d.velop documents for Microsoft 365: Administrator

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1. d.velop documents for Microsoft 365: Administrator

1.1. Basic information about d.velop documents for Microsoft 365 and this documentation

This documentation describes the basic setup of d.velop documents for Microsoft 365.

Setup requires access to Microsoft Entra ID and administrative permissions in the Microsoft 365 tenant.

1.1.1. About d.velop documents for Microsoft 365

d.velop documents for Microsoft 365 adds structures and interfaces to ERP systems to the DMS functionalities of Microsoft 365 and SharePoint Online.

More information is available on the d.velop website at https://www.d-velop.com under **Integrations > Microsoft 365**.

d.velop documents for Microsoft 365 is a SaaS application. The software is operated by d.velop as multi-tenant-capable cloud software. Patches, updates and new features are made available without any manual effort. All metadata and documents are stored in a Microsoft 365 SharePoint site of the customer. The SharePoint site resides in the customer's Microsoft 365 tenant. Users work with the data using a provided application interface. The SharePoint site serves as a repository of the data.

The customer’s Microsoft Entra ID user directory is used for user logins. All communication with SharePoint is conducted via official SharePoint APIs and Microsoft Graph endpoints within Microsoft Entra ID apps in a user context. Using Microsoft Entra ID authentication enables you to make use of its security and compliance features. The use of Microsoft Entra ID also allows use of the SharePoint permissions model.

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

d.velop composer

d.velop composer enables you to create and manage structures for d.velop for Microsoft 365.

These structures refer to information objects in Microsoft SharePoint. These information objects comprise the following:

- Lists
- Libraries
- Content types

You define the relationships between these content types in the structures. You can use these structures in d.velop for Microsoft 365 center and ecspand sidebar.

d.velop documents for Microsoft 365 center

d.velop documents for Microsoft 365 center provides the button **Open center** in Microsoft 365. **Open center** takes you from SharePoint Online to d.velop documents for Microsoft 365 center.

d.velop integrator

With d.velop integrator, you identify documents in Microsoft SharePoint based on unique identifiers. d.velop integrator directs the requesting system to the target (document or structure node).

1.1.2. Supported browsers

The following web browsers are supported in their latest version under Windows 10 and Windows 11:

- Microsoft Edge (Chromium-based)
- Mozilla Firefox
- Google Chrome

> **Note**
> Please note that third-party cookies must generally be allowed in your browser. Alternatively, you can add an exception for the login.microsoftonline.com domain.

1.2. Installing and Uninstalling

This chapter contains information on installing and uninstalling d.velop documents for Microsoft 365.

1.2.1. System requirements

System requirements d.velop composer

- You need a Microsoft 365 tenant.
- The app catalog must be set up in Microsoft 365.
- Setup requires administrative access to both the Microsoft Entra Admin Center and Microsoft 365.
- The setup requires permissions to the SharePoint root site of the SharePoint client.

System requirements of d.velop documents for Microsoft 365 metadata search

- You need a Microsoft 365 tenant.
- The search communicates with the SharePoint tenant in the context of the Microsoft Entra enterprise application “d.velop for Microsoft 365.” D.velop for Microsoft 365 must be set up beforehand.
- To configure the metadata search, the **Administrator** role must be assigned in the Microsoft Entra enterprise application “d.velop for Microsoft 365.”

1.2.2. Installing d.velop documents for Microsoft 365

To use d.velop documents for Microsoft 365, follow the steps below:

1. Configure d.velop composer to manage the structures for d.velop documents for Microsoft 365.
2. Create a structure.
3. Configure the following components or functions:
   - d.velop documents for Microsoft 365 center
   - d.velop documents for Microsoft 365
   - d.velop integrator
   - Metadata search (optional)
   - Quicksearch web part (optional)

Setting up d.velop documents for Microsoft 365

To use d.velop documents for Microsoft 365, you must grant administrative permissions.

Providing administrative approval for d.velop documents for Microsoft 365

This is how it works

1. Open **https://onboarding.d-velop365.com**.
2. Click **Login**.
3. Log in using a user account with sufficient permissions.
4. Select **d.velop documents for Microsoft 365**.

5. Under **User permissions**, click **Grant administrative approval**.
6. Click to select your user account or click **Use another account** to select a different user account.
7. Click **Accept**.
8. Click **Check status** to determine if Microsoft has processed the administrative approval. It may take up to three minutes to update. Repeat this step until all permissions have a green check mark.

Once you have granted administrative approval, you must define users for the application administration of the enterprise application. Users with application administration permission can configure your installation of d.velop documents for Microsoft 365, such as structures, integrations, and the user interface of d.velop documents for Microsoft 365 center.

You can authorize the following users to perform application administration:

- Users in your own organization
- d.velop consultants
- Consultants of your d.velop partner with an existing Microsoft Entra ID account in your organization

Granting permissions for application administration

This is how it works

1. Log in to Microsoft Entra Admin Center with an authorized user account: https://entra.microsoft.com/.
2. Navigate to **Applications > Enterprise applications**.
3. Navigate to **d.velop documents for Microsoft 365 > Users and groups > Add user/group**.
4. Under **Users and groups**, click **None selected** and select the appropriate users.
5. Under **Select role**, click **None selected** and select **Administrator**.
6. Click **Select** and then click **Assign**.

Setting up d.velop documents for Microsoft 365 in Microsoft SharePoint

Set up the app “d.velop documents for Microsoft 365 - Integration” to use d.velop documents for Microsoft 365 (**center** button) in Microsoft SharePoint.

d.velop documents for Microsoft 365 - Integration adds the d.velop documents for Microsoft 365 item to the shortcut menu. The app also adds the **center** button to lists and libraries. The **center** button allows users to open d.velop documents for Microsoft 365 center.

This is how it works

1. Download the latest version of “d.velop documents for Microsoft 365 - Components” from the d.velop service portal.
2. Extract the downloaded ZIP file.
3. Open **SharePoint Admin Center**.
4. Click **More functions**.
5. Under **Apps**, click **Open**.
6. Add the file **dvelop365-center-button.sppkg** using the **Upload** button or drag and drop it.
7. Click **Only enable this app > Enable app**.
8. Perform the following steps in all SharePoint site collections where you want the **center** button to appear:
   a. Open a site collection and click **Site contents**.
   b. Click **New > App**.
   c. For **d.velop documents for Microsoft 365 - Integration**, click **Add**.

Important: It may take up to an hour for the added app to be available to all users.

Setting up the metadata search.

You must first configure the metadata search before you can use it. First check whether you meet the system requirements.

System requirements of d.velop documents for Microsoft 365 metadata search

- You need a Microsoft 365 tenant.
- d.velop for Microsoft 365 has been set up. The metadata search communicates with the SharePoint tenant in the context of the Microsoft Entra enterprise application d.velop for Microsoft 365.
- You have the **Administrator** role in the Microsoft Entra enterprise application d.velop for Microsoft 365.

1.2.3. Removing d.velop documents for Microsoft 365 in Microsoft SharePoint and Microsoft Entra ID

The apps “d.velop documents for Microsoft 365” (**center** button) and “d.velop documents for Microsoft 365-Quicksearch” can be removed either from the site or from the entire tenant.

- **Removing from the site**
  Within the site, you can remove the apps from the list of site contents.
- **Removing from the entire tenant**
  If you want to remove the apps across the entire tenant, remove the apps from the app catalog.

You can remove the “d.velop documents for Microsoft 365” enterprise applications in the Microsoft Entra Admin Center.

1.3. Configuring a structure (d.velop composer)

You can adjust the appearance and behavior in the administration area of d.velop documents for Microsoft 365 center. Your settings apply to the embedded view and the Outlook integration. Note the following:

- Child nodes in the structure can be from the same or a different site collection.
- When saving documents in the structure, subfolders can be created automatically, or the documents can be saved in existing subfolders.
- A single node can be integrated into different libraries. Thus, the documents are available in the various libraries.
- You can also define subnodes as a content type or a search-based node.

1.3.1. Creating a structure

You create structures for d.velop documents for Microsoft 365 with the structure designer in the administration area.

This is how it works

1. Log in to the administration area and navigate to the structure designer:
   a. Open the **d.velop for Microsoft 365 - Admin** site in your browser at https://admin.d-velop365.com.
   b. Log in.
   c. Click on **Structures** under **Document management**.
2. Create a new structure:
   a. Click **New**.
   b. Under **Available items**, select the desired site collection to create a structure. You can also create structures independently of a site collection and add items from different sites to a structure.
   c. Select to relevant site of the source. Note that you can only change the site if there are multiple existing sites in the respective site collection.

   d. Select an item from the available lists, libraries and content types. This item becomes the top item of the structure being created (root node).
   e. Drag and drop the root node to the **Draft** area. The root node is indicated by a house icon after the name of the item.
   f. Select the item that will be the child of the root node.
   g. Drag the child item to the corresponding root node in the **Draft** area.
3. Complete the structure by repeating the previous steps for the other items below the root node.
   If you want to add another level below a child item, you must add the child item again as a parent item in the structure. Finally, add the corresponding child items.

> **Note**
> You can use the preview to check how your created structure will appear in the application interfaces.

4. Enter the metadata for the new structure:
   a. Enter a name for the structure under **Name**.
   b. Specify a **Description** for the structure.
   c. Under **Apply to**, you have the option of selecting a site collection to be applied to the structure. In addition, you can select one or more sites in which the structure will be used within the selected site collection.
5. Configure the node properties. Additional Information: Configuring the node properties
6. Specify the link fields. Additional Information: Structure settings
7. Save the structure.

> **Note**
> To save a modified interface configuration in d.velop documents for Microsoft 365 center, use a CMID in a structure in d.velop composer. Otherwise, the interface configuration will be overwritten and cannot be restored. Additional Information: How do I use a CMID (case management ID)?

1.3.2. Configuring the node properties

In the **Node properties** area, the various configuration options are divided into three groups. Initially, the two groups **View settings** and **Structure settings** are open. Additional configuration options and technical information can be found in the **Extended configuration** and **Technical information** groups.

The following chapters describe how you configure the various node properties.

View settings

In the following, you will learn which configuration options are available to you in the **View settings** group and how you can perform the configuration. The configuration options displayed are based on the selected structure node.

Defining the display name of the structure node

Under **Display name structure node**, you have the option of specifying the name of the structure node under which the structure is displayed. The name of the list or library in the structure is overwritten in this case.

This is how it works

1. Click in the text field. If you have not changed the display name, the name of the list or library will be displayed as a placeholder in the text field.
2. Enter the required display name. You can also define the display name in multiple languages. Use the country code or the SharePoint LCID for this purpose.

> **Note**
> **Example**
>
> “de:Kundenakte;en:Customer Record;” or “1031:Kundenakte;1033:Customer Record;”

Defining the display format of items

Under **Display format items**, you have the option of specifying the display format for list items or documents. You can use any combination of text and placeholders. The specified display format overwrites the title or document name when it is displayed.

This is how it works

1. Click in the text field. If you have not changed the display format, an example in the required format is displayed as a placeholder in the text field.
2. Define the required display format using text and placeholders.

> **Note**
> **Example**
>
> "${item.Title}" or "${item.OrderConfirmationNumber}"

Defining the icon

Under **Icon**, you have the option of selecting an icon to be displayed before the name of the structure node. If you specify an icon, this icon replaces the default icon in the structure.

This is how it works

1. Click in the selection field. You can search in the displayed selection by entering text or simply scroll through the selection.
2. Select the required icon.

> **Note**
> To delete a selected icon, click the recycle bin icon. Select a different icon if necessary.
> You can click the clipboard icon to copy the name of the icon to your clipboard.

Grouping the structure

For a better overview, you have the option of combining several structure nodes into one group. The group is displayed as a parent structure node. You can learn how to create groups under Creating groups for the structure.

This is how it works

1. Click in the selection field.
2. Select the required group.

Tabular view

If you use a content type as a structure node, you must also define a view. In a view, you can specify the properties of the content to be displayed. You can also specify ascending or descending sorting for a property. This configuration is mandatory for content types.

You can only define a global view for a content type. If you are already using the content type in another structure in which a view has been defined, the view is preselected in the current structure and can only be edited. Any changes are applied globally.

This is how it works

1. Click **Add**.
2. If required, select a field for the sorting and define the sorting order via the selection field.
3. Add the name of the of the managed property under **Managed property** in the row of the corresponding field name. The managed property must have been previously created in the SharePoint Online search schema.
4. Drag and drop the relevant fields from the **Hidden fields** area to the **Displayed fields** area and arrange the fields in the desired order. These fields will be included in the view in d.velop documents for Microsoft 365 center.
5. Save your changes with **Apply**.

> **Note**
> Note that the **Link fields** area only contains fields for which you have mapped the relevant managed property in the tabular view. The mapping is relevant for columns used under **Display format items**.

Configuring the display in the properties area

You have the option of configuring the displayed properties of a structure item. To do this, you group and sort the properties of a structure node to provide users of d.velop documents for Microsoft 365 center users with a better overview.

You can only define the global display in the properties area for a list or library. If you are already using the list or library in another structure with a defined display in the properties area, the display is preselected in the current structure and can only be edited. Any changes are applied globally.

> **Note**
> If you have not defined a display in the properties area, the display order of the columns is based on the order of the content type of the item in SharePoint.

This is how it works

1. Click **Add**.
2. Specify a name for the new group and create the group by clicking the plus icon. You can rename previously created groups by clicking the pencil icon or delete them by clicking the recycle bin icon.
3. Map the relevant property from **Existing columns** to the desired group in **Created groups** by dragging the property onto the group.

> **Note**
> Columns that are not mapped to a group and remain in the existing columns are not displayed in the properties area. If necessary, you can change the column arrangement within the created groups using drag and drop.

4. Save your changes with **Apply**.

Structure settings

In the following sections, you will learn which configuration options are available to you in the **Structure settings** group and how you can perform the configuration. The available configuration options vary depending on the selected structure node.

Root node

The first item added to the structure is automatically marked as the root node. A structure has at least one root node. The root node is indicated by the house icon. You can define additional root nodes by activating the option below **Root node**.

Root node for Outlook integration

If the structure is enabled for the Microsoft Outlook integration, you can activate the **Root node for Outlook integration** option. This option allows you to define an item separately as the root node for Outlook integration. You can identify the root node for Outlook integration by the Outlook icon. The behavior in other apps remains unaffected. If the item is already a root node, this option is not available.

Link fields

Maintain the **link fields** for all item relationships defined in the **Draft** area in order to establish the link between the items: Defining the link fields is mandatory.

This is how it works

1. Select a child item in the **Draft** area.
2. Define the relationship between the items of the structure using the field links. To do this, select the parent and child fields. You can also define additional link fields using **Add**.

The following column types are supported for the links:

Parent <> Child	Notes
Text <> Text	-
Text <> Managed metadata (single selection)	-
Text <> Managed metadata (multiple selection)	-
Text <> Lookup (single selection)	-
Text <> Lookup (multiple selection)	The prerequisite is that the inherited text value also exists as a lookup value in the lookup list. Otherwise, the default inheritance (field name → field name) is used.
Text <> Choice (single selection)	-
Text <> Choice (multiple selection)	Any default values configured for the multiple selection field are determined by SharePoint directly after the upload. In addition, the text value is inherited as a further selection value (regardless of the permitted input option).
Text <> Number	-
Managed metadata (single selection) <> Managed metadata (single selection)	-
Managed metadata (single selection) <> Managed metadata (multiple selection)	-
Managed metadata (single selection) <> Text	-
Lookup (single selection) <> Lookup (single selection)	-
Lookup (single selection) <> Lookup (multiple selection)	-
Lookup (single selection) <> Text	-
Managed metadata (multiple selection) <> Managed metadata (multiple selection)	-
Managed metadata (multiple selection) <> Managed metadata (single selection)	The value of the managed metadata field with multiple selection (on the parent item) is inherited by the managed metadata field with single selection.
Lookup (multiple selection) <> Lookup (multiple selection)	-
Lookup (multiple selection) <> Lookup (single selection)	The first value of the lookup field with multiple selection (on the parent item) is inherited by the lookup field with single selection.
Choice (single selection) <> Choice (multiple selection)	Any default values configured for the multiple selection field are determined by SharePoint directly after the upload. In addition, the value of the single selection field is inherited as a further selection value (regardless of the permitted input option).
Choice (single selection) <> Choice (single selection)	-

Choice (single selection) <> Text	-
Choice (multiple selection) <> Choice (single selection)	The first value of the multiple selection field (on the parent item) is inherited by the single selection field.
Choice (multiple selection) <> Choice (multiple selection)	-
Counter (system column) <> Text	The system column **Counter** cannot be used as a child link field.
Counter (system column) <> Number	The system column **Counter** cannot be used as a child link field.
Counter (system column) <> Choice (single selection)	The system column **Counter** cannot be used as a child link field.
Yes/No <> Yes/No	-
Number <> Number	-
Number <> Text	An integer value is required, as otherwise the value will contain decimal separators.
Number <> Choice (single selection)	-

Note

To ensure that linked lookup fields and managed metadata fields can be linked correctly, the source and target fields must reference the same term store (managed metadata) or the same list (lookup fields). Correct references are necessary because the IDs and not the texts of the values are processed internally during the mapping.

Extended configuration

In the following, you will learn which configuration options are available to you in the **Extended configuration** group and how you can perform the configuration. The available configuration options vary depending on the selected structure node.

Configuration ID (CMID)

You can specify the CMID (case management ID) for every structure node in d.velop composer. Once the CMID is configured, you can modify and save the interface configuration for the relevant structure node in d.velop documents for Microsoft 365 center. If you also want this interface configuration to be applied to other structure nodes, you must also configure the CMID with same value for this node. This means that you can use the CMID, for example, to map different interface configurations to identically named structures in d.velop composer. You must use separate CMIDs for lists and libraries to avoid side effects.

If you configure structure nodes in multiple languages, you must specify a CMID. Otherwise, you must customize each structure node for a language individually and independently. If the CMID is not specified, the display name **Structure node** and the default configuration are used instead in the user interface of d.velop documents for Microsoft 365 center.

The CMIDs always refer to the entire client and are cross-structural.

Defining the view for parent structure nodes

You have the option of defining a view for parent structure nodes in order to overwrite the standard view for the nodes belonging to the selected structure node.

This is how it works

1. Activate the option **Define a view for structure item overview**.
2. Configure a search query (keyword query). For a dynamic query, you can use placeholders in the search query, which are replaced by the metadata of the document or item when the query is performed in the web interface. To open the placeholder suggestion list, press **Ctrl + Space** or type **$** in the input field.
3. Configure a tabular view. The process is the same as for configuring the tabular view for content types. More information can be found in the chapter Tabular view.

4. Assign the fields relevant to the search query to the managed and searchable properties in SharePoint Online. Assignments for the displayed fields are shown in the result list in the web interface. Hidden fields are not displayed but can be used for the search query.
5. Optional: Select a website to which the search query should be restricted.

> **Note**
> **Example of a search query (keyword query)**
>
> OrderConfirmationNumberOWSNMBR:${item.OrderConfirmationNumber}

Restrict search to site collection

You can use content types to link search results across site collections. If you do not link the search results, but instead want to restrict the search to a single site collection, you can activate the option **Restrict search to the site collection**. This option limits the search to the site collection from which you added the content types to the configuration. This is an optional configuration option.

Generate unique ID

You have the option of generating a tenant-wide ID in order to tag items with a unique identifier.

This is how it works

1. Activate the option under **Generate unique ID**. After activating this option, two additional selection fields are displayed.
2. Select the relevant field under **Target field for unique ID**. The selection field contains all text columns that are available for the selected structure node.
3. Select the relevant ID configuration under **Configuration name**. Additional Information: Configuring IDs.

Defining the inheritance mode for metadata

Under **Inheritance mode for metadata**, you can define the inheritance type to be applied to child structure nodes when creating new items or documents. You can choose between the following two options:

- **AllFromParent**: All metadata with the same name (**InternalName**) and type is inherited. The reference data (link fields) of the parent item is also inherited. This inheritance mode is selected by default.
- **Reference**: Only the reference data (link fields) is inherited.

> **Note**
> Reference fields (link fields) are prioritized due to their influence on the structure and are always entered last. Reference fields can therefore overwrite any previously copied or inherited metadata with the same name (**InternalName**).

Search query (Keyword Query)

To integrate search-based nodes into a structure, you can specify a search query (keyword query) for content types. This must be a subnode within the structure. This keyword search query replaces the original query. Only the type (**document** or **item**) and any applicable site collection restrictions are appended. Link fields are not evaluated separately. Within the query, you can use placeholders that refer to items of the parent item.

If you have already defined a view for the content type used, the view is also applied for the search-based node. The specified keyword search query will not be used at any other points.

Enter the desired keyword search query under **Search query (Keyword Query)**.

> **Note**
> **Example of a search query (keyword query)**
>
> (ContentType:Order) AND (ContentType:Invoice) AND (ContentType:Offer) AND (Created>=2025-01-01 AND Created<=2025-12-31)

Options for documents and items

The following sections describe which configuration options are available to you in the **Options for documents and items** group and how you can perform the configuration. The available configuration options vary depending on the selected structure node.

Storage location for documents and items

When using content types, the storage location for documents or items must be defined. This configuration is mandatory for content types to allow documents to be uploaded or items to be created.

This is how it works

1. Expand **Document storage location** or **Item storage location**. The site collection and site are automatically defined and preselected in the background. You can adjust the preselection if necessary.
2. Select the library or list. Alternatively, you can manually enter the following placeholders in the selection fields:
   - **item.**: The current list item followed by the internal name of the SharePoint column
   - **site.url**: The server relative URL (without “https://...”) for the site collection
   - **site.id**: Returns the ID of the site collection in the form of a GUID
   - **site.absoluteurl**: The absolute URL to the site collection
   - **list.url**: The server-relative URL to the list
   - **list.id**: The ID of the list
   - **web.url**: The siterelative URL to the website
   - **web.id**: The ID of the web
   - **web.absoluteurl**: The absolute URL to the web
   - **server.url**: The server URL (current domain)
   - **location.href**: The current URL of the clients
   - **tenant.id**: The ID of the tenant
   - **user.id**: The ID of the current user

> **Note**
> Please note that only text boxes are supported.
>
> Example for using a placeholder:
>
> ```
> ${site.absoluteurl}//Kundendokumente/$
> {item.glCustomerNumber}
> ```
>
> $: Use a dollar sign to specify the placeholder. Only the items listed above can be used as placeholders.
>
> { }: Inside the curly brackets, reference the current list item (e.g. with "item.") and the internal name of the SharePoint column.

Note

Example for: **server.url**

```
https://mytenant.sharepoint.com/
```

Example for: **site.absoluteurl**

```
https://mytenant.sharepoint.com/sites/siteA
```

Example for: **site.url** (relative URL)

```
/sites/siteA
```

Example for: **web.absoluteurl**

```
https://mytenant.sharepoint.com/sites/siteA/webA
```

Example for: **web.url** (relative URL)

```
/sites/siteA/webA
```

If you want a subfolder to be created when uploading the document or creating the item, define the name of the created folder under **Name of the created subfolder**.

Creating a subfolder during upload

You can choose to have subfolders created automatically within libraries and lists as soon as a new document or item is created in the user interface of d.velop documents for Microsoft 365 center. The subfolder is identified by the specified property of the parent item (e.g. parent dossier). If the subfolder does not exist, it will be created the first time a document is uploaded. This allows you to collect technical documents related to a case in a single folder, for example. The folder where the new subfolder will be created must already exist. Nested folders are not permitted.

Under **Name of the created subfolder**, enter the display name for the subfolder created during upload. You can use the following placeholders:

1. **item.**: The current list item followed by the internal name of the SharePoint column
2. **site.url**: The server relative URL (without “https://...”) for the site collection
3. **site.id**: Returns the ID of the site collection in the form of a GUID
4. **site.absoluteurl**: The absolute URL to the site collection
5. **list.url**: The server-relative URL to the list
6. **list.id**: The ID of the list
7. **web.url**: The siterelative URL to the website
8. **web.id**: The ID of the web
9. **web.absoluteurl**: The absolute URL to the web
10. **server.url**: The server URL (current domain)
11. **location.href**: The current URL of the clients
12. **tenant.id**: The ID of the tenant
13. **user.id**: The ID of the current user

> **Note**
> Use the parent link field for placeholders. Please note that only text boxes are supported.
>
> Example for using a placeholder:
>
> ```
> ${item.ecsPlaneID}
> ```
>
> $: Use a dollar sign to specify the placeholder. Only the items listed above can be used as placeholders.
>
> { }: Inside the curly brackets, reference the current list item (e.g. with "item.") and the internal name of the SharePoint column.

Document templates

You have the option of defining a template library that can be used to create documents in a structure node (document library).

Expand **Document templates** and select the relevant template library under **Library**. You can also enter a URL. The site collection and site are automatically defined in the background.

Technical information

The following information is displayed in the **Technical information** group:

- **Structure ID**
- **Node ID**
- **Site ID**
- **Web ID**
- **Web URL**
- **List ID**
- **List URL**
- **URL of the embedded view**
  Copy the link by clicking the icon at the end of the URL. To display the folderplan in the embedded view, insert the corresponding ID in the **{itemID}** placeholder.
- **URL of the center**
  Copy the link by clicking the icon at the end of the URL. To display the folderplan in the user interface, insert the corresponding ID in the **{itemID}** placeholder.

1.3.3. Additional settings

The following topics provide information on additional settings in d.velop composer.

Creating groups for the structure

You can create groups for grouping the structure.

This is how it works

1. Navigate to **Additional settings > Structure grouping**.
2. Select an icon under **Add group**. You can enter search terms in the text field to search for suitable icons.
3. Enter a name for the group.
4. Click the plus icon to create the group.

The created group appears under **Existing groups**.

Activating the folderplan for the Microsoft Outlook integration

You need to activate the folderplan for the Microsoft Outlook integration.

This is how it works

1. Navigate to **Additional settings > Integration**.
2. Activate the option **Folderplan available in Outlook integration**.

1.3.4. Adding a content type to a structure node

You can add a content type as a structure node.

Note the following information for the configuration:

- Tabular view
- **Restrict search to site collection** under Extended configuration
- **Search query (Keyword Query)** under Extended configuration
- **Document storage location** under Options for documents and items
- Mapping refinable properties for sorting the tree view

> **Warning**
> If a parent item is simultaneously part of a list or library due to the configuration and part of a structure based on the content type, the subitems of both structure nodes are displayed in both main nodes.

Mapping refinable properties for sorting the tree view

To be able to sort the defined tree view, the selected column must allow sorting. You need to map the refinable properties in Microsoft SharePoint Online. Depending on the field type, a corresponding Refinable field is required. Information on suitable refinable fields can be found in the Microsoft technical documentation in the article **Manage the search schema in SharePoint** (https://learn.microsoft.com/en-us/sharepoint/manage-search-schema). You do not have to map system columns (e.g. **Title**).

This is how it works

1. Get the internal name of the site column.
2. Open the website settings on the page where you use d.velop documents for Microsoft 365.
3. Open the search schema under Site Collection Administration.
4. Under **Managed properties**, look for an appropriate Refinable field (e.g. **RefinableDate**).
5. Map a crawled property (internal site column name, e.g. **OWS_ECSOFFERDATE**) to a free managed property (e.g. **RefinableDate00**).

> **Note**
> Use a 1:1 relationship when mapping crawled and managed properties.

6. Save the customization. The site is indexed.
7. Open d.velop composer and select the corresponding structure.
8. Select the configured view under **Tabular view**.
9. Add the name of the managed property (e.g. **RefinableDate00**) to the corresponding field in the row of the mapped internal field name.
10. Optional: Activate **Show** if you want the column to be displayed.
11. Repeat the previous steps for all relevant columns in the view.
12. Click **Apply** to save your entries.
13. Click **Save** to save the structure.

1.3.5. Document templates

This chapter provides information on configuring document templates and on defining document templates in the structure.

Configuring document templates

With document templates, you can provide users with predefined Word templates which they can use to create new documents. When a document is created, the templates are automatically populated with the appropriate metadata. This ensures that documents have a uniform structure and that relevant information in the documents is always correct and complete.

To be able to use document templates, the following prerequisites must be met:

- A library for document templates is defined in the structure.
- The document templates exist as Word files in the library.
- Internal field names are used as placeholders in the Word templates.

Defining document templates in the structure

To make the document template available for selection in a structure node, you must define the template library.

This is how it works

1. Open the **structure**.
2. Navigate to the library or content type for which document templates are to be made available.
3. Define a library for document templates.
4. Save the configuration.

1.3.6. Providing document templates and inserting placeholders

All documents from the defined document library for templates are displayed for selection in the user interface. Upload the relevant documents to the document library. For a clearly organized structure, you can manage the templates in subfolders.

To dynamically insert field content from Microsoft SharePoint into the document, define the placeholders in the Word document. You can customize the documents in any compatible editor. The following describes how to edit the documents in Word on the web.

This is how it works

1. Switch to the library that you defined for the document templates.
2. Open the document in Word on the web.
3. Insert the placeholders at the desired locations.
4. The document is saved automatically.

> **Warning**
> To define the placeholders, use the internal column name enclosed in curly brackets: **{InternalName}**

Note

Example

```
Der Kunde „{Title}“ mit der Kundennummer {ecsCustomerNo} wurde
am {Created} erstellt von dem Bearbeiter/der Bearbeiterin
{Editor}.
```

Depending on the column type, special formatting may be necessary.

Column types | Lookup and managed metadata

```
{offerName | lookup}
```

Use the relevant code for language/region-specific representation.

Date with language code

```
{Created | date:"en-US"}
```

Number with language code

```
{offerId | number:"en-US"}
```

Currency with language and currency code

```
{ecsTotalSum | currency:"en-US":"USD"}
```

1.3.7. Integrating contracts

If you use contract management in addition to document management, you can also integrate contracts into your structure.

This is how it works

1. In the **Available items** area, select the site collection and the contract management site under **Source**.
2. In the **Content types** area, select the desired contract content type.
3. Drag and drop the selected contract content type into the structure of the desired root node as a child content type.
4. In the **Node properties** area, define the name for the structure node (e.g. "Supplier contracts" under **Display name structure node**.
5. Create a tabular view to specify which columns are displayed in the table in d.velop documents for Microsoft 365 center. Note the following:
   - Map the field **ecsContractId** to the managed property **ecsContractIdOWSTEXT**.
   - Ensure that you map the corresponding managed property to the field you are using as a link field. Otherwise, this field will not be available as a link field.
6. Add a field from the DMS environment as the parent link field (e.g. "Supplier number").
7. Use a field from contract management as the child link field (e.g. "Supplier number" or "Contractual partner ID"). If use the contractual partner ID, you must map the **ecsCPIds** column.
8. Activate **Restrict search to site collection**.
9. Optional for displaying contract documents in the Outlook integration:
   - Drag and drop the previously selected contract content type into the structure as a parent item again and add the content type **ecsContractDocumentContentType** as a child item.
   - Define the display name and the tabular view.
   - Use **ecsContractIdOWSTEXT** as both the parent and child link field.
10. Optional for displaying all contracts in one structure node:

- Drag and drop the contract content type **ecsContractContentType** to the desired location in the structure.
- Define a display name for the structure node.
- Create a tabular view.
- Add a field from the DMS environment as the parent link field (e.g. "Supplier number").
- Use a field from contract management as the child link field (e.g. "Supplier number" or "Contractual partner ID"). If use the contractual partner ID, you must map the **ecsCPIds** column.
- Define a search query (keyword query). You can search through all contracts using the advanced search in contract management. You can display the search query by clicking the information icon and then apply it.

11. Save the structure.

The contracts are now displayed within d.velop documents for Microsoft 365 center. Associated contract documents are not displayed. For the contract management content types, the entry **Show in d.velop contracts for Microsoft 365** is automatically added to the context menu. The contract documents are also displayed in the Outlook integration. Users can add new documents to contract files.

1.4. Configuring the web interface (d.velop documents for Microsoft 365 center)

In the following sections, you will learn about the configuration options for the web interface (d.velop documents for Microsoft 365 center).

You have the following options:

- Configuring the old web interface within the web interface itself
- Configuring the new web interface in the administration interface

1.4.1. Configuring the old web interface

In this section, you will learn how to configure the old web interface.

Configuring the quick search

You can configure the quick search in d.velop documents for Microsoft 365 center.

This is how it works

1. In d.velop documents for Microsoft 365 center, click the gear icon followed by **Administration mode**.
2. Click in the **Quick search** field.
3. Click **Item settings**.
4. Configure the quick search as follows, for example:
   - Under **Additional parameters**, add the parameters **ContentType** and **Title**.
   - Add additional formats under **Title formats**.

> **Note**
> Example for **ContentType**: "0x01" (for all items found)
>
> Example for **Title formats**: "(ContentType) | (Title)". With this format, the **ContentType** value, followed by the separator "|" and then the title will be displayed in the quick search results.

5. Click **Save**.
6. Click the gear icon followed by **Save**.

For more information, see Item settings for the quick search.

Item settings for the quick search

The following describes the functionalities of the item settings for quick search:

Placeholder: Enter a placeholder here to be displayed in the quick search text box.

Result source ID: Here you can enter the ID of a result source.

We recommend using one result source. Only result sources created in the search service application are supported. For more general information on configuring result sources, see the Microsoft 365 documentation under the search term "Manage result sources".

Example ID

```
b09b7990-05fa-4af9-82ef-edfcb16c4e31
```

Hide duplicate search results: Determines whether duplicate items should be removed from search results.

Maximum number of search results: Specifies the maximum number of search results that will be displayed.

Sorting: Here you can specify how the search results should be sorted.

Start with * wildcard: Decide whether a search should always be performed with an initial wildcard.

End with * wildcard: Decide whether a search should always be performed with an attached wildcard.

Additional parameters: Here you can specify additional parameters for formatting the titles, if desired.

Title formats: By default, the quick search returns only the title of a found item.

Default placeholders: {Title}, {ListItemID}, {ListID}, {SPSiteURL}, {WebID}.

The field with the placeholder **ContentTypeID or List ID** is used here as a support for selecting a list or content type.

Adding a button in the properties area

You can configure the buttons in d.velop documents for Microsoft 365 center.

Adding a new button – This is how it works

1. In d.velop documents for Microsoft 365 center, click the gear icon followed by **Administration mode**.
2. Click an empty space in the buttons area (properties area) to open the settings.
3. Click on **Add item**.
4. Click on the **Edit properties** button.
5. Select the function of the button under **Item type**. You can choose between the following buttons:
   - **Button for standard actions**
   - **Button for sharing the current item**
   - **Button for updating the properties area**
   - **Button to open dialog boxes and windows**
6. Confirm the new function of the button with **OK**.
7. Assign a name for the button under **Title**.
8. Configure the button.
9. Save the new settings for the button with **Save**.
10. Save the complete configuration via **Settings gear > Save**.

Item settings for "Button for sharing the current item"

The following item settings are available for **Button for sharing the current item**:

Function: Determine here the preconfigured behavior of the button (e.g. edit form etc.).

Title: Enter the title of the button here. The title can be localized as follows:

Example: 1031:Schaltflächentitel,1033:Button title

Icon: Enter the path to the image to be displayed here.

Item settings for "Button for updating the properties area"

The following item settings are available for **Button for updating the properties area**:

Title: Enter the title of the button here. The title can be localized as follows:

Example: 1031:Schaltflächentitel,1033:Button title

Icon: Enter the path to the image to be displayed here.

Show in context menu: Specify whether the entry should also be displayed in the context menu.

Display in menu: Specify whether the entry should also be displayed in the menu.

Display in "More options": Specify whether the entry should also be displayed under the **More options** menu item.

Item settings for "Button to open dialog boxes and windows"

The following item settings are available for **Button to open dialog boxes and windows**:

Title: Enter the title of the button here. The title can be localized as follows:

Example: 1031:Schaltflächentitel,1033:Button title

Icon: Enter the path to the image to be displayed here.

Show in context menu: Specify whether the entry should also be displayed in the context menu.

Display in menu: Specify whether the entry should also be displayed in the menu.

Display in "More options": Specify whether the entry should also be displayed under the **More options** menu item.

Open in browser: Specify how you want the page to be displayed.

Possible options:

- Modal dialog
- New tab
- Same window

URL: Specify the URL of the page you want to access.

Example: https://www.bing.com/search?q=${item.Title}

Window title: Specify the title of the dialog box.

Window height: Specify the height of the window to be displayed in pixels.

Window width: Specify the width of the window to be displayed in pixels.

Maximize: Define whether the dialog should be maximized.

Adding a tab

You can configure tabs in d.velop documents for Microsoft 365 center.

This is how it works

1. In d.velop documents for Microsoft 365 center, click the gear icon followed by **Administration mode**.
2. Click an empty space in the tab area to open the settings.
3. Click on **Add item**.
4. Click on the desired tab **Result groups (500+)**.
5. Under **Item type**, select what functionality to add to the tab.
   e.g.: "Tab for grouped display of unstructured items (result groups)"
6. Confirm the change of the tab functionality with **OK**.
   In the example, the label of the tab changes to "Result groups"
7. Assign a name for the tab under **Name**.
8. Configure the tab.
9. Save the new settings for the tab by clicking **Save**.
10. Save the complete configuration via **Settings gear > Save**.

You can choose between the following item types for the tab:

- Tab for grouped display of unstructured items (result groups)
- Tab for displaying an iFrame

Item settings for "Tab for grouped display of unstructured items (result groups)"

The following item settings are available for **Tab for grouped display**:

Name: Enter the title of the tab here. The title can be localized as follows:

Example: 1031:Registerkartentitel,1033:Tab title

Result source ID: Here you can enter the ID of a result source.

We recommend using one result source. Only result sources created in the search service application are supported. For more general information on configuring result sources, see the Microsoft 365 documentation under the search term "Manage result sources".

Example ID

```
b09b7990-05fa-4af9-82ef-edfcb16c4e31
```

> **Note**
> Please note that the **Result source ID** becomes a mandatory field once you make a change in the item settings.

Hide duplicate search results: Determines whether duplicate items should be removed from search results.

Display columns: If you want to define additional columns, you can configure these columns here. Enter the name of the SharePoint search configuration (managed property) and the desired display name for the column title.

Managed property: Enter the name of the managed property here.

Title: Enter the title of for the column here. The title can be localized.

Example: 1031:Spaltentitel, 1033:column title

Type: Enter here the type of the field in the respective list.

Property for grouping: Specify here the managed property according to whose content the groups will be generated.

Extended query: Here you have the option to refine the search results further. For syntax relevance, please refer to the Microsoft technical documentation. The information can be found under the search term "Syntax reference for the Keyword Query Language (KQL)"

You can use the parameters of the current item as follows: Managed Property: (internalName)

Item settings for "Tab for displaying an iFrame"

The following item settings are available for **Tab for displaying an iFrame**:

Name: Enter the title of the tab here. The title can be localized as follows:

Example: 1031:Registerkartentitel,1033:Tab title

URL: Specify the URL of the page to be called up for the tab. You can use the parameters of the current item as follows: (internalName)

Example URL

```
https://www.bing.com?q={Title}
```

1.4.2. Configuring the new web interface

In this section, you will learn how to configure the new web interface.

Displaying the new web interface

With **Call for structures**, you can define centrally whether folderplans are opened in the old or new web interface by default.

This is how it works

1. Open the administration interface under https://admin.d-velop365.com/.
2. Under **Document management**, click **Web interface**.
3. Click **Call for structures**.
4. Activate **Open all structures in new web interface** to display folderplans in the new web interface by default.
5. Click **Save**.

Useful information about the display language

The language of the web interface is determined by the language set in the browser. If the language set in the browser is not available, the web interface is displayed in English.

Alternatively, you can define the language using the URL parameter **SPLanguage** by transferring the relevant language code to the parameter. Using **?SPLanguage=de**, for example, will ensure that the user interface is displayed in German on this system.

The following languages are available:

- de – German
- en – English
- es – Spanish
- fr – French

- it – Italian
- nl – Dutch
- pl – Polish
- pt – Portuguese

Configuring the column view

You can visually highlight column values based on specific conditions. This conditional formatting improves the clarity of your data and automatically highlights important information, such as overdue documents, high amounts or specific status values. You can change the background color, text color and border as well as set the background color for the value within the cell.

This is how it works

1. Open the administration interface under https://admin.d-velop365.com/.
2. Under **Document management**, click **Web interface**.
3. Click **Column view**.
4. Click **New** to create a new configuration, or select an existing configuration and click **Edit** modify it.
5. Create or edit the configuration in the JSON file. In the case of new configurations, an example configuration is displayed which you can use as a basis.
6. When configuring a new view, enter a title for this view.
7. Click **Save**.
8. Select the configuration in the table.
9. Click **Assign structures**.
10. Select one or more structures to be applied to the configuration from the selection list. You can also apply the configuration to all structures.
11. Click **Save**.

Parameters for the configuration

The following options are available to you for configuring the column view:

fieldConfigs

The **fieldConfigs** parameter contains a collection (array) of configurations for different fields. Each field can have its own **styledConditions**.

Example:

```
"fieldConfigs": [
  {
    "fieldName": "ecsStatus",
    "styledConditions": [...]
  },
  {
    "fieldName": "ecsBetrag",
    "styledConditions": [...]
  }
]
```

fieldName

The **fieldName** parameter specifies the internal name of the field to which **styledConditions** are to be applied. Enter the internal (technical) field name as defined in Microsoft SharePoint. The internal field name can differ from the display name. The internal field name appears after **field=** in the URL.

Example:

```
"fieldName": "ecsStatus"
```

styledConditions

The **styledConditions** parameter is a collection (array) of conditions and their corresponding formatting. The array consists of **condition** and **displayConfig**.

The conditions are evaluated in the order in which they are listed in the array. The first matching condition is applied, and further conditions are not checked.

Example:

```
"styledConditions": [
  {
    "condition": {...},
    "displayConfig": {...}
  }
]
```

condition

With **condition**, you define the conditions under which a formatting is to be applied. Conditions can be combined with logical operations:

- **all**: All conditions must be met (AND operation)
- **any**: At least one condition must be met (OR operation)

You can use the following parameters for the conditions:

- **fact**: Defines the field name to be checked (e.g. **ecsStatus**).
- **operator**: Comparison operator. More information can be found in the **table of available operators** in this chapter.
- **value** Defines the value to be compared with.
- **path** (optional): Used when **fact** is an object and you want to access a property.

Example for AND operation (all):

```
"condition": {
  "all": [
    {
      "fact": "ecsStatus",
      "operator": "equal",
      "value": "Active"
    },
    {
      "fact": "ecsBetrag",
      "operator": "greaterThan",
      "value": 1000
    }
  ]
}
```

Example for OR operation (any):

```
"condition": {
  "any": [
    {
      "fact": "ecsStatus",
```

```
      "operator": "equal",
      "value": "Urgent"
    },
    {
      "fact": "ecsStatus",
      "operator": "equal",
      "value": "Overdue"
    }
  ]
}
```

Available operators

Operator	Description	Example
equal	Value is equal	"value": "Active"
notEqual	Value is not equal	"value": "Inactive"
contains	Value contains text	"value": "Error"
doesNotContain	Value does not contain text	"value": "Test"
startsWith	Value starts with text	"value": "1000"
lessThan	Value is less than	"value": 100
lessThanInclusive	Value is less than or equal to	"value": 100
greaterThan	Value is greater than	"value": 1000
greaterThanInclusive	Value is greater than or equal to	"value": 1000
isEmpty	Field is empty or undefined	"value": true
isNotEmpty	Field is defined	"value": true

Notice

Important note about field values

When configuring conditions with numbers, currency, percentage, yes, no and date, you must observe the following format to ensure correct functionality:

- **Numbers:** 889999000 instead of 889,999,000.00 (no separators, no decimal places)
- **Currency:** 99.95 instead of 99,95 € or 99.95 € (period instead of comma, no currency symbol)
- **Percentage:** 0.5 (= 50%) or 1.01 (= 101%) instead of 50% or 101% (specification as decimal, not as percentage)
- **Yes/No:** true or false instead of yes or no
- **Date:** 2012-07-03 instead of 07/03/2012 (ISO format YYYY-MM-DD)

displayConfig

The **displayConfig** parameter defines the formatting to be applied when the corresponding condition is met. The following formatting options are available:

- **cellBackground**: Background color of the cell (hex code, e.g. `"#d4edda"`)
- **cellTextColor**: Text color of the cell (hex code, e.g. `"#155724"`)
- **cellBorder**: Border of the cell (CSS border syntax, e.g. `"2px solid #ff0000"`)
- **valueBackground**: Background color only for the value within the cell (badge effect)

Example:

```
"displayConfig": {
  "cellBackground": "#d4edda",
  "cellTextColor": "#155724",
```

```
  "cellBorder": "2px solid #28a745"
}
```

> **Note**
> Ensure sufficient contrast between the background and text colors to guarantee readability.

Example configurations

The following examples illustrate different use cases. You can use these examples as templates for your own configurations.

Example 1: Text field comparison (equal)

Requirement: Cells with the status "Active" are to be highlighted in green.

```
{
  "fieldName": "ecsStatus",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsStatus",
            "operator": "equal",
            "value": "Aktiv"
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#d4edda",
        "cellTextColor": "#155724"
      }
    }
  ]
}
```

Example 2: Multiple conditions with OR operation (any)

Requirement: Cells with large numbers (> 500,000) or negative numbers are to be highlighted in red.

```
{
  "fieldName": "ecsZahl",
  "styledConditions": [
    {
      "condition": {
        "any": [
          {
            "fact": "ecsZahl",
            "operator": "greaterThan",
            "value": 500000
          },
          {
            "fact": "ecsZahl",
            "operator": "lessThan",
            "value": 0
```

```
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#f8d7da",
        "cellTextColor": "#721c24"
      }
    }
  ]
}
```

Example 3: Multiple conditions with AND operation (all)

Requirement: Cells with the status "Verified" and an amount > 1,000 EUR are to be highlighted in blue.

```
{
  "fieldName": "ecsStatus",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsStatus",
            "operator": "equal",
            "value": "Geprüft"
          },
          {
            "fact": "ecsBetrag",
            "operator": "greaterThan",
            "value": 1000
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#d1ecf1",
        "cellTextColor": "#0c5460"
      }
    }
  ]
}
```

Example 4: Currency field threshold

Requirement: Amounts below 50 EUR are to be highlighted in yellow.

```
{
  "fieldName": "ecsBetrag",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsBetrag",
            "operator": "lessThan",
            "value": 50
          }
        ]
```

```
      },
      "displayConfig": {
        "cellBackground": "#fff3cd",
        "cellTextColor": "#856404"
      }
    }
  ]
}
```

Example 5: Boolean field

Requirement: Cells with an activated Boolean field (yes/no) are to be green.

```
{
  "fieldName": "ecsJaNein",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsJaNein",
            "operator": "equal",
            "value": true
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#d4edda",
        "cellTextColor": "#155724"
      }
    }
  ]
}
```

Example 6: Date comparison

Requirement: Cells with a date before 01/01/2020 are to be gray.

```
{
  "fieldName": "ecsDateOnly",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsDateOnly",
            "operator": "lessThan",
            "value": "2020-01-01"
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#e2e3e5",
        "cellTextColor": "#383d41"
      }
    }
```

```
  ]
}
```

Example 7: Percentage field with range logic (discount)

Requirement: Discounts between 10% and 50% are to be green, discounts over 50% are to be orange.

> **Note**
> Percentage values are saved as decimal numbers (10% = 0.1, 50% = 0.5, 101% = 1.01).

```
{
  "fieldName": "ecsRabatt",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsRabatt",
            "operator": "greaterThanInclusive",
            "value": 0.1
          },
          {
            "fact": "ecsRabatt",
            "operator": "lessThanInclusive",
            "value": 0.5
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#d4edda",
        "cellTextColor": "#155724"
      }
    },
    {
      "condition": {
        "all": [
          {
            "fact": "ecsRabatt",
            "operator": "greaterThan",
            "value": 0.5
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#fff3cd",
        "cellTextColor": "#856404"
      }
    }
  ]
}
```

Example 8: Intermediate value range for a number field

Requirement: Cells with a number between 10 and 100 (inclusive) are to be highlighted in blue.

> **Note**
> To define an intermediate range, you must combine **greaterThanInclusive** and **lessThanInclusive** with **all**.

```
{
  "fieldName": "ecsAnzahl",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsAnzahl",
            "operator": "greaterThanInclusive",
            "value": 10
          },
          {
            "fact": "ecsAnzahl",
            "operator": "lessThanInclusive",
            "value": 100
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#d1ecf1",
        "cellTextColor": "#0c5460"
      }
    }
  ]
}
```

Example 9: Text field begins with (startsWith)

Requirement: Customer numbers starting with 1000 are to be highlighted in yellow.

```
{
  "fieldName": "ecsKundennummer",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsKundennummer",
            "operator": "startsWith",
            "value": "1000"
          }
        ]
      },
      "displayConfig": {
        "cellBackground": "#fff3cd",
        "cellTextColor": "#856404"
      }
    }
  ]
}
```

Example 10: valueBackground – badge effect for status values

Requirement: The status value is to be highlighted like a badge, while the cell itself should remain neutral.

> **Note**
> With **valueBackground**, only the value within the cell is formatted, not the entire cell.

```
{
  "fieldName": "ecsStatus",
  "styledConditions": [
    {
      "condition": {
        "all": [
          {
            "fact": "ecsStatus",
            "operator": "equal",
            "value": "Dringend"
          }
        ]
      },
      "displayConfig": {
        "valueBackground": "#dc3545",
        "cellTextColor": "#ffffff"
      }
    },
    {
      "condition": {
        "all": [
          {
            "fact": "ecsStatus",
            "operator": "equal",
            "value": "In Bearbeitung"
          }
        ]
      },
      "displayConfig": {
        "valueBackground": "#ffc107",
        "cellTextColor": "#000000"
      }
    }
  ]
}
```

Helpful tips

- **Test your conditions:** Check the formatting with different datasets to ensure that the rules work as expected.
- **Note the order:** The first matching condition in the **styledConditions** array is applied. Prioritize specific conditions over more general ones.
- **isEmpty/isNotEmpty:** Use these operators to identify empty or defined fields. This is particularly useful for validating mandatory fields.
- **Document your rules:** Use the optional **description** field in conditions to document complex logic.
- **Be aware of performance:**Display may be delayed with a very high number of styled conditions. Keep the number of conditions per field manageable.

Adding additional buttons

You can add additional buttons at document level, item level and overall level. With additional buttons, you can define custom links and use additional functions. You can apply the buttons to selected or all folderplans. You can also use rules to restrict buttons to specific metadata.

This is how it works

1. Open the administration interface under https://admin.d-velop365.com/.
2. Under **Document management**, click **Web interface**.
3. Click **Additional buttons**.
4. Select the level (documents, items or overall).
5. Click **New**.
6. Create the configuration in the JSON file. You can find the available configuration parameters under Parameters for configuring the buttons.
7. Click **Save**.
8. Select the configuration in the table.
9. Click **Assign structures**.
10. Select one or more structures to be applied to the configuration from the selection list. You can also apply the configuration to all structures.
11. Click **Save**.

The document- and item-specific buttons are then displayed above the table. Overall buttons appear next to the search field.

Parameters for configuring the buttons

The following options are available for configuring the buttons in the JSON file:

config

The **config** parameter contains a collection (array) of button configurations. Each configuration can have its own conditions (**condition**) to determine whether or not the button is displayed.

text

The **text** specifies the text that the button contains. You can enter the text either directly or in different languages. If you enter different languages, enter the translations as a language pair. The key is the language code, and the value is the translated text.

Example:

```
"text": {
    "de": "Altes center öffnen",
    "en": "Open old center"
},
```

> **Note**
> In the menu bar, the **text** property is only displayed in submenus. On the parent levels, only the defined symbol (**icon**) is displayed.

tooltip

The **tooltip** parameter is optional and determines which text is displayed when users place the cursor over the button. Like the **text** parameter, you can also define the **tooltip** parameter in different languages.

url

You must specify the URL if you are not using the **subMenuButtons** parameter. The URL contains the link that is opened when the button is clicked. You can extend URLs with metadata of the selected item, e.g. as follows:

```
https://www.bing.com/search?q=${item.title}

https://www.bing.com/search?q=${title}
```

icon

You can use **icon** to define a symbol for the display in the web interface. You can select from Material Design 3 symbols.

openIn

The **openIn** parameter is optional and defines how a URL is opened when the button is clicked. By default, the URL is opened in a new tab. You have the following options:

- **sameTab**: The URL is opened in the current tab.
- **newTab**: The URL is opened in a new tab (default).
- **panel**: The URL is opened in a panel within the current tab.

panelSize

If you have entered the value **panel** for **openIn**, you can optionally use the **panelSize** parameter to define the width of the panel in pixels.

subMenuButtons

You can use **subMenuButtons** to make grouped buttons available. If you use this parameter, you must not specify a URL. Since a submenu is opened, the **text** property is always displayed.

condition

With **condition**, you can specify the conditions under which the button is displayed. If you do not define any conditions, the button is always displayed. You can enter the conditions in the following types of lists:

- **all**: All conditions in the list must be met.
- **any**: One of the conditions in the list must be met.

You can use the following parameters for the conditions:

- **fact**: This parameter defines a column from an item.
- **path**: You can optionally use this parameter if **fact** is an object and you want to refer to a property of the object.
- **operator**: You can use the following operators:
  - For text:
    - **equal**
    - **notEqual**
    - **startsWith**
  - For numbers:
    - **greaterThan**
    - **lessThan**
    - **greaterThanInclusive**
    - **lessThanInclusive**
  - For arrays:

- **in**: The **fact** parameter must be included in the **value** list.
- **notIn**: The **fact** parameter must not be included in the **value** list.
- **contains**: The **fact** list must contain the value **parameter**.
- **doesNotContain**: The **fact** list must not contain the value **parameter**.

Metadata structure

The structure of the metadata that can be used for comparing and constructing URLs is as follows:

```
item?: Record; // contains the metadata of the selected item
    location: {
        listid: string;
        listtitle: string;
        contenttype: string;
        contenttypeid: string;
        webid: string;
        siteid: string;
        siteurl: string;
        weburl: string;
        basetype?: number;
        userpermissions:   {
          AddItems?: boolean;
          EditItems?: boolean;
          DeleteItems?: boolean;
          ViewItems?: boolean;
          ViewVersions?: boolean;
          Open?: boolean;
          DeleteVersions?: boolean;
          OpenItems?: boolean;
        }
    };
    structure: {
        id: string;
        title: string;
        cmid: string;
    };
    isdocument?: boolean;
```

In addition, all metadata for a top-level item is available to you, meaning that you do not necessarily have to use the **item** parameter. You can therefore use the metadata in the conditions as follows:

```
{
    "fact": "item",
    "path": "title",
    "operator": "startsWith",
    "value": "4711",
}
{
    "fact": "title",
    "operator": "startsWith",
    "value": "4711",
}
```

> **Note**
> Note that for additional buttons at the parent level, you can only use fixed values (e.g., the folderplan ID). You cannot access metadata at this point.

Example configuration

```
{
    "title": "Center Links",
    "structures": [],
    "config": [{
            "text": {
                "de": "Altes center öffnen",
                "en": "Open old center"
            },
            "url": "https://center.d-velop365.com/fileview?ItemID=$
{item.id}&ListID=${location.listid}&SiteUrl=${location.siteurl}&SPHostUrl=$
{location.weburl}&roid=${structure.id}",
            "icon": "open_in_new_off",
            "condition": {
                "all": [{
                        "fact": "item",
                        "path": "ContentTypeID",
                        "operator": "startsWith",
                        "value": "0x0100353532535",
                        "description": "Only for special elements"
                    }
                ]
            }
        }, {
            "text": {
                "de": "Im neuen Tab öffnen",
                "en": "Open in new tab"
            },
            "url": "https://center-new.d-velop365.com/fileview?ItemID=$
{item.id}&ListID=${location.listid}&SiteUrl=${location.siteurl}&SPHostUrl=$
{location.weburl}&roid=${structure.id}",
            "showIn": ["toolbar"],
            "icon": "open_in_new",
            "openIn": "newTab"
        },
        {
      "text": "Button with Submenu",
      "icon": "menu",
      "tooltip": {
        "de": "Submenü",
        "en": "Submenu"
      },
      "condition": {},
      "subMenuButtons": [
        {
          "text": "Level 1 Buttton 1",
          "description": "Level one of the submenu",
          "url": "https://test/${item.id}/${location.listid}",
          "icon": "10k",
          "openIn": "newTab"
        },
        {
          "text": "Level 1 Button 2",
          "icon": "menu_book",
          "subMenuButtons": [
```

```
            {
              "text": "Level 2 Button 1",
              "description": "Sub sub 1 desc",
              "url": "https://test/${item.id}/${location.listid}",
              "icon": "ac_unit",
            }
          ]
        }
      ]
    }
    ],
    "id": "new",
    "elementType": "element"
}
```

1.5. Configuring the search application

You can configure the metadata search either in the form of a JSON text or in the administration interface (wizard) for the metadata search.

The following procedure describes the configuration using the administration interface (wizard).

Opening the configuration – This is how it works

1. Open the metadata search configuration using the following URL https://search.d-velop365.com/config.
2. Select **Create new configuration**.
3. Choose whether you want to configure in the JSON format or using the administration interface (**wizard**).
4. Customize the search configuration. Constant values, such as client ID and root URL, are automatically predefined.

Customizing the configuration using the wizard – This is how it works

1. Assign any name for the search configuration.
   You will get an error message if the search configuration name already exists.
2. In the **Basic search query** field, define a search that pre-filters the search results.
3. Use **Grouping of content types in the drop-down** to determine whether the content types in the drop-down menu in the metadata search are grouped by list content type and document content type.
4. Use **Alphabetical sorting of content types** to determine whether the content types in the drop-down menu in the metadata search are sorted alphabetically.
5. Create a content type.
   - Choose a site. You have the following options to do this:
     - Insert the URL of a SharePoint site.
     - Choose a website from the drop-down list.
       After choosing the site, the corresponding content types are listed in another drop-down menu. If this drop-down list is grayed out, select a content type first. The content types are then loaded.
   - Select a content type.
     After that, the respective fields are displayed.
   - Specify the following:
     - Do you want the fields for restricting your search to be available?
     - Do you want the fields to be shown in the result?
     - Do you want the fields to be displayed as the default filter for restricting your search?

- Assign each field to the corresponding property.
- Adjust the column arrangement in the search results by dragging and dropping the fields and positioning them where you want them.

6. Edit an existing content type.
   - It is not possible to change the site and content type here. Create a new content type instead.
   - The next steps are the same as step 5: “Creating a content type.”
7. Edit or delete an assignment.
   Assignment lists all assignments that were already defined during the creation/editing of a content type. You can edit or delete these assignments.
8. Use **Default content type** to define which content type is preselected when the search is opened. The content type you chose will be selected. You can deselect it by clicking on it.
9. Save the search configuration.

Please refer to the JSON documentation for the configuration parameters.

Calling a search configuration

After you have created a new configuration, users can open the search.

In the following example, "MySearchConfig" specifies the name of the created configuration.

This is how it works

1. 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
   As an administrator, you can also jump directly from the search configuration to the configured search. To do this, select a search configuration and click **Open** in the command bar. Alternatively, you can click the icon after the name of the search configuration. The icon appears when you move the mouse over the line containing the search configuration.
2. Either select a content type from the selection, or use **Search without content type** to perform a search without any content type restrictions.
3. Enter the search keyword if necessary. This step is optional and only required if you have not selected a content type.
4. Select a constraint (filter) from the available fields.
   This option is available only if you have selected a content type, or if you have configured to search without content types, as in the **Search configuration example** in the documentation for d.velop documents for Microsoft 365.
5. If required, you can refine the search results list further by using filters within the search results list.
   Once a search has been performed, you can activate additional filters in the column headers of the results list.
   1. Click the filter icon and enter the required filter 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.
   3. You can deactivate the filter by clicking **Delete**.

   Filters are applied locally. This means that a new search is not performed when a filter is applied. For search results lists containing over 500 items, items above this number cannot be recorded. In this case, limit the search query further using the filter in the **Properties** area.
6. Adjust the order of the columns in the search results list as required.
   Initially, the column arrangement of the configuration is used. You can adjust the order with **Select columns**. You can move individual columns by dragging and dropping them.

1.5.1. Description of the search parameters

The following configuration parameters are available in the metadata search:

- **name** (mandatory field)
  Description: The name of the configuration.
  Format: Text
- **siteUrl** (optional field)
  Description: Specify a URL to limit the search to this sitecollection.
  It is possible to use a placeholder, e.g.: {TenantRootUrl}/sites/supplierfile
  This parameter is also necessary if the search schema within a site collection has been adapted so that this search schema does not match the root-level schema (for example, mapping of managed properties and crawled properties).
  Format: Text/URL
- **rootBaseSearchQuery** (optional field)
  Description: Specification of a basic search query.
  Format: Text in syntax for KQL.
  Notice: If the **baseSearchQuery** parameter is maintained on the content type, this parameter will be overwritten.
- **contentTypeSearchOperator** (optional field)
  Description: The comparison operator for SharePoint search. This specifies whether the search is performed with an equals or contains. If the parameter is not specified in the configuration, the default value ":" is used.
  Format: Text
  Possible values:
  - ":" (contains, default value)
  - "=" (equals)
- **singleContentTypeRequests** (optional field, obsolete)
  Description: Specifies whether the content type information is retrieved in a batch or individually. Use this optional parameter only in exceptional cases.
  Format: Boolean
- **defaultContentType** (optional field)
  Description: Specifies which content type is pre-selected when the search is first opened. Copy the value from the **id** field of the desired content type configuration.
  Format: Text
- **groupedContentTypeDropdown** (optional field)
  Description: Specifies whether the content types in the drop-down menu in the metadata search are grouped by list content type and document content type.
  Format: Boolean
- **sortedContentTypeDropdown:** (optional field)
  Description: Specifies that content types are displayed in the content type selector in alphabetical order.
  Format: Boolean

- **contentTypeConfigurations** (mandatory field)
  Description: Use the parameter to configure the range of content types.
  You can use the following parameters for this purpose:

- - **id** (optional)
    Description: The ID of the site content type.
    Please note: If you do not specify the ID at the first configuration, the search configuration does not contain a content type. You can specify several of these configurations – they are distinguished via the **label** parameter.
    Format: Text
  - **contentTypeSourceUrl** (optional)
    Description: The full URL to the website where the content type was defined.
    You can use a placeholder, e.g.: **{TenantRootUrl}/sites/supplierfile**.

Please note: Even if you do not specify an ID, the URL is used to find all definitions and define the search context. It is therefore mandatory to enter this information.
This URL is used solely to identify the site collection from which the field information is to be loaded. The search is not restricted by this URL.
Format: Text/URL

- **baseSearchQuery** (optional field)
  Description: Specify a base search query. In the example, only documents of type **pdf** are searched for.
  Format: Text in syntax for KQL.
  Notice: This parameter overrides the **rootBaseSearchQuery** parameter at the parent level, if this parameter was maintained there.
- **label** (optional field)
  Description: Specify a label unless you want the name of the content type to appear in the drop-down menu.
  Format: Text
- **structureId** (optional field)
  Description: Specify the structure to be given when the component d.velop documents for Microsoft 365 center is called.
  Format: Text
- **description** (optional field)
  Description: Enter a description. This is useful because JSON does not allow comments.
  Format: Text
- **searchFields** (optional field)
  Description: Define which search fields are available for selection.
  Please note: If you do not define search fields when you search without a content type, the default fields (Type, Title, Created, Modified, Content Type) are used.
  - **internalName**
    Description: The internal name of the column.
  - **showAsRefiner**
    Description: Specifies whether the field for restricting the search is available.
    Format: Boolean
  - **showInResult**
    Description: Specifies whether the field should be included in the search result display.
    Format: Boolean
  - **showAsDefault**Description: Specifies whether the field should be pre-selected when selecting the content type to restrict the search.
    Format: Boolean
- **searchFieldMappings** (mandatory field)
  Description: Use the parameter to assign the internal fields to managed search properties.
  The following parameters are available for this purpose:

- - **internalFieldName**
    Description: The internal name of the column.
  - **managedPropertyName**
    Description: Name of the managed search property.
- **siteUrl** (optional field)
  Description: The search is performed in the specified site collection. It is not restricted to the site collection. Instead, use the "**baseSearchQuery**" property by limiting the search to a particular site collection.
  Format: Text/URL
- **showPropertiesLink** (optional field)
  Description: You can use the parameter to show or hide the **Show properties** button. The button is hidden by default.

Format: Text

- **sharepointSearchSettings** (optional field)
  Description: Use this parameter to specify parameters that have a direct effect on the performance of a search.
  Use this parameter if your search is experiencing problems (e.g. incomplete results).

- • **disableInterleaving** (true/false)
  Description: This parameter disables “interleaving,” which may result in results not being filtered again in SharePoint.
  - **disableQueryRules** (true/false)
    Description: Optional rules that can be configured in SharePoint are ignored with this switch.
  - **enableTrimming** (true/false)
    Description: This parameter activates the duplicate filter of the SharePoint search.
- **dvelopTenant** (optional field)
  Description: Using this parameter, you can enter your d.velop tenant. The tenant is used to display PDF files in d.velop viewer. Once this parameter is activated, d.velop viewer is always used.

> **Note**
> To improve ease of configuration, parameters that are **false** are automatically removed from the JSON configuration.

1.5.2. Supported field types

The following field types are supported to limit the search results as well as in the display of the search results:

- Text
- Number
- Currency
- Date
- Person (simple)
- Selection
- Boolean

The “Selection” field type deserves special mention. If the SharePoint field setting “Allow Fill-in” is enabled in a drop-down menu, this allows text input instead of pre-defined choices. This option allows you to search for values that are not included in the pre-defined set of values for the field. This allows for a more flexible search beyond the traditional choices.

1.5.3. Configuration example search

```
{
    "sharePointRootUrl": "https://MyTenant.sharepoint.com",
    "siteUrl": "https://MyTenant.sharepoint.com/sites/VendorFiles",
    "name": "MySearchConfig",
    "contentTypeSearchOperator": "=",
    "singleContentTypeRequests": false,
    "showPropertiesLink": false,
    "contentTypeConfigurations": [
                {
            "description": "Search without CT",
            "contentTypeSourceUrl": "{TenantRootUrl}/sites/VendorFiles",
            "searchFields": [
                {
```

```
                "internalFieldName": "ecsVendor",
                "showAsRefiner": true,
                "showInResult": true,
                                    "showAsDefault": true
            },
            {
                "internalFieldName": "ecsVendorNumber",
                "showAsRefiner": true,
                "showInResult": true
            }
        ]
            {
        "description": "Generic search query",
        "label": "Search for docx files",
        "baseSearchQuery": "filetype:docx",
        "searchFields": [
            {
                "internalFieldName": "Title",
                "showAsRefiner": true,
                "showInResult": true
            },
            {
                "internalFieldName": "ecsVendor",
                "showAsRefiner": true,
                "showInResult": true,
                "showAsDefault": true
            },
            {
                "internalFieldName": "ecsVendorNumber",
                "showAsRefiner": true,
                "showInResult": true,
                "showAsDefault": true
            }
        ]
            },
        "id": "0x0100E4E1E3530D6A6A49A954A97936811601",
        "description": "Vendor File",
        "contentTypeSourceUrl": "{TenantRootUrl}/sites/VendorFiles",
        "searchFields": [
            {
                "internalFieldName": "ecsVendor",
                "showAsRefiner": true,
                "showInResult": true,
                                    "showAsDefault": true
            },
            {
                "internalFieldName": "ecsVendorNumber",
                "showAsRefiner": true,
                "showInResult": true
            },
            {
                "internalFieldName": "ecsAdress",
                "showAsRefiner": true,
                "showInResult": true
            },
```

```
                {
                    "internalFieldName": "ecsPostalCode",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "ecsCity",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "ecsCountry",
                    "showAsRefiner": true,
                    "showInResult": true
                }
            ]
        },
        {
            "id": "0x01010041EA14BBF07ED44588A8633DB374C3C1",
            "description": "Vendor Correspondence",
            "contentTypeSourceUrl": "https://MyTenant.sharepoint.com/sites/
VendorFiles",
            "baseSearchQuery": "filetype:pdf",
            "searchFields": [
                {
                    "internalFieldName": "ecsVendor",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "ecsVendorNumber",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "ecsOrderNumber",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "ecsDocumentDate",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "Created",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "CreatedBy",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
```

```
                    "internalFieldName": "ModifiedBy",
                    "showAsRefiner": true,
                    "showInResult": true
                },
                {
                    "internalFieldName": "Modified",
                    "showAsRefiner": true,
                    "showInResult": true
                }

            ]
        }
    ],
    "searchFieldMappings": [
        {
            "internalFieldName": "ecsVendor",
            "managedPropertyName": "ecsVendorOWSTEXT"
        },
        {
            "internalFieldName": "ecsVendorNumber",
            "managedPropertyName": "ecsVendorNumberOWSTEXT"
        },
        {
            "internalFieldName": "ecsAdress",
            "managedPropertyName": "ecsAdressOWSTEXT"
        },
        {
            "internalFieldName": "ecsPostalCode",
            "managedPropertyName": "ecsPostalCodeOWSTEXT"
        },
        {
            "internalFieldName": "ecsCity",
            "managedPropertyName": "ecsCityOWSTEXT"
        },
        {
            "internalFieldName": "ecsCountry",
            "managedPropertyName": "ecsCountryOWSTEXT"
        },
        {
            "internalFieldName": "ecsOrderNumber",
            "managedPropertyName": "ecsOrderNumberOWSTEXT"
        },
        {
            "internalFieldName": "ecsDocumentDate",
            "managedPropertyName": "RefinableDate00"
        },
        {
            "internalFieldName": "Created",
            "managedPropertyName": "Created"
        },
        {
            "internalFieldName": "CreatedBy",
            "managedPropertyName": "CreatedBy"
        },
        {
```

```
            "internalFieldName": "ModifiedBy",
            "managedPropertyName": "ModifiedBy"
        },
        {
            "internalFieldName": "Modified",
            "managedPropertyName": "LastModifiedTime"
        }
    ]
}
```

1.5.4. Using search templates

You can use search templates to rerun saved searches. In this case the search result columns saved in the template are also displayed again.

The search templates can be found on the search page 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.

Filters specified in the search and columns selected in the search results list are saved in 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**.

1.5.5. 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 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 results 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.

1.6. Configuring the Quicksearch web part for d.velop documents for Microsoft 365

Configure the Quicksearch web part for d.velop documents for Microsoft 365 in order to be able to use the quick search in Microsoft 365.

This is how it works

1. Download the latest version of “d.velop documents for Microsoft 365 - Components” from the d.velop service portal.

2. Extract the ZIP file.
3. Open **SharePoint Admin Center**.
4. Click **More functions**.
5. Under **Apps**, click **Open**.
6. Add the file **d-velop-for-M365-Quicksearch.sppkg** using the **Upload** button or drag and drop it.
7. Click **Only enable this app > Enable app**.
8. Perform the following steps in all SharePoint site collections where you want the web part to appear:
   a. Open a site collection and click **Site contents**.
   b. Click **New > App**.
   c. For **dvelop-for-Microsoft365-Quicksearch**, click **Add**.

Important: It may take up to an hour for the added app to be available to all users.

1.6.1. Configuration parameters Quicksearch web part

Configure the parameters described below according to the instructions to be able to use the quick search. Two methods of data retrieval are available:

1. The SharePoint search (KeyWordQuery) queries the SharePoint search index. This allows the contents of the entire tenant to be searched. Note here that depending on the amount of data, the query is more performant than the direct list query. However, new and changed data are added to the SharePoint search index with a time delay.
2. The list query queries a single SharePoint list or library. Please note that this method may not perform as well with large lists. The advantage of the list query is that new and changed data can be queried directly.

Configuring the web part for the search - This is how it works

1. Put the page on which the web part was integrated into edit mode with **Edit web part** .
   A control panel opens with the available configuration parameters.
2. Define the configuration parameters listed below.
   Note the different configuration parameters for KeyWordQuery and list query.
3. Save the changed configuration parameters.

Configuration parameters of the Quicksearch Web Part in conjunction with the KeyWordQuery:

Web part title: The text saved here is displayed as a heading for the web part in SharePoint.

Define a title for the web part here.

Search URL: Specify the API search request here.

For the KeyWordQuery, the API request must look like this:

Example KeyWordQuery API call

```
/_api/search/query?
selectproperties='Title,ListItemID,ListID,SPSiteURL,SPWebURL,WebID,ContentTy
peID,path,filename,ContentType'&trimduplicates=false&querytext='Title:*{inpu
tValue}*'&RowLimit=10
```

{inputvalue} is replaced with the value that the user enters in the web part when filling out the search form.

The query parameters are described in the Microsoft documentation.

URL for the redirection: Here you enter the URL to the d.velop documents for Microsoft 365 center integration as follows:

Example URL for the redirection

```
https://center.d-velop365.com/fileview?
SPHostUrl={url}&ItemID={itemid}&ListID={listid}&Source={CurrentSite}
```

The parameters in the curly brackets are replaced. Do not enter any values for the parameters.

Placeholder for the search box: The text defined here serves as a hint text, which is displayed within the search mask.

Managed properties for displaying results: Specify here all managed properties to be displayed in the dropdown.

The managed properties specified here must also be specified in the **selectproperties** (see search URL). Use "|" as the separator.

Example result format

```
ContentType|Title
```

Result format: Define here the format how the previously specified selectproperties should be displayed.

Example result format

```
{ContentType}: {Title}
```

Minimum length of the search string: Enter here the minimum length of the search string after which the search will be started. Possible values are from 0 to 10.

Width of the web part in pixels: Enter the width of the web part in pixels.

Configuration parameters for the Quicksearch web part in conjunction with the list query:

Web part title: The text saved here is displayed as a heading for the web part in SharePoint.

Define a title for the web part here.

Search URL: Specify the API search request here.

For the list search, the API request must look like this:

Example ListQuery API call

```
/_api/web/lists(guid'{list_guid}')/items?
$filter=substringof('{inputValue}',Title)&$select
ID,Title,ecsVendor,ecsVendorNumber
```

{list_guid} must be replaced with the ID of the list.

{inputvalue} is replaced by the value entered in the search mask.

The query parameters are described in the Microsoft documentation.

URL for the redirection: Enter here the URL to d.velop documents for Microsoft 365 center as follows:

Example URL for the redirection

```
https://center.d-velop365.com/fileview?
SPHostUrl={url}&ItemID={itemid}&ListID={listid}&Source={CurrentSite}
```

The parameters **url**, **listid** and **CurrentSite** must contain values. The **itemid** parameter must not be replaced.

Placeholder for the search box: The text defined here serves as a hint text, which is displayed within the search mask.

Managed properties for displaying results: Specify here all properties to be displayed in the dropdown.

The properties specified here must also be specified in the select-statement (see search URL). Use "|" as the separator.

title = Example result format

```
ecsVendor|Title
```

Result format: Define here the format how the previously specified columns should be displayed.

Example result format

```
{ecsVendorNumber}: {Title}
```

Minimum length of the search string: Enter here the minimum length of the search string after which the search will be started. Possible values are from 0 to 10.

Width of the web part in pixels: Enter the width of the web part in pixels.

1.7. Setting up redirections (integrator)

The **Redirections** feature in d.velop documents for Microsoft 365 enables you to define calls to third-party documents and dossiers using generic links.

This is how it works

1. Open the **d.velop for Microsoft 365 - Admin** site in your browser at the URL https://admin.d-velop365.com.
2. Log in.
3. Under **Document management**, click **Redirections**.
4. Click **New**.
5. Enter a unique name for the redirection in the **Name** field.
6. Specify a description for the redirection.
7. Select a search method to search for the target. You can choose between a cross-search in the search index (SharePoint search, KeyWordQuery) and a direct search in a list or library (SPQuery).

Creating a new redirection for the search in the search index

1. Enter the desired target URL. For simplicity, select a saved template from **Template for the target URL**.
   If you want to address the embedded view, manually enter the URL for the call. The URL can be found in the folderplan.
2. Define the desired query parameters under **SharePoint search query**. Define the SharePoint KeyWordQuery in KeyWordQuery Language (KQL) syntax.
   If you want to link multiple queries together, use **AND** as the operator.
   Example
   - Calling a document via **DocumentNumber**:
     ecsDocumentID={DocumentNumber}
   - Calling a document of content type **Invoice** via **DocumentNumber** and **Tenant**:
     ecsDocumentID={DocumentNumber} AND contentType=Invoice AND ecsCompanyCode={CompanyCode}
3. Test the query by defining the query parameters in the **Test parameter** field.
   - You will receive a table with the test results.

- Click on a row for more information about the result.

4. Take the generated URL for integration in external systems and define the URL in the calling system. Replace the placeholder with system-specific placeholders, for example **%1**.
5. Save the redirection.

> **Warning**
> Select the option **Override the SharePoint base URL** only if the tenant's search index is having problems and, for example, search results are not found at the tenant level, but only at the site collection level.

Creating a new redirection for the search in a list or library

1. Enter the desired target URL. For simplicity, select a saved template from **Template for the target URL**.
2. Complete the entry under **URL of the list/library** and specify the list/library to search in.
3. Complete the **Site URL** property with the absolute URL of the SharePoint site collection.
4. Define the desired query parameters under **Parameter mapping**. For the SharePoint SPQuery, define the query with the syntax **ecsPlaneID:{PlaneID}**. **ecsPlaneID** represents the internal name of the site column and **{PlaneID}** specifies the parameter.
   Example
   - **ecsCaseNumber:{case no.}**
   - **(ecsArticlePackagingCode:{ArticlePackagingCode}) and (ecsArticle:{Article})**
5. Test the query by defining the query in the **Test parameter** field.
   - You will receive a table with the test results.
   - Click on a row for more information about the result.
6. Take the generated URL for integration in external systems and define the URL in the calling system.
7. Save the redirection.

1.7.1. Advanced configuration parameters

The following advanced configuration parameter is available for calling up the URL generated by integrator:

- **login_hint** (optional)
  By specifying a **login_hint** you specify a particular user account for log in. This makes log in easier for the end user, as the user name does not have to be selected manually.

Add the parameter to the URL generated by integrator.

Example of a URL with configuration parameter:

Example URL

```
https://integrator.d-velop365.com/navigate?
target=Planes&ecsPlaneID=A380-800&login_hint=user@tenant.onmicrosoft.com
```

1.8. Creating an optimized view of the structure (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.

Configure an appropriate redirection. This article shows you which settings you need to define in the redirections and how the view will be displayed when you construct the document structure.

Setting up a redirection (list-based structure) - This is how it works

1. Set up a redirection as described in the chapter **Setting up a redirection**. Make sure you use the target URL correctly.
2. Define the target URL. The target URL is displayed in the structure configuration (composer) under **Technical information** of the corresponding structure node. Select the structure node you want to use as an entry or main node.

> **Note**
> The value for the **{itemID}** parameter is automatically generated by the redirection and does not need to be configured.

Setting up a redirection (list-based structure) - This is how it works

1. Set up a redirection as described in the chapter **Setting up a redirection**. Make sure you use the target URL correctly.
2. Define the target URL. This is displayed in the structure configuration (composer) under **Technical information** of the corresponding structure node. Select the structure node you want to use as an entry or main node.

> **Note**
> The values for the parameters **{itemID}**, **{siteUrl}**, **{webId}** and **{listId}** are automatically generated by the redirection and do not need to be configured.

Other URL parameters

If necessary, you can add the following URL parameter: **&showDevDetails=1**. Developer details will be displayed below the structure view. Here, among other things, the search queries can be performed again and information about the elements and the structure is output.

> **Note**
> **Using icons**
>
> Define symbols for the respective nodes in the structure configuration. To do so, assign an image path or the Fluent UI icon name.
>
> We recommend using the Fluent UI icon names instead of the image path.
>
> If you specify an image path, make sure that the images can be loaded anonymously. This will help you avoid problems with authentication. A SharePoint document library is not a suitable storage location for the image files. You may not yet have logged into SharePoint when you click an icon in a leading system.

Display of documents with subordinate structures in the optimized view

In the embedded view it is possible to display documents with associated substructures.

By default, the preview of the document is displayed first. If you want to display the substructure, click the icon behind the file name to change the view.

> **Note**
> Please note that currently a maximum of 100 items (dossiers or documents) can be displayed on one level.

Displaying and editing item properties in the optimized view

You can have the properties (metadata) of list items and documents displayed in the embedded view. To do this, move the cursor over the corresponding line and click on the info icon.

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

If you upload a document via the embedded view and mandatory information is missing, the input screen opens automatically.

Uploading files in the optimized view

You can add files by dragging and dropping them or by clicking **Upload**. If the file name has already been assigned, a dialog will open in which you can change the name. 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 name 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.

1.9. Installing and setting up the Microsoft Outlook integration

The Microsoft Outlook integration was designed specifically for Microsoft Outlook and developed as a web add-in. The manifest for the Microsoft Outlook app can be found in the d.velop service portal at https://serviceportal.d-velop.de/de/products/applications/dvelop-documents-for-microsoft-365-outlook-integration.

The permission level **read/write mailbox** is requested in the manifest file. Additional information: https://learn.microsoft.com/en-us/office/dev/add-ins/outlook/understanding-outlook-add-in-permissions#readwrite-mailbox-permission. This permission level is required to implement various functions, e.g. categorization of e-mails by storage location and creation of new e-mails with attachments.

Activating the Microsoft Outlook integration for all users – This is how it works

1. Open the Microsoft 365 Admin Center at https://admin.microsoft.com/Adminportal/Home/#/Settings/IntegratedApps.
2. Select the app type **Office Add-in** and the option **Upload manifest file (.xml) from device**.
3. Add the manifest file for the Microsoft Outlook integration.

It can take up to six hours for the Microsoft Outlook app to be available to users. Additional information: https://learn.microsoft.com/en-us/microsoft-365/admin/manage/manage-deployment-of-add-ins?view=o365-worldwide.

Activating the Outlook integration for your own user (e.g. for tests) – This is how it works

1. Open the link https://outlook.office365.com/mail/inclientstore.

2. Navigate to **My Add-Ins**.
3. Add the manifest file as a user-defined add-in.

In the structure designer (composer), you must select the structures that are to be available to users in the Microsoft Outlook integration.

Selecting structures in the structure designer (composer) – This is how it works

1. Open the administration interface under https://admin.d-velop365.com/.
2. Under **Document management**, click **Structures**.
3. Select the required structures and click **Available in Outlook integration**.

Note the following:

- If you use Apple Safari as your browser, disable the pop-up blocker for **outlook.office.com** in your browser settings.
- The application is optimized for use with classic Microsoft Outlook for Microsoft 365. Ensure that Outlook is deployed via Click-to-Run technology and is in the Current Channel. Otherwise, functionality limitations may occur.

1.9.1. Limitations in different mailbox types

You can use the Microsoft Outlook integration in different types of mailboxes. Note the following technical limitations depending on the mailbox type:

Mailbox for users with authorization for other users

If an authorized person stores an e-mail in the mailbox via the Outlook integration, the category **Stored in SharePoint** is not entered.

Shared mailbox

The category **Stored in SharePoint** cannot be created automatically. If the category exists, it will be entered.

Also note that Microsoft 365 groups are not supported.

1.10. Tips and tricks

This topic describes further options that are provided by the application to help simplify your work.

1.10.1. Configuring IDs

You can reach the admin interface via the following URL: https://admin.d-velop365.com/.

Here you specify how IDs are to be generated.

The following information is required for the configuration:

- **Name**: A unique character string that may only contain "a-z" or "A-Z" and "-" and "_" and numbers.

You can also enter the following:

- **Initial value**: The value with which to start counting.
  (Please keep in mind that when you create a new configuration to "edit" it, users may have created new contracts in the meantime with the old configuration)
- **Counting up steps**: As a rule 1.
- **Prefix**: A string of characters that is always written before the ID.
- **Pad characters**: With how many zeros the space between the prefix and the current value should be filled (Maximum 10).
- **Description**: Description: The description for the configuration.

Example 1

Name: contractIDs

Initial value: 0

Counting up steps: 1

Prefix: CMID-

Pad characters: 0

Description: test

The next three IDs that will be generated: CMID-0, CMID-1, CMID-2.

Example 2

Name: contractIDs-2

Initial value: 9

Counting up steps: 1

Prefix:

Pad characters: 10

Description: test

The next two IDs that will be generated: CMID-0000000009, CMID-0000000010.

1.10.2. How do I retrieve search results from SharePoint using the Search Query tool?

This is how it works

1. Open the Search Query tool at https://admin.d-velop365.com/searchQueryTool. You can perform searches at root or site level.
2. Searching at root level:
   1. Enter the root URL in the first text box.
   2. Select **/** from the drop-down menu.
3. Searching at site level:
   1. Enter the root URL in the first text box.
   2. Select **/sites/** from the drop-down menu.
   3. In the second text box, enter the name of the site.
4. In the **Search query** text box, enter the relevant search query. You can view the search query in the contracts application interface.
   1. Perform any search using the advanced search.
   2. Click on the magnifying glass (**Show technical information for the search**) next to the column selection. The search query is displayed under **Search query**.
5. Use the **Parameter** checkbox to control the corresponding settings.
6. In the **Add managed property** text box, enter the columns to be displayed in the search results, separated by commas.

> **Note**
> **Example**
>
> ecsContractIdOWSTEXT,ecsSubjectOfContractOWSTEXT,RefinableDate02

7. Click **Search**.

1.10.3. How are placeholders used for the display name?

You can use any text in combination with placeholders for the **Elements display format**. You can use the properties of the current element as placeholders.

Please note that only text fields are supported.

Set the display name for the structure node.

Example:

```
${item.Title} Customer number: (${item.ecsCustomerNumber})
```

$: Use a dollar sign to specify the placeholder. You can only use the current list item as a placeholder.

{ }: Inside the curly braces, reference the current list item with "item.". This is to be followed by the internal name of the SharePoint column.

1.10.4. How are content type-based structures configured?

The following example will show you how to configure structures based on content types.

This is how it works

1. Add content types. Content types can be used as main and sub nodes in a structure. The procedure for adding content types is described in the documentation of d.velop documents for Microsoft 365 in the chapter Adding a content type to a structure node.
2. Define the Relation fields.
   When using content types as main nodes, specify the link fields at **field (parent)** and **field (child)** as managed property. Be sure to assign this link field to the view (see below).
3. Create views for all content types used (main and sub nodes).
   The creation of views is described in the d.velop documents for Microsoft 365 documentation in the chapter Creating a view for a content type.
4. Assign the link fields in the display definition.
   It is not necessary to check the link fields under **Display**.
5. Define the **Storage location for documents**.

Example: The customer documents are to be stored. The upload library is located in the same site as the list item with the customer record. The following configuration leads to the desired goal:

The following parameters are maintained in the **Storage location for documents** area:

- Site collection: **${site.absoluteurl}**
- Site: **/**
- Library: **Customer documents**

> **Note**
> Currently, a structure can and must be applied exclusively to one site. If a structure should also be valid for other sites, it is necessary that the ID of the structure be passed as URL parameter **roid** when calling d.velop documents for Microsoft 365 center.
>
> When jumping from the sidebar this is done, with the search (search.d-velop365.com) this can be configured. Unfortunately, this is not possible when jumping from SharePoint lists with the button, because a button cannot be configured.

Note

If you want to sort items by a specific field, consider the conditions of the search service.

Only fields that are also marked as sortable in the SharePoint's search service (/_layouts/15/searchadmin/ta_listmanagedproperties.aspx?level=tenant) are sortable. Since the search service API does not share this information, make sure when configuring that sorting is only used for fields that can actually be sorted. The **Refinable...** fields, which can be assigned their own crawled properties, are also used for this purpose in the search service configuration. After the search service has performed the indexing, you can use the **Refinable...** fields for mapping.

If you use sorting for a non-sortable field, the search may return an error on the search service side and therefore the search cannot be performed. It can also happen that the sorting works in one direction, but not in the other direction.

Please also refer to the chapter What to consider when configuring SharePoint search?

Note

The assignment must be completed at each level.

Example structure in composer:

1) Customers

2) Orders

3) Orders

4) Order confirmations

In the example, you create the view and the assignment for the orders on nodes (2 + 3).

1.10.5. How do I export a structure?

You can export defined structures, e.g. to save them locally or to transfer them from one Microsoft 365 tenant to another.

This is how it works

1. Open d.velop composer.
2. In the tile of the desired structure, select the **Export structure** function. It is indicated by an arrow pointing downwards.
3. The structure is downloaded.

1.10.6. How do I import a structure?

You can import previously exported structures into d.velop composer.

This is how it works

1. Open d.velop composer.
2. Select **Import structure**.
3. Select the file you want to import and start the import.
4. The import is performed asynchronously in the background. The status of the import is displayed in the corresponding tile.

1.10.7. How do I configure the structure property of the sidebar as the subject for sending e-mails?

> **Note**
> You can configure the **sbMailSubject** property for the sidebar in composer. The **sbMailSubject** property is used as a subject when sending e-mails. You have the possibility to use the property with placeholders.
>
> If you have not defined a configuration, the display name of the structure node is used as the subject when sending e-mails.

Please also note the section How are placeholders used for the display name?.

1.10.8. How do I edit PDF files in d.velop documents for Microsoft 365 center?

SharePoint enables direct editing of PDF files in conjunction with OneDrive, e.g. using Adobe Reader. This functionality can be accessed in d.velop documents for Microsoft 365 center via **Open in app**. If you activate this function, a OneDrive synchronization process is initiated in the background and includes the following steps:

- The selected PDF file is opened locally on the user's device.
- Once you have finished editing the file and saved your changes, the file is automatically synchronized back to SharePoint.

Requirements and important information:

- OneDrive must be set up correctly before you can use this function.
- The function must be correctly deployed and functional in SharePoint in order for the function to work correctly in d.velop documents for Microsoft 365 center.
- Problems related to setting up and operating OneDrive are not within the scope of the support provided by d.velop AG.

1.10.9. How do I deactivate the configurations made in d.velop documents for Microsoft 365 center?

If you want to call up the d.velop documents for Microsoft 365 center component without your configurations, you can use the URL parameter **defaultConfig** to deactivate the configurations. This can be helpful, for example, to rule out the possibility that a behavior that is perceived as erroneous is related to the configuration that has been made.

1. Navigate to the area of d.velop documents for Microsoft 365 center that you want to check.
2. Extend the called up URL with the parameter **defaultConfig**.
   Important: You may use the parameter **defaultConfig** only in the area of the URL before **SourceUrl**, because the parameter in the rear area (after **SourceUrl**) does not lead to the desired result.
3. Call up the URL again.
   The d.velop documents for Microsoft 365 center component is now displayed without the configurations made.

1.11. FAQ

You can find answers to frequently asked questions in this section.

1.11.1. Known limits

center: Upload limit

D.velop documents for Microsoft 365 center allows for the upload of files up to a maximum size of 250 MB.

1.11.2. What to consider when configuring SharePoint search?

Some functions of d.velop products with Microsoft 365 integration are based on queries via SharePoint search.

The following articles give a very good overview of how SharePoint search works and important configuration options in the search schema.

Especially the creation and usage of managed properties should be known in order to build structures based on content types or to configure the d.velop documents for Microsoft 365 search.

Useful links for SharePoint search configuration

- Manage the search schema in SharePoint
  For more general information about configuring result sources, see the Microsoft technical documentation under the search term "Manage search schema 365".
- How do site columns become managed properties?
  For more general information on this topic, see the Microsoft technical documentation under the search term "How do site columns become managed properties - thus available for search)".
- Syntax reference for the Keyword Query Language (KQL)
  For more general information on this topic, see the Microsoft technical documentation under the search term "Syntax reference for the Keyword Query Language (KQL".

1.11.3. Why is the selection of standard buttons in d.velop documents for Microsoft 365 center limited at document level?

There are standard buttons at document level in d.velop documents for Microsoft 365 center which you cannot configure or only configure to a limited extent.

For example, some buttons only work with Office documents, such as **Open in Browser**.

You can recognize the usable buttons by the fact that you can select them. All other buttons are grayed out.

1.11.4. What do I need to know about the share feature?

To use the share feature, you must log in to Microsoft SharePoint Online or Microsoft 365.

The share function is integrated as an iFrame. Microsoft occasionally does not allow embedding an iFrame. In this case, the function will be temporarily unavailable.

1.11.5. How do I use a CMID (case management ID)?

The CMID (case management ID) property can be specified in d.velop composer for each structure node. Once the CMID property has been configured, the interface configuration of d.velop documents for Microsoft 365 center for this structure node can be customized and saved. If you also want to apply the interface configuration to other structure nodes, configure the CMID property with the same value on the other nodes.

Using the CMID, you can assign an interface configuration to the respective structure node in d.velop composer. This means that you can use the CMID, for example, to map different interface configurations to identically named structures in d.velop composer. If structure nodes are configured in multiple languages, a CMID must be specified. Otherwise, the structure node must be configured independently for each language used. If the CMID is not set, the **Display name** node property of the structure node is used instead.

The CMIDs always refer to the entire client and are cross-structural.

We always recommend defining an CMID. Plan the structure in advance.

1.12. 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.