

# d.velop

d.velop documents collector: User

# Table of Contents

|                                                                                                          |   |
|----------------------------------------------------------------------------------------------------------|---|
| 1. d.velop documents collector: User .....                                                               | 3 |
| 1.1. Basic information about the application .....                                                       | 3 |
| 1.1.1. About d.velop documents collector .....                                                           | 3 |
| 1.2. Getting started .....                                                                               | 3 |
| 1.2.1. Prerequisites .....                                                                               | 3 |
| 1.2.2. Selecting documents to create PDF document collections .....                                      | 3 |
| 1.2.3. Sorting and searching .....                                                                       | 3 |
| 1.2.4. Editing pages .....                                                                               | 4 |
| 1.2.5. Viewing properties and notes .....                                                                | 5 |
| 1.2.6. Exporting documents .....                                                                         | 5 |
| 1.2.7. Saving templates .....                                                                            | 5 |
| 1.3. Frequently asked questions .....                                                                    | 6 |
| 1.3.1. How do I print the total page count? .....                                                        | 6 |
| 1.3.2. Why is there a “Merge PDF” option for filtering data in addition to the<br>search function? ..... | 6 |
| 1.3.3. How do I create a table of contents? .....                                                        | 6 |
| 1.3.4. When are a document’s properties transferred to the document collection’s<br>properties? .....    | 6 |
| 1.3.5. How do I select a cover page template? .....                                                      | 6 |
| 1.4. Additional information sources and imprint .....                                                    | 6 |

# 1. d.velop documents collector: User

## 1.1. Basic information about the application

This section 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. Getting started

This section will introduce you to the application's functions.

### 1.2.1. Prerequisites

You can configure various presets in the administrative area of d.velop documents for the export of PDF document collections.

For more information, see the documentation for d.velop documents collector: Administrator.

### 1.2.2. Selecting documents to create PDF document collections

You can filter by dossiers, documents, etc. to create a PDF document collection based on your selection.

To filter, you can either use the d.velop documents search or the **Merge PDF** option. In both cases, filtering is performed via the search form and is therefore independent of the selected filtering method.

#### This is how it works

1. Enter the parameters you want to search by in the search form.
2. Click **Search**. The search results are displayed as a list.
3. To create your PDF document collection based on the search results, you have two options:
  - a. If you want to include specific dossiers and documents, click the three-dot menu next to the relevant document or dossier in the result list. Under **Download**, select the option **Merge PDF**.
  - b. If you want to select multiple dossiers and documents at once, select the respective checkboxes next to the result list and click **Merge PDF**.

The PDF document collection will then be created according to your selection.

### 1.2.3. Sorting and searching

In the export dialog, the documents are sorted as in the search result list.

You can choose between the following sorting criteria: **Document ID**, **Creation date** and **Modification Date**. Use the arrow icon next to the sort criterion to specify whether the list should be sorted in ascending or descending order. Click **Sort** to sort the list according to your selection. Any existing sorting will be reset.

**Note**

We recommend that you first use the **Sort** function and, if necessary, sort manually afterward. You can see from the document view whether sorting has already been applied and, if so, which sorting method is being used.

**Example**

Sorting: Document ID ↑

Order was changed manually

If you want to find a document for further editing, you can use the search field. To do so, enter your search term and click the magnifying glass icon. You do not need to use wildcards such as “\*” in this field, as you can enter partial terms.

You can manually sort your search results by dragging and dropping items to the desired positions.

### 1.2.4. Editing pages

When you select a document, the pages it contains are displayed. This allows you to deselect individual pages within the document for export or to edit the contents of individual pages.

To edit a page within the document, click the respective page. Below you will learn about the editing options available to you.

- [Changing the view](#)
- [Using shapes](#)
- [Redacting content](#)
- [Inserting stamps, signatures and images](#)

#### Changing the view

In the **View** area, you can use the zoom button to enlarge or reduce the text area you want to edit and move the page freely by holding down the mouse button. By clicking the icon with the dotted square, you can select text passages to highlight or underline using the quick selection menu that appears.

**Note**

You can only select text passages in documents that have been rendered and are therefore available as PDF versions.

#### Using shapes

Under **Shapes**, you can choose from various shapes – such as a rectangle or a circle – to insert into the text. If needed, you can use the arrow icons to repeat or undo individual editing steps. If you want to remove parts of your shapes, click the eraser icon and select the relevant areas.

#### Redacting content

In the **Redact** area, you can mark individual text passages for redaction by clicking the icon with the dotted square.

After selecting the text passages, click **Mark for redaction** to open the redaction area, where you can review your marked text passages. You can remove the redactions by clicking **Clear**. Alternatively, you can also remove individual text passages by clicking the X icon.

### Warning

You cannot undo the redaction. The undo function and the eraser function have no effect on redacted content. These functions only allow you to modify actions within the redaction area, such as erasing a highlight in the text.

Before finalizing the redaction, check that all markings are correct.

## Inserting stamps, signatures and images

In the **Insert** area, you can select or configure a stamp and apply it to the relevant page in the document by clicking the stamp icon. You can also insert a signature using the signature icon. You can either draw the signature freely, type it in or upload it as a signature image using the options **Draw**, **Type** and **Upload**. To insert the signature onto the page, click the signature displayed within the bar and position it at the appropriate location in the text.

Click the image icon to insert images. Click where you want to insert an image in the text, and select the image from the file selection dialog. Supported formats: JPG, JPEG, PNG.

If needed, you can use the arrow icons to undo or redo individual editing steps. If you want to completely remove stamps, signatures or images, click the eraser icon and select the corresponding locations.

### 1.2.5. Viewing properties and notes

If needed, you can view the properties and notes for individual documents. To do so, select the relevant document and expand the **Properties** or **Notes** area.

Notes for a document are indicated by the heading **Notes** and the option **Show all notes**. If there are no notes for a document, the heading **No notes available** is displayed. Existing notes are displayed as a list. Hover your cursor over the note to view a preview of its contents.

### Note

Longer notes are not displayed in full. If you want to see the entire contents, click **Show all notes**. This displays the notes in full in a separate window.

### 1.2.6. Exporting documents

Use the **Export** option to create a document collection. If you have defined multiple export configurations, you must select the appropriate export configuration for the export. Your default configuration is always displayed first. After clicking **Export**, you will see a message confirming that the export has started successfully. Click **Back** to return to the export dialog, or click **Close** to view the result list.

Depending on the selected storage location, once the export is complete, you will receive a link to download the document collection or to access the document collection in the repository.

### Note

For on-premises versions, you will find the document collection at the respective local destination path if local storage is enabled.

### 1.2.7. Saving templates

You can use the **Save template** option to save your compiled export as a template.

If you intend to use the export frequently, you can use the **Merge PDF** widget in the dashboard. This way, you can go directly to the export using the template without having to perform a search first.

Please note that created templates are visible to all users.

When you click **Save**, the template is saved and available on the dashboard under **Merge PDF**. If you have customized an existing template and select **Save copy**, you can save the customized template as a new template.

You can remove a template by selecting **Delete**. Use **Back** to exit the dialog.

## 1.3. Frequently asked questions

In this topic, you will find answers to frequently asked questions.

### 1.3.1. How do I print the total page count?

The total page count is set in the configuration and is accessible only to administrators. Please refer to the documentation on the administration of d.velop documents collector.

### 1.3.2. Why is there a “Merge PDF” option for filtering data in addition to the search function?

You can use the **Merge PDF** widget on the dashboard to view and directly open saved templates. You can save these templates in the export dialog.

### 1.3.3. How do I create a table of contents?

The table of contents is defined in the configuration. Only administrators have access to the configuration. For more information, see the documentation for d.velop documents collector: Administrator.

### 1.3.4. When are a document's properties transferred to the document collection's properties?

A document's properties are only transferred to the document collection's properties when you select a document and click **Merge PDF**. The data is thereby compiled for the document collection. This is not possible with multiple documents, as in this case there would be multiple sets of properties that cannot be resolved even by subsequently deselecting documents in the export dialog.

### 1.3.5. How do I select a cover page template?

The cover page template is defined in the configuration and is accessible only to administrators. For more information, please refer to the documentation on the administration of d.velop documents collector.

## 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>.