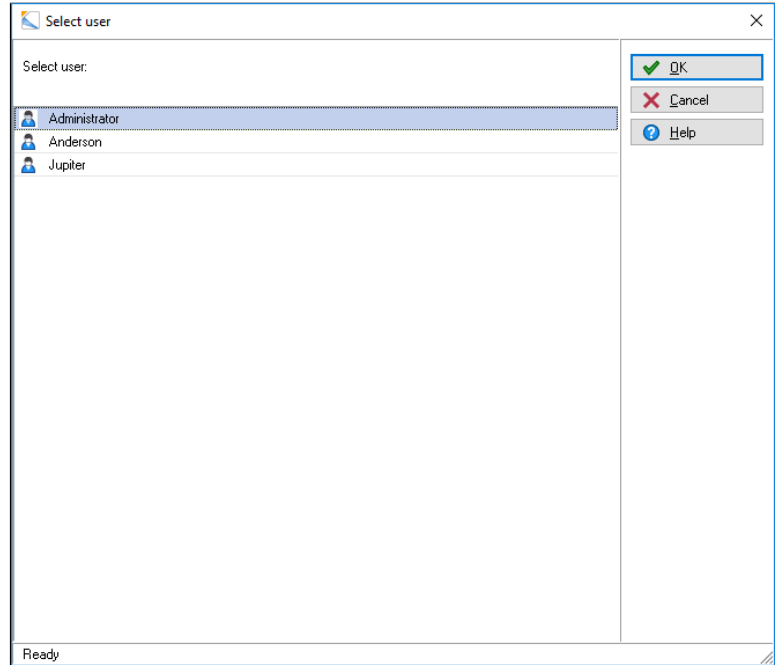
Fig. 541: Select user

The *Select user* window opens.

4. Select the user that you want to copy the permissions from.

5. Click *OK*.

Information: You can also use the *Clone rights of* option directly under the *New user* input field when you are creating new users.

User report

The program can also issue a report of the documents and reminders from all users.

1. Click *Reminder information*.

The *Reminder information* dialog box appears.

All users are displayed. If you do not see them, click the triangle in front of the repository name.
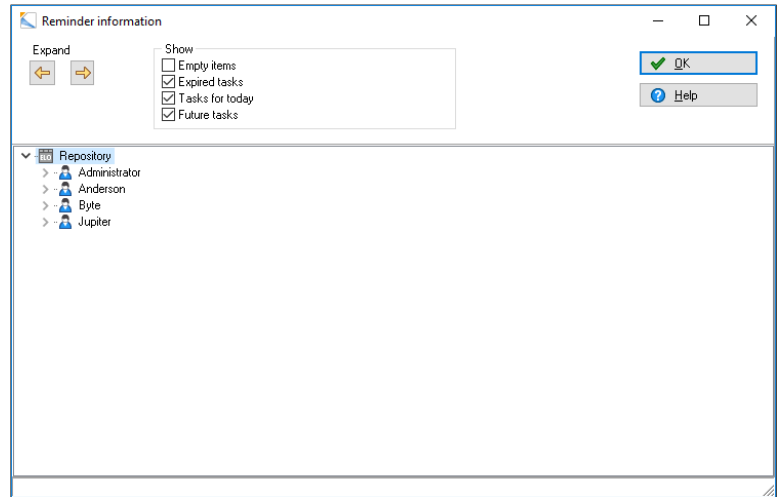
Fig. 542: 'Reminder information' dialog box

Information: Click the triangle in front of a user's name to open the next level for the user.

These triangles open up the next level for each user.

2. In the *Display* area of the dialog box, select the options you want to view.
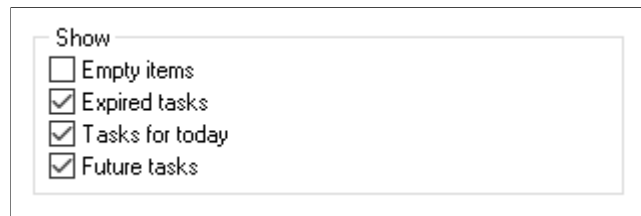
Fig. 543: Selecting display options

Removing users

1. Open the *Users* dialog box.

2. Select the user you want to delete.

3. Click *Delete*.

The user has now been deleted and no longer exists as a user in ELO.

Warning: If you delete a user who has created other users, a warning message appears. Click *Yes* to delete this user as well.
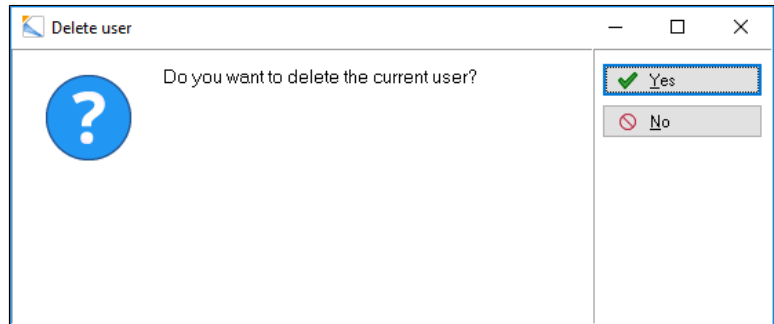
Fig. 544: 'Delete user' dialog box

Alternative: If you do not want to delete the users, click *No* to become the administrator of these users. You can change this assignment in the subsequent dialog box.

Inherit permissions
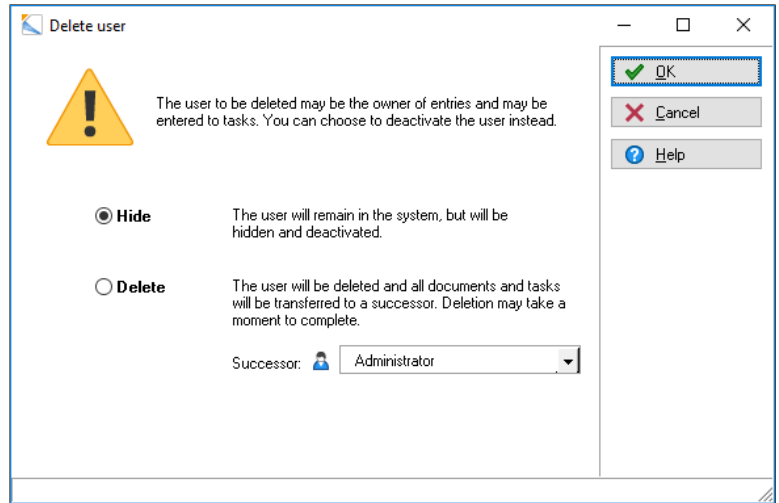
Fig. 545: Transferring rights

A dialog box appears that allows you to hide the user without changing the rights structure in the repository or delete the user completely from ELO.

4. Select the required setting. If the user is deleted, you must transfer the user's rights in the repository to either yourself or another user.

5. Click *OK* to transfer the rights of the deleted user.

Setting permissions

Use the *Permissions* function to assign rights to each folder and document individually.

1. Select an entry in the repository.

2. Select *Permissions* from the context menu.

The *Permissions* dialog box appears.
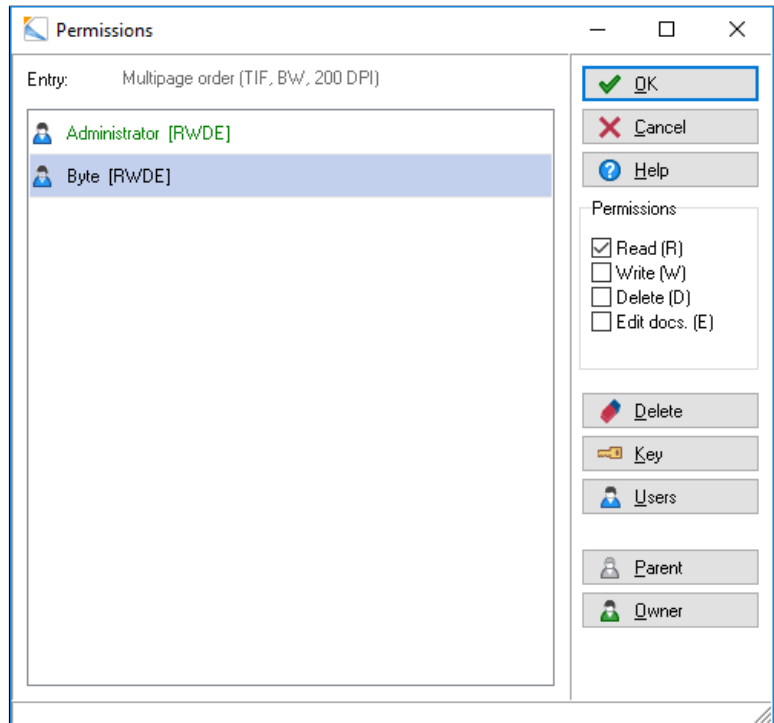
Fig. 546: Editing permissions to a document

3. Use *Keys* and *Users* to assign permissions to an entry.

Option A: Assign keys   A1. Click *Keys*.
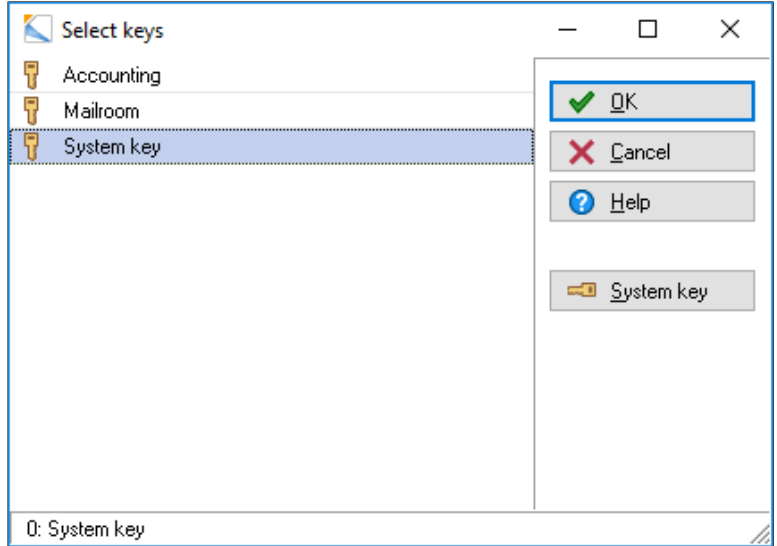
Fig. 547: Permissions - assigning keys

The *Select keys* dialog box opens.

A2. Select the desired key from the list.

A3. Click *OK*.

The key is assigned to the entry.

Option B: Assign users   B1. Click *Users* to assign user permissions to an entry.
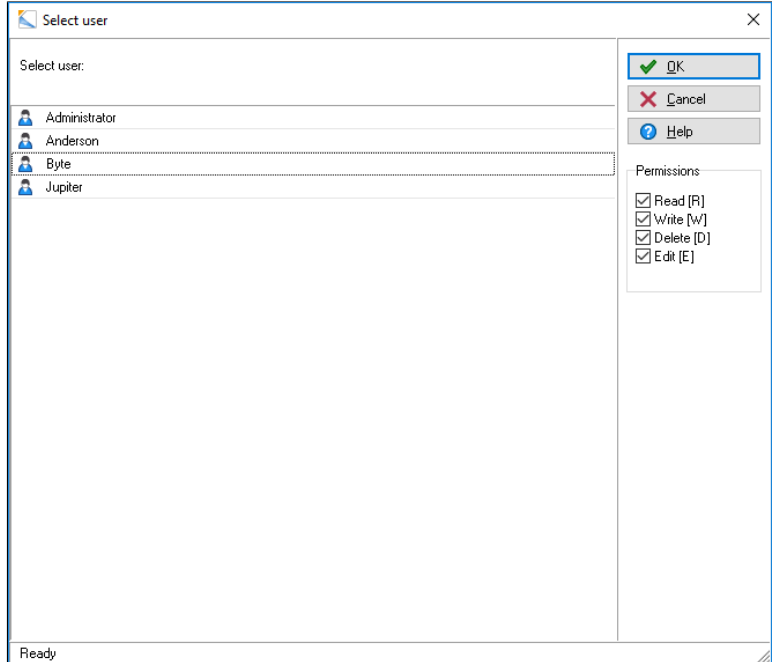
Fig. 548: 'Select user' dialog box

The *Select user* dialog box appears.

B2. Select a user, modify the rights and click *OK* to confirm your selection.

Alternative: If you want to pass on rights, use the *Parent* and *Owner* buttons. The permissions are added to the list of permissions.
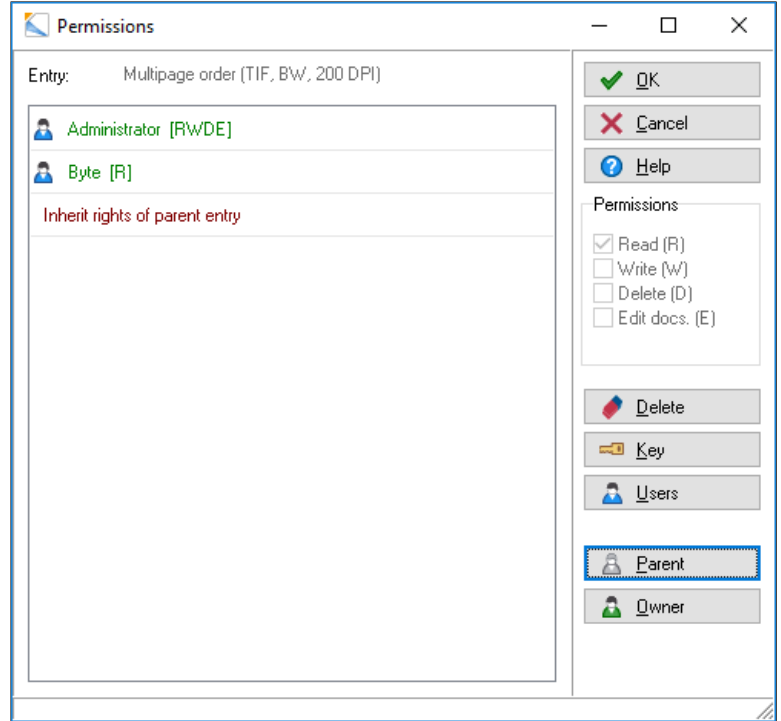
Fig. 549: Assigning permissions

B3. Click *OK*.
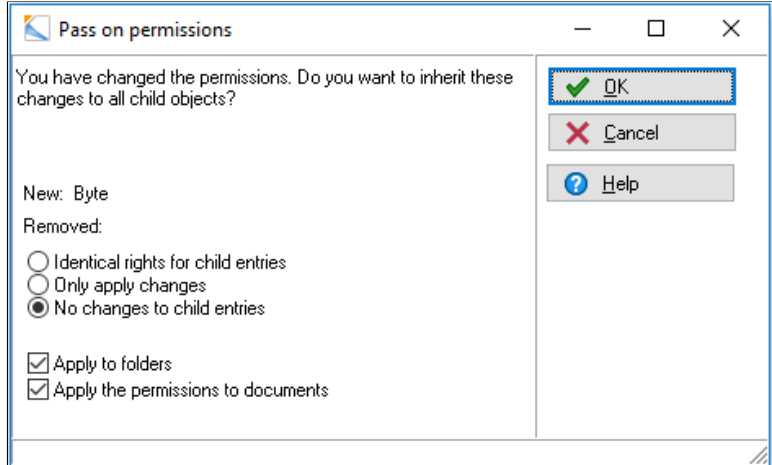
Fig. 550: 'Pass on permissions' dialog box

If you changed the permissions for an object with child entries, the *Pass on permissions* dialog box opens.

Specify whether you want child objects to inherit changes here.

The following options are available:

- **Identical setting for child entries**
- **Only apply changes**
- **No changes to child entries**

If you check the *Apply to folders* option, the setting applies at folder level.

If you check the *Apply to documents* option, the setting applies at document level.

You can open the list of permissions to a document or folder by selecting the corresponding entry in the repository context menu. Select the *Permissions* menu item.

Reports

Security is a vital aspect of an electronic repository. ELO includes a range of features to protect your data and documents from unauthorized access. Another important aspect of security, however, is the ability to track processes and actions in the repository. The *Report* function is used to accomplish this. ELO is able to log all repository processes that are relevant to security. The administrator is able to define which processes are logged in the repository.
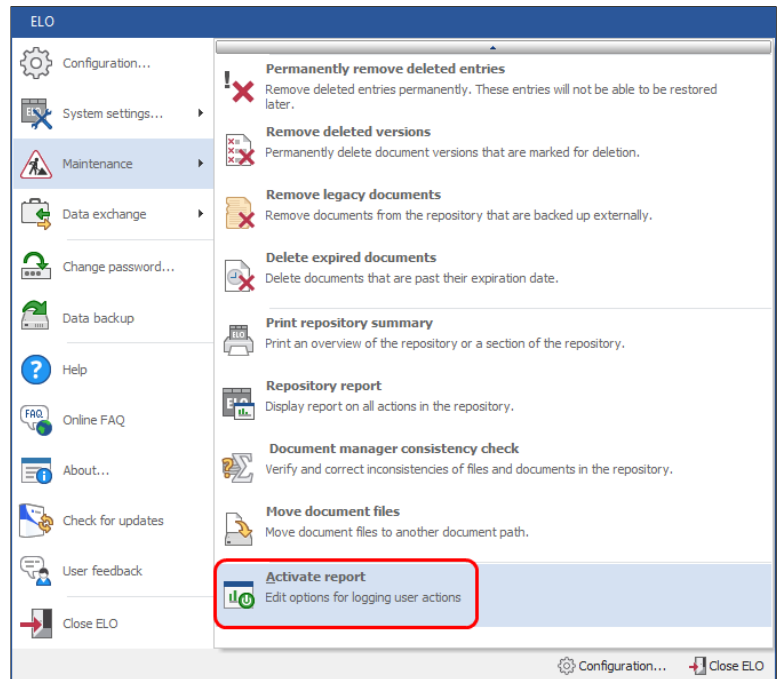
Fig. 551: 'Activate report' menu item

Activate report

1. Click *ELO menu > Maintenance > Activate report*.

	Information: The *Activate report* function is highlighted in the menu. After the report is activated, all repository processes are logged.

Close report   1. Click the function again to turn off logging.

Viewing report data   All report data logged by ELO can be viewed in a list.
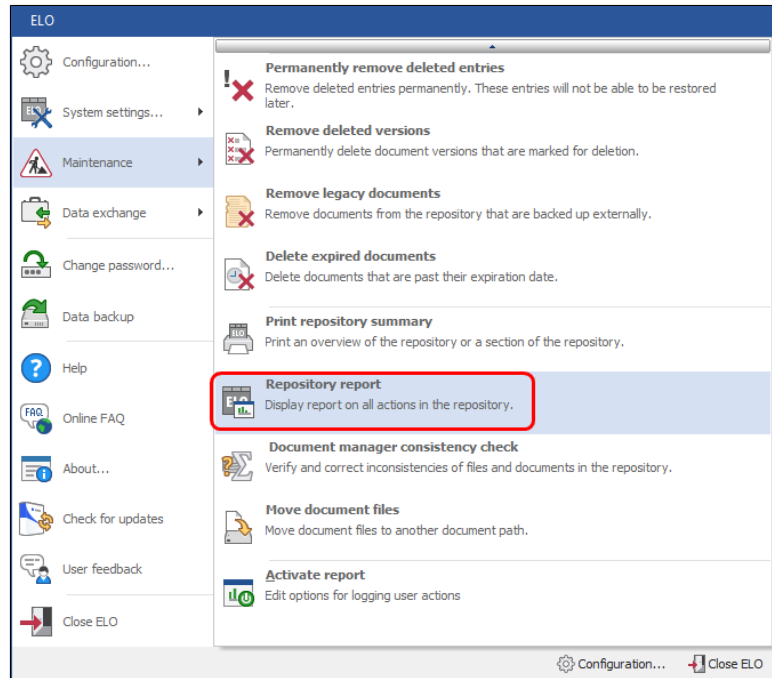
Fig. 552: Open 'Repository report'

1. Click *ELO menu > Maintenance > Repository report*.

Options
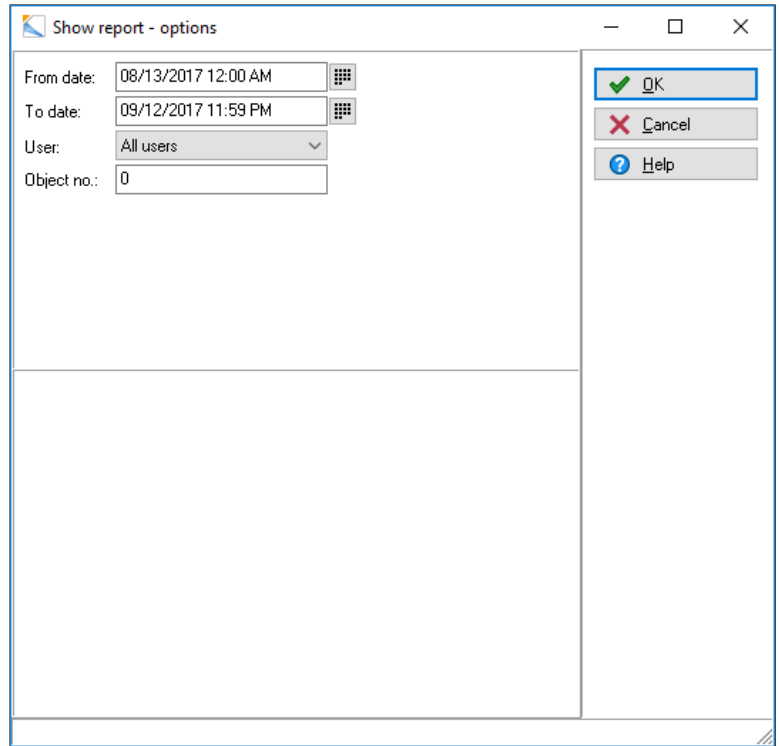
Fig. 553: 'Show report - options' dialog box

The *Show report - options* dialog box appears.

From date: Specify when you want the program to start showing the transaction overview.

To date: Specify when you want the program to stop displaying report data. Select the date and time from the calendar.

User: Select the users that you want to view the repository actions of.

Object no.: Enter the object number to show which actions occurred in connection with an object. You can view the object number in the keywording for an entry on the *Options* tab.

ⓘ **Information**: The options in the *Show report - options* window are linked with an AND. For example, if you enter user A and object number B as selection criteria, you will only see results if user A worked with object B.

2. Click *OK* to confirm your selection.

Show
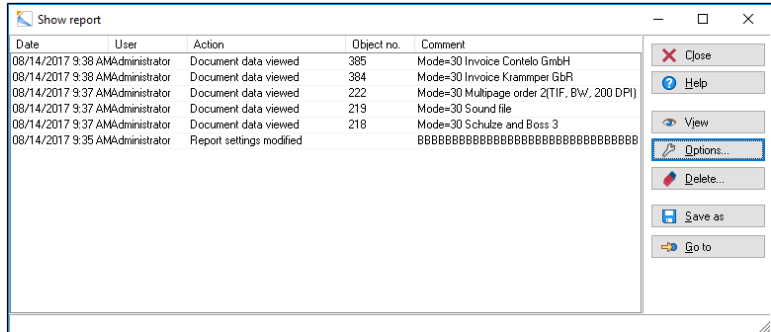
Fig. 554: 'Show report' dialog box

The selected transactions are listed on the report in the *Show report* dialog box.

ⓘ **Information**: To see the report for a single document, select it in the repository. Click *ELO menu > Maintenance > Repository report*

Reminders

The program can generate a report on reminders for all users.

Reminders overview

1. Select the document that you want to see the reminders for.

2. Click *Tasks > Reminders overview*.

The *Reminders overview* dialog box appears.
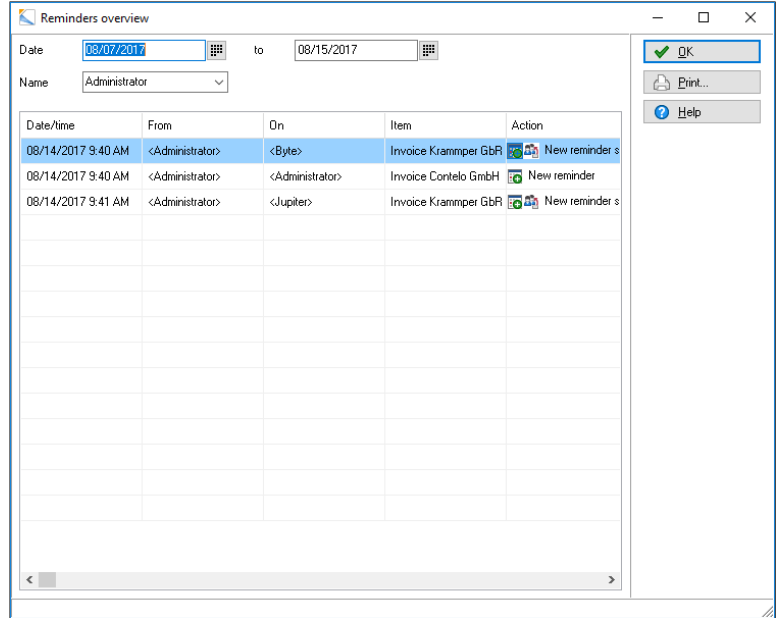
Fig. 555: Showing a report with the filter function

2. Define a time frame in *From date* and *To date*, and the user in *Name*.

The report is shown in list format.

3. Click *Print* to print the report.

4. Click *OK* to close the report window.

System information center

The *System information center* function helps you to manage users. You can print an overview of individual or all users, as well as single or all keys.

1. Click the *ELO menu > Maintenance > System information center*.
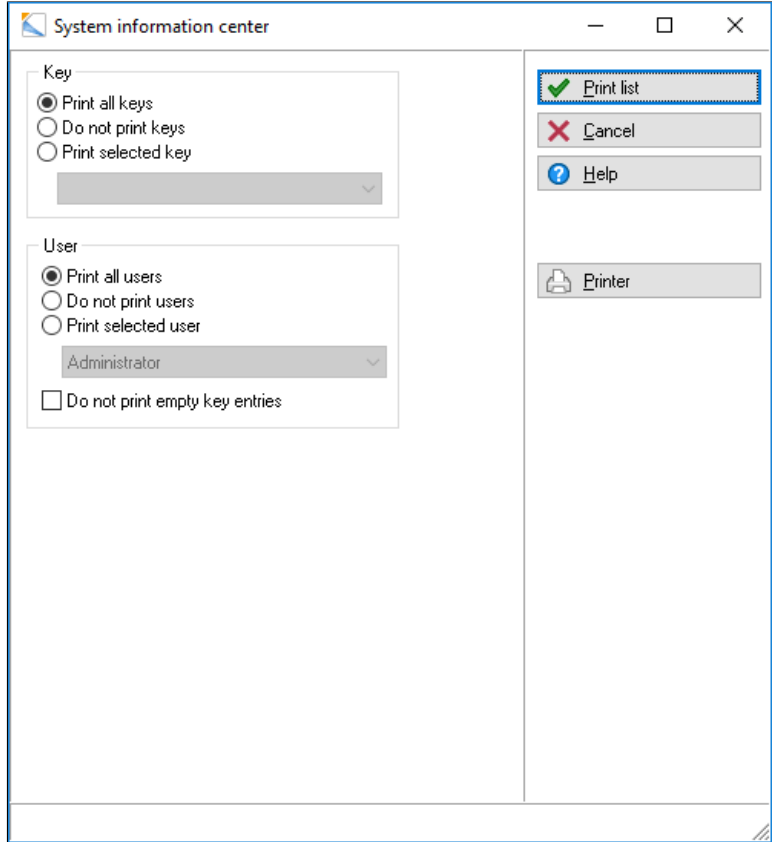
Fig. 556: 'System information center' dialog box

The *System information center* dialog box appears.

2. In the *Keys* area, specify the keys you want to print.

Information: If you select the option *Do not print empty key entries*, keys without associated documents will not be printed.

3. In the *User* area, define the corresponding options.

Information: If you select *Print selected user*, you can select the user from the drop-down menu below it.

4. Click *Printer* to select a printer.

5. Click *Print list*.

The *Information center overview* is printed.

System diagnostics

The *System diagnostics* function analyzes your program settings. This helps you to quickly pinpoint incorrect settings and makes it easier to troubleshoot problems.
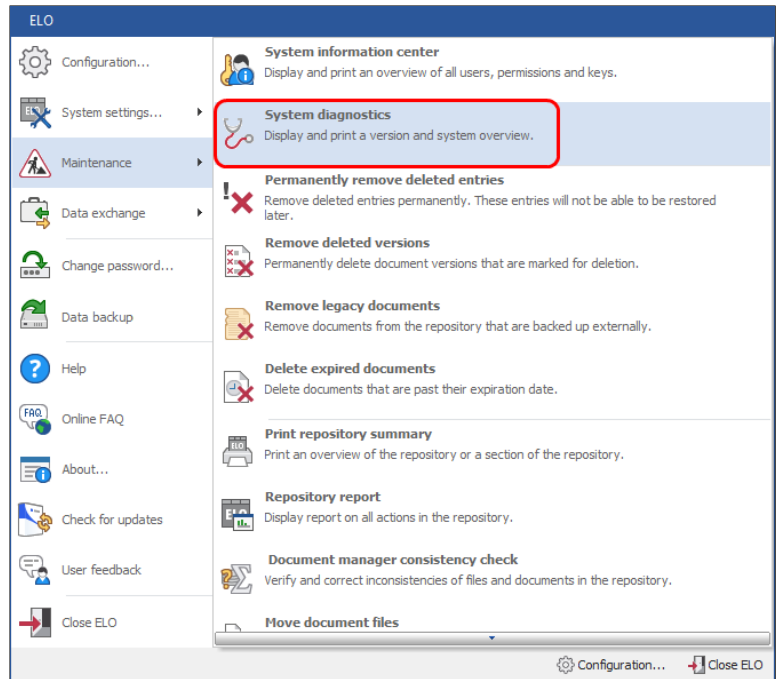
Fig. 557: 'System diagnostics' menu item

1. Click *ELO menu > Maintenance > System diagnostics*.
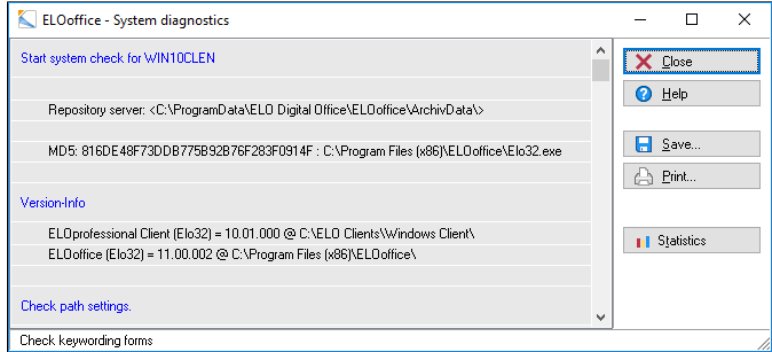
Fig. 558: Results of the system diagnostics

The *ELOoffice - System diagnostics* window opens.

All settings are displayed, such as path and scanner settings.

Notes on individual settings are shown in green type. Incorrect settings are shown in red. This lets you quickly identify and resolve any problems that may arise.
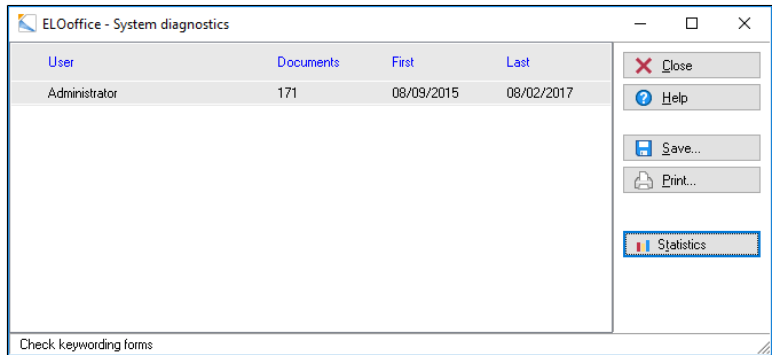
Fig. 559: User report

2. Click *Statistics* to see an overview of the documents from individual users.

Click *Save*.

The report is saved to your computer after a query.

3. Click *Print*.

Administration

The system diagnostics are printed.

4. Click *Close*.

The system diagnostics are complete.

Keyword lists

If you want to keyword documents that contain frequently recurring terms (such as customer names), it is useful to select keywords from a list.

Information: A small icon next to an index field indicates that this index field contains a keyword list. Use this helpful function.

There are four different types of keyword lists:

- The global keyword list (ELOSTDSWL)
- The index field-related keyword lists (index fields)
- The version number keyword list
- The version comment keyword list

Open the keyword lists in the *ELO menu > System settings > Keyword lists*.
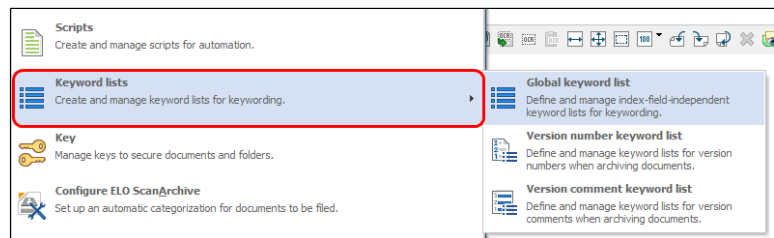
Fig. 560: 'Keyword lists' menu item

Information: Create and edit index field-related keyword lists in the keywording forms manager (*ELO menu > System settings > Keywording forms*).

ELO enables you to create universal (global) keyword lists that contains child groups. You can see this list in the *Edit keywording* dialog box when you are filing documents. Open it from the context menu (right-click).

There are four different types of keyword lists:

1. Global keyword lists (ELOSTDSWL)

You can use this keyword list in any field of any keywording form. Move the cursor over an index field and right-click it to open the list.
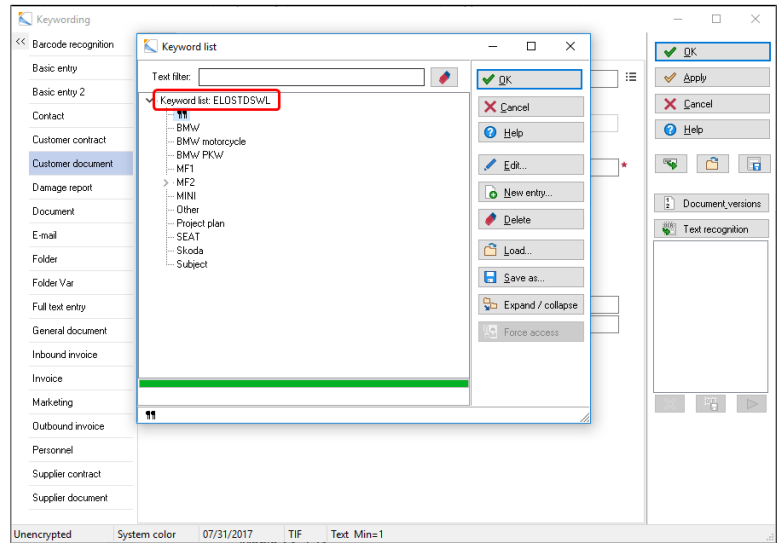
Fig. 561: Show global keyword list

Edit: To edit a keyword list, open it from the context menu of the index field.

1. Select an entry in the keyword list.

2. Click *Edit*.

Make the desired changes.

3. Click **OK**.

The changes have been saved to the keyword list.

Fig. 562: Index field-specific keyword lists

2. Field-specific keyword lists (index fields)

This keyword list is only available in an index field.

You can edit these lists either in the keywording forms manager or via the context menu in the index field itself in the keywording dialog box.

Information: The keyword lists for the index fields are grouped within their respective group names. This means that index fields with the same group identifier can access the same keyword list. If you want every index field to have its own keyword list, you must assign different group names for each index field in the keywording forms manager.
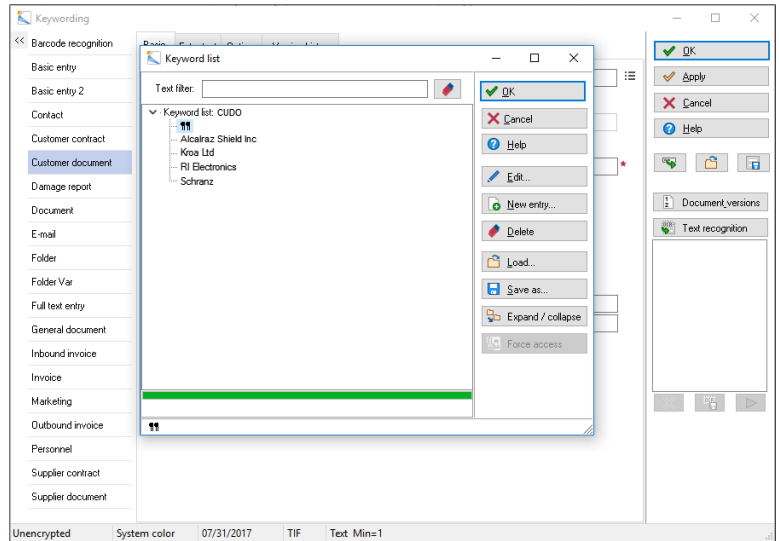
Fig. 563: 'Keyword list' dialog box

Information: The keyword lists must be created or edited for each index field individually in the keywording forms manager or via the context menu.
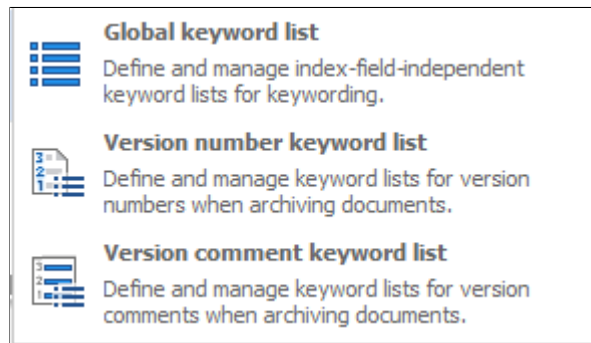
Fig. 564: Keyword list selection menu

3. Version numbers keyword lists

Open the version numbers keyword list in the *ELO menu > System settings > Keyword lists > Version number keyword list*.

It is available when filing version-controlled documents and contains the assignable version numbers.
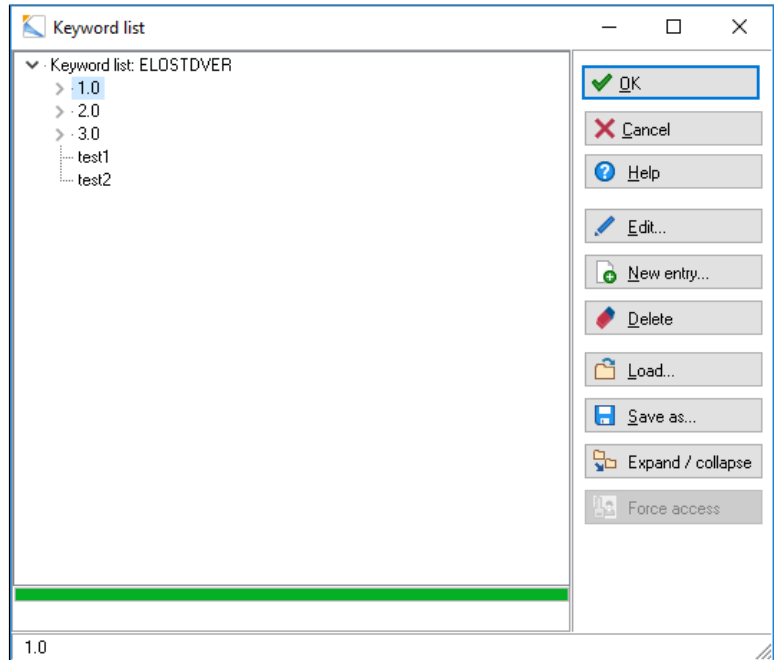
Fig. 565: 'Version number keyword list' dialog box

Open the version number keyword list in the *Version comment* dialog box by right-clicking the *Version* field.

1. Select an entry from the list.

2. Click *OK*.

The version number is entered to the *Version* field.

4. Version comment keyword lists

Open and edit the keyword list for version comments by right-clicking the *Comment* input field.

1. Open the dialog box from the context menu of the *Comment* input field.
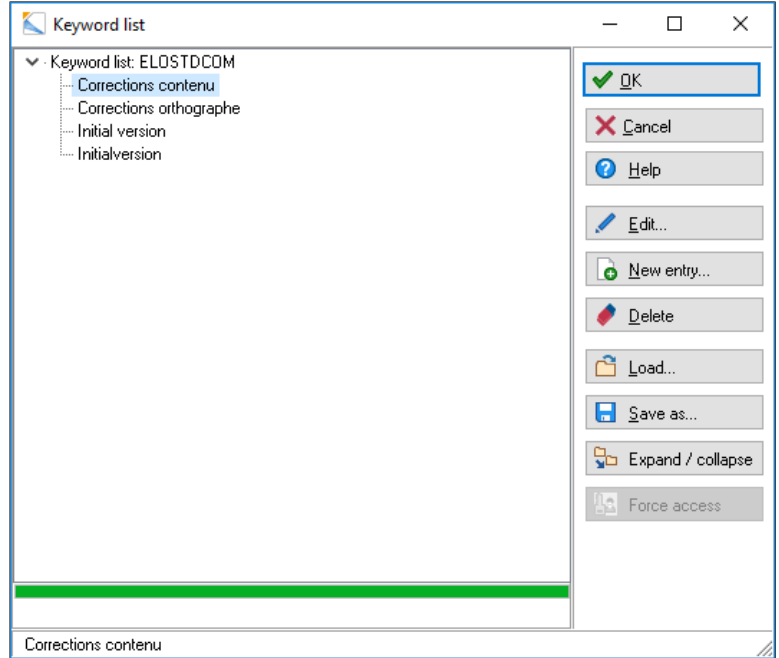
Fig. 566: 'Version comment keyword list' dialog box

2. Select a comment in the list provided in the *Version comment keyword list* dialog box.

3. Click *OK*.

The comment is applied to the *Comment* input field.

Information: All keyword lists can be created, edited, and deleted in the same way.

Creating, editing, and deleting keywords

1. Click *ELO menu > System settings > Keywording forms*.

The *Keywording forms* dialog box opens.

2. Click *Select* to open a keywording form.

3. Click *OK* to confirm your selection.

4. Select the index field that contains the keyword list you want to edit by navigating to its index field tab.

5. Click *Keyword list*.
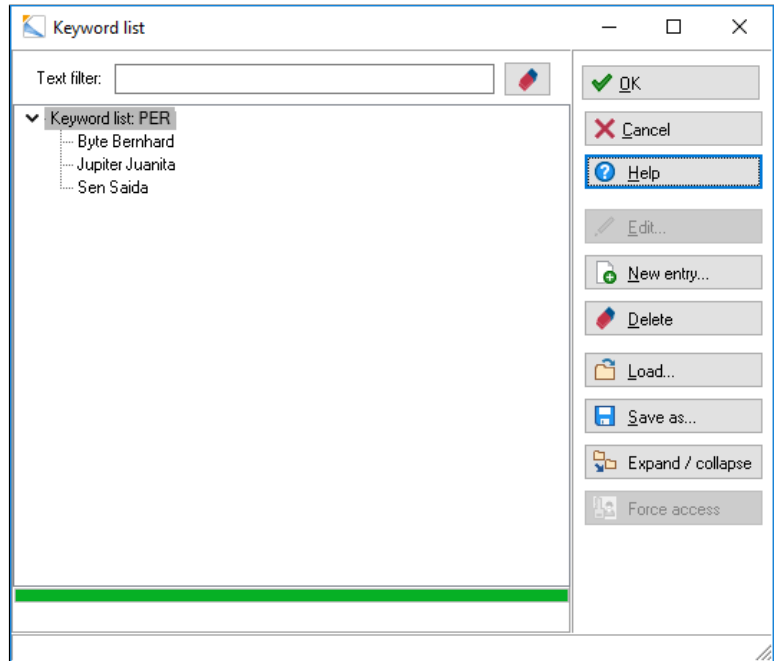
Fig. 567: Editing a keyword list

All keywords are displayed as a structured list.

Information: You can use child directories of list entries to optimally structure a large number of keywords.

6. Select an entry in the list to edit it.

7. Click *Edit* to edit the selected entry.

8. Confirm the changes to the keyword list and click *OK*.

Information: You can create multiple keywords at once by separating the words with a separator of your choice.

Optional: Add a new entry to the keyword list under *New entry*.

Optional: Click *Delete* to remove a selected entry from the keyword list.

Optional: Click *Load* to add a keyword list to the list (XML, HTML, SWL format).

Using the keyword list

Whenever you file a document in ELO or edit its keywording, the keywording form you selected opens. Keyword lists enable you to standardize keywording (metadata) for your documents. This improves the quality of search results in the repository.

1. Right-click the index field you want to add a keyword to.

The *Keyword list* dialog box opens.

2. Click the desired keyword in the keyword list.

Information: You must enable the option *ELO menu > Configuration > Display > Keyword list selection from dialog* for the functions described here to be available.

3. Click *OK*.

The keyword is entered to the field.
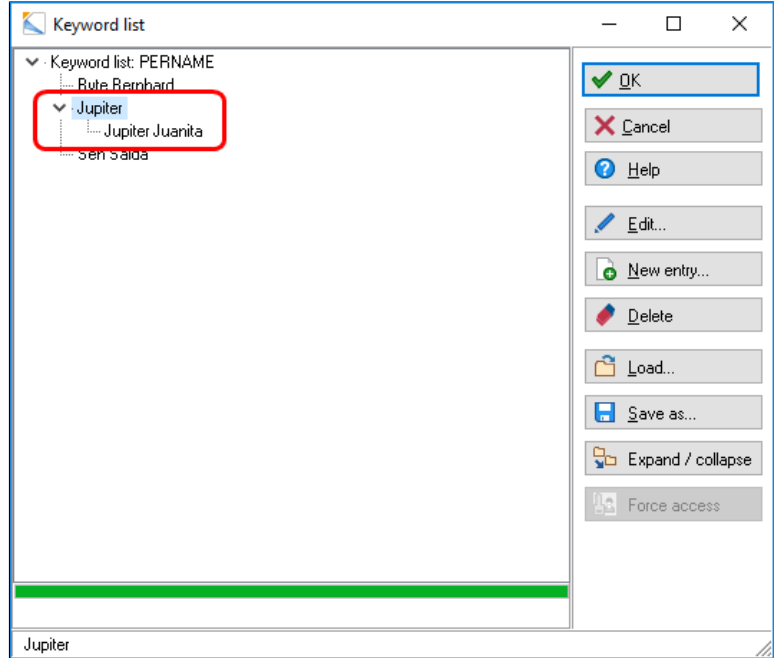
Fig. 568: Keyword list with group - child group - keyword

In our screenshot, the *Edwards* keyword group is selected along with the *Emily Edwards* child entry. The existing child group is displayed. In this case, the *Emily Edwards* keyword has been entered to the field.

Information: Keywords with child groups help to categorize keywords. Only keywords without additional child groups can be entered to keywording forms. Plan your keyword list carefully in this respect. See the following tips for more information.

Efficient use of keyword lists

ELO is able to connect keyword child groups with their parent group.

Normally, the keyword of the last child group will be entered to the index fields of your keywording forms.

A sample keyword list would have the structure:
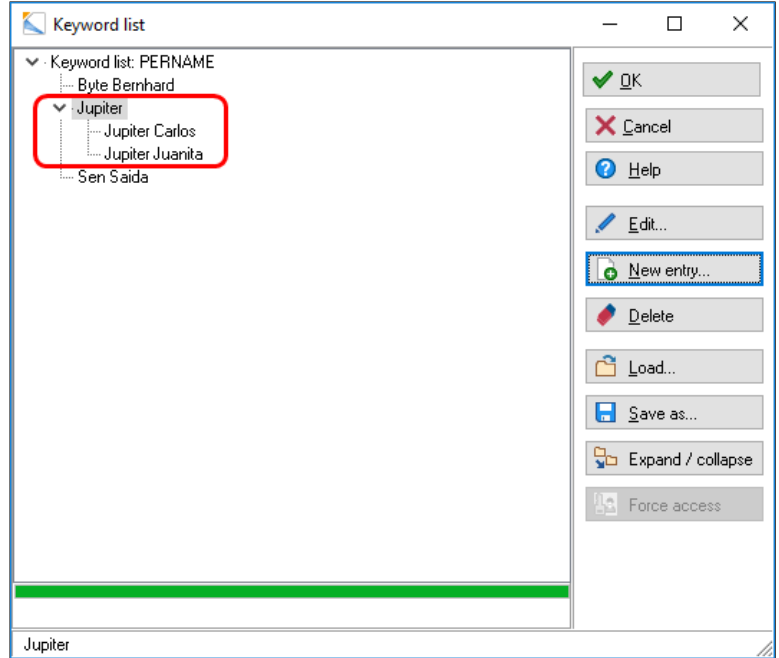
Fig. 569: Optimizing a keyword list

You could then use either *Byte*, *Edwards*, or *Santini*. But what happens when multiple customers are named *Edwards*? You could then create new child groups with all of their first names.

The + link

The + link provides an easier method.

1. When you are creating the *Edwards* keyword group, enter a plus sign in front of the name: +Edwards.

2. Click *New entry* to create a new child group that will contain the first names.

3. Select the *Edwards* group.

4. Click *New entry*.

Information: When the group and child group are placed in the index field, they are combined without a plus sign or space.
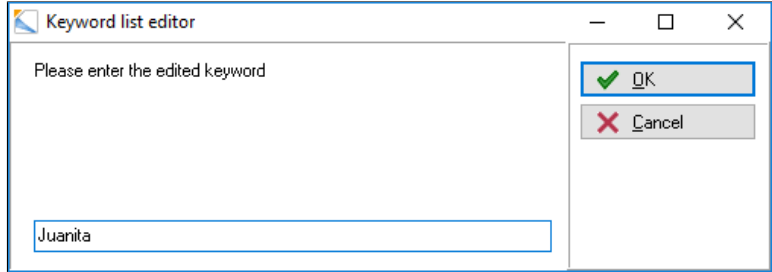
Fig. 570: Keyword list: Child group with space

5. For this reason, enter a space to the input field before each first name.

You have now created additional child groups, as well as linked +*Edwards* to a child group, but with less work.

Result

The result when you enter it to the index field is therefore Edwards Emily and not EdwardsEmily.

Information: Our example applies the character string *Edwards Emily* from the keyword list because of the + link in front of **Edwards**.

Example

The + link is particularly useful for structured customer, invoice, and identification numbers. For example, the number *1801272* could be comprised of a company number *180*, area *12*, and department number *72*.

All identification numbers for this company start with 180, subsequently varying by division and department. Use the + link to structure the various number combinations and apply the numeric strings from the keyword list to the index fields of your keywording forms.
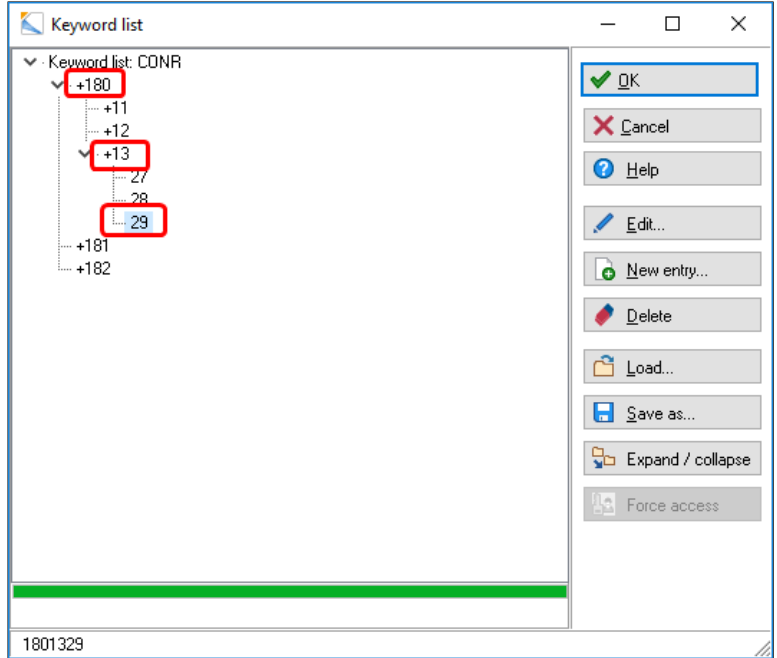
Fig. 571: Create invoice number with keyword list: Company ID - division - department

For example, create a group with the company identifier **180**. Enter a + sign before the number. Then create a child group which contains all of the division numbers. Once again, enter a + sign in front of every number.

In the illustration above, the number *1801329* can be entered into the keywording field.

Information: If you have number combinations in sequence, do not enter a space when you are creating the keyword list.

The ! link

You can also use an exclamation mark in keyword lists in order to structure the contents. If you place an exclamation mark in front of an entry, it will not be applied to the field if you select the child keyword beneath it. This term should only be used to structure groups of keywords. For example, if an "!" is placed in front of the "13" in the example above - "!13" - then only "18027", "18028", or "18029" will be applied to the index field when selecting an entry from the list of a parent term, such as 27, 28, or 29.

Drag and drop: You can drag and drop entries within the keyword list dialog box. This allows you to restructure lists.

Multiple selection: You can make multiple selections in keyword lists by holding down the CTRL key. Select multiple keywords in this way, then click *OK* to apply them to an index field.

Navigation: View or hide the keyword list by clicking *Expand/collapse*.
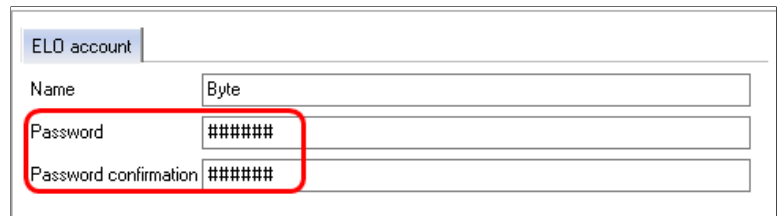
Force access: If the keyword list is currently being edited by another user, click *Force access* to allow you to edit the list anyway. This option is only available for the administrator.

Passwords

For security reasons, each user should be assigned a unique password for logging on to the system. The passwords are assigned by the administrator (or by a user given this right by the administrator).

Creating and assigning a password

1. Click *ELO menu > System settings > Users*.

Fig. 572: User manager; fields for password entry

The *Users* dialog box opens.

2. Select the user you want to assign a new password to.

3. Enter the password to the *Password* field.

Warning: The password is displayed with hidden characters. For this reason, you should write down all passwords and store them in a secure location.

4. Click *OK* to confirm the password.

Change password

All passwords can be changed. For security reasons, you should change your password on a regular basis.

Passwords can be changed with two methods:

- The administrator can change passwords in the *User manager*.

- Authorized users can change their own password using the *ELO menu > Change password* option.

Information: The administrator defines the length of the passwords. The users must take the minimum password length into account.

Changing the password in the user manager

1. Click the *ELO menu > System settings > Users*.

The *Users* dialog box opens.

2. Select the user whose password you want to change.

3. Enter the new password to the *Password* field.

4. Click *OK*.

Result

The user now has a new password.

Changing a user's password directly

1. Click *ELO menu > Change password*.

Fig. 573: Change password

The *Change password* dialog box opens.

2. Fill out the input fields.

Information: Do not forget to make a note of your new password and store it in a safe place.

Change password		×
Username	Administrator	✔ OK
Old password	#####	✗ Cancel
New password	######	❓ Help
Password confirmation	######	

User name: The name of the user who wants to change their password.

Existing password: Enter your current password here. This is necessary for security reasons. It ensures that passwords cannot be changed without authorization.

New password: Enter the new password. A minimum length is required.

Password confirmation: Re-enter the new password to confirm.

3. Click *OK*.

The user now has a new password.

Information: If the password you enter to the *Existing password* field does not correspond to the actual password, an error message will be shown in the *Change password* status bar. Repeat with the correct password.

If you have any questions relating to *security* or *permissions*, contact your system administrator.

Remove old documents

Maintaining a document management system also includes removing *unnecessary* documents from the repository. For example, a large number of documents may become redundant after performing a backup. These documents can be removed from the repository and stored externally.
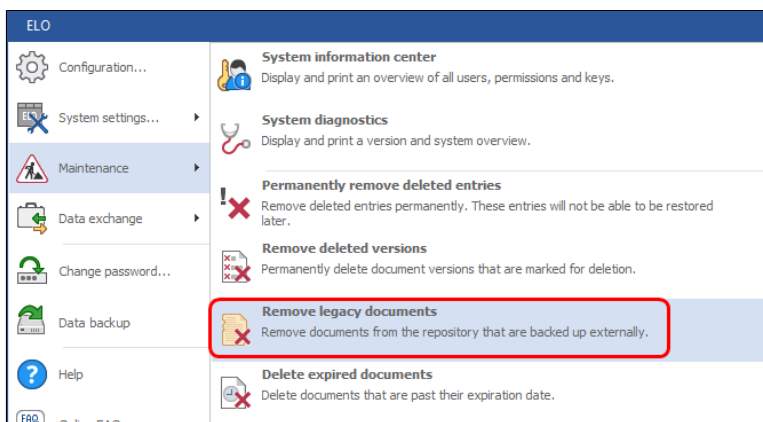
Fig. 575: 'Remove old documents' menu item

The *Permanently remove deleted entries* and *Remove old documents* functions enable you to remove old documents from the repository. You can also use this function to automatically delete the documents from an entire path.

> **Information**: This does not delete the ELO document, but only the associated file.

You can still find the ELO document in the repository and restore it from the backup if needed.

1. Click *ELO menu > Maintenance > Remove old documents*.

The *Remove old documents* dialog box appears.

Make all the necessary settings regarding the *Document path*, the *Delete older than* and *Deletion control* and start a test run if needed.
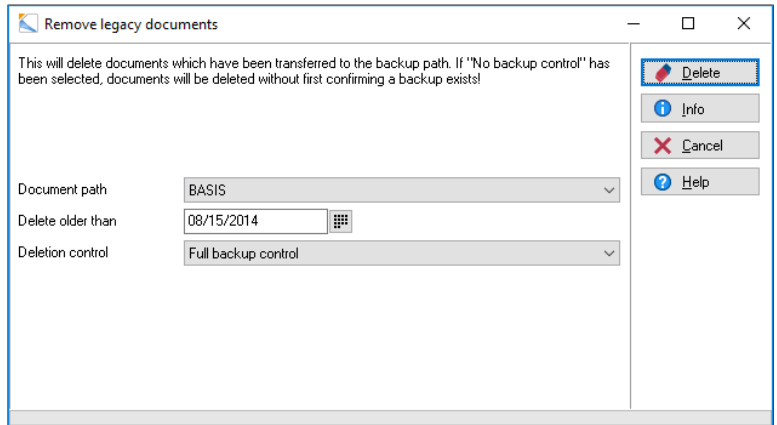
Fig. 576: 'Remove old documents' dialog box

2. In the drop-down menu, select the document path you want to clear.

All existing paths are displayed.

4. Enter the cut-off date.

Information: Use the calendar feature for this. Documents are only deleted from the selected document path if they are older than the date specified.

5. Set the *Deletion control*.

You have the following options:

- **Full backup control**: This option checks the content of the document, the file name and the file size to see if documents have been backed up. The documents will only be deleted if they exist in the backup.

- **Compare file size only**: This option checks whether the backup contains a file with the same document name and the same document entry. The file contents are not checked.

- **No backup control**: Neither the content of the document nor the file name or size are compared with the backup. This deletes all the entries on a filing path without first verifying that these entries exist on the backup. 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 action.

Warning: If you have selected the option *No backup control*, please make absolutely sure that you are only deleting the documents you want. Incorrect usage of this function can lead to irreparable data loss!

Information: After you have selected your preferred options, click *Info* to perform a test run.

6. Click *Info*.
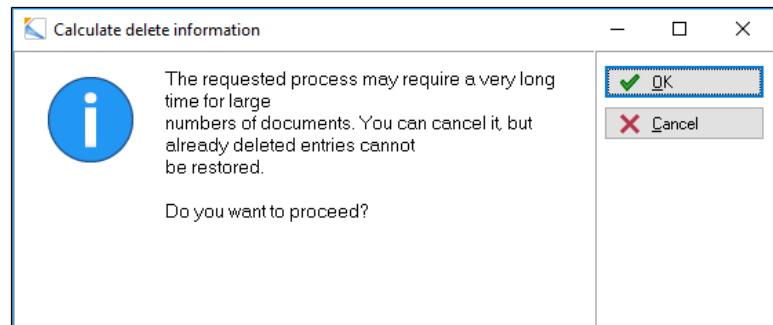
Fig. 577: Deletion confirmation request

A confirmation request appears.

7. Click *OK*.
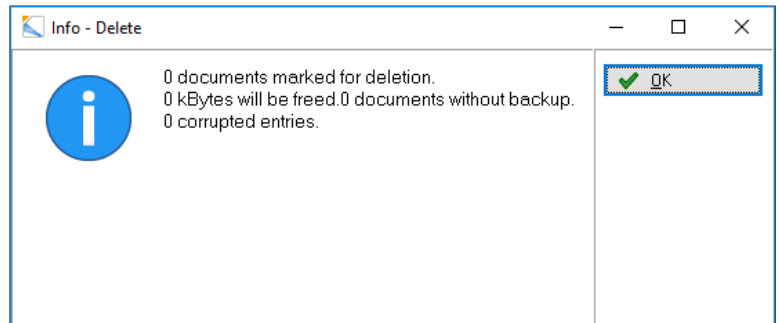
Fig. 578: Deletion information dialog box

The *Info - delete* dialog box opens.

Information: This test run is identical to the actual deletion process, except that no documents are deleted.

A dialog box appears with a status message. It shows you information about:

- How many documents will be deleted
- How much disk space will be freed up
- How many documents are not in the backup
- How many damaged entries exist in the repository

8. Click *Delete* to start the deletion process.

This will remove all old documents from the repository.

Lifetime and expiration documents

Each document can be assigned an expiration date. This is a useful option if you have documents that need to be retained over a specific period by law.
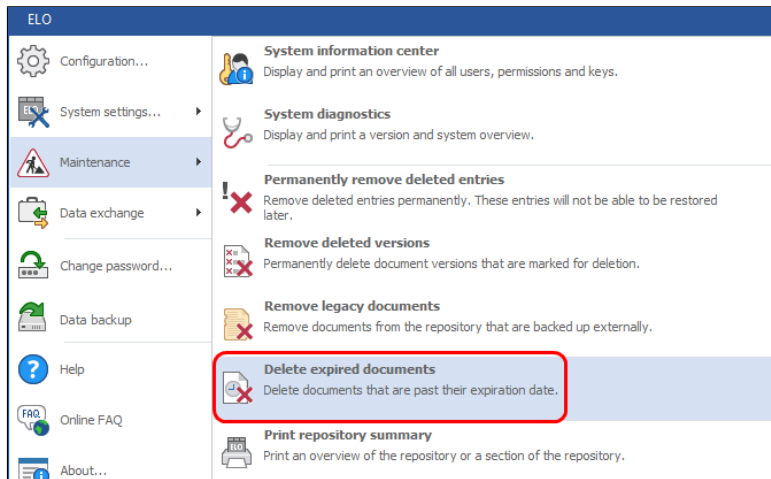
Fig. 579: ELO menu with the 'Delete expired documents' function

1. Click *ELO menu > Maintenance > Delete expired documents*.

The *Delete expired documents* dialog box appears.
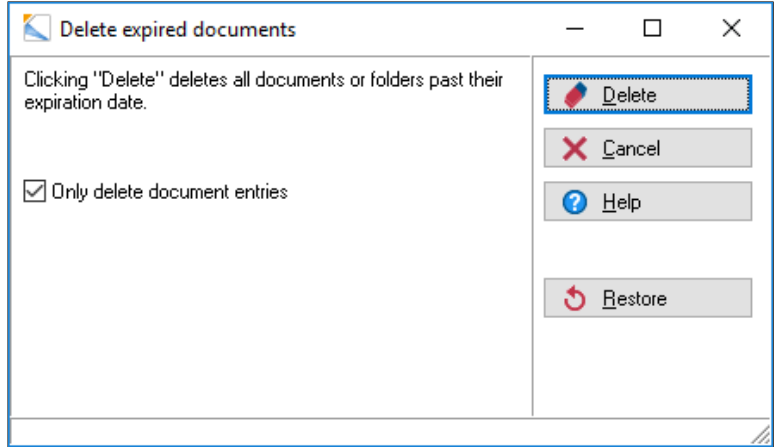
Fig. 580: Deleting expired documents in the repository

Make all necessary settings, and select the option *Only delete document entries* if needed.

> **Information**: You can set an expiration date for an ELO object on its keywording form by going to *Options > Expiration date*. The expiration date also corresponds to the settings on the keywording form for the ELO object in the *Lifetime* field. Open the keywording forms manager and set the lifetime for a specific document type to use this feature in a keywording form.

1. Click *ELO menu > System settings > Keywording forms*.

Fig. 581: Setting the expiration date in a document's keywording

The *Keywording* dialog box opens.

2. Click *Select*.

3. Select the keywording form you want to edit.

4. Click *OK*.

Fig. 582: Defining a document's lifetime

The keywording form, e.g. Invoice, opens.

Information: Documents filed with these keywording forms are au-
tomatically deleted from the repository after the defined time peri-
od has passed.

5. Enter a specified duration to the *Lifetime* field. Use the abbrevia-
tions described in the following.

Lifetime   You can assign a lifetime to a document type in the keywording form. You can specify this in days, weeks, months, or years. You can also enter an absolute date. If you want to define a time frame, enter a + sign followed by the number. Example: "+5Y" defines a time frame of five years. You can use D for days, W for weeks, M for months, and Y for years for this interval.

ELOviewer

The ELOviewer is used to show read copies of a repository.

This is an overview of the ELOviewer functions.

Logon dialog box
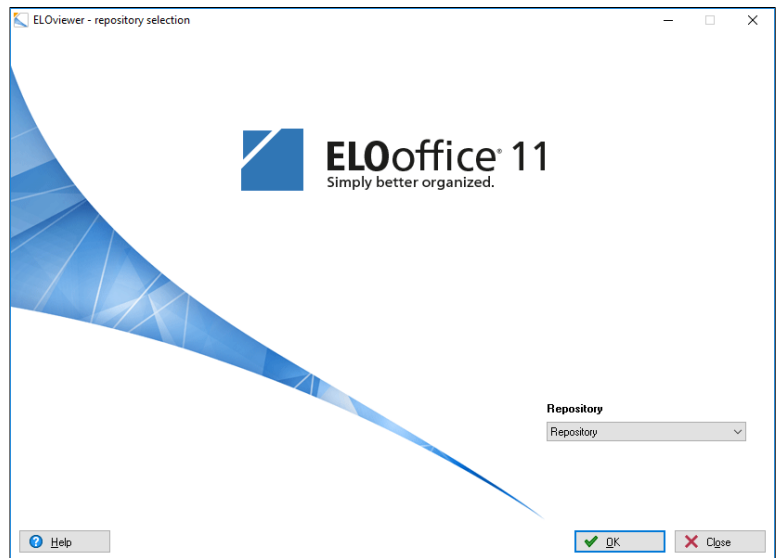
Fig. 583: 'ELOviewer' logon dialog box

Repository: The ELOviewer contains a repository. This default setting cannot be changed.

Close: Closes the program.

OK: Click *OK* to open the program.

Import wizard

Use the import wizard to import additional import data sets to the read copy of the repository.

Information: You cannot move entries in the read-only copy.

Source tab
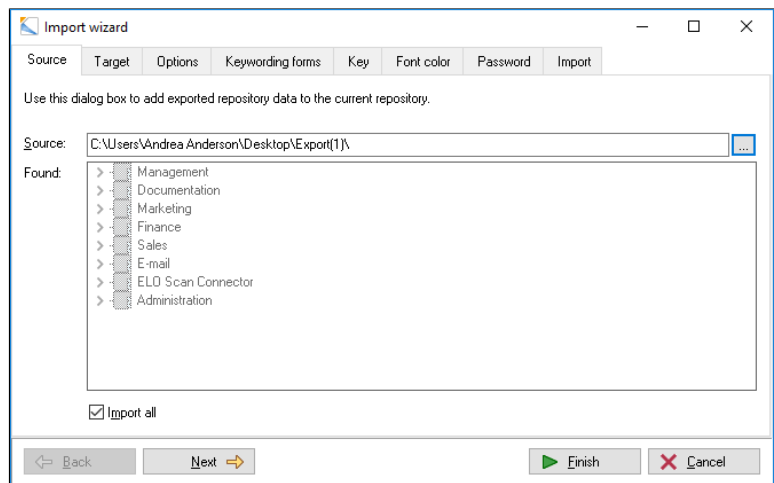
Fig. 584: ELOviewer import wizard, 'Source' tab

1. Enter the path to the import data set into the *Source* field.

2. Click the button with the three dots.

The *Browse For Folder* dialog box opens.

3. Select the folder containing the section of the repository you exported and click *OK*.

The path is now entered in the *Source* field. All sections of the repository found at this location are shown in the *Found* field.

4. Uncheck *Import all* if you only want to import a single folder.

5. Click *Next*.

Target tab
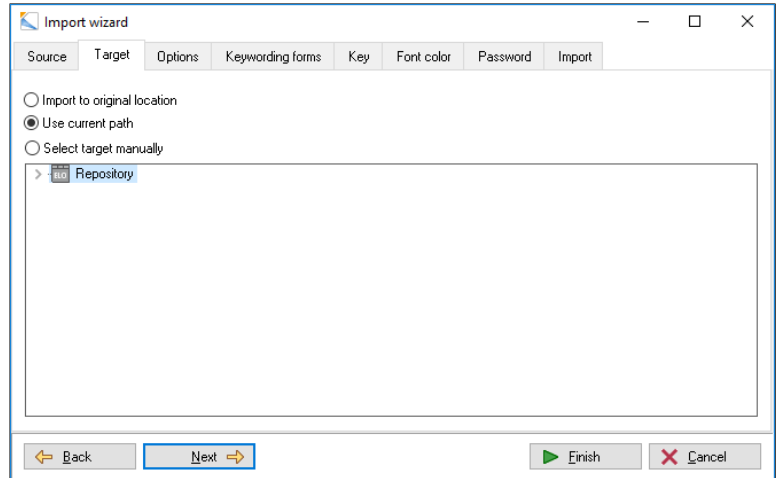
Fig. 585: ELOviewer import wizard, 'Target' tab

The *Target* tab appears.

6. Specify how you want to insert the export data set in ELO. You have three options:

- **Import to original location**: This setting imports the data into its original location in the repository.

- **Use current path**: This inserts the repository section into the currently selected location in the repository.

- **Select target manually**: This allows you to choose the import path according to your repository structure.

7. Click *Next*.

Options tab
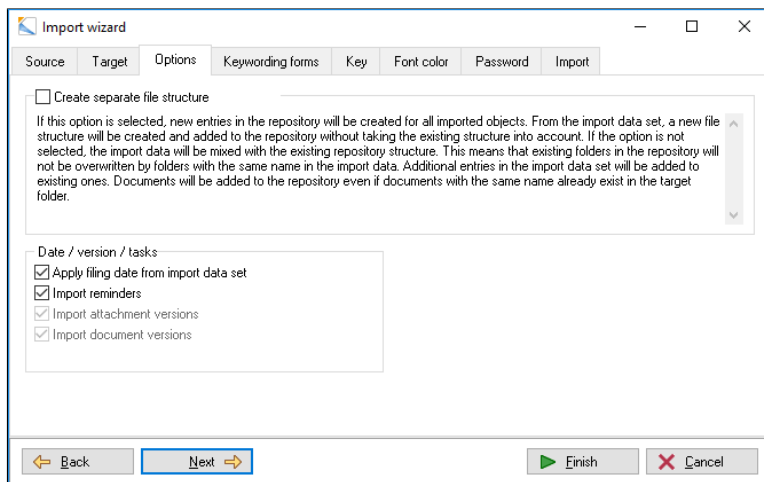
Fig. 586: ELOviewer import wizard, 'Options' tab

The *Options* tab appears.

8. Select the import options. You can choose from the following options:

Create separate file structure: New entries will be added to the repository for all imported objects. That means a new file structure will be created and added to the repository. The existing file structure in the repository will not be affected. If you do not select this function, the import data will be mixed with the existing structure. However, entries already in the repository will not be overwritten. Documents will be added to the repository, even if they already exist there. These documents will then exist as duplicates.

Apply filing date from import data set: Select this option if you want the imported elements to retain their original filing date.

9. Click *Next*.

Keywording forms tab
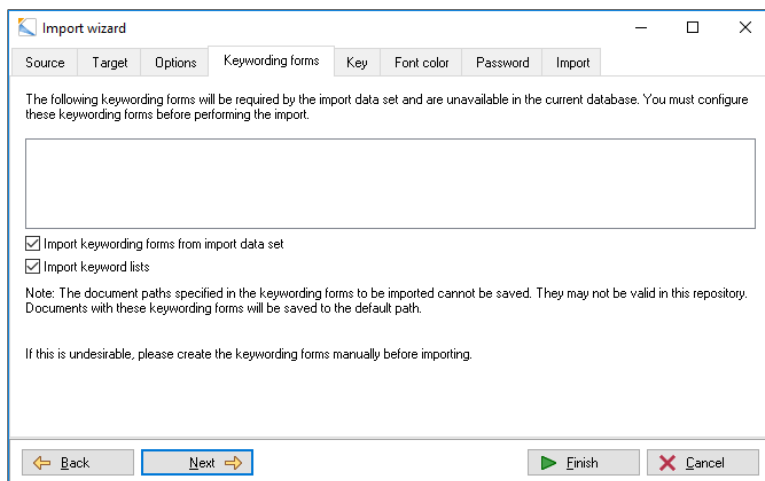
Fig. 587: ELOviewer import wizard, 'Keywording forms' tab

The *Keywording forms* tab opens.

Information: This tab shows the keywording forms required by the import data set that do not exist in the target repository.

Import keywording forms from import data set: When you select this function, the keywording forms will be imported from the import data set. This means that the forms do not have to exist in the target repository.

Information: If the keywording forms you are importing contain filing path information, this will not be used, since it may not be valid for the target repository. Documents using these keywording forms will be filed to the default path.

10. Click *Next*.

Keys tab
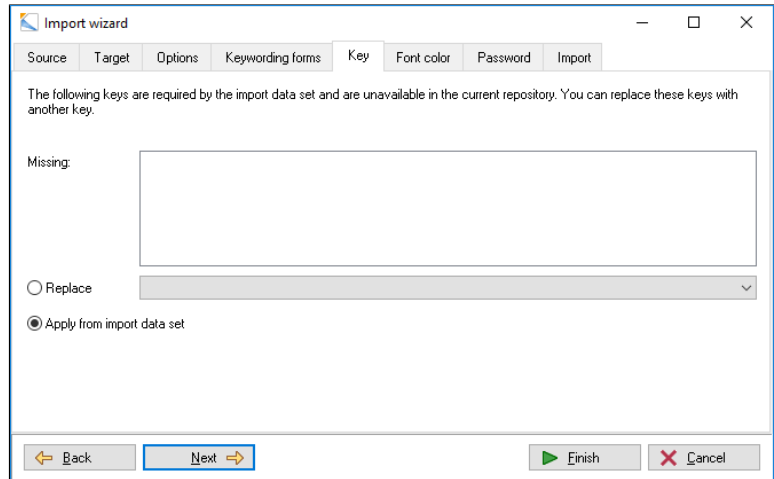
Fig. 588: ELOviewer Import wizard, 'Key'' tab

The *Keys* tab opens, displaying any missing keys.

11. Click *Next*.

Depending on the settings selected, any missing keys will be replaced.

The *Font color* tab appears and shows missing font colors.

Font color tab
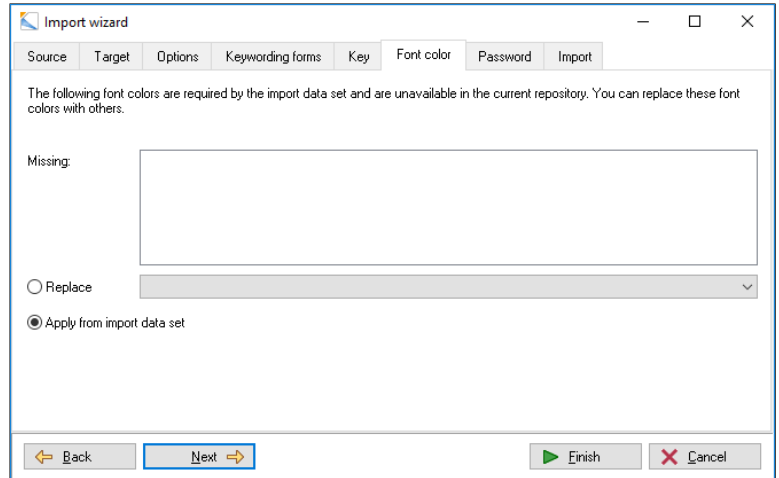
Fig. 589: ELOviewer import wizard, 'Font color' tab

Optional: Select *Replace* if you want to replace any missing colors.

12. Click *Next*.

Password tab
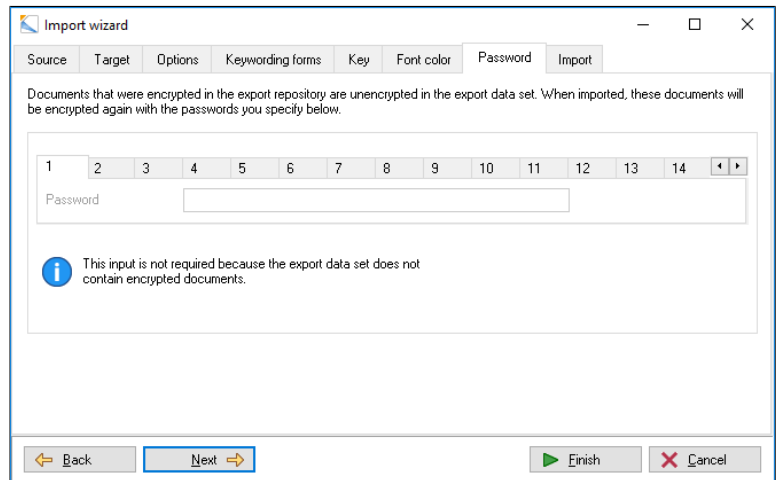
Fig. 590: ELOviewer import wizard, 'Password' tab

The *Password* tab appears.

Information: Documents that were encrypted in the repository are encrypted again using the password during import. If your import data set contains encrypted documents, you must enter this password. This means you will have to enter the password for every encryption key associated with the documents you want to import.

Information: You can skip this step here. However, you will be asked for the password during import when the program encounters the first encrypted document.

13. Click *Next*.

Import tab
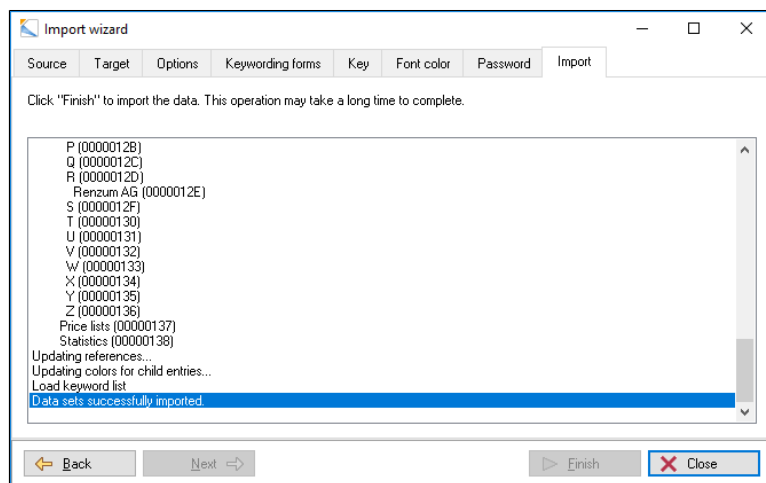
Fig. 591: ELOviewer import wizard, 'Import' tab

The *Import* tab appears.

14. Click *Finish*.

The *Import* tab shows the log of the import.

Click *Close*.

The import is completed.

Keywording

Basic tab

Fig. 592: ELOviewer keywording form, 'Basic' tab

> **Information**: The keywording information cannot be changed in the ELOviewer. Therefore, some functions of the keywording dialog box are not available. The buttons *OK* and *Apply* are grayed out.

You can select document templates on the left-hand side of the dialog box.

Cancel: Closes the keywording dialog box.

Index fields: These contain the short name and the additional index fields (such as content type) of the keywording information.

Extra text tab
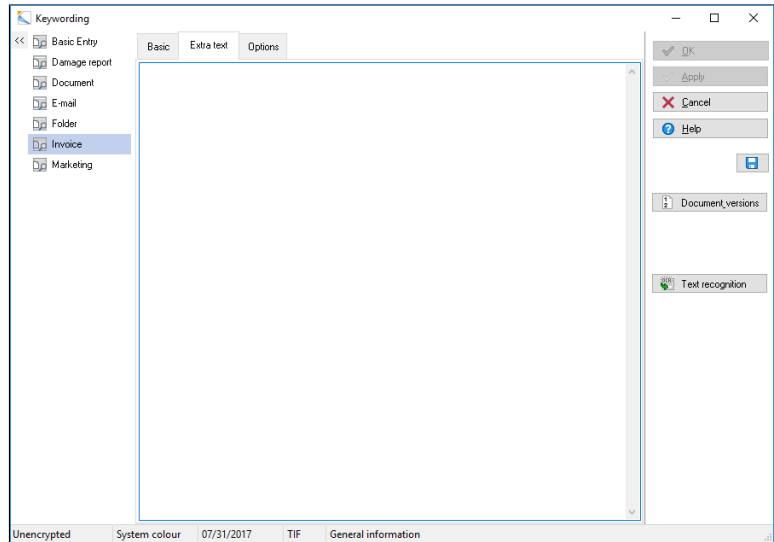
Fig. 593: ELOviewer keywording form, 'Extra text' tab

You can find additional information in the extra text. You can save information from recognized text (OCR) and EXIF information for image files here.

Options tab

Fig. 594: ELOviewer keywording form, 'Options' tab

Object type: The file type of the object is displayed here.

Filed by: This is where you enter the user who filed (keyworded) the entry.

Permissions: This is where the permission settings for the folder or document are set.

Marker: The color assigned to the object is displayed here.

Document status: This shows the status of the document. The options are *Version control disabled*, *Version control enabled* and *Non-modifiable*.

Document path: Contains the filing path of the document.

Expiration date: Define an expiration date (lifetime) for a document here.

Add to full text database: There is no full text function in the ELOviewer.

Encryption key: This shows you the encryption key that has been assigned to the document.

Object ID: This is the object ID of the document.

File name: Shows the file name of the document as it is stored in the file system.

Document versions
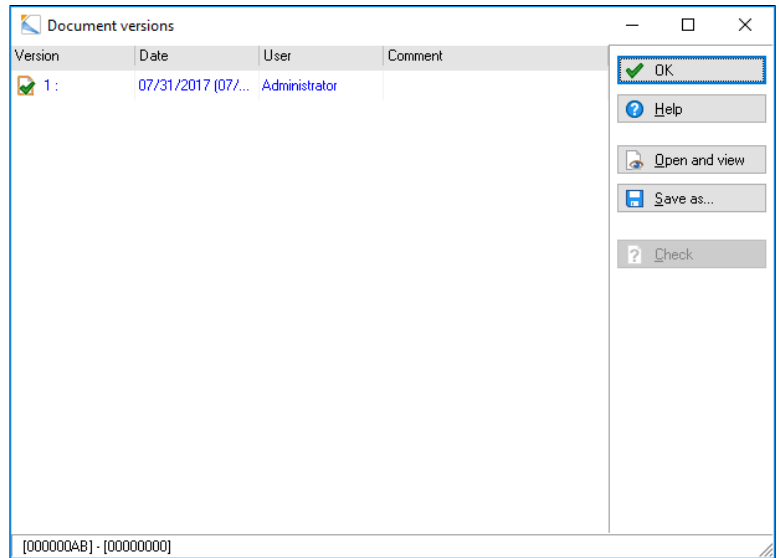
Fig. 595: ELOviewer, 'Document versions' dialog box

Display list: The list shows all existing versions of the document. It also provides the date of when it was edited last, the user, and a comment on the version.

Open in read-only mode: Clicking the corresponding version and then *Open in read-only mode* to display the selected version in a separate window.

Save as: You can save the selected version of your document to any directory on your computer.

Check: This button is only available when the signature components have been installed. You can find more information on this function in the section on the signature component.

About...

Fig. 596: ELOviewer 'About' dialog box

This dialog box shows information on the version, serial number, registration, and name of the workstation.

Click the link to go to the ELO Digital Office website.

OK: Click *OK* to close the dialog box.

Print repository summary
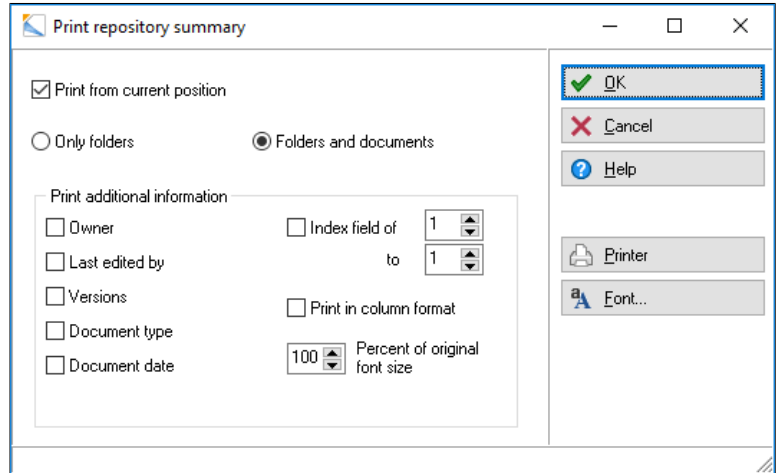
Fig. 597: ELOviewer 'Print repository summary' dialog box

Use the *Print repository summary* function to print a list overview of your repository. Use this feature to check the repository structure.

The following options are available:

Print from current position: If you only want to print part of the current repository, select this option. This creates an overview of the selected folder. If you have not selected an entry in the repository, an overview of the repository as a whole is printed.

Information: Before starting the print job with this option, check that the correct entry is selected in the repository.

Folders only: Only folders will be included in the report.

Folders and documents: The report will only include folders and documents.

Print additional information: This option prints an overview that contains additional information about the repository.

Information: Please bear in mind that the reports can be very extensive depending on the option you selected.

- **Owner**: The *Owner* option prints the owner information for each document.
- **Last edited by**: The option *Last edited by* prints information about who edited the document last.
- **Versions**: The *Versions* option prints all version information and version comments for each document.
- **Document type**: The *Document type* option prints information about the type of document.
- **Document date**: The *Document date* option prints the date of the last document version for each document.
- **Index field from ...**: The option *Index field from ...* defines which index field to start printing out keywording information from.
- **to ...**: The option *to ...* defines which index field to stop printing out keywording information from.
- **Print in columns**: The *Print in columns* option prints the repository overview in column form. The options *Document date* and *Index field from ... to ...* are the only options for additional information that are enabled in this view.

Information: To prevent overlaps, you should not select more than one additional information option and if necessary minimize the size of the text using the option *... Percent of original font size*.

- **... Percent of original font size**: The function *... Percent of original font size* allows you to print in a smaller font. This only applies for the additional information options.

OK: Click OK to apply your changes and close the dialog box.

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

Printer: To print an overview of the repository, you first need to select the printer.

Font: Choose the font color for the printout of the repository overview.

 Information: If you want to see a different or a more detailed overview, change your settings and repeat the above process.

Repository context menu
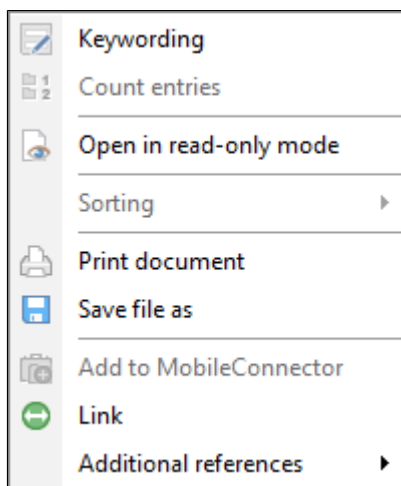
Fig. 598: Repository context menu in the ELOviewer

You can find explanations on each of the functions of the *Repository context menu* in the Functions chapter.

Clipboard context menu
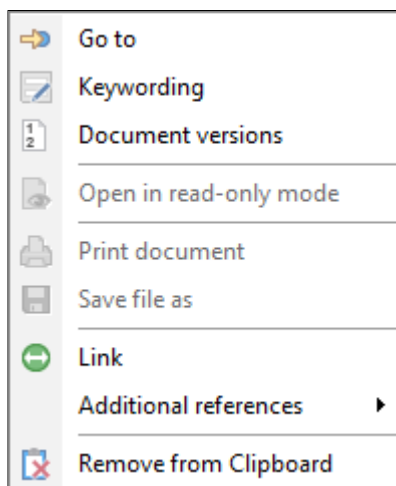
Fig. 599: Clipboard context menu in the ELOviewer

You can find explanations on each of the functions of the *Clipboard context menu* in the Functions chapter.

Search context menu
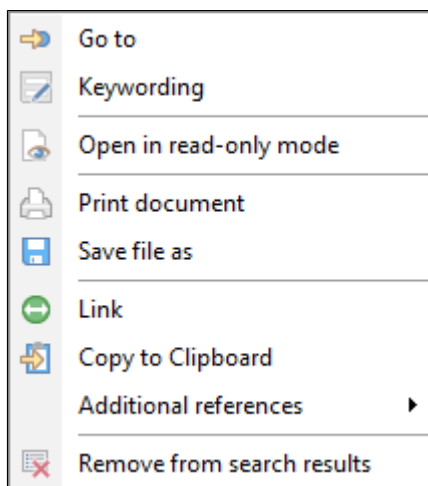
Fig. 600: Search context menu in the ELOviewer

You can find explanations on each of the functions of the *Search context menu* in the Functions chapter.

Print margin note (split bar context menu)
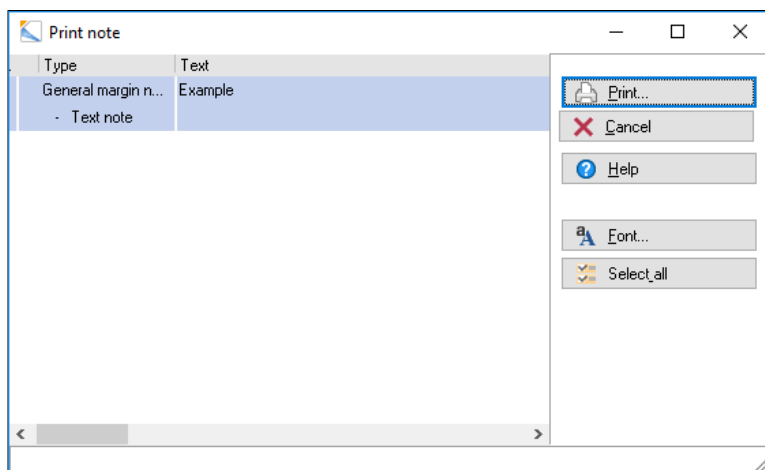
Fig. 601: Split bar context menu in the ELOviewer

Print: Choose the margin note that you want to print on the left. Click *Print* to open the printer settings dialog box.

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

Font: Click *Font*. The *Font* window opens. Select the font that will be used to print the margin note. Confirm with *OK*.

Select all: Click *Select all* to select all the margin notes of a given document.

Keyword list
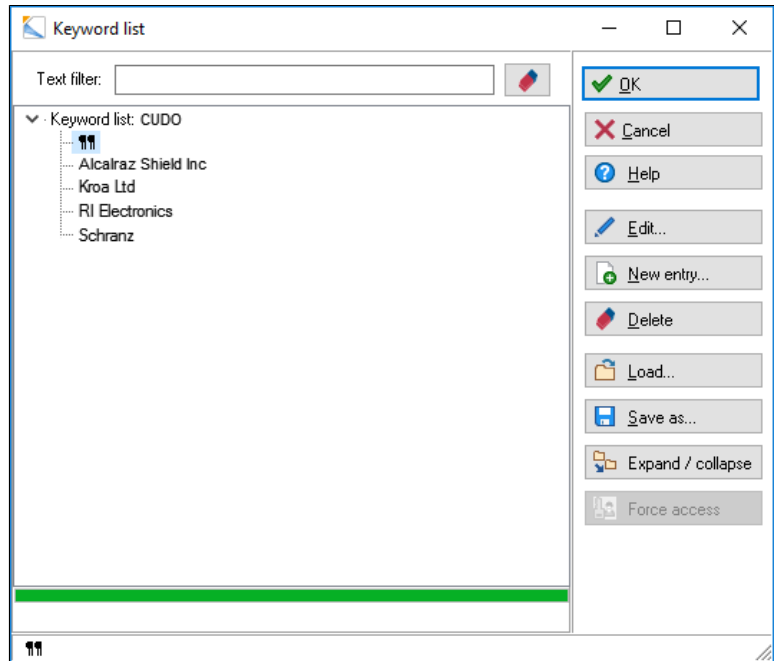
Fig. 602: 'Keyword list' dialog box in the ELOviewer

OK: Click *OK* to apply your changes and close the dialog box.

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

Edit: Certain keyword list functions are not available in the ELOviewer.

Save as: Save the keyword list to any folder.

Expand/collapse: View or hide a keyword list.

Configuration - Display
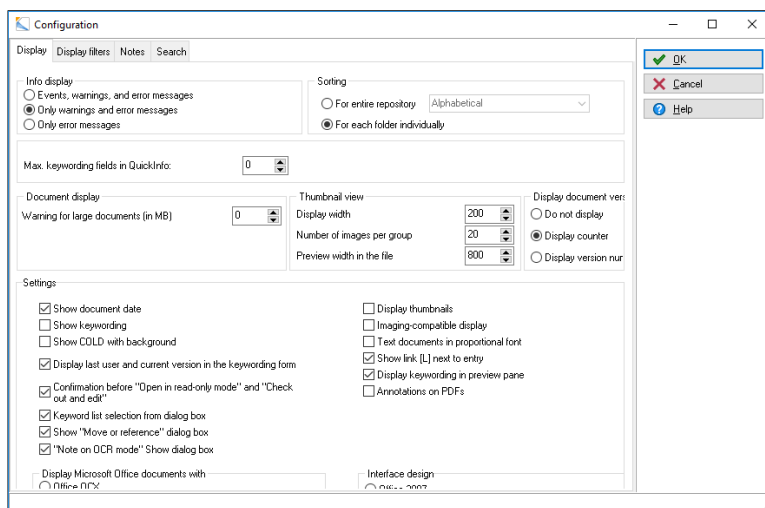
Fig. 603: Display configuration in the ELOviewer

Info display
Define the information and messages that should be displayed when events occur in the repository. You can define whether to show the info display every time (*Information, warnings and error messages*), for serious messages only (*Only warnings and error messages* or even *Only error messages*).

Sorting (for folders)
For entire repository: Define sort settings for the repository as a whole.

For each folder individually: Define the sort settings on a per-folder basis.

Max. number of keywording fields: Define the number of index fields to be shown in the QuickInfo. Select "0" to show all index fields in the QuickInfo.

Document display
Warning for large documents: Define the document size for a warning to be issued before displaying the document. The warning will be displayed if the document is larger than the size you have defined.

Thumbnail view	**Display width**: Define the width of the thumbnails here.
	Number of images per group: Define the number of thumbnail images that appear in a group here.
	Preview width in the file: Define the width of a preview file here.
Display document versions	When the version history is shown in the repository tree view, you can choose whether to show the internal ELO counter (number of checked in document versions) or the version number entered manually.
	Do not display: Only the short name and the date are shown in the list view in the repository. You will not see any information about the version history.
	Display counter: Shows the internal ELO document version counter.
	Display version number: Shows the version information you entered manually.
Settings	**Show document date**: The document date is shown in addition to the name in the Repository work area.
	Show keywording: Shows QuickInfo for each entry in the repository tree. This contains information from the index fields and date entries of the keywording.
	Show COLD with background: Show or hide the background forms for COLD documents. Disable this option if you have very large background forms (such as full color scans) or if your computer is slow.
	Display last user and current version in the keywording form: The last editor of a file is shown in the keywording form for documents.
	Confirmation before "Open in read-only mode" and "Check out and edit": Define whether to show a confirmation request before a document is opened in an external program.
	Keyword list selection from dialog box: Set whether to allow selection of keywording information from keyword lists only.
	Show "Move or reference" dialog box: Before moving a document, show a dialog box with options that ask the user whether they want to move the document or create a reference.

Display thumbnails: If you want to view a multi-page TIFF document in ELO, for example, select this option to see an overview of the pages in the document on the border of the viewer pane. This function makes it easier to navigate through multi-page TIFF documents. This setting only affects full screen mode.

Imaging-compatible display: Image documents are adjusted to the format used by Wang Imaging. Otherwise, certain types of TIFF documents are shown upside down.

Text documents in proportional font: ELO displays text documents and e-mail messages in Courier font by default. If this option is selected, they will be displayed in a proportional font. This enables you to see more text on the screen.

Show link [L] next to entry: Select this option to see linked documents in the repository tree.

The [L] next to the short name shows that a document is linked to another document in the repository. Click *Link* on the *Repository* ribbon tab to view the linked documents.

Display keywording in preview pane: Show the keywording information above the document contents.

Annotations on PDFs: If the option *Annotations on PDFs* is selected, the functions of the document viewer toolbar are also available for PDF documents. Alternatively, you can select this option via *ribbon > View*.

Display Microsoft Office documents with	The Windows COM subsystem is very complex, which means that certain display options may not be available on some systems. ELO makes every effort to offer as many alternatives as possible so that users have the best display settings for their systems. There are four different tools available for viewing Microsoft Office documents:

- *Office OCX*
- *Internet Explorer*
- *OLE container*
- *Preview handler*

The default setting is *Office OCX*. This viewer, developed by ELO, shows Office documents in a "lifelike" way, while the comprehensive toolbar for Office documents can be moved around the screen as a context menu. However, not every operating system supports this function.

The *Internet Explorer* is less dependent on the type of operating system. It lets you scroll through the documents and see all sections of forms. A disadvantage of Internet Explorer, however, is that it occasionally keeps files locked for long periods. This is why the option should only be used for workstations used primarily for searches.

If you select the *OLE container*, ELO provides a type of frame for the preview. Microsoft Windows then finds the appropriate program for the file extension and displays it in the container. The program must support OLE functionality. The default tool for Office documents is *Office OCX*. If you have selected *OLE container* and Office OCX is not installed, the Office programs themselves will be shown.

Windows uses the *Preview handler* solution even in Explorer for previewing file contents. A preview of the file is opened in read-only mode without using the corresponding program for the file extension.

Display Microsoft Office documents with: Microsoft Office format documents are normally shown using the OLE preview mode in Windows (*OLE container* option). However, this display option does not allow you to page through documents, and not all image contents are shown. Use the *Internet Explorer* option to switch the display to Internet Explorer. You can then scroll through the documents and see all sections of forms. However, Internet Explorer does have certain drawbacks as far as editing is concerned (because it locks the files for long periods), so this option should only be enabled on computers that will not be used to perform edits. The *Office OCX* display option presents a third possibility. Use this option if the other options do not work.

Interface design: Select the design for the ELO interface. The examples and screenshots in this manual were created with the *Office 2013* design option.

OK: Click *OK* to apply your changes and close the dialog box.

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

Configuration - Display filters
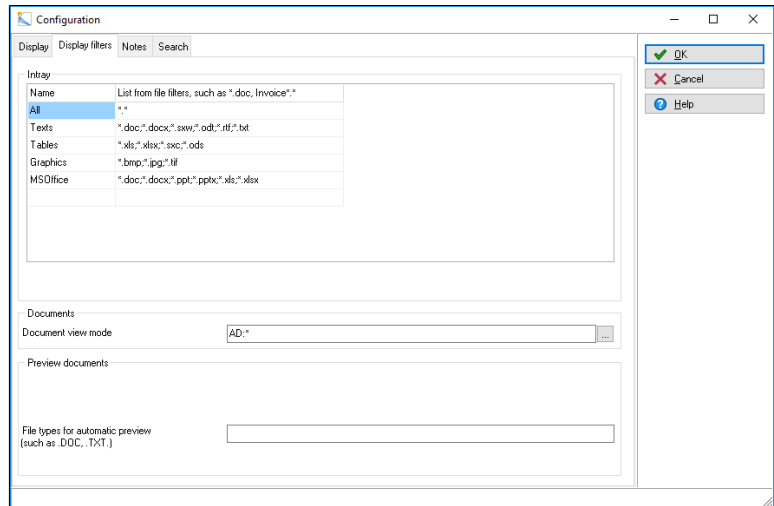
Fig. 604: Display filters configuration in the ELOviewer

Intray: ELO can use different viewing filters in the Intray to determine what documents are displayed. These are created on the *Display filters* tab. As there is no Intray work area in ELOviewer, viewing filters have no effect here.

Document view mode: When you click the browse button to the right of the field, you open a configuration dialog box that allows you to set how ELO opens a document.

File types for automatic preview: Enter the file extensions her for the automatic preview. Separate the entries with periods.

OK: Click *OK* to apply your changes and close the dialog box.

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

Configuration - Notes

Use the *Notes* tab to define colors, sizes, and text formatting options for *Margin notes* and *Annotations*.

Margin notes
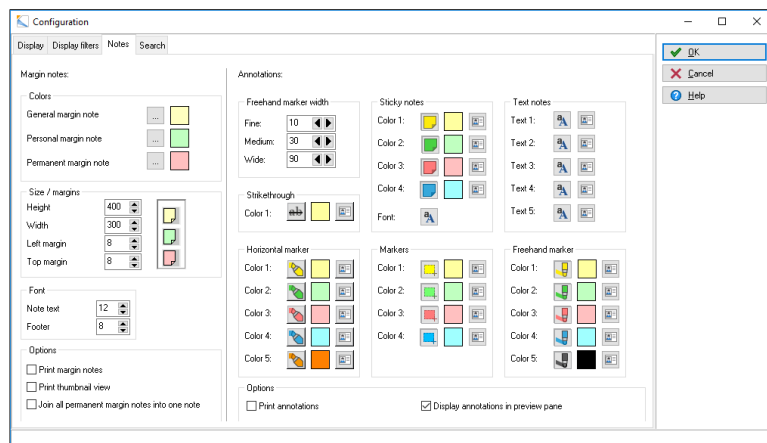
Fig. 605: Notes configuration in the ELOviewer

Colors: To define the colors for margin notes, click the button to the left of each color pattern and select the desired color.

Size/margins: This option allows you to set the size and margins of the margin notes.

Information: You can view the current size of the margin notes by moving the mouse over the margin note icons directly on the tab.

Font: Define the font size of the notes (texts and footers)

Options - **Print margin notes**: You can print margin notes when you enable the *Print margin notes* option. Otherwise, they will not be printed.

Options - **Print thumbnail view**: You can print thumbnails when you select the *Print thumbnail view* option.

Options - Join all permanent margin notes into one note: When you check this option, all permanent margin notes will be joined into one note.

Print margin notes: You can make settings for printing pages on which you can print margin notes.

Annotations

Define settings for annotations here. The settings affect what is shown in the viewer pane. You can define colors, line widths, and permissions to the various types of annotations.

Options - Print annotations: This option determines whether the annotations are printed with the document or not. When activated the annotations will be printed attached to the end of the relevant document.

Options - Display annotations in preview pane: Define here if annotations should be displayed in the preview window.

OK: Click *OK* to apply your changes and close the dialog box.

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

Search configuration
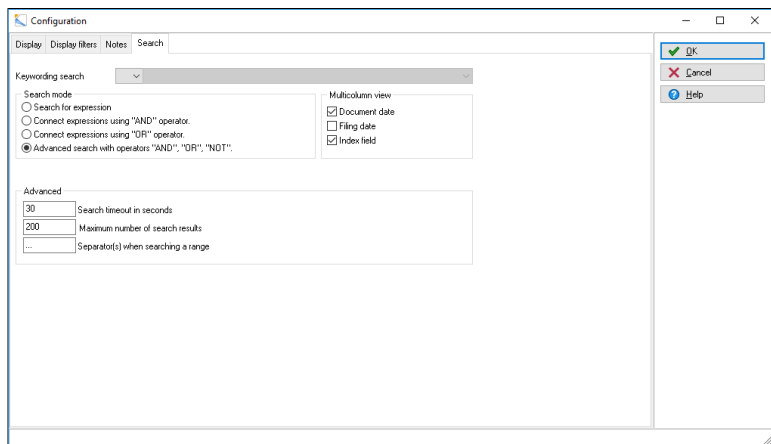
Fig. 606: Search configuration in the ELOviewer

Keywording search: You can connect the four user-defined buttons for the Search work area with keywording forms here. For example, if you want to assign button *1* to the invoice search, select *1* from the list on the left, then the *Invoice* keywording form from the drop-down menu on the right. This search is available on the *Search* tab in the *Keywording search* group.

Search mode: This option only applies to the short name and extra text.

Search for expression
If you search for the text "ELO Digital", then ELO will return all documents containing this exact term. A document containing the text ELO Digital will not be returned as a match.

Connect expressions using *AND* operator
Finds those documents containing all the words in the list. The list will include both the document with " ELO Digital" in it, and one with "ELO ... digitization"

Connect expressions using *OR* operator
Finds those documents containing all the words in the list. In our example, it would be sufficient for the terms " ELO" or "digital" to appear anywhere in a document.

Advanced search with operators *AND*, *OR*, *NOT*	This option lets you define custom combinations of operators. The individual expressions have to be explicitly linked with the operators and/or/not. Example: ELO and DMS or not REPOSITORY.
Multicolumn view	You can view the search results in multicolumn mode. Define which columns you want to be displayed here. The *Index field* option should always be enabled, as otherwise the multicolumn view is not really useful.
Search timeout in seconds	If you are running complex search queries in large repositories, the search may take a long time. To prevent the user from getting the impression the computer has crashed, a query will be automatically terminated after a set period of time.
Maximum number of search results	A very general search (e.g., all documents with the letter "E" in the short name) can generate a very long list of matches that may overload the server. To prevent individual clients from disrupting integral processes, you can limit the size of the results list.
Separator(s) when searching a range	You can search index fields for individual terms and for ranges of data. To run the range search, enter the start and end of the range, separated by this symbol. Example: 2000...4000. The separator icon can also be a character string. The default value consists of three dots.
OK	Click *OK* to apply your changes and close the dialog box.
Cancel	Click *Cancel* to close the dialog box without saving the changes.

Repository work area
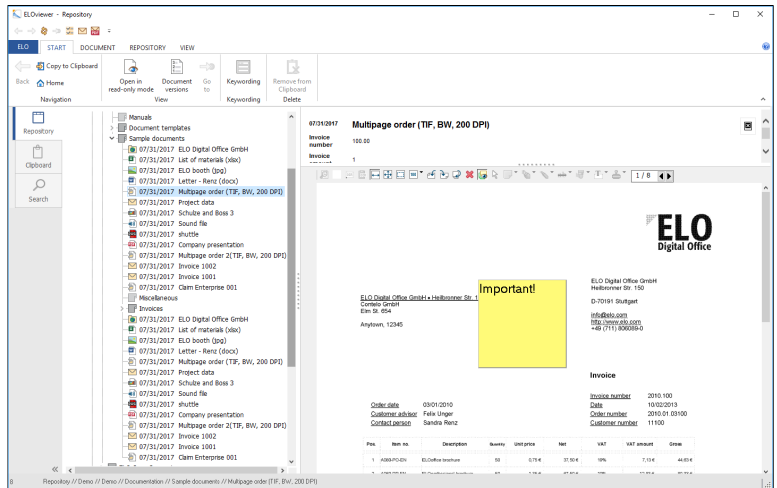
Fig. 607: Repository work area in the ELOviewer

You will see the repository tree in the left-hand program pane. Select the individual folders or documents. The contents of the corresponding entry are displayed in the right-hand program pane. You have access to various functions and options on the ribbon and the context menu. The alphabetically sorted overview provides a list of these functions. Please use the table of contents and index of the manual, as well as the in-program help.

Clipboard work area
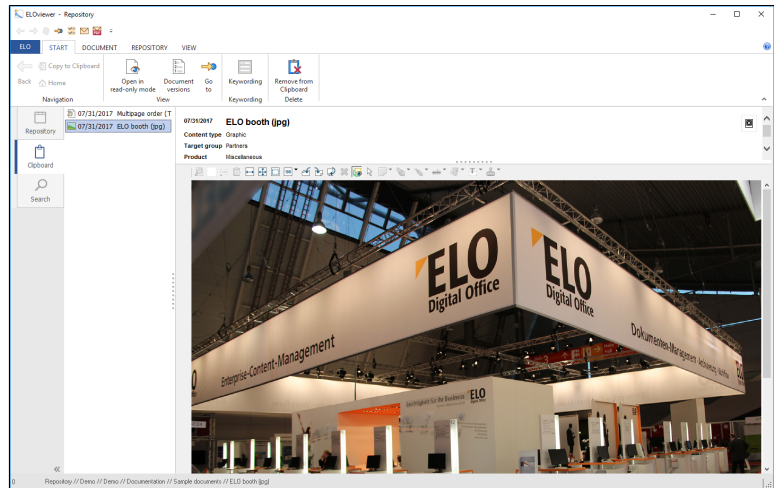
Fig. 608: Clipboard work area in the ELOviewer

You have access to various functions and options on the toolbar and the context menu. The alphabetically sorted overview provides a list of these functions. Please use the table of contents and index of the manual, as well as the in-program help.

Search work area
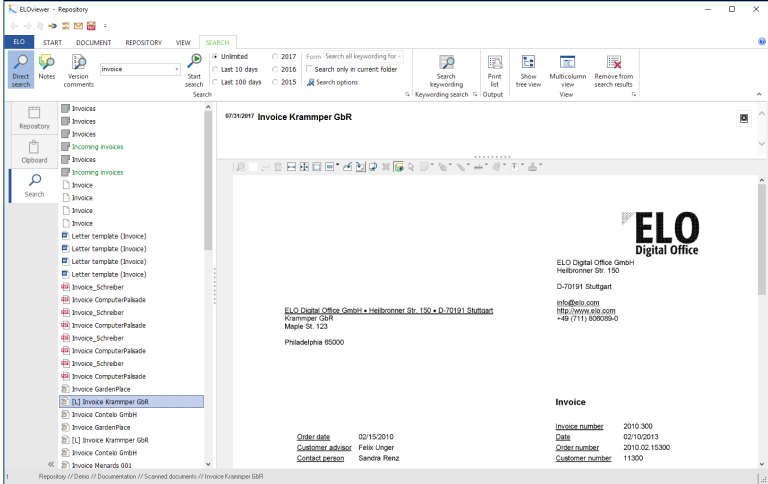
Fig. 609: Search work area in the ELOviewer

You have access to various functions and options on the toolbar and the context menu. The alphabetically sorted overview provides a list of these functions. Please use the table of contents and index of the manual, as well as the in-program help.

Appendix

This chapter provides important additional information. Please also consider the information on our website.

Licensing information for ELO QuickScan

This software is based in part on the work of the Independent JPEG Group.

FAQ

Please note: This section offers some tips that will help you. What should you do when something does not work and what can you try before you call the support hotline?

Information: Please always read all the FAQ on our website first before you send a request to support.

Scanner	**Problem**: The scanner does not work.
	Reinstall the driver first. Check whether the scanner works correctly with other programs. If so, then you should call the hotline.
Document filing	**Problem**: I cannot file any documents in ELO.
	First, check all the filing paths. Check the user rights. Do you have enough rights to save a document? Check the configuration of the keywording form.
Starting the program	**Problem**: I am unable to start ELO. What should I do?
	Are you using the correct user name? Try the default for ELO: User name "Administrator" and no password.
Create client report	**Problem**: I was asked to send a "client report". I do not know how to create this report.

First, you need to create a .txt file such as "ELO_protocol_Smith.txt". Create this file on your desktop or in any folder on your computer by opening the context menu. Click *New > Text file* and enter the file name (ELO_protocol_Smith.txt). Please keep in mind that this must be a txt. file.

Now, select this file in the *ELO menu > Configuration > Paths > Log file storage path*. Then click the browse button and select the path and log file. In our example:

C:\Temp\Smith\ELO_protocol_smith.txt.

Then, select *511 Everything* in the field on the same line. Next, close the program and reopen it.

Now, repeat the action that caused the problem. As soon as the box with the error message appears, save the report file, WITHOUT confirmation of the message box (without clicking a button) and send us the log file.

Finally, close the message box and ELO again. To deactivate the log file, set the value to *0 No log* in the *ELO menu > Configuration > Paths > Protocol file path*.

Website

You can find more information on the ELOoffice website at:www.elooffice.com.

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(8) 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.

12. Liability

(1) The Licensor shall be liable for damages for which it is responsible up to the purchase price. The Licensor accepts unlimited liability for damages resulting from defects of title and the failure to provide the warranted characteristics. Liability for neglect of duty shall be limited to five times the purchase price and to the losses that would typically be expected in relation to a software license. 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 neglect of duty as defined above.

(2) For ordinary negligence, the Licensor shall be liable only where it has neglected an obligation that is central to achieving the purpose of the Agreement (material obligation). If the material obligation is not fulfilled, limited liability for neglect of duty in accordance with paragraph 1 of this liability clause shall apply accordingly.

(3) 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. We do not accept liability for consequential losses caused by a defect not covered by insurance or for loss of profit, unrealized savings or other indirect losses.

(4) The Licensor shall not be 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. Similarly, the Licensor does 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.

(5) Liability under section 14 of the German Product Liability Act (ProdHG) is not affected.

13. Obligation of confidentiality and duty of care

Both parties to the Agreement shall 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. Both parties to the Agreement shall 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.

14. Place of jurisdiction

Commercial relations with the Licensee are governed exclusively by the laws of the Federal Republic of Germany with exclusion of the UN Convention on Contracts for the International Sale of Goods. 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.

15. Severability clause

If individual provisions of this Agreement are or become completely or partially invalid, the validity or enforceability of the remaining provisions shall remain unaffected. In the event a provision of this Agreement becomes invalid or unenforceable, said provision shall be replaced by a valid and enforceable one which most closely approximates the economic intent of the parties. The above provisions shall apply correspondingly to any gaps in the Agreement.

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