

# d.velop

INMA202201121 (d.velop  
inbound e-mail 1.0)

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# 1. Administration manual d.velop inbound e-mail

## 1.1. Basic information on the application and the manual

This chapter contains general product information.

### 1.1.1. About d.velop inbound e-mail

d.velop inbound e-mail is a service that lets you process e-mails using d.velop inbound. Administrators create different mailboxes. As a user, you can send e-mails to the mailboxes the administrator has defined. You can also process the e-mails in d.velop inbound directly from Microsoft 365 (Outlook). The e-mails are forwarded to d.velop inbound in batches and can then be further processed.

## 1.2. Installation and uninstallation

This chapter contains information about installing d.velop inbound e-mail.

### 1.2.1. System requirements

The user interface is displayed in browsers. The listed browsers are tested as part of the quality assurance at the time of the release.

We cannot guarantee the functionality for browser versions which were not already available at the time of the product release. Please understand that d.velop AG can only grant support for the browsers listed here. However, if you can prove that the error also occurs in the listed browsers, we will obviously grant support as usual.

System requirements for the Microsoft Outlook web application:

- You require a Microsoft 365 subscription.
- To use the functions of d.velop inbound in Microsoft Outlook, your user mailboxes must be in Microsoft 365.

System requirements for the Microsoft Outlook desktop application:

- Microsoft Outlook Version 2102 (Build 13801.21004) (semiannual enterprise channel)
- Operating system: Microsoft Windows 10
- Restriction: If you access another e-mail after logging into d.velop cloud, you need to log into d.velop cloud again if single sign-on is not set up.

#### Note

If Microsoft Outlook has Internet Explorer embedded, the **Enable Protected Mode** option must be enabled for the corresponding security zone of **\*.d-velop.cloud**.

You also need to adjust the integration settings in d.velop cloud.

#### This is how it works

1. Click **Configuration > Web settings > Integration settings**.
2. Enable **Integration with any domains for Internet Explorer**.
3. Click on **Apply changes**.

For more information, see Microsoft's help by searching for "Browsers used by Office Add-ins".

### 1.2.2. Installing d.velop inbound e-mail

You want to install an app in your d.velop cloud tenant.

#### This is how it works

1. Click the **Subscribe App** feature on the start page of your d.velop cloud instance.
2. Select the app to be installed from the list.
3. Click on **Subscribe now**.
4. Follow the setup wizard.
5. Confirm the provision by **Subscribe for a fee**.

### 1.2.3. Uninstalling d.velop inbound e-mail

You want to remove an app in your d.velop cloud tenant.

#### This is how it works

1. Click the **d.velop cloud management** feature on the start page of your d.velop cloud instance.
2. Select the organization with the tenant from which you want to remove the app.
3. Select the correct tenant and click on **Edit tenant**.
4. Find the app you want to remove and click on **Cancel app**.
5. Confirm to unsubscribe.

### 1.2.4. Installing Microsoft Outlook integration

As an administrator, you can set up integration in Microsoft Outlook as an add-in.

#### Note

It can take minutes or hours for the changes to the configuration to take effect.

In particular, validate the group assignment through regular updates and logging on and off repeatedly. If necessary, add the group assignments again, because the group assignment appears to get lost during the initial configuration of the add-in.

There are three ways to install the application:

- Option 1: Configuring it as an integrated app
- Option 2: Configuring it as an add-in
- Option 3: Configuring it as a user-defined add-in

#### Note

If Microsoft Outlook has Internet Explorer embedded, the **Enable Protected Mode** option must be enabled for the corresponding security zone. In addition, enable the option **Enable integration in any domains for Internet Explorer** in the d.velop cloud configuration under **Web Settings > Integration Settings**.

#### Option 1 (only for Azure AD administrators)

You can install the application as an integrated app. According to Microsoft, it may take up to six hours for the application to become available to your users.

#### This is how it works

1. Click **Settings > Integrated apps**.
2. Click **Upload custom apps**.
3. Choose **Provide link to manifest file** and **Validate**.
4. Enter the following URL: **https://<TenantUri>/inboundoutlook/addin**

5. Choose the users or groups for which the add-in is to be provided.
6. Accept the authorization requirements.

#### Option 2 (only for Azure AD administrators)

You can install the application as an add-in. According to Microsoft, it may take up to ten hours for the application to be available to your users.

##### This is how it works

1. Click **Settings > Integrated apps > Add-ins**.
2. Click **Deploy add-in**.
3. Choose **I have a URL for the manifest file**.
4. Enter the following URL: **https://<TenantUri>/inboundoutlook/addin**
5. Choose the users or groups for which the add-in is to be provided.
6. Accept the authorization requirements.

#### Option 3 (for administrators and users directly in Outlook)

You can install the application as a custom add-in. The add-in is available to your users immediately.

##### This is how it works

1. In Outlook (web or desktop application), go to **Manage add-ins**.
2. Go to **My add-ins**.
3. Click **Add a custom add-in > Add from URL**.
4. Enter the following URL: **https://<TenantUri>/inboundoutlook/addin**
5. Confirm the installation of the add-in.

## 1.3. Configuring d.velop inbound e-mail

This chapter contains information about configuring d.velop inbound e-mail.

### 1.3.1. Manage mailboxes

Users can send e-mails to mailboxes in d.velop inbound e-mail in order to further process these e-mails in d.velop inbound. A batch is created for each e-mail in d.velop inbound.

Before you can provision this function for your users, you need to configure the relevant mailboxes.

##### This is how it works

1. Select the tile **Configuration**.
2. In the **Incoming mail** category, click **E-mail storage settings** in the **Inboxes** area.
3. Select the mailbox that you would like to manage, or create a new one using the plus icon.
4. Select a group that is to receive authorizations for the created batch in d.velop inbound.
5. Specify a user or group that you want to notify by e-mail if processing errors occur.
6. Select an import profile to be used to process e-mails and attachments in d.velop inbound.
7. Enter the name that you want the generated batch to have. You can use user-defined text or transfer values from the e-mail using the following wildcards:
  - **%Sender%** – SMTP address of the e-mail sender
  - **%Subject%** – subject of the e-mail
  - **%Timestamp%** – time that the e-mail was received
8. Enter all the e-mail addresses that are allowed to send e-mails to this mailbox under **Whitelist e-mail addresses**. You can use wildcards for these entries.
9. Define optional key-value pairs that are passed as batch properties when creating a batch in d.velop inbound. This allows following processes to access these properties. You can also use the previously listed placeholders.

You can use placeholders to permit multiple e-mail addresses to send e-mails to d.velop inbound e-mail mailboxes.

You may use the following placeholders:

- Use the asterisk (\*) for any number of characters you like. If you would like to allow all mailboxes from a given domain to send e-mails, for instance, you can enter `*@<domainname>.de`
- Use the question mark (?) for exactly one character. For example, you can permit e-mails from the address `test1@domain-a.de` by entering `test?@domain-?.de`.
- To permit all e-mails, you can enter `*@*`.

### 1.3.2. Working with profiles

You can use profiles to control the options for manual batch processing.

d.velop inbound provides the following selection of profiles by default:

- Default profile
- File import profile
- Automatic file import profile

The profiles provide the following scope of functions. You can adjust the profiles to your requirements.

Profile	Description	Restrictions
Default profile	In the default profile, batch processing is entirely manual. A scanner or file import is used to add pages, and users may correct them. Changes that AI services make to the batch can be modified as needed. Users also perform storage processes manually.	None.
File import profile	If you select this profile, batches are automatically edited for the most part. Batches are also modified using AI services. Users store the batches manually.	Users may also add additional pages. It is not possible to perform page actions, such as rotating and deleting, as well as separating documents.
Automatic file import profile	Batches with this profile are processed entirely automatically. If necessary, AI services process the batches. The documents are subsequently stored in d.velop documents.	The batch is visible only to technical administrators. If the storage process is not successful, the batch is also visible for authorized users.  The same restrictions as when the file import profile is used apply to processing.

### 1.3.3. Using placeholders

You can use placeholders to permit multiple e-mail addresses to send e-mails to d.velop inbound e-mail mailboxes.

You may use the following placeholders:

- Use the asterisk (\*) for any number of characters you like. If you would like to allow all mailboxes from a given domain to send e-mails, for instance, you can enter `*@<domainname>.de`
- Use the question mark (?) for exactly one character. For example, you can permit e-mails from the address `test1@domain-a.de` by entering `test?@domain-?.de`.
- To permit all e-mails, you can enter `*@*`.

## 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.keelarning.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>.