d.velop documents (Cloud): User

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1. d.velop documents (Cloud): User

1.1. Getting started with searching for and finding information

You want to perform a full-text search with search operators in d.velop documents. The search is case insensitive. You therefore get the same search results, regardless of whether you write in uppercase or lowercase letters.

The full-text search follows the Elasticsearch simple query string syntax. You can find more information on the Elasticsearch website.

You can use the following search operators for your search:

- **+** (plus sign): This is used for AND operators.
- Space character (white space): Behaves in the same way as the plus sign.
- **|** (vertical line): This is used for OR operators, and is also called the pipe symbol.
- **-** (minus sign): Excludes units (that is, words or numbers).
- **"** (quotation mark): This is used to search for a specific sequence of units.
- * (asterisk): This is used as a wildcard at the end of the word.
- **( )** (brackets): Groups units and indicates logical priority.
- \ (backslash): Suppresses the function of other search operators.

The logical AND is used as the standard link operator. That means that individual search terms without a search operator are always linked with a logical AND.

1.1.1. Useful things to know about the full-text search with search operators

A search phrase is separated into multiple units (tokens). The smallest unit is an individual letter or number.

You can connect units to each other using search operators.

- If you only separate your search units with space characters, you apply the standard operator **AND** (+).
- If you connect two units with a minus sign (dash) (for example, Winston-Salem), then the two words are recognized as one unit during the search. The order of the words does not matter here. The minus sign is evaluated as a special character in this case.
- If you want to use the minus sign to exclude units, enter a space character before the minus sign.
- When searching with the wildcard character (*), always enter this character at the end of the unit.
- You can use any special character as the word separator between two units.
- A full-text search not only searches the full text but also all the document metadata, such as the advanced properties and system properties. That means you can also search in different data records. This increases the amount of potential results.

Example:

You start a search for **3°C**. The search is separated into **<3><AND (default)><C>**. You therefore find all the documents that contain the characters **<3>** and **<C>** in the same data record.

You get the same result if you search for **3~C**.

If you search for **3 <space character> C**, you find all the documents containing **3** and **C**, regardless of the data record in which the units are located.

If you search for **3 | C**, the search is separated into **<3><OR><C>**. The search results return all the documents that contain **3** or **C**. You can also see search results such as **3kg** or **25°C** in this case.

1.1.2. Searching with quotation marks

You want to search for terms that are contained in the same data record in a specific order. You can use quotation marks to do so. When searching with quotation marks, you must enter at least one letter or number between the quotation marks.

Let's assume you have a dossier containing the following documents:

- A. Fisher & Sons Inc.
- Fisher and Angler Accessories

The following examples show how you can use quotation marks in the search.

Example 1: Searching without quotation marks

If you search for **A. Fisher**, you get the following results:

- A. Fisher & Sons Inc.
- Fisher and Angler Accessories

Fisher and Angler Accessories is found because there is an A in the document ID for the document.

Example 2: Searching with quotation marks

If you search for **"A. Fischer"**, you get only the following result: A. Fisher & Sons Inc.

1.1.3. Searching with the vertical line (OR operator)

You want to search for two different terms or units from different documents in a search query. To do so, you use the vertical line (|), which is also called the pipe symbol. For the search, add the vertical line with space characters between the two search terms. In this case, the vertical line stands for "or". You can use this search operator to disable the default AND operator.

Let's assume you have a dossier containing the following documents:

- The Changing German Language
- Invoice: Delivery of French Tea Varieties
- The Origin of the Chinese Language

The following examples show how you can use the vertical line in the search.

Example:

If you search for **German | French**, you get the following results:

- The Changing German Language
- Invoice: Delivery of French Tea Varieties

1.1.4. Excluding search terms

You want to perform a search in which a specific term is not to be included. You can use the minus sign (-) to do so.

You have to add a space character before the minus sign to exclude words from the search. Otherwise, the minus sign is understood as a word separator.

Let's assume you have a dossier containing the following documents:

- Buy great-value bath fittings online
- Delivery Note 234567: Mats for baths

The following examples show how you can use the minus sign in the search.

Example 1: Searching with a minus sign with a space character

If you search for **bath -fittings**, you get the following result: Delivery Note 234567: Mats for baths

Example 2: Searching with a minus sign without a space character

If you search for **bath-fittings**, you get the following result: Buy great-value bath fittings online

The minus sign is understood as a word separator in this case.

1.1.5. Searching with wildcards

You want to perform a search with wildcards. You must always enter the asterisk (*) at the end of a word stem or unit. As the search result, you get all the terms that contain the word stem or unit. If you perform a wildcard search without a word stem, all the documents in the system are displayed in the results list.

Let’s assume you have a dossier containing the following documents:

- Bath City Council, Market Sq. 2, 76530
- Market Sq. 1, Bath, North Carolina, 70173, USA
- Buy great-value bath fittings online
- High-quality bath fittings direct from our warehouse
- Freestanding bathtub
- Rembath Clinic: Delivery Note 5678
- Invoice NW45, Abatha Inc.

The following examples show how you can use the asterisk in the search.

Example:

If you search for **Bath***, you get the following results:

- Bath City Council, Market Sq. 2, 76530
- Market Sq. 1, Bath, North Carolina, 70173, USA
- Buy great-value bath fittings online
- High-quality bath fittings direct from our warehouse
- Freestanding bathtub

1.1.6. Searching with special characters

You want to perform a search with special characters. All special characters, regardless of type, are ignored during the search. Only the units around the special characters are searched for (that is, numbers or words).

The search does not recognize a difference between **3°C** and **3~C** because it searches only for the units 3 and C. It is therefore not possible to search for special characters explicitly.

You can use any special character as the word separator between two units.

Let’s assume you have a dossier containing the following documents:

- A. Fisher & Sons Inc.
- Fisher and Angler Accessories

The following example shows how you can use special characters in the search.

Example:

If you search for **Fisher &**, you get the following results:

- A. Fisher & Sons Inc.
- Fisher and Angler Accessories

1.1.7. Searching with word separators

You can use any special character as the word separator between two units. Since the search filters out special characters, it does not matter which word separators you use. For example, you can use a tilde, a hyphen without space characters or a degree sign. This search differs from the search using an AND operator because the units are in the same data record in this case. If you want to maintain the order of the units, add quotation marks as well.

Let's assume your system contains the following documents:

- 3°C in the foothills and 25°C on the coast at night.
- Samson 3-c smartphone invoice
- Park St., house number 3 c
- Smith, supervision of class 3c

Example 1: Searching with word separators

If you search for **3°C** or **3~C** or **3-C**, you get the following results:

- 3°C in the foothills and 25°C on the coast at night.
- Samson 3-c smartphone invoice
- Park St., house number 3 c

Example 2: Searching without word separators

If you search for **3c**, you get the following result: Smith, supervision of class 3c

1.1.8. Searching with brackets

You want to search for multiple terms or units. You want to give one or more terms priority or logically link them. You can use brackets ( ) to do so. Let's assume you want to search for a document or dossier that is not from the year 2020. You can use the brackets to indicate that both the documents and the dossiers should come from years other than 2020.

The following examples show how you can use brackets in the search.

Let's assume your system contains the following documents:

- Sample invoice 2019
- Sample invoice 2020
- Sample invoice 2021
- Sample delivery note 2019
- Sample delivery note 2020
- Sample delivery note 2021

Example:

If you search for **(invoice | delivery note) -2020**, you get the following results:

- Sample invoice 2019
- Sample invoice 2021
- Sample delivery note 2019
- Sample delivery note 2021

1.1.9. Searching with a backslash

You want to search for a term or sentence containing a search operator such as **( ) * | + -**, for example. The search operator should not be applied for this search; instead, it should be searched for as part of the sentence. To disable the search operator functionality, you can use the backslash (\ ), which is also referred to as the reverse slash.

Let's assume your system contains the following documents:

- Delivery to Stuttgart, Baden-Württemberg, Germany
- Invoice for Baden-Baden City Council

Example 1: Searching with a backslash

If you search for **Baden \-Württemberg**, you get the following result: Delivery to Stuttgart, Baden-Württemberg, Germany

Example 2: Searching without a backslash

If you search for **Baden -Württemberg** (with a space character before -), you get the following result: Invoice for Baden-Baden City Council

1.2. Getting started with storing and saving documents

Use the **Storage** feature to save files in your d.3 repository.

Suppose you would like to save a locally saved file in your repository.

This is how it works

1. Click or tap **Storage** on the start page.
2. In the start section **Store in**, you can specify a file using **Browse** and select a category, in which you want to save the file in the d.3 repository.
3. You can specify the properties in the **Advanced** perspectives which are valid only for this category.
4. If your category contains multi-values, enter the values in the **Multi-value** perspective.
5. You can specify the common, system-specific properties in the **Common** perspective.
6. Confirm saving the item with **Save**.

Once you have successfully saved the item, you can use the context action **Save new document** to directly save an additional item in the repository. To display the saved item once the storage process is finished, use the context action **Show document**. This context action is used to display the detail section with the perspectives of the document.

Characteristics about the document number

The document number is a common property available for any document. If you store a document which already exists in a d.3 repository, you can enter the document number to match the document. You can identify an already existing document in the repository by using the document number in order to update the existing document or to create a new version of the document. If there is already a document existing in the same category with the identical document number and variant number, you switch to the update mode. Once you switch, the properties of the existing document are already specified and displayed. If you have already entered changed the properties, the values are discarded.

Each document has a certain status. If the existing document is in the status **Release** or **Archive**, you create a new version of the document with **Save**. The existing document is replaced if it is available in the status **Processing** and **Verification**.

1.2.1. Automatic saving of documents in dossiers

You can store at least one item (file, e-mail) in a dossier by dragging it onto a dossier in the dossier navigation or in the result list of the search and dropping it in the **Save automatically** drop zone.

The options to store an item are set up by a d.3 administrator and depend on your permissions.

When you drag an item onto the drop zone **Save automatically,** the name of the category is shown that was configured as the default category of the dossier. You save the item in these categories.

Once you have dropped the item, a dialog is displayed to inform you that the item is transmitted to the server. If you dropped several items onto the dossier, the respective status and the related note is shown for each item. If, for example, properties required by the dossier or the item to be stored could not be applied, you are forwarded to the section in which you can store it manually.

1.2.2. Manual saving of items in dossiers

You can store at least one item (file, e-mail) in a dossier by dragging it onto the desired dossier in the dossier navigation or in the result list of the search and dropping it in the **Save manually** area. When saving manually, you can select another category than the default category of the dossier and specify the properties individually.

Suppose you would like to save several local files in a dossier and indicate the document properties manually.

This is how it works

1. Drag the items onto a dossier in the **Save manually** area.
2. Select the category for the first item and enter the required values for the properties. If a default category has been defined for the dossier, this category is automatically selected for all items.
3. Click on **Next** and enter the values for the following items. The category selected for the first item is suggested for all other items. If necessary, you can change the category for each item.
4. Click on **Back** or **Next** to check your entries again or to make changes.
5. In the summary of the documents to be saved, choose whether all the items are to be saved. If you do not want to save an item in your repository, click on **Do not save**.
6. Click on **Apply** to save all items with the indicated properties.

If at least one item could not be saved successfully, you will see a notification and you can edit the item again. You can get to the related storage dialog by moving back page by page with **Back** or use the pencil icon to navigate directly to the according page.

1.2.3. Tip: Saving items using a template

You can store at least one item (file, e-mail) in a dossier by dragging it to a dossier in the dossier navigation or in the result list of the search and dropping it in the **Save with template** drop zone.

When you drag an item to the **Save with template** drop zone, you can then select a template. After you select the template, you can change the values in the storage dialog box and save the element.

If you want to save multiple items in a dossier at the same time using a template, you can view the properties of each item. You can choose **Next** and **Back** to switch back and forth between the items; however, this only applies if all the entered properties could be successfully validated. It is shown on every page which template you selected. If necessary, you can enter additional values. After the summary, you can save all the items in the same way as you do when saving them manually.

1.2.4. Applying property values when saving several documents

When manually saving several documents in a dossier via drag & drop, you usually also specify values for properties or set the category. In certain cases, a property value or the category may be identical for all documents. In order to avoid specifying an identical value for each document, you can set the value for a property or category in the first document with the pin. This value is applied to the subsequent documents. If you set the pin for a multi-value property, all multi-value properties are applied.

The pinned value of a property or the pinned category is disabled for the subsequent documents so that you cannot change the values. If you want to edit a pinned property or set the category, you need to return to the first document in the storage dialog. All changes for pinned values in the first step are automatically applied to the following documents.

Each pinned value is only set for the storage dialog of the current storage operation.

Let's suppose you want to store various locally saved items with the same properties in a dossier.

This is how it works

1. Drag the items onto a dossier in the dossier navigation or in the result list and drop it on the drop zone **Save manually**.
2. Enter the values for the properties for the first document.
3. Click on the pin for each value you want to apply for all documents.
4. Then click on **Next** to enter or check the values for the following documents.

1.3. Getting started with working with documents

You can edit the content of documents any time. However, the option to edit depends on your permissions.

If you have the permission to edit a document and to create a new version, you can reserve the document for your purposes using the context action **Start editing**. You are entered as the editor for the document in the d.3 repository and the document is transferred into the status **Processing**. Then, go ahead. As soon as you have changed the document, you can update the document in the d.3 repository.

If you have not the permission to edit a document and to create a new version, the context action **Start editing** is not displayed.

When collaborating, it may occur that a different user is currently editing the document that you also want to edit. This user is entered as editor in the properties of the document. You get a message stating that the document is currently being edited by a user. The name of the user is displayed. If you have the permission to take over a document that is being edited by a different user, you can confirm takeover of the document to be edited. We strongly recommend contacting the user in advance to make sure that the collaboration works smoothly. A policy for the organization or the department can be helpful to specify when documents in editing can be taken over by other users.

The editing takeover function may also be useful when employees have to handle their colleagues' tasks in case of unexpected absences.

1.3.1. Concluding the processing of a document

There may be often situations that, for example, a document was saved in the status **Processing**, you, however, need this document in the status **Release**. You can assign the document to the status **Release**.

Changing the status of an item can also be helpful in the following situations**:**

- You are responsible for a team and need to release an item which is currently edited by a team member who is absent. You need to have the permission to withdraw an item currently edited by another team member.
- You are a member of a d.3 group responsible for an item in the status **Processing**, which should be in the status **Release**.

Suppose you would like to change the status of a document from **Processing** to **Release**.

This is how it works

1. In the result list, select, for example, the document in the status **Processing**.
2. If you are confident that the document is the correct one, click or tap on the context action **Finish editing**.
3. In the dialog to enter the information (alteration text), enter a comment.

The document is saved in the d.3 repository in the status **Release** with additional information.

1.3.2. Updating document properties

If applicable, you can change the properties of a document provided you are granted the required permissions. You can only view the required functions if you are granted the permission to change the properties.

Supposed, you want to change at least one property.

This is how it works

1. Select the document in the results.
2. Go to the **Properties** perspective.
3. Select **Edit properties** to change the available properties.
4. After making the changes, use **Validate properties** to check whether your changes are allowed.
5. Save the changes.

If the **Edit properties** function is not available, use the context action **Start editing** or **Assign to me for editing**.

1.3.3. Editing documents in a local file

To edit a document, you can save the document locally at any time and, as usual, edit it in the corresponding application.

Supposed, you want to edit a document and to replace the original document by the edited version.

This is how it works

1. Select the document in the result list.
2. Select the context action **Start editing** to be entered as an editor for the document. The document contains the status **Processing**.
3. Download the document with the context action **Download** to save it locally and edit it.
4. Update the locally saved document by dragging and dropping it onto the **Replace** drop zone.
5. Save the updated document with the context action **Finish editing** to create a new version in the d.3 repository.

By finishing the editing process you make sure that the document in the current version is stored in the d.3 repository on a long-term basis and that the staff granted the permission to view the released document version can view the current version.

1.3.4. Editing documents directly from an Office application

You have the option of editing a document directly in a Microsoft Office application. The function to directly edit documents in Microsoft Word, Microsoft Excel, and Microsoft PowerPoint is provided by the administrator.

Suppose you want to edit a document in an Office application directly without saving it locally.

This is how it works

1. Select the document in the result list.
2. Select the context action **Start editing** to be entered as an editor for the document. The document contains the status **Processing**.
3. Open the document using the context action **Edit in Microsoft Word locally**, **Edit in Microsoft Excel locally** or **Edit in Microsoft PowerPoint locally**. Maybe you need tot confirm that you want to open Microsoft Office URLs using a local application. If you use a different browser than Internet Explorer, you need to log in again.
4. Edit and save the document.
5. Use the context action **Finish editing** to finally save the document and create a new version in the d.3 repository.

> **Note**
> If you share a PC with several other persons by using the same user and the same password for your Windows login, you cannot use the function to edit documents in Office applications. As soon as you use your personal Windows credentials (user and password), you can use the function.
>
> If you have any questions, please contact your administrator.

1.3.5. Working on Office 365 documents collaboratively

This function is available only in d.velop documents ultimate.

If you use Microsoft Office 365 in your organization, you can work on documents collaboratively as part of a team. A group must be created in order to collaborate.

Suppose your team needs to create project documentation by a specific time. The project documentation is a Word document located in the d.3 repository. Your team leader has assigned your group with the task of editing the document. Once the document is assigned to the group, all the members of the group can work on the document online in Microsoft Office.

However, if you would prefer for the document to be edited successively by different members of the group, you can choose **Assign for editing** to select yourself as the assignee. Once you have finished working on the document, you can assign the document to the group again using **Assign for editing**.

> **Warning**
> If your team decides that individual members of the group or a different user should take over the work on the document during collaborative editing, all the group members need to save their changes in the document first. If you assign the document to yourself beforehand using **Assign for editing**, the group members cannot save their work.

1.4. Getting started with working with the result list

The result list contains documents and dossiers (items). You can select various views based entirely on your personal preference or on the tasks to be performed.

In the result list, you can also always see the title of the item, the category to which it belongs and the document status of the item. The file type is shown as a symbol and the properties are displayed. In the menu for context actions, you can find all the actions for the item (document or dossier).

You can learn more about the basic functions in this topic.

1.4.1. Changing the view of the results list

You can display the result list as list view or as table view. In the list view, you can quickly find certain properties and the status directly next to the item. In the table view, however, the items are arranged in a tabular view with the properties as column heading.

You can switch between the views by using the icon to switch the view:

- Icon to switch to the table view:
- Icon to switch to the list view:

1.4.2. Displaying the dossier in which a document is located

Dossiers form the logical parentheses around several documents as well as dossiers. In some cases, it is important to know the dossier and its further content in which the selected document or the selected dossier is located.

You can use the action **Show in dossier:** to show the dossier to which a document or dossier was assigned.

This is how it works

1. Select a document in the result list.
2. Open the dossier navigation with the action **Show in dossier:** in the menu for context actions.

In the dossier navigation, you can see the dossier that is the direct parent of the item, the content of the dossier, and the dossier structure in which the dossier is located.

1.4.3. Filtering the properties in the results list table view

In the **Search** feature, you can use the facets of the properties to reduce the result of your search from a very large set of items to the most essential set.

You can work on the results in the table. Maybe you want to sort large result lists, e.g. by using the properties (sort by date, alphabetically). In the table view, you can also filter the columns (properties) using various options (e.g. **Contains**, **Or**, **Equals**).

If you filter the results in the table view based on the found items, the result of the search does not change.

1.4.4. Grouping results in the result list

You can group your search results in the table view by dragging and dropping a column heading onto the **Drag columns here to group the displayed results** field.

1.4.5. Navigating in dossiers using dossier structures

In the dossier navigation, you can see the child documents and dossiers sorted by the title. The selected dossier is the top item in the dossier navigation. To display the details of a child item, click or tap an item in the dossier structure.

Let's suppose, you want to have a look at the contents of a dossier and the contents of a child dossier.

This is how it works

1. Under **Results**, for example, select a dossier to view its contents.
2. In the contents of the dossier or the dossier structure, select the child dossier to view the contents of this dossier.

To return to your starting point, choose the action **Back to starting point**.

1.4.6. Sorting results using several properties in the table view

By default, the displayed search results are sorted by a criterion. It may often be more helpful to sort the results by several common and advanced properties (column headings).

In the table view, press and hold the **SHIFT** key and click on multiple column headings to use the selected columns for reordering your results.

The numbering of the selected column headings indicates the order of the selected properties which is applied for sorting purposes.

1.4.7. Sorting or grouping results by multi-value property in the table view

You can sort and group the search results in the table view. If you perform this action for a property with several values (multi-value property), only the first value is considered.

To get all values of a multi-value property, export the properties in an Excel file. Use the Excel file to sort and group the columns as needed.

If there are more than 100 results available, first load all results into the result list.

This is how it works

1. Use the **Export properties** context action to export the result list.
2. Enable or disable the single results as needed.
3. Confirm the selected items using the **Export properties** action.
4. Selected the format **Excel file** for the export under **Export options** dialog.
5. Enable the **Export all multi-value properties** export option and download the file to your local disk.
6. Open the file to group or sort the results.

1.4.8. Saving the column order in the table view

In the table view, you can move the columns with the properties to different positions to find the essential properties at a glance. The column order is immediately saved for a combination of categories.

> **Note**
> The procedure described here only applies if you are not working with layouts.

Let's suppose you select the category "Delivery note" and the category "Invoice" for your search. You move some columns of the result list to another position in the table view. Next time you perform a search using both categories, the result list is displayed in the last column order selected.

If you did not select any category and perform a search operation, items from different categories may be found. If you change the column order, then the selected column order is only valid for this combination of categories.

1.4.9. Working with layouts

You can save table views as a layout under your chosen name and call up previously saved layouts at any time. This allows you to switch quickly and easily between different table views.

A layout contains the grouping, column order, column sorting and filtering of the table view. You can create as many layouts as you like and share your layouts with others.

> **Note**
> The following functions are only available if you have activated the **Layouts** function under **Customize view**.

Saving layouts

You want to save your current table view as a layout.

This is how it works

1. In the table view, select the option **Save view as layout** under **Customize view**.
2. Enter a name for your layout.
3. Click **Save** to permanently retain the table view as a layout.

You will then find your newly created layout under **Customize view**.

Using layouts

To use a saved layout, click the layout name under **Customize view**. The table view associated with the selected layout is then displayed.

Managing layouts

You can manage your saved layouts. Click **Customize view > Manage layouts**. All your saved layouts are then listed.

You can rename, share and delete your layouts. You can access these options via the three horizontal dots.

Rename

Select this function to rename a layout. To do this, enter the new name in the dialog box and click **Save**.

Share

You can use this function to share a layout with other people.

This is how it works

1. Under **Recipients**, select the people with whom you would like to share the layout.
2. You have the option to enter a short, descriptive text under **Message**.
3. Click **Share** to send the layout to the chosen people.

These people then receive a task in which they can accept or reject the shared layout.

> **Note**
> Please note that your layouts are shared as independent copies. Changes to your own layouts will not affect layouts that have already been shared.

Delete

If you no longer need a layout, you can use this function to delete the layout.

1.4.10. Tip: Grouping, filtering or sorting and using a column function for a multi-value property at the same time

In the table view you can group, sort or filter the search results by properties. For example, if you want to group by a property, drag the header of the respective column to the grouping pane.

If you perform this action for a property with multiple values (multi-value property), all values of the multi-value property will be taken into account. A separate table row is displayed for each row of the multi-value properties of an item. The three dots (**...**) are resolved to the line number.

If you want to view all values of a multi-value property, you can load all results if necessary. We recommend using the column function only for small result sets. In case of large result sets, loading may take some time and increase memory usage in the browser. However, you can reset the column property if necessary and return to the previous view.

1.4.11. Tip: Loading all contents of a dossier entirely

By default, you can directly work in a dossier with the first 100 items. However, you can specify that all dossier contents are loaded immediately.

Note that loading many items takes some time.

You can adjust the settings directly when working with the dossier or in the feature **Configuration**.

If you want to adjust the settings directly in the dossier view, tap or click the gear icon. Select the entry **Always load dossier content entirely** under **Search results and dossier navigation**.

Afterwards, all items of a dossier are always loaded.

1.5. Getting started with managing your lists in the personal space

The **Personal space** feature is displayed as a tile on the start page. Use the personal space to quickly access your favorite items, procedures from the feature **Search** and templates from the feature **Storage**.

If you are a member of the dossier creation group, you can also access templates from the feature **Dossier creation**.

You can find the following lists in **Personal space**:

- **Search operations**: Directly access your favorite search operations or your search history.
- **Storage templates**: Directly access your preferred storage templates or templates for dossier creation.
- **Watched items**: Get an overview of the item you are watching.
- **Lists of favorites**: Organize your personal lists (favorites) and structure them by theme.

You can manage documents or dossiers that you work with frequently in separate lists. If, for example, you are working on two themes at the same time or on a project with time restrictions, you can use the **Add to list** context action (asterisk) to save documents and dossiers in separate lists. You can find the lists in the **Personal space** feature.

Suppose that you are working on a quotation for which you require information from various documents and dossiers. You can search for the relevant documents and dossiers using the **Add to list** context action and add the relevant elements to existing or new lists.

You can find your lists of favorites in the **Personal space** feature.

1.5.1. Watching events in search templates

This function is available only in the Business Edition.

You can keep yourself updated regarding changes done for d.3 items contained in your search templates. You can watch a couple of events so that you are notified, e.g. per e-mail, once there were changes.

By default, the following events are watched as soon as you enable the watch function:

- A new item was created.
- A document was updated.
- A note was added to an item.
- The properties of an item were changed by a user.
- The editing process for an item was finished.
- An item was deleted.
- The current version of an item was deleted.

Furthermore, you can select a number of different events, e.g. adding an item to a dossier or initiating a workflow.

Let's suppose, besides the default events you want to be informed, once an item is added to a dossier which resides in a certain search template.

This is how it works

1. Select **Search operations**.
2. Open the menu for context actions for the search template and select the gear next to **Watch**.
3. Select the **Child item was manually added to the watched item** event in the **Watched events** dialog, if you want to be informed once another user adds an item to a dossier.
4. Use **Save** to set the events for the search template.

1.5.2. Creating a search template

Search templates support you to easily find documents and dossiers during routing tasks. If you need to specify several properties and categories to find certain documents or dossiers, you can save the search operations including these criteria as search template. You can also define a search history as search template anytime.

A search template is a saved search operation, you can run, modify, and delete at any time.

You can save a complex search operation as search template by specifying first all criteria for the search and then save it.

This is how it works

1. Define the search criteria that you want your search template to contain and save the search.
2. Specify a title in **Create search template** and select a folder in which the search template is to be stored. If applicable, you can use the plus sign to create a new folder.
3. Select **Create new** action to save the search template.

You can find your search template in the **Search operations** perspective.

You can save your search criteria using the asterisk.

1.5.3. Creating a template for saving files

You save and manage, for example, complex storage operations for documents and dossiers with a storage template. The template contains values for the properties, which should be suggested for storage operations.

You can save a storage operation as a storage template by first specifying all criteria for the storage and then save it.

This is how it works

1. Select the feature **Storage**.
2. Define the storage criteria which should be contained in your storage template.
3. Click on the asterisk symbol to save the storage criteria as a template.
4. Specify a title in **Save as template** with which the template should be saved.
5. Select the **Create** action to save the storage template.

In the **Personal space** feature on the start page, you can find an overview of your storage templates, saved search operations, lists of favorites and watched items, for example.

1.5.4. Creating a new folder in "Search templates"

You can group search templates by creating folders in **Search operations** under **My search templates**. By grouping your search templates by topic or task, you can access individual search templates more quickly.

This is how it works

1. Select **Search operations**.
2. Open the menu for context actions next to the dossier under which you want to create a new dossier.
3. Select the **Create new folder** action and enter a name.

However, if you changed your mind and wanted to select another parent folder, select a different folder in **Create new folder** dialog.

1.5.5. Saving a storage template under a different name

You can modify the storage template criteria at any time. If you recognize that you frequently used modified criteria when saving documents or creating dossiers, it is worth saving this storage operation as a separate storage template under a different name.

This is how it works

1. Open the perspective **Storage templates** in the **Personal space** feature.
2. Select the desired storage template to display the storage criteria.

3. Change the entry.
4. Click on the asterisk symbol to save the storage template under a different title.
5. Specify a different title in **Save as template**.
6. Select the **Create** action to save the storage template with a different name.

1.5.6. Saving a search template under a different name

You can modify the search template criteria at any time. If you recognize that you frequently use the search with modified criteria, it is worth saving this search operation as a separate search template under a different name.

This is how it works

1. Select **Search operations**.
2. Click the magnifier icon next to the search template to view the search criteria.
3. Change the entries and save the search template.
4. Specify a different title in **Update or create search template**. You can also save the search template in a different folder or create a different folder using the plus sign.
5. Select the **Create new** action to save the search template with a different name.

1.5.7. Saving a search history item as search template

You notice that you are carrying out a particular search operation several times. The search operation was temporarily saved as search history item under **Search operations**. In this case, it is advisable to save the search history as a search template. You can then give the search operation a name and save it in a folder in order to find the template more quickly.

This is how it works

1. Select **Search operations**.
2. You can find the list with the performed search operations under **Search history**.
3. Open the menu for context actions next to the entry and select **Save as search template** action.
4. Specify a title in **Create search template** and select a folder in which the search template is to be stored. If applicable, you can create a new folder.
5. Select **Create new** action to save the search template.

You can find your search template under **My search templates**.

1.5.8. Sharing storage templates with a team

If you have a complex storage operation with numerous properties, you can save this storage operation as a storage template. Each time you want to store your documents or dossiers using the same storage criteria, use the storage template.

If you and your team often work with the same storage criteria, you can send your storage template to the team by copying the link to the clipboard. This function is available in the menu for context actions:

This is how it works

1. Open the perspective **Storage templates** in the **Personal space** feature.
2. Click on the three dots next to the saved storage operation and select **Copy link to clipboard**.
3. Insert this link into an e-mail, for example.

If the link cannot be immediately copied, a dialog appears where you can copy the link.

1.5.9. Sharing search templates in the team

If you work with complex search operations consisting of many properties and categories, you can store such a search operation as a search template. Each time you want to find your documents using the same search criteria, use the search template.

If you and your team often work with the same search criteria, you can send your search template to the team by copying the link into the clipboard. This function is available in the menu for context actions:

Let's suppose, you plan some days out of office and the person who stands in for you takes over your tasks. You want to send your delegate the search operations instead of listing each single criterion for each search operation.

This is how it works

1. Select **Search operations**.
2. Click next to the saved search operation on the three dots and select **Copy link to clipboard**.
3. Insert this link into an e-mail, for example.

If the link cannot be immediately copied, a dialog appears where you can copy the link.

1.5.10. Things to know about saved search operations

Saved search operations refer to both search templates and search histories. You can use a search template to save and manage complex search operations, for example. The search history contains the search criteria of your search operation and is created automatically.

You can save a search history entry as a search template with a name, update it and share it across your team.

1.6. Getting started with working with tasks

When working with tasks, you have the option of limiting your task list to specific results. This enables you to reduce the task list to the results which are important for the completion of your tasks.

The application supports your task search with the following options:

- **Filtering recipient lists**: You can limit the displayed tasks by selecting task recipients. You can choose between the items **Sent to me**, **Sent to me and others** and the name of any group of which you are a member.
- **Searching for contents**: To filter the task list by contents, enter a keyword in the input field and confirm your input. The search includes the properties **Subject**, **Sender**, **Context** and task-specific metadata.
- **Sorting the task list**: You can sort the task list by applying the filters **Received**, **Subject**, **Sender**, **Priority** or **Due**. You can also use the sorting order button to reverse the order of the list of results.

1.6.1. Defining a delegate for certain task types

In your profile, you can specify a default delegate who can manage your tasks while you are absent. Your default delegate can manage all your tasks by default.

In your organization, there may be task types that are always handled by a particular user. In this case, you have the option of specifying a user other than your default delegate for certain task types. To be able to specify a different user, your administrator must have already created a delegate rule for the task type.

Let’s assume you want to specify a user other than your default delegate for tasks of the “Invoice” type. Your administrator has already created a delegate rule called “Invoice” for this task type.

This is how it works

1. Open the **Configuration** feature.
2. Under **Task settings**, select the entry **Manage delegates** .
3. For the “Invoice” delegate rule, enter a user to stand in for you under **Delegate**.
4. Save your changes.

If you enter nothing for a task type, your default delegate will manage these tasks.

1.6.2. Withdrawing a task already adopted by another user

Tasks can be sent to multiple recipients or groups. In addition, multiple users can have access to a task, e.g. due to delegations or the release of task lists. However, a task sent to multiple users can only be edited by one user at a time. If a task you have to edit is already being edited by another user, you can withdraw the editing from the current user.

This is how it works

1. Select the three dots (**More actions**) and click **Show tasks processed by other recipients**. You will now find tasks in the task list that are currently being processed by other users.
2. Select the respective task.
3. Select **Withdraw task**.

You are now the assignee of the task yourself.

1.6.3. Creating a task for a document

You can create a task based on a document in order to automatically add the document to the task as an attachment. Creating a task for a document can be helpful if you want to have a document checked by an employee, for example.

This is how it works

1. Open the document, e.g. from the list of search results.
2. Select **Create task for document**.
3. Enter one or multiple recipients.
4. Optionally, select **Deliver individual task to every assignee** to assign a separate task to each assignee if there are multiple assignees.
5. You also have the option to enter advanced properties.

If you create the task for one or more employees, it is helpful to specify advanced properties for editing the task. For example, you can enter a description to give your employees more detailed information about the task.

1.6.4. For experts: Displaying the task lists of other users

You can view the task lists of other users if you have been assigned the **Administrator** role. To view the tasks of another user, choose **Show task list of another user > Administer task lists** and then enter the name of the user.

1.6.5. For experts: Excluding delegation for certain task types

In your absence, your delegate can manage your tasks. If you do not want tasks of a certain type to be viewed or edited by your delegates, you can exclude these task types from delegation using a delegate rule. These task types can then no longer be managed by any other user.

If a task meets the criteria for excluding delegation, it can never be viewed or edited by a delegate. Even if another delegate rule would allow this type of task to be managed, the delegation exclusion overrides this other rule.

If you have been assigned the **Administrator** user role, you can exclude certain task types from the delegation.

Let’s assume you want to exclude all tasks with the context “HR” from delegation.

This is how it works

1. Open the **Configuration** feature.
2. Under **Task settings**, select the entry **Delegation rules**.
3. Add a new entry.
4. Use a unique name for the task type, e.g. “HR”.
5. Select the **Context** property and enter **HR** as the comparison value.
6. You also have the option of adding further conditions that the tasks must fulfill. For example, you can enter the metadata “Location” and the comparison value “Berlin” to limit the delegation exclusion to HR processes for this location.
7. Confirm the dialog.
8. Disable the **Delegation possible** option so that delegation is prohibited for this rule.
9. Save your changes.

Tasks of this type can now no longer be delegated.

1.6.6. For experts: Defining delegate rules for certain task types

You can specify a default delegate for your tasks for when you register as absent. Your default delegate can manage all your tasks by default.

However, there may be situations in which you want to specify a different user as your delegate for certain task types. Specifying another user as your delegate can be useful if you want the user to stand in for all tasks with the context “Invoice”, for example.

If you have been assigned the **Administrator** user role, you can define delegate rules that allow users to specify one additional delegate per delegate rule.

Let’s assume you want to create a delegate rule for all tasks with the context “Invoice”.

This is how it works

1. Open the **Configuration** feature.
2. Under **Task settings**, select the entry **Delegation rules**.
3. Add a new entry.
4. Use a unique name for the task type, e.g. “Invoice”.
5. Select the **Context** property and enter **Invoice** as the comparison value.
6. You also have the option of adding further conditions that the tasks must fulfill. For example, you can enter the metadata “Location” and the comparison value “Berlin” to limit the delegate rule to invoices for this location.
7. Confirm the dialog.
8. Save your changes.

All users now have the option to configure a specific delegate for this delegate rule.

1.6.7. Tip: Completing tasks as a delegate

When working in teams, it can be useful to appoint a delegate for tasks delivered solely to you. If you were specified as a delegate by another user, you can stand in for this user and manage their tasks. You can display the user’s task list when they have registered as absent.

Let’s assume you have a colleague named Martin Bauer who has named you as his delegate. He registered as absent, and now you want to manage his tasks.

This is how it works

1. Open your task list.
2. Click **Show task list of another user**.
3. Select Martin Bauer from the **Delegate for** menu to view all tasks that were sent to him as the sole recipient.
4. Select a task to display it.

You can now complete the task yourself or forward it to another person.

1.6.8. Forwarding a task to another user

Situations may arise in which you want to forward one of your tasks to a co-worker. Let's assume you opened the attachment of a task and found out that you are not the recipient for the document. You have the option of forwarding the task to another user.

This is how it works

1. Select the task in the task list.
2. Select **Forward**.
3. Enter the name of the user in the input field and select him/her.
4. Optionally, enter a comment for forwarding.
5. Select **Forward**.

1.6.9. Useful information about task lists

When working with tasks, you can select different task lists. Using different task lists enables you to always find the exact tasks you need to complete your work. Which task lists are available to you will depend on whether you are a member of a group and whether you are responsible for certain task types. The **My tasks** task list is selected by default.

You can select other task lists from the drop-down list. The task lists are grouped according to the groups available to you, your activities and the tasks you are responsible for.

Available groups

The child task lists contain all tasks for which you are entered as recipient. You can select between the following task lists:

- **My tasks:** This task list contains all tasks that have been sent to you.
- **Sent to me**: This task list contains all tasks that were sent only to you.
- **Sent to me and others**: This task list contains all tasks that were sent to you and other users.
- **My planned tasks:** The task list contains all tasks that are already planned for you and will be sent to you in the future.

If you are a member of a group, you can also select a task list with the same name as the group. A separate task list is displayed for each group. This task list contains all tasks sent to the particular group.

My activities

When you complete or forward a task from your personal task list, it no longer appears in your task list. If you still want to keep track of these tasks, you can use the child task lists for created, forwarded and completed tasks:

- **My created tasks:** This task list contains all tasks that you created.
- **My forwarded tasks:** This task list contains all tasks that you have forwarded.
- **My completed tasks:** This task list contains all tasks that you have completed. Completed tasks are displayed only until the end of their retention period.

My responsibility

If you are responsible for a specific task type, you can select an additional task list for this task type. Which tasks are displayed in this list is determined by the responsibility rules. The name of the task list is the same as the name of the corresponding rule.

1.7. Getting started with scanning paper documents and recording e-mails

You can use the feature **Scan** to import new documents into a batch or combine existing documents. You can process documents further using a batch. Once a batch has been completely processed, you can transfer it to a specialized process for safe storage or further processing. These systems or processes are called target systems.

You can download the documents in a batch onto your computer by default. Depending on the other services in your company, you can select additional target systems to which you can transfer the documents.

So-called import batches or batches are used to import documents. A batch represents a processing operation. A processing operation can be an imported document, for example, or all the paper documents that have been collected throughout the day and that will be scanned tomorrow morning. These batches are used to prepare documents that are transferred to external systems or special processes.

1.7.1. Creating and completing a new batch

You need to create a new batch to begin importing receipts or documents. On the start page, click **Scan**.

A new batch is created. You will see the details of the batch and can use it for further processing.

You can import files from the file system.

This is how it works

1. In the opened batch view, select the file system (folder icon) as the source.
2. Choose whether to import the file as a new document or attach it to the last document.
3. Add files by using drag & drop.

You have successfully imported the files. You see a summary of all the pages of a document as a preview so you can continue processing.

If the batch is empty, you can also add files directly through the drop zone.

When you upload multiple documents at once, document separators that you did not add yourself may be inserted automatically. The software detects the start of new documents and sets document separators accordingly. Naturally, you still have the option of adding or removing any document separators manually.

After you have imported all the pages into a batch, check whether the documents in the batch still need to be post-processed (for instance, rotating or adding document separators). If the batch satisfies your requirements, you can finish the import. The documents are then subjected to an analysis process. Once you finish importing a batch, you can no longer post-process the batch.

To complete the import, click **Complete import**.

Start the document processes as soon as you have finished the import and after all the page analyses have been completed. During the document process, a category is automatically assigned to the document. For some categories (such as invoices), properties are automatically extracted during the process and assigned to the document.

1.7.2. Opening existing batches

You must open the batch containing the documents to further edit documents imported by other team members or to edit your own documents that have not been exported yet.

Open **Batch** on the start page and click the batch you would like to edit.

1.7.3. Downloading documents in a batch

Once you complete the import, you can download the documents immediately for further processing.

This is how it works

1. Select the documents you would like to save.
2. Click on the button **Save** (the disk symbol) or **Save current document**.
3. Select **Download file** as the target system.
4. For every document, select whether the document should be deleted from the batch after the export.
5. Click the button **Download and close**.

The selected documents are downloaded. If you process multiple documents, they are provided in a ZIP file. Depending on the settings you select, the exported documents are deleted from the batch.

1.7.4. Post-processing: Changing a document name in a batch

You can rename documents to provide a more descriptive name, for example.

This is how it works

1. Open the properties of a document using the pencil symbol on the first page of the document.
2. You can change the document name under **Document**.
3. Click **Savechanges** to save your changes.

1.7.5. Post-processing: Rotating pages in a batch

When you import documents, the pages may be rotated the wrong way. You can rotate the pages to make them readable. You can rotate pages 90° to the left or right.

This is how it works

1. Select the pages you want to rotate.
2. Click the button for rotating pages in the toolbar.

You have successfully rotated the pages. You can repeat this process as often as you need.

1.7.6. Post-processing: Adding document separators in a batch

Before the export, you can determine the point at which the imported pages are separated into individual documents. To do this, add document separators. You can also use the document separator to export several documents from a batch at once.

This is how it works

1. Position your mouse pointer at the space between two pages where you want to add a document separator.
2. Click on the plus sign that appears between the pages on a dotted vertical line.

When you upload multiple documents at once, document separators that you did not add yourself may be inserted automatically. The software detects the start of new documents and sets document separators accordingly. Naturally, you still have the option of adding or removing any document separators manually.

1.7.7. Post-processing: Correcting completed batches

You can reset the status of a batch, for example to resume editing of documents that have been incorrectly merged.

This is how it works.

1. Click the symbol for resetting a batch in the toolbar.
2. Make all the desired changes to the documents.
3. Finish importing the batch.

1.7.8. Post-processing: Deleting pages in a batch

Delete the pages you do not need in a batch.

This is how it works

1. Select the pages you would like to delete.
2. Click on the trash bin icon in the toolbar near the documents and confirm the action.

The pages are no longer part of the batch.

1.7.9. Post-processing: Manually assigning categories and properties (in document batches)

You can assign documents to different categories and properties for subsequent processing or storage. In addition to automatic assignment through self-learning programs and artificial intelligence, you can also assign them manually.

To manually assign categories and properties, first make the desired changes to the documents. Once the import is complete, you can no longer make changes to the document. You can then edit the categories and properties. While modifying the values, you receive assistance based on the data types to which the properties are mapped.

The available data types are:

- Text (alphanumeric)
- Numeric value (numeric)
- Date
- Date and time
- Currency

This is how it works

1. Click a page in the document to which you want to assign categories and properties.
2. Change the categories and properties accordingly, or add additional properties.
3. Delete any unnecessary properties.
4. Click on **Save changes**.

1.7.10. Post-processing: Moving pages within a batch

If you want to combine documents or if pages were imported in the wrong sequence, you can move individual pages. You can move pages to the right or left of their current position.

This is how it works

1. Select the pages you would like to move.
2. In the toolbar, click the arrow symbols to move a page in the direction in which the arrow is pointing.

If you move pages from different documents or pages that are not consecutive, they will be positioned beside each other after you move them.

1.7.11. Storing scanned documents in a document management system

Once you complete the import, you can transfer the documents to a target system.

This is how it works

1. Select the documents you would like to save.
2. Click on the button **Save** (the disk symbol) or **Save current document**.
3. Select the desired target system.

The selected documents are transferred to the target system.

1.7.12. For experts: Adding a scanner

As a professional administrator, you can check the settings for certain scanner models and change them as necessary. Only the approved scanner models can be used.

You can create your own entries for scanner models.

This is how it works

1. Click **Configuration** on the start page.
2. In the **Incoming mail** category, click **Approve scanner models** under **Scan**.
3. Click on **New**.
4. Enter a regular expression under **Product name** and **Driver version**.
5. If the entry should not be considered, remove the checkmark under **Activated**.
6. Save the entry.

1.7.13. For experts: Sharing scanners on the network

As a professional administrator, you can share scanners in the network with other users. Shared scanners are visible for all users. You can add the scanners to the list of favorite scanners and use them, even if they are connected to another computer in the network.

You must share the specific model of a scanner before it can be used by other computers.

This is how it works

1. Search for the scanners you would like to share.
2. Click the symbol for sharing.

If the scanner model of this scanner is not available in the list of approved scanner models, you can have an appropriate entry for the scanner model added automatically. Click on **Add scanner model**.

1.8. Getting started with sharing documents with other people

You can work on documents in your document management program together with other people. By using the function for sharing documents, you can share your documents with other people. Make documents available for customers, suppliers, or partners so they can view or edit them. You can apply changes that external persons make to documents later to maintain a consistent state for the documents.

The function for sharing documents outside your organization is available only with d.velop documents business.

1.8.1. Sending a document copy by e-mail

If you want to make documents available to other persons from the document management program, you can also send these documents as e-mail attachments.

This is how it works

1. Search for and open the document that you want to share.
2. Click the context action **Share** ( ).
3. Select the **Send copy** option. An e-mail with the document as an attachment is generated and stored in your download directory.
4. Open the e-mail from the download directory.
5. Enter the recipient or adapt the message to your requirements.
6. Click on **Send**.

1.8.2. Sending a link to a document by e-mail

If you want to make documents available to other persons from your document management program, you can also send the link to the document as an e-mail.

This is how it works

1. Search for and open the document that you want to share.
2. Click the context action **Share** ( ).
3. Select the **Send link** option. An e-mail with the link to the document in its message is automatically stored in your download directory.
4. Open the e-mail from the download directory.
5. Enter the recipient or adapt the message to your requirements.
6. Send the e-mail.

1.8.3. Sharing documents outside your organization

This function is available only in d.velop documents business.

If you want to make a document available to a person outside of your organization, you can share it.

This is how it works

1. Search for and open the document that you want to share.
2. Click the context action **Share** ( ).
3. Select the **External sharing** option.
4. Choose whether the external person is permitted only to read the document or also edit it.
5. Select the period for which the document is to be shared.
6. Click **Share**.

After you have shared the document, you can see the link to the shared document. You can copy this link to the clipboard and make it available to other people. Alternatively, you can also send an e-mail containing the link.

1.8.4. Updating documents that you have shared with external people

This function is available only in d.velop documents business.

You can grant editing rights for a shared document to external persons. The external person can download your document and then upload an edited version.

If an external person edits a shared document, the document is not automatically transferred back to your document management program. The person who shared the document decides which changes are applied.

If an external person has edited a shared document, you can view the update by the external person and transfer it back to your document management program.

This is how it works

1. On the start page, click **Shared documents**. If changes were made by external persons, the icon appears next to a document.
2. Click the icon next to the shared document.
3. Check the changes by the external person using **Show changes**.
4. Click **Update document**.
5. Click on **Save**.

You have updated the document with the changes made by an external person.

1.8.5. Managing shared documents

You can view all the documents that you have shared. You can send links for sharing documents to other people again.

This is how it works

1. On the start page, click **Shared documents**.
2. Select the shared document from the list.
3. Click the icon.

1.9. Frequently asked questions about working with d.velop documents

Learn some useful things to know about the various aspects and functions.

1.9.1. Can I group, filter or sort by a keyword function and use a column function for a multi-value property at the same time?

With the keyword function you can define your own keywords for an item, e.g. for an individual categorization.

When you use the column feature for a multi-value property, the keyword property does not resolve to a row in the search results. Grouping, filtering or sorting by the keyword property is not possible in this case. The keyword function does not have a line number, but three dots (...).

The same applies to grouping, filtering or sorting multi-value properties: When you use the column function for a keyword function, the multi-value properties are not resolved row by row. Accordingly, you cannot group, filter or sort by multi-value properties at the same time.

1.9.2. Does the use of uppercase and lowercase spelling matter in the search?

No, it does not matter whether you use uppercase or lowercase letters. The search is case insensitive.

For example, you get the same result whether you search for **instrument panel** or **INSTRUMENT PANEL**.

1.9.3. Why can I not see the context action “Combine into PDF file”?

You would like to collect individual documents in a PDF file. However, if you selected a document in the result list, the details of the document are displayed with all perspectives. The context action **Combine into PDF file** is not available in this view. You need to go back one step using the breadcrumb navigation so that you can view the result list again. The context action is available again.

1.9.4. Why are certain categories shown to me first when storing?

When you save items manually in your d.3 repository, always indicate a category first. To allow you to find frequently used categories more quickly, the recently selected categories are displayed at the top position in the category selection. The order corresponds to the order you used the categories during the last storage tasks. The other categories are displayed below in alphabetical order.

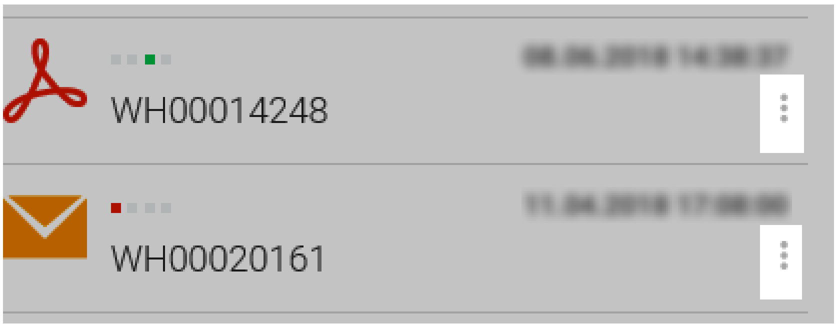
1.9.5. What is a context action?

Context actions are functions which are only available to you if the function is useful in this specific context. For example, you can download documents to your local disk, thus, in the context of a document in the result list, you can find the function for downloading items. However, dossiers are a kind of sleeve (logical parenthesis) around documents in the real world as well. For your work purposes, the documents are of importance, while the ring binder is a means to thematically bundle documents. Thus, it does not make sense to offer the download function for a dossier in the digital world.

You can only see the context action if you can use the function. The advantage is that the user interface is easy to oversee and clearly structured. You can decide more quickly what to do because the number of options is customized according to the context.

You can find the context actions for a selected item positioned laterally at the screen margin. By default, the context actions are displayed as icons. Point to the icon using the mouse, the function is displayed as text. Use the double-headed arrow to display the context action with the text or part of the text so that you can identify the icons more quickly.

The context actions for an item are combined in a menu for context actions so that you can directly perform the actions for an item. You can tell the menu for context actions by the three superimposed dots.



The context actions which are only present in an integrating application, e.g. in Microsoft Outlook, are not available in the menu for context actions.

1.9.6. What is a generated document?

A long with the original file (e.g. in Word format) for a document, you can also find so-called generated files (e.g. in PDF format) in a d.3 repository. Generated files reflect the contents of the original file.

If you want to download a document using the context action **Download**, you may also download additional formats (generated file) besides the original file.

1.9.7. What are activities?

Activities provide you with a summary of the changes that were made to your items and who made the changes. There are two ways to access information about activities: You can display either your own personal activities or activities related to individual items.

The overview of your personal activities shows you the changes that you made recently. When you view the activities related to an individual item, you can track which user made which changes at which time.

The activities are summarized and displayed for you in a list of changes. You always see the most recent change first. All the other activities are displayed in descending order sorted by the time at which the change was made.

If you search for a specific activity, you can filter the list based on time periods, content or area. You can also change the view of the list from the default view to the advanced view. The advanced view provides you with additional change information about an item. Select an activity from the list to view the details of the change.

1.9.8. What are general and advanced properties and categories?

Items are always stored with a number of properties in a certain category. The properties of a document are characteristics that, for example, help to find a document easily. There are the so-called common properties and advanced properties. By default, the common properties are generated when an item is stored in a d.3 repository. Common properties are, for example, the creation date, the owner or the document number. These properties cannot be edited. Each enterprise or organization can in addition define advanced properties, for example "Invoice number", "Due date", "Project number", "Project title", which helps to identify, store and find items.

Besides the properties, there are categories as another characteristic feature to organize items in a repository. Categories can be, for example, document types (travel cost settlement, e-mail, procurement application) oder dossier types (personnel dossier, dossier with the name of a customer).

1.9.9. What is searched during a full-text search?

A full-text search not only searches the full texts of the documents but also all the document metadata:

- System properties such as the document number, creator, timestamp for document changes and editing, etc.
- Comments and notes
- All the advanced property fields that were created for the documents

This information is searched to the same extent as the full texts to return as many results as possible.

1.9.10. What short forms for date entries can I use when storing or searching?

In the storage dialog or when entering search criteria, you have the following options for entering dates quickly using wildcard characters, letters, and numbers:

- **Hash (#)**: In date fields, you can specify the current date by entering a hash mark. In date/time fields, the current time is also included.
- **Ordinary number**: A single month of the current year is specified by the according number of the month. The number 1 corresponds to the month January, the number 9 corresponds to the month September accordingly.
- **"W" followed by an ordinary number**: A week of the current year is specified by the letter **W** for the week followed by the number of the week. The short form **W5** (no space) corresponds to the fifth week of the current year.
- **"Q" followed by an ordinary number**: A quarter of the current year is specified by the letter **Q** for the quarter followed by a number (no space).
- **Four-digit number**: A complete year is specified a four-digit number.

If you work in teams across your organization that resides in various time zones, you need to consider that the time zone of the d.3 server is used for the dates. This means, for example, that the time specification "today" (#) for a co-worker in Japan differs in results from those results a co-worker in Germany finds.

You can combine the short forms for week (**W**) and quarter (**Q**) with a four-digit number for the year.

For example, you want to search for documents that were updated in a certain week in the year 2013, you can specify the following search pattern in the field of the common property **Last modified**: **KW22013**

1.9.11. Which media and file formats can I display?

You can view a range of different file formats in the **View** perspective. You can open some file formats, such as Microsoft Office files, in their corresponding application.

You can view the following file formats and media in the **View** perspective by default:

- **Video file**: depending on the video format supported in your browser, e.g. MP4 format (Codec H.264).
- **JPG image file**
- **PC Paint Brush file (PCX)**
- **BMP image file**
- **JPEG image file**
- **TIFF image file**: no compression or with FaxG4, LZW, JPEG or PackBits compression.
- **PNG image file**
- **TXT file**
- **PDF file**
- **Microsoft Word**
  - For on-premises systems, the DOC, DOCX and DOCM file formats are displayed in the viewer.
  - In the d.velop cloud, they are displayed with Microsoft 365.
- **Microsoft Excel**
  - For on-premises systems, the XLS, XLSX and XLSM file formats are displayed in the viewer.
  - In the d.velop cloud, they are displayed with Microsoft 365.
- **Microsoft PowerPoint**
  - For on-premises systems, the PPT, PPTX and PPTM file formats are displayed in the viewer.
  - In the d.velop cloud, they are displayed with Microsoft 365.

Depending on the available features, you can display the following file formats:

1.9.12. How do I activate two-step login?

If your administrator has activated two-step login, you can log in using a mobile device with the aid of a TOTP-compatible authentication app (e.g. the Google Authenticator app).

There are two ways to use two-step login: You may be prompted to do so by the software and guided through the settings. If you are not prompted to use two-step login, you can provide the necessary settings in the configuration yourself.

This is how it works

1. On the start page, open **Configuration**. Under **Login settings**, click or tap **Settings for two-step login**.
2. Click or tap **Activate the two-step login**.
3. Follow the instructions, write down the one-time deactivation code and store it in a safe place. You will need the one-time deactivation code to deactivate two-step login if you lose your phone, for example.
4. Click or tap **Check and activate**.

Once you click **Check and activate**, two-step login is activated. You will now need your mobile device to log in, by entering the code displayed for this website.

1.9.13. How do I work with the dashboard?

With the dashboard, various d.velop documents functions are available to you as widgets. The widgets are based on existing features of the start page (e.g.**Search** or **Personal space**), but they provide you with additional functions.

The following widgets are available for your personal dashboard:

- **Search**: Search using a search bar. You can search for documents in all available categories via full-text search. The search results are displayed as usual. Click on the header of the widget to open the search dialog.
- **Recently edited**: View a list of your recently edited items. You will find items there that you have recently imported or for which a new version is available. In this context, e.g. status changes, adding notes, changing properties or adding or editing comments do not count as editing an item.
- **Watching**: View a list of your watched items. You will find items there for which you are using the **Watch** function. Click on the header of the widget to view all watched items from **Personal space**.

- **Favorited**: View a list of your favorite items. You will find items there that you have saved under **Favorites**. Click on the header of the widget to view all items from the list of favorites.

For the **Recently edited**, **Watched** and **Favorited** widgets, you will find information like title, date of last edit and type of the item as usual. You can open a preview with a click and view the details if needed.

1.9.14. How do I end the validity period for the link to a shared document?

This function is available only in d.velop documents business.

Document sharing is ended automatically after the selected time period passes. However, you can also manually stop sharing the document before the time passes.

This is how it works

1. On the start page, click **Shared documents**.
2. Select the shared document from the list.
3. Click the icon to stop sharing the document.

Document sharing is ended immediately and any persons that have the link to this document can no longer access the document.

1.9.15. How do I deactivate two-step login?

If you have lost your mobile device or if it is not working anymore, then you can deactivate two-step login yourself with the aid of a deactivation code.

However, if you simply no longer want to use this login procedure, consider the following and consult your administrator where applicable:

> **Warning**
>
> Deactivating two-step login always makes the login process less secure and should therefore be done only in exceptional circumstances. To deactivate it, you require a valid deactivation code or a valid code from the authentication app you use (e.g. the Google Authenticator app).

Let's say you have lost your mobile device or it is no longer working – if so, you can deactivate two-step login in a couple of steps using the deactivation code. You received the authentication code when you activated two-step login, and have stored it in a safe place.

This is how it works

1. On a different device (e.g. a computer), connect with your d.3ecm system environment as usual to log in.
2. While logging in, enter the one-time deactivation code instead of the two-step login code.

Once you have confirmed the deactivation code, two-step login is deactivated.

Let's say you decide that you no longer want to use your mobile device to log in – if so, you can deactivate two-step login on the mobile device yourself using the Authenticator app.

This is how it works

1. First, log in to your d.3ecm system environment in two steps as usual.
2. Open **Configuration** on the start page.
3. Under **Login settings**, click **Settings for two-step login** and then **Deactivate the two-step login**.
4. Enter the current code from your Authenticator app or the deactivation code and tap **Check and deactivate**.

Two-step login is now deactivated.

If you do not have access to your deactivation code or Authenticator app, you can ask your administrator to deactivate two-step login for you.

1.9.16. How do I create and manage thematic lists?

You can manage documents or dossiers that you work with frequently in separate lists. If, for example, you are working on two themes at the same time or on a project with time restrictions, you can use the **Add to list** context action (asterisk) to save documents and dossiers in separate lists. You can find the lists in the **Personal space** feature.

Suppose that you are working on a quotation for which you require information from various documents and dossiers. You can search for the relevant documents and dossiers using the **Add to list** context action and add the relevant elements to existing or new lists.

You can find your lists of favorites in the **Personal space** feature.

1.9.17. How do I export the properties for the contents of a dossier?

If you open a dossier in the result list, you can immediately view a complete overview of the dossier including the dossier structure, the contents of the dossier and the detail view of the dossier. You can export the properties for the items from the dossier contents as follows:

This is how it works

1. Navigate back to the navigation bar, which closes the detail view.
2. Click the **Export properties** context action.
3. In the dossier contents, select the items whose properties you want to export.
4. Start the process by clicking **Export properties**.

1.9.18. How do I find documents with a due date in the future?

You can use wildcards in date fields to dynamically calculate time periods in the future while the today's date is your point of reference. The date fields are properties that only contain a date. In general, you can enter a concrete date in a date field and thus specify a time period. If you use the search pattern **{<number_of_days>}** or **{<number_of_days1>}..{<number_of_days2>}**, the exact date of the time period is irrelevant.

The search pattern **{14}** in the **Due date** advanced property finds all documents which are due in 14 days (deadline), namely calculated as of today. However, if you want to determine a completed time period in the future, just compose a search pattern by combining the number of days in the braces. The search pattern **{14}..{3}** finds all documents which are due in the time period in 3 days up to in 14 days, namely calculated as of today.

This is how it works

Let's suppose, you are working in the Accounting department and at a certain deadline (today) in the month, you want to review the invoices which are due in 14 days. For review purposes, your organization set up the date field as **Due date** property.

1. Select a category, e.g. **Invoices** in the **Search** feature.
2. Enter the search pattern **{14}** in the **Due date** property.

As a result, you get the invoices which your organization need to settle on the 14th days (deadline) in the future, calculated by today's day.

Determining a completed time period in the future is just as easy.

This is how it works

Let's suppose, you are working in the Accounting department and at a certain deadline (today) in the month, you want to review the invoices which were already received, but which are only due in 3 up to 4 weeks. For review purposes, your organization set up the date field as **Due date** property.

1. Select a category, e.g. **Invoices** in the **Search** feature.
2. Enter the search pattern **{21}..{28}** in the **Due date** property.

As a result, you get the invoices which are due in 3 up to 4 weeks.

1.9.19. How can I merge multiple documents into one PDF file?

In some situations it might be helpful to collect document in a simple and readable format and provide it locally or send it in a separate e-mail. You can collect documents in a kind of container. The container is a PDF file in which the documents are embedded. On the cover sheet of the generated PDF file, you can view the title of the contained documents. The exported documents are inserted as attachments into the PDF file. You can view the PDF file with any PDF reader which also supports attachments in a PDF file, e.g. Adobe Acrobat Reader DC.

You can select several documents simply with **Combine into PDF file** and export only the selected items into a PDF file. The items can be part of a search result, your favorites or the content of a dossier. Dossiers cannot be exported. If you selected dossiers by chance, the dossiers are not embedded into the PDF file.

Supposed, a team member wants to have a look at the current version of all invoices of a customer in a given time period and wants to save them on a local disk to take them where needed. You would like to send an e-mail containing these documents in the current version.

This is how it works

1. To export only a subset of your search result, use the context action **Combine into PDF file**.
2. Use the checkmark at the top position to deselect all items so as to select the relevant documents in the list for export.
3. Confirm the selected items using the **Combine into PDF file** action; the items are then supplied for you.
4. Click or tap on **PDF file** in the **Download** dialog to generate the file.

As soon as the PDF file is generated, you can open the PDF file with a PDF reader or save it locally. Since the embedded documents can have different formats, it is helpful if the applications required to read the documents are available on the PC.

You can find further information on merging PDFs in the d.velop documents collector user manual.

1.9.20. Where can I find activities related to documents and dossiers?

To keep track of the changes made to an item, you can display the activities related to each item individually.

Let's assume you want to find out what changes were made to a specific item.

This is how it works

1. Open the item whose activities you want to display.
2. Click **Activities**. A list of the recent changes made to the item is displayed.
3. Select an entry from the list to display additional details about the change.

1.9.21. Where can I find my personal activities?

To keep track of the changes you have made to items, you can display your activities related to various items.

You can find your activities on the **Activities** feature on the start page. The feature lists your personal activities. Select an entry from the list to view additional details about the relevant change.

1.9.22. Where can I define my own settings for functions?

On the start page, you can configure personal settings for a number of different features under **Configuration**. For instance, you can appoint a substitute for tasks, manage scanners or define a different order for the tiles on the start page.

The options available to you for defining your own settings depend on what has been made available to you in your organization and which authorizations you have.

1.9.23. What is the purpose of keywords in the properties of a document?

You can use keywords to create your own thematic areas or task-based thematic areas, independently of structures and categories. Keywords also help you to find the appropriate documents for a theme quickly.

You can add terms under **Keywords** in the **Properties** perspective or in the search or storage dialog box.

1.9.24. What is the purpose of the perspective "Process"?

If your task is part of a digital business process, you can see the **Process** perspective in the task details. This perspective gives you an overview of the process history so far. You can see e.g. who started the process and which tasks have already been completed or forwarded. If a process protocol exists for the process, you can still see the perspective after completing or forwarding your task.

1.9.25. How can I use the search to display all documents?

You can use the search to display all documents by searching with the asterisk (*).

1.9.26. How do I customize the color theme?

You can adapt the color design of the applications to suit your requirements.

This is how it works

1. Open the **Configuration** feature on the start page and navigate to the **Appearance** category.
2. Under **Appearance**, select **Theme selection**.
3. Select an appropriate theme. A light, a dark and a high-contrast theme are available by default. You can also select the **System settings theme** option to adapt the theme to your operating system settings (light or dark).
4. Click **Apply**.

As an administrator, you can lock, share, or create custom themes for your organization.

1.9.27. You can find further information on merging PDFs in the d.velop documents collector user manual.

Some components of d.velop documents use deep learning technology for the automated processing of documents. Image and text information from your documents is used to continuously improve the services. In order to do so, we store extracts of your documents in a secure, encrypted account for a maximum duration of 90 days.

You can object to the use of data at any time. The setting applies to all documents and repositories in your tenant. If you revoke the use of data, you can prevent data that is particularly sensitive from being used for deep learning training (e.g. documents that fall under Art. 9 of the GDPR).

Let's say you want to revoke your consent to the use of data by deep learning services.

This is how it works

1. Open the **Configuration** feature.
2. In the **Document management** category, under **Administration**, click **Improvement of deep learning features**.
3. Select **Configure processing of your data for improving deep learning features**.
4. Disable **Allow processing of data for improving deep learning features**.
5. Click **Save** to apply the changes.

This will immediately prevent your data from being saved and used to improve all relevant deep learning-based services. Please note that this setting only affects the use of your data for training our deep learning-based services. The respective services are still available to you. However, they will no longer adapt to your usage or documents.

Further information on the use of data by d.velop AG can be found in the privacy statement for d.velop cloud and in the statement of work for d.velop documents.

1.10. Tips and tricks

You can find out more about tips on functions and tips for making your work easier in this section.

1.10.1. For experts: Activating feature previews

You can use feature previews to try out functions in advance. You can find all available feature previews with corresponding descriptions in a central overview.

Using feature previews, you can make new and modified functions available for your organization to preview in your client.

This is how it works

1. Open the feature **Configuration**.
2. Navigate to **Miscellaneous > Feature preview > Enable and disable.**.
3. Select the feature preview you would like to use.
4. Activate the feature.

After refreshing the website or logging in to the client again, the feature preview will be available for your organization. You can deactivate the feature preview in the same way.

1.10.2. For experts: Giving feedback

You can give feedback on a feature preview if the integrated feedback function is activated for the corresponding feature preview.

This is how it works

1. Open the feature **Configuration**.
2. Navigate to **Miscellaneous > Feature preview > Enable and disable.**.
3. Click on the feature preview for which you would like to give feedback.
4. Click **Give feedback**.

You can then open a draft in your e-mail inbox in which the address data and subject are already automatically inserted. Add your feedback and send the e-mail to the address specified.

1.11. 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.