d.velop documents for Microsoft 365: User

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1. d.velop documents for Microsoft 365: User

1.1. Basic information about the application

This chapter contains notes about the product and general information.

1.1.1. About d.velop documents for Microsoft 365

With d.velop documents for Microsoft 365, you enable your Microsoft SharePoint instance to structure documents and information in digital dossiers and process documents based on workflows.

d.velop documents for Microsoft 365 consists of several components.

- **Web interface (center)**
  d.velop center is an intuitive web interface for your SharePoint DMS that gives you quick and easy access to your digital documents and dossiers.
- **Advanced search**
  In the advanced search, you can restrict the search to a content type (e.g. supplier dossier) and specify properties (filters) to reach the search result you are looking for as quickly as possible.
- **Embedded view**
  An optimized view is available to integrate structures into leading systems such as ERP or CRM systems. The embedded view allows working with structures directly in the leading system.
- **Outlook integration**
  An optimized view is available for integrating structures into Microsoft Outlook. The Outlook integration enables you to save e-mails and their attachments directly from Outlook into the structures.

1.2. Web interface (center)

This section provides you with information about d.velop documents for Microsoft 365 center, the web interface of the application.

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1.2.1. Opening the web interface

You can implement the **Open center** button in SharePoint Online. You can then use this button to navigate from SharePoint Online in the context of the item or document to d.velop documents for Microsoft 365 center. There is also a quick search function that you can integrate on a SharePoint website. You can use the quick search function to go from the search results to the corresponding area of d.velop documents for Microsoft 365 center.

Alternatively, you can also implement links to third-party systems, such as an ERP system, to open d.velop documents for Microsoft 365 center in the context of an item or document within the third-party system.

The language of the web interface is determined by the language set in the browser. If the set language is not available, the user interface is displayed in English. You can define the language yourself via a URL parameter. Contact your administrator.

1.2.2. Overview of the web interface

The following section gives you a brief overview of the web interface (center). The different functions are described in more detail below.

The web interface contains a header with a quick search function and the account information. The view below this is divided into four areas. The navigation pane is located on the left-hand side. When you first open the center, you are taken to the structure of the corresponding dossier. Above this you will see the **Add** button with which you can add new items or documents. Underneath the structure you will also find the favorites, history, entry to the advanced search and a link to the user documentation.

In the area of the structure, next to the navigation pane, you will see the structure diagram, which shows you the defined dossier structure and which you can use to navigate through the dossier. In the center is a table that lists the associated items or documents depending on the structure node selected. Above the table is a command bar that contains the various actions that are available for the selected item or document.

The metadata for the selected item or document and the document preview are located on the right-hand side of the web interface.

1.2.3. Structure diagram

You can use the structure diagram to navigate through the defined dossier structure. Clicking a structure node opens the structures below it. The associated items or documents are shown alongside in a table. You can change the width of the structure diagram to by dragging it with the mouse. The number of items or documents contained is shown after the respective structure node. For large structures, it may take a while for the structures to fully load.

Documents or items may also be present in several dossiers. In this case, an icon is displayed before the alternative dossiers. Clicking the icon expands the structure upward.

1.2.4. Table

In the middle of the web interface, there is a table of the items and documents that are linked to the selected structure node. In this table, you can adapt the view in various ways and restrict the content. You can change the column width by dragging the column with the mouse. You can also sort the content of the columns in ascending or descending order. In addition, you can use a filter function across several columns to restrict the content that is shown in the table.

In the contents table, the linked items and documents are displayed at child level. You can adapt the view in various ways and restrict the displayed content. You can change the column width by dragging the column with the mouse. You can sort the content of the columns in ascending or descending order. In addition, you can use a filter function across several columns to restrict the content that is shown in the table.

> **Note**
>
> If you are filtering number fields that contain percentages, you must enter "0.17" as the filter value if 17% is displayed, for example.
>
> With the filter option **Between** (entries in **From** and **To**), the limit values are included in the filter. This means that if you filter by the values 200 to 500, items with the values 200 and 500 will be included.

The left-hand column of the table contains various options that you can use to select one or more rows. You activate individual options by clicking the row. Once you have made your selection, a command bar with various functions is displayed above the table. You can use this to execute different document- or item-related actions, such as deleting, sharing or downloading. In addition, the metadata for the item or document is displayed in the properties area on the right-hand side. In the case of documents, a preview is also shown.

The available views are shown in the selection menu above the table. The default view of the library or the list defined in SharePoint Online is used by default. You can use the selection menu to select further configured views to adapt the view of the table.

If there are several pages of results, a navigation pane is displayed under the table. You can use this to navigate through the different pages and display all the results.

1.2.5. Properties area

The metadata for the selected document or item is displayed in the properties area. In the case of a document, the document preview is shown above the metadata. In the lower area, the system fields **Modified**, **Modified by**, **Created**, **Created by** and **Version** are displayed. If you have the required permissions, you can change or add to the metadata using **Edit**.

1.2.6. Document preview

For documents, the document preview is displayed in the properties area. This gives you an overview of the document content. You can change the size of the preview by adapting the width of the properties area. Above a certain width, the view wraps and the document preview is displayed next to the metadata. You can expand the display to the maximum view by clicking the corresponding icon in the document.

1.2.7. Command bar

The command bar is situated above the table and is shown when you activate one or more rows. The different context-related functions are shown within the command bar.

At the level of individual or several documents/items, the following functions are available by default:

- **Delete**: delete up to ten items simultaneously.
- **Open in browser**: open and edit individual files in the browser.
- **Open in app**: open and edit individual files in the respective desktop application. In order to edit PDF files with Adobe Reader, you must set up a OneDrive synchronization.
- **Download**: download individual files. Note that you can only download one file at a time.
- **Share**: select individual files and items that you want to share with other people.
- **Open in contract management** (only available for contracts from d.velop contracts for Microsoft 365): open items in the relevant contract within contract management.
- **Open version history**: Open the version page of the file in Microsoft 365/SharePoint, provided that versioning is enabled.
- **Manage permissions**: Open the permissions page of the file in Microsoft 365/SharePoint.

At the level of individual or multiple items, the following functions are available by default:

- **Delete**: delete up to ten items simultaneously.
- **Share**: Select individual items that you want to share with other people.
- **Open version history**: Open the version page of the item in Microsoft 365/SharePoint, provided that versioning is enabled.
- **Manage permissions**: Open the permissions page of the item in Microsoft 365/SharePoint.

You can also display customized buttons that execute actions defined by your administrator.

If your administrator has defined a view for a parent structure node, the corresponding search results will be displayed in the result list. The following functions are available for the documents and items in this view:

- Documents:
  - Open in browser
  - Open in app
  - Download
  - Share
- Items: Share

1.2.8. Uploading documents

There are two ways to upload documents in the web interface.

Uploading documents using the "Add" button – This is how it works

1. Click the plus icon in the navigation pane.
2. Select the files with the documents that you want to upload.
3. Confirm the selected files.

Your documents are then uploaded.

Uploading documents using drag & drop – This is how it works

1. Select the files with the documents that you want to upload.
2. Drag the selected files to the area with the table and release the mouse button.

Your documents are then uploaded.

You can see the progress of the upload process on the lower edge of the dialog. You can continue to work while the documents are uploading. Just make sure you do not close the browser tab.

1.2.9. Creating new documents based on document templates

If document templates are defined for the corresponding structure node, you can add new documents based on document templates.

This is how it works

1. Click the plus icon in the navigation pane.
2. Create a new document using **Add from template**.
3. Select the desired template. If necessary, use the search function or select a document from a subfolder.
4. Choose a document name or accept the suggestion.
5. Click **Create new document**.

A new document is created based on the template. The placeholders defined in the template are populated.

1.2.10. Adding items

You can add new items at list level.

This is how it works

1. Click the plus icon in the navigation pane.
2. Enter all relevant metadata for the item in the dialog box.
3. Click **Save** to create the new item.

1.2.11. Favorites

The **Favorites** area contains all items that you have marked as favorites. You can remove an item from the list of favorites by hovering over the item with the cursor. The items defined as favorites in the web interface are also displayed in the Outlook integration and vice versa. Clicking on a favorite takes you to the corresponding structure.

1.2.12. History

The **History** area lists all dossiers in which you have either created an item or uploaded a file within the last 14 days. The web interface and the Outlook integration share the history, which means that when you are in the web interface you can also access the history from the Outlook integration and vice versa.

Clicking on a dossier takes you to the corresponding structure.

1.2.13. Quick search

In the web interface header, you can enter a search term in the quick search to obtain a list of results. Selecting the relevant search result takes you to the required place in the structure.

Search results can be displayed differently or restricted depending on how this has been configured by your administrator.

1.2.14. Advanced search

In addition to the quick search in the header, there is also an advanced search option in the navigation pane. For more information about the advanced search, see Opening and performing the advanced search.

1.3. Advanced search

This section explains the advanced search and its various functions.

1.3.1. Opening and performing the advanced search

You can open the advanced search from the navigation pane of the web interface. This takes you to the search configuration that your administrator has defined for the selected structure. Alternatively, you can open the advanced search directly.

Opening the advanced search – This is how it works

Open the search via the associated URL. Add the name of the configuration to the base URL.

- Format: https://search.d-velop365.com/<Configuration name>
- Example: https://search.d-velop365.com/MySearchConfig

Performing a search – This is how it works

1. Under **Narrow search**, select a content type from the selection list or use **Search without content type** to perform a search without any content type restriction.
2. Enter a search term. If you have already restricted the search to a content type, this step is optional.

3. Under **Properties**, select a value to restrict the search results if necessary. This option is only available if you have selected a content type or your administrator has configured a search without content types.
4. Click **Search** to perform the search.

Once a search has been performed, you can activate further filters or sort the result list in the column headers. You can also change the sorting of the columns.

Adjusting the search result list – This is how it works

1. Click the filter icon and enter the required filter value in the text box.
2. Activate the filter by clicking **Apply**.
   - The results list shows only the results that correspond to the filter. If a filter is active, the filter icon in the respective column is filled in.
   - You can deactivate the filter by clicking **Delete**.
3. Adjust the order of the columns in the search result list as required by clicking the column header.
4. Adjust the columns you want to display in the search result list as required. Initially, the column arrangement of the configuration is used.
   - Click **Select columns** to select the columns that you want to display. You can move individual columns using drag & drop.
   - Click **Save**.

1.3.2. Using search templates

You can use search templates to rerun saved searches. The columns of the search result list saved in the template are also displayed again.

You can find the search templates under **My search templates**.

Creating a search template – This is how it works

1. Perform the search that you want to save as a search template. A search results list appears.
2. Click **Save as search template**.
3. Enter a name for the template and confirm your entry.

The filters and columns that you have used in the search are saved in the template. You can select the search template in the **My search templates** area to perform the search according to the template.

Deleting a search template – This is how it works

1. For the search template you want to delete, click the three dots.
2. In the context menu, click **Delete**.

1.3.3. Exporting search results

You can export the search results as a Microsoft Excel file.

This is how it works

1. Open the search application using the following URL with a configuration ID: **https://search.d-velop365.com/<configuration-id>**
2. Restrict the search if necessary using the appropriate criteria.
3. Perform the search.
4. Click **Export search results**. The search results are downloaded as an Excel file.

Note
Only 500 search results are shown in the search result list. If there are more than 500 search results, a selection menu is available for exporting the search results. You can export either the 500 search results shown or up to 20,000 search results.

1.4. Embedded view

An optimized view is available for integrating structures into leading systems such as ERP or CRM systems. The embedded view enables you to work directly with structures in the leading system.

1.4.1. Navigation

The embedded view shows the structure in the context of a specific item. Clicking on a structure node takes you deeper into the structure. You can navigate back via breadcrumb navigation. Clicking the house icon takes you back to where you started. You can also use this icon to return to the web interface of d.velop documents for Microsoft 365 and continue to work on the structure or a document.

Note
From the starting point, it is not possible to navigate further up in the structure.

In the embedded view, you can display documents with associated substructures.

The document preview is displayed by default. If you want to display the substructure, click the icon after the file name to change the view.

Note
A maximum of 100 items (dossiers or documents) can be displayed on one level.

1.4.2. Viewing and editing properties

You can have the properties (metadata) of list items and documents displayed in the embedded view. Move the cursor over the corresponding row and click the info icon.

You can also edit the properties (metadata) of list items and documents in the embedded view. To do so, move the cursor over the corresponding row and click the three dots and then **Edit properties**. Alternatively, you can set the properties view dialog (metadata) to edit mode.

If you upload a document via the embedded view and any required information is missing, the input dialog opens automatically.

1.4.3. Uploading files

You can upload files by dragging and dropping them or by clicking **Upload**. If the file name has already been assigned, you can change the file name in the dialog box. The following options are available to you:

- You can change the name yourself in the input field.
- You can have the name generated automatically by appending a timestamp to the name.
- You can cancel the upload for the file.
- You keep the file name. Based on your SharePoint online settings, a new version of the file is uploaded or the old file is overwritten.

Click **Upload** to start a new upload process. For large upload processes, you can upload all files with an automatically generated name by enabling the option **Generate file names automatically**.

> **Note**
> During the upload, the file name is changed, not the title. In the embedded view, the title of the files is displayed. The title is still obtained from the metadata. If there is no title, the name is used as the title. You can have the name displayed in the file's metadata.

1.4.4. Document preview

If you click the title of a document, the document preview is opened and you can view the content of the document.

1.5. Outlook integration

The Outlook integration is an add-in for Microsoft Outlook that you can use to save e-mails and e-mail attachments in the relevant structures. Provided the integration has been set up by your administrator, it will be available for you in Outlook in the context of an e-mail under **Apps**.

1.5.1. Structure

This chapter explains the structure of the Outlook integration.

Navigating within the structure

You can navigate through the displayed structure to access the required storage location.

This is how it works

1. Click the relevant node to navigate to it.
2. Click the back button to navigate one level upward.
3. Hold the cursor on the back button to navigate several levels upward. A menu opens showing the higher levels, which you can click to navigate to.

Searching in the structure

To access the required storage location quickly, you can search the content of the displayed structure node.

This is how it works

1. Click the name of the node that is currently selected or click the Search button.
2. Enter your search term. The search results are updated automatically.

> **Note**
> You can only search within a node.
>
> If there is a large number of items, not all items may be displayed on the user interface. In this case, you can find all items via the search.

Saving whole e-mails, attachments and e-mails without attachments

There are two ways to upload e-mails and attachments.

Uploading via the user interface – This is how it works

1. Select all the e-mails you require in Outlook.

   > **Note**
   > Multiple selection in Microsoft Outlook is not supported on a Mac.

2. Navigate to the required node.
3. Click **Upload**. **Upload** is only available if you have the relevant permissions.
4. Choose between **Upload entire e-mail**, **Upload selected attachments** and **Upload e-mail without attachments**.

> **Note**
> If you have selected several e-mails, you can only upload the entire e-mails or the e-mails without attachments.

5. Click **Upload**.

> **Note**
> If the entire e-mail was uploaded, the category **Filed in SharePoint** is set for the e-mail in Outlook.

Uploading using drag & drop – This is how it works

1. Navigate to the relevant structure.
2. Drag the e-mails or e-mail attachments you require into the Outlook integration.

> **Note**
> Setting of the category **Filed in SharePoint** is not supported when uploading via drag & drop.
>
> In the classic Outlook, only the upload of e-mail attachments is supported.

Viewing and editing metadata

You can view and edit the metadata in the Outlook integration.

This is how it works

1. Navigate to the required item.
2. Click the three dots.
3. Select **Details**. The metadata is displayed in view mode.
4. Click **Edit**.
5. Amend the metadata as required.
6. Click **Save**.

Creating list items

You can create new list items at list level.

This is how it works

1. Navigate to the required structure node in which the new list item is to be created.
2. Click the three dots.
3. Select **Add new item**.
4. Adapt the metadata.
5. Click **Save**.

Deleting items

This is how it works

1. Navigate to the required item.
2. Click the three dots.
3. Select **Delete**.
4. Confirm the security prompt.

Opening the web interface (center)

If required, you can open the web interface, d.velop documents for Microsoft 365 center, directly.

This is how it works

1. Navigate to the required item.
2. Click the three dots.
3. Select **Open in center**.

Creating e-mails

There are three options available for creating an e-mail from the Outlook integration:

- **Create e-mail**: An e-mail is created with the selected title in the subject.
- **Send link by e-mail**: An e-mail is created with the selected center link.
- **Send file by e-mail**: An e-mail is created with the selected file.

This is how it works

1. Navigate to the required item.
2. Click the three dots.
3. Select the option you want to use.

1.5.2. Favorites

Under **Favorites**, the items marked as favorites are displayed. Only items that are not at the lowest level of the structure can be marked as favorites. Structure nodes cannot be marked as favorites either.

> **Note**
> Favorites are saved for each structure and user.

Marking an item as a favorite – This is how it works

1. Switch to **Structure** and navigate to the relevant item.
2. Click the three dots.
3. Select **Mark as Favorite**.

Deleting favorites – This is how it works

1. Switch to the overview of the favorites.
2. Click the **X** next to the relevant favorites.

1.5.3. History

Under **History**, the parent items to which documents have been uploaded in the last 14 days are displayed.

> **Note**
> The history is saved for each structure and user.

1.5.4. Settings

This chapter contains further information about the settings for the folderplan and the trace ID.

Selecting folderplans

This is how it works

1. Click **Select folderplan**.
2. Select the folderplan you require.

> **Note**
> The most recently opened folderplan is saved and is preselected the next time you open the Outlook integration.

Trace ID

The trace ID is displayed at the end of the settings. The trace ID is required for support tickets to enable the behavior in question to be identified and traced.

1.6. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.