

# d.velop

d.velop documents collector:  
Administrator

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# 1. d.velop documents collector: Administrator

## 1.1. Basic information about the application

This chapter contains product notes and general information.

### 1.1.1. About d.velop documents collector

With d.velop documents collector, you can combine multiple documents from the repository into a newly created PDF file.

#### Notice

When creating the export, you can only include documents that are either PDF files or for which a PDF version exists in the repository.

## 1.2. Install and Uninstall

This chapter provides information on installing the application.

### 1.2.1. System requirements

The system requirements for d.velop documents apply.

#### Notice

Please note that d.velop documents collector is not cluster-capable. In a cluster environment, install d.velop documents collector on only one node.

### 1.2.2. Installing d.velop documents collector

You install the software exclusively using d.velop software manager. d.velop software manager automatically installs all components which you require to operate the software.

You can find more information in the documentation for d.velop software manager.

### 1.2.3. Installing updates for d.velop documents collector

You can only update the software using d.velop software manager.

You can find more information in the documentation for d.velop software manager.

### 1.2.4. Rolling back an installation of d.velop documents collector

You can restore an earlier version of the software that you installed with d.velop software manager. During this process, the software is only reset to a previous version.

You can find more information in the documentation for d.velop software manager.

### 1.2.5. Uninstalling d.velop documents collector

The software you installed using d.velop software manager can only be uninstalled with d.velop software manager. If the software to be uninstalled has dependencies with other software packages, you must resolve these conflicts accordingly.

You can find more information in the documentation for d.velop software manager.

### 1.2.6. Opening the default port

The port for d.velop documents collector is dynamically determined from the range specified in the `config.json` file located in the installation directory at `...\d3\documentscollector`.

## 1.3. Configuring the export options

Configuration is performed in the administrative area of d.velop documents. You will need the appropriate administrative permissions.

### This is how it works

1. On the d.velop documents start page, click **Configuration**.
2. Go to **Export > Export options**.

### Notice

When you open the export options for the first time, the default configuration will be displayed.

### 1.3.1. Defining additional configurations

In addition to the default configuration, you can create additional configurations to meet various requirements for creating a document collection.

### This is how it works

1. In the configuration area, enter a descriptive title under **Configuration name**.
2. Click **Add**. You can then customize the configuration or select another configuration to edit under **Configurations**.
3. Click **Save** to save your configuration.

### 1.3.2. Setting the default configuration

Using **Default configuration**, you can specify which configuration should be automatically selected during export. You can choose from all available configurations.

### 1.3.3. Integrating information and pages into the document collection

Under **Additional pages**, you can integrate information or pages into the document collection. Below you will learn about the options available to you.

### Excluding and replacing pages and documents

To exclude certain pages from the export when compiling a document collection, you can deselect the corresponding pages while creating the document collection. Alternatively, you can replace the deselected pages with blank pages as placeholders using **Add blank pages for deselected items** so that the total number of pages remains the same. If you deselect an entire document, the number of pages the document would have had is added as blank pages.

### Creating cover pages and tables of contents

If you want to add a cover page to your document collection, activate the option **Create cover page**. With **Create dossier pages**, you can also add a separate dossier cover page to each dossier when exporting dossiers that contain documents. The cover page is a standard document provided by d.velop. You can specify a separate cover page for each configuration. For more information, see [Defining templates](#).

The default option **Create table of contents** generates a table of contents. The table of contents references the individual documents and is added at the beginning of the document you create. You can deselect this option if needed.

### Creating and adding notes and back pages

If you want to add notes to your documents, activate the option **Add notes**. This adds one or more pages of notes to the end of every document that includes notes.

You can also have a back page created for the document collection by activating the option **Create back page (important information)**. The back page is a standard document provided by d.velop. You can define a separate back page for each configuration. For more information, see [Defining templates](#).

### 1.3.4. Displaying page numbers

In the **Printing** area, you can display the number of pages in your document collection by activating the option **Print overall page numbers**. With **Print overall page on**, you can use multiple selection to specify which pages should include page numbers.

### 1.3.5. Additional options for document collections

The following settings are available for your document collection under **Additional options**:

- With **Create PDF/A-3**, you can specify whether you want to create the document collection in the long-term archive format.
- With **Add original files as attachments**, you can embed the original documents as attachments in the PDF containing the document collection. The original files are located in the PDF under **Attachments** (paperclip icon).

#### Note

Please note that you must use these options for documents that contain XML or a signature, such as ZUGFeRD invoices.

- By selecting **Add linked documents**, you specify that, during export, linked documents will be inserted as pages in the document collection immediately after the document to which they are linked.
- With **Use lossy compression**, you can specify the degree of compression and thus influence the file size. Higher compression reduces the file size but can result in poorer readability for documents containing graphics.

### 1.3.6. Specifying the storage location

In the **Location** area, you can specify where your exported document collections will be saved. You have several options.

- For on-premises versions, you can use **File system** in the **Local destination path** field to specify a local storage location for your document collections.
- Clicking **Download** generates the export. You will then receive an e-mail with a link. When you click the link, the document collection will be downloaded to your downloads folder.
- With **Archive**, you can save your document collections directly in the repository. To do this, specify the appropriate repository and the document type for saving the document collection under **Automatic export**. You can also use a fixed user to save the collection in the repository. Add d.velop documents collector to the list of trusted apps; to do this, select the corresponding option to open the list of trusted apps and enter the value **classcon-documentscollector**. If you do not enter a user, the system will use the user you are logged in as at the time of the export.

### 1.3.7. Defining the file name pattern

Under **File name pattern**, you can configure the automatic generation of file names for document collections.

By default, the file name is generated as follows: documents collector export dd\_mm\_yyyy hh\_mm\_ss.pdf

### 1.3.8. Defining templates

In the **Templates** area, you can define templates for various scenarios. To access the templates, the templates must be stored in the repository. For more information, see [Integrating information and pages into the document collection](#).

To use the templates available in the repository, select the respective repository and enter the document ID of the template.

Whenever possible, create templates in a separate document type so that you can grant users permissions for that document type and avoid conflicts with other permissions. If users do not have permissions for templates, these templates will not be listed when creating the PDF document collection.

If the original document is not available as a PDF file, the templates can use the rendered PDF file. This allows users to work directly with Microsoft Word or Microsoft Excel templates for the cover pages.

### Placeholders

The templates do not need to have specific properties. You can freely select the properties. You can use either generic or custom values as placeholders.

You can use placeholders in the template as follows:

- Using the system properties, e.g. **property\_caption** for **Title** or **property\_last\_modified\_date** for **Last modified**
- Using the property IDs (either the short RID or the long UUID)

The values used to replace the placeholders on the cover page and back page are taken from the first entry in the document list – for example, from the dossier if a dossier is selected as the starting point. For dossier cover pages, the placeholders are replaced with the corresponding values from the dossier properties.

### Placeholders for generic values

| Placeholder    | Meaning                                    |
|----------------|--------------------------------------------|
| [date_long]    | Date stamp                                 |
| [date_short]   | Date stamp                                 |
| [time_long]    | Time stamp                                 |
| [time_short]   | Time stamp                                 |
| [user]         | Technical name, usually the e-mail address |
| [user_display] | First and last name                        |
| [user_family]  | Last name                                  |
| [user_given]   | First name                                 |

### Placeholders for custom values

In addition to the generic values, you can use any properties that appear in the search results. Suppose you want to use the property **File changed on** for the cover page and need to find out the property name.

#### Identifying the property – This is how it works

1. On the d.velop documents start page, go to **Search**.
2. Under **File changed on**, enter any value.

The URL changes based on the search and contains the property **property\_last\_alteration\_date**, which corresponds to **File changed on**.

### 1.3.9. Sending a test message

To test that messages are sent correctly, you can use the function **Send test message**. This function allows you to verify that you can receive the e-mails generated during the export.

### 1.3.10. Deleting configurations

Suppose you want to delete a configuration.

#### This is how it works

1. Select the configuration you want to delete. If the configuration in question is set as the default configuration, first select a different default configuration.
2. Click **Delete**.
3. Complete the deletion process by clicking **Save**.

You have successfully deleted the configuration. Once you have deleted all existing configurations, the default configuration for d.velop documents collector will be displayed again after you refresh the page.

## 1.4. 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.keelelearning.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>.