d.3one and d.velop documents: User

Table of Contents

1. d.3one and d.velop documents: User

1.1. Basic information on the application and the manual

In this manual, you will find the central DMS (document management system) functions described in greater detail. The application allows knowledge workers with the right to access a d.3 repository, for example, to browse the company-wide document collections. Whether you use d.3one in the browser, in your e-mail application, or in Microsoft Office, you always experience and work with the same user interface applying the same intuitive user experience. Some functions and settings apply to certain integrating applications only, such as e-mail.

1.1.1. About d.3one

d.3one is an innovative modern product suite with the philosophy of focusing on the end users and supporting them from wherever they would like to access ECM information, be it Microsoft Outlook, Microsoft Office, HCL Notes, or simply the browser.

Seamless integration and simple handling

You can define a few areas for your users so that they can access the required information with a URL, without detours and without many clicks.

The innovative search supports you step by step in finding information and data using the facets. In this way, you also quickly gain an overview when you have large quantities of data. Importing documents into dossiers is accomplished quickly with drag & drop, whether it is one document or several.

An intelligent check for duplicates protects you from importing identical data multiple times. You can change document contents and properties at any time. You can also edit contents of Microsoft Office documents natively and straightforwardly in Microsoft Office.

As a team and across the organization, you communicate directly in d.3one using Tasks and Messages as well as with integrate forms, so that everyone can participate in digital business processes.

Expandability and adaptation

You can expand and adapt d.3one individually with functions, tailored to your requirements.

d.3one is an innovative tool that allows you to collaborate with the d.3ecm world.

1.2. Getting started

Get to know the basic functions that will make it easier for you to start using the application. After you have undertaken the first steps, you can delve deeper into the functions. Find out more in the tips and tricks, find answers to frequently asked questions about the application, and acquire knowledge of other functions and settings.

See also:

- More functions and settings
- Tips and tricks
- FAQ

1.2.1. Working with widgets in 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.

1.2.2. Find contents using properties and categories

The **Search** feature helps you find data and information even if you do not exactly know where and how to search for it. You do not need any special knowledge about the dossier and document structure in the d.3 repository. You can simply search for a keyword or a category and, then, restrict the search result by additional traits (facets) until you get the information you need.

In a sense, you are rummaging in a pool data and information based on a vague idea that there is information that you need for your task.

Supposed, you only know the category and want to learn more about a specific customer. Although you know the name of the category, e.g. **Customer invoice/credit**, you have only a vague memory of other details, such as the customer number and when changes were made.

This is how it works

1. Select at least one category in the start section under **Select a category**. The category is added to the bouquet.
2. The properties are immediately reduced to the values which are found based on the keyword you entered. If you specified several categories, all properties are shown that are commonly existing in the specified categories.
3. Select a property to add this to the bouquet.
4. Perform the search to display the results for the indicated criteria.
5. Indicate further properties to refine the search result.

If you want to remove properties from the bouquet, click or tap on the cross next to the property.

1.2.3. Finding contents using keywords

The **Search** feature helps you find data and information even if you do not exactly know where and how to search for it. You do not need any special knowledge about the dossier and document structure in the d.3 repository. You can simply search for a keyword or a category and, then, restrict the search result by additional traits (facets) until you get the information you need.

In a sense, you are rummaging in a pool data and information based on a vague idea that there is information that you need for your task.

In addition to the search using categories and properties, you also have the option of searching for items using key words in the full-text search. This search option is only available if the full-text search functionality was installed for your organization.

Suppose you know that there are projects and documentations related to the topic "ebikes" in your organization. Maybe the keyword exists in a document and is also mentioned in the properties of a document. You can enter the keyword "ebikes" into the search field. Because the result list is very long, you can specify additional properties.

This is how it works

1. Enter a keyword into the search field.
2. The properties are immediately reduced to the values which are found based on the keyword you entered.
3. Select a property to continue to refine the result.

The found keyword is only displayed in the result list if it matches the selected properties.

1.2.4. Things to know about searching

In the **Search** feature, you can find contents in a d.3 repository using key words as well as properties and categories. To make finding easier, there are a few options available to you that you can combine with each other or use individually.

You can do the following in the **Search** feature:

- **Select a category or several categories**: Use **Select category** to specify at least a document type or dossier type to search across. By selecting at least one category, you can find the item more precisely.
- **Search by key words**: Enter a keyword in the search field. It is a full-text search feature. If you have selected a category, the search for the keyword is only performed across the selected category.
- **Refine results by selecting values in the properties (facets)**: Enter at least a single value for a property to use the property for finding documents. You can also combine a category and at least one property.

In the **Results** section, you will find all the items that match your selected criteria. Each time you add a property, you can refine the number of results.

In addition to the categories and possible key words, properties are a great help when it comes to finding. For example, you can search for a specific date or a time period in properties reserved for a date. You can use properties that contain only figures such as monetary amounts to find documents located in a certain figure range or whose values are larger or smaller.

1.2.5. Things to know about searching using facets

The **Search** feature helps you find data and information even if you do not exactly know where and how to search for it. You do not need any special knowledge about the dossier and document structure in the d.3 repository. You can simply search for a keyword or a category and, then, restrict the search result by additional traits (facets) until you get the information you need.

In a sense, you are rummaging in a pool data and information based on a vague idea that there is information that you need for your task.

For example, if you use a keyword for your search operation, you may get a lot of results. Since the keyword only exist in certain categories and properties, the properties are reduced based on the results. Only those properties are shown that are present in the result list. You can refine the results by specifying more properties.

Let's suppose you want to know who is currently working on an essential project. The data about each project are collected in a project dossier in the d.3 repository. A common property of all documents in the project dossier is the name of the project manager. You can select the category **Project dossier** so that the search result is refined for the first time using this facet. You can refine your search result again because you now get only the names in the project manager name property that are actually listed as project manager in the properties of the result.

The **Search** feature uses the opposite approach. The opposite approach to finding information is made possible by the full-text search functionality on the one hand and due to faceting the search operation.

With the faceting feature, you are offered only the search criteria (properties and categories) that always lead to a result.

This combination of functions helps you get the information you need faster and more efficiently.

- **The pre-selection makes the difference**: For each search result you only get the properties that are actually present in this search result and, thus, can be selected.
- **The combination of criteria leads to where you want to go**: The search criteria present in the search result facilitate your search because you can only select from the criteria that are relevant and present in your search. This means that any values which were excluded previously by the selected search criteria are no longer present.
- **The search operation always ends up with results**: Use the offered properties and categories for your search to ensure that you always get results. You can immediately refine the result by adding or removing search criteria.

1.2.6. Things to know about search operators and wildcard characters

There are several options and ways to search for and find information using the **Search** feature to get things done. For example, you can search for documents which were modified at a certain date or in a certain time period. Then, you search across fields, which are specifically reserved for dates, and for a date range, for example, you enter two dots between two dates (**<Date1>..<Date2>**). You can also use fields, which are reserved for numbers and sums of money, to search for certain numbers or sums of money. Of course, you can find your documents and dossiers as well by entering a keyword.

Besides the very specific data you can enter into the property fields, you can also use wildcard characters. Wildcards are so-called operators that you can use to search without entering concrete figures and text. You can use the wildcard characters to compose so-called search patterns. For example, you can use the **$** (dollar sign) to search for a property which does not contains any entry (empty).

By default, you can use specific search patterns in property fields to find documents matching these criteria. However, your administrator can define wildcard characters that differ from the default. If you have any questions regarding the wildcard characters and the search patterns, contact your administrator.

1.3. More functions and settings

Get to know other ways in which the application can support you in your daily work.

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. Update 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 your changes.

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

1.3.3. Changing the category of an item

If applicable, you can change the category of an item provided you are granted the required permissions. If you have any questions regarding the permissions, contact your d.3 administrator.

Suppose you want to move an existing document into another category.

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. Select a different category in the list of categories.
5. After making the changes, use **Validate properties** to check whether your changes are allowed.
6. Save your changes.

Once the changes are saved, the item is marked with the tag **Changed**. As soon as you perform a new search operation, the changed item is found in the new category.

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

1.3.4. Displaying an item in the associated dossier

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.

1.3.5. Displaying documents during editing

The **View** perspective offers you a preview for the selected document. By default, the documents are displayed in the status **Release**, provided the document exists in this status. If the document also exists in the status **Processing** and you are the editor, then the version you can view is by default in the status **Processing**. If the document, for example, only exists in the status **Processing**, then, by default, this current version is displayed. If no preview can be displayed or you are not granted the permission to view documents in the status **Processing**, a note is displayed in the perspective. You can determine the status of the displayed version by a colored bar above the displayed item.

Supposed, you want to edit a document which exists in the status **Release**. In the perspective **View** there is a green bar displayed for the document. Once you take over the document to edit it using the context action **Start editing** for this document, the status of the document is transferred to **Processing**. Now, you can view the document in the status **Processing** in the **View** perspective.

If you want to verify if there are additional versions for the document, go to the perspective **Versions**. Each document that exists in different versions, is shown in the perspective **Versions**.

In turn, use the perspective **Versions** to display the different versions for a document.

> **Note**
>
> Some PDF documents contain an electronic signature. You can view the PDF document with the electronic signature in the **View** perspective. Since the electronic signature is shown as a graphic as standard, there is no automatic validation of the signature.
>
> The document containing the electronic signature can be saved locally to validate the signature.

1.3.6. Working with comments and visual annotations in PDF documents

In the Document view, you can display, create, and edit comments and visual annotations in PDF documents using the Comment toolbar. The comments do not change the original document.

In the case of documents from d.velop documents, comments on the document are also displayed depending on the permissions. You can enable or disable the display of comments.

Creating and modifying comments

> **Note**
>
> You can comment on documents with the status **Processing**, **Verification** and **Release** , but not on documents with the status **Archive**.
>
> You can also comment on documents from a source other than d.velop documents. In this case, the primary system is responsible for storing the comments.

To change or create comments in a document from d.velop documents, you must open this document using d.3one.

To create a new comment, select the desired comment type in the Comment toolbar. The different comment types are divided into the following groups: general tools, form tools, image tools and stamp controls.

- The “general tools” group includes the tools **Note**, **Text comment**, **Pen** (freehand drawing) and **Highlight area**. For more information, see Adding and modifying comments in PDF documents.
- The “form tools” group includes, for example, the comment types **Rule line**, **Rectangle**, **Oval**, **Connected Line** and **Arrow**. For more information about working with visual annotations, see chapter Adding and modifying visual annotations and images in PDF documents.
- As an image, you can add check mark or cross symbols as well as pictures. For more information about adding icons and images, see chapter Quickly marking list entries in PDF documents.
- Information about creating and working with stamp templates can be found in the chapter Working with stamp templates.

For some comment types, comments are created with default values (e.g. color and line width) after you select the desired position in the document. For other comment types, you must first enter parameters and then specify the position in the document. In order to add several elements of the same type one after the other, the selection remains active for some comment types.

To change a comment, you can select the desired comment and adjust it by clicking **Edit**. The properties that can be changed depend on the comment type. Please note that changes in d.velop documents only take effect after saving. Either save the changes manually or activate **Automatically save** to automatically save progress at certain intervals. This prevents any loss of data.

1.3.7. Working with stamp templates

Stamp templates are combinations of one or more comment types that can be added to a document as a dynamic image.

This is how it works

1. Select one or more of the comment types and add the comment types to the document.
2. Select the comments elements from which you want to create the template.
3. Click **Create stamp template**.
4. Enter a unique name and save the stamp template.

To dynamically replace values in the stamp, you can use text elements with the following values:

- **{date}**: The current date (format: dd.mm.yyyy).
- **{time}**: The current time (format: hh:mm:ss).
- **{username}**: The name of the user who uses the stamp.
- **{userInput:<Your value>}**: When using this placeholder, users are prompted to enter a value. Replace "<Your value>" with a text that you want other users to see when using the template, e.g.: "{userInput:Please enter the reference number}".

In the **Manage stamp templates** dialog window, you can delete stamp templates, export them to a file, import them from a file, and share them with other d.velop documents users. The respective action depends on the templates selected in the drop-down list.

1.3.8. Merging comments with the document

Comments that you have added in a PDF document (e. g. annotations or stamps) can be permanently merged with the document. This creates a new version of the document in which the comments are permanently embedded. The original version is retained. Information below the comments and the OCR text remain unchanged.

> **Note**
>
> The function is only available in the **Release** status. Merging is only possible for PDF documents or PDF files generated from other formats.
>
> You need write permissions and the right to create new document versions.

This is how it works

1. Open the desired PDF document.
2. Click **Merge**.
3. If necessary, enter an alteration text. The system automatically creates a new version of the document with the embedded comments. The original version remains unchanged.

> **Note**
> The merge function is deactivated by default The administrator can activate the function in the configuration under **View > Comments**.

1.3.9. Redacting document content

With the **Redact** function, you can permanently obscure confidential or sensitive content in a document. The selected area is completely removed, and the corresponding OCR text is also deleted.

This is how it works

1. Open the desired PDF document.
2. Select one or more areas to be redacted.
3. Confirm the redaction.
4. Specify whether the result is to be stored as a new document or as a new version. The original document remains unchanged.

Notes

- The redaction is permanent. You cannot restore the erased content.
- The OCR text for the redacted areas is also permanently deleted.
- Unlike redaction, the merge function permanently integrates comments such as annotations or stamps into the document. The original content and the OCR text remain unchanged during merging.

> **Note**
> The redact function is deactivated by default. Your administrator can activate the function in the configuration under **View > Comments**.

1.3.10. 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.

1.3.11. Editing a document 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.

Useful rules for working on the same documents as a team

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.

1.3.12. Editing 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.

Useful rules for working on the same documents as a team

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.

1.3.13. Editing documents in 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.

Useful rules for working on the same documents as a team

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.

1.3.14. Creating a new dossier

You can use the **Dossier creation** feature to create a new dossier in your d.3 repository. You can see the feature on the start page, only if you are a member of the dossier creation group. If you have questions, please contact your administrator.

When creating a dossier, you somehow create a kind of logical cover for a file folder in which you store your documents later on. Both tasks, creating a dossier and place a document into the dossier, are separate tasks.

This is how it works

1. Open the **Dossier creation** feature on the start screen.
2. Select a category or a template which you want to assign to the dossier.
3. Specify additional properties in the **Advanced** or **Common** perspectives.

Use **Validate properties** to make sure that all required fields are filled out.

1.3.15. Creating a new 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.

1.3.16. Creating a new version of a document with alteration text

If you save a new version of an item in the **Release** status, you have the opportunity to indicate additional information by approving the document. This information can help you or other users to understand, for example, the reasons for a release at a later point in time. The option of the alteration text must be set up by a d.3 administrator.

You can display the information about a release version of an item at any time in the **Versions** perspective of an item. To save an item in the status **Release**, you need to be granted the permission to release, which can only be granted by a d.3 administrator.

Supposed, you have edited a document and you want to save the edited version of this item in the status **Release**.

This is how it works

1. Drag the edited document on the document in the result list, to get the drop zone to manually or automatically create a new version.
2. Enter any required information in the **Storage** feature.
3. Click or tap on **Save** to save the information for the item and to create a new version for the document.
4. In the dialog to enter the information (alteration text), enter a comment.
5. The document is saved in the d.3 repository in the status **Release** with additional information.

1.3.17. Exporting the properties of several items

Sometimes it may be helpful to analyze the properties of documents in a separate file saved locally on a PC. For example, if you want to export the properties of a distinct set of documents and save them locally in an Excel file, you can select the items and export them as an Excel or CSV file. You can simply select several documents and only export these items, whether you want to analyze a part of a search result, your favorites, or a part of the contents in a dossier which is saved locally in an Excel or CSV file.

With the context action **Export properties** you can decide whether to export the properties of all items or only a part of it. Afterwards you can choose to export all items or a part of them.

Supposed, you performed a search and want to have a closer look at a part of the items' properties in a locally saved file.

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. In the **Export options** dialog, select the format for the export. In addition, you can decide whether to export the multi-value properties.

As soon as you have selected the format for the file, the properties are exported and save locally under the path which you specified for the browser as storage location for a download.

> **Note**
> If you selected a document in the result list, the details of the document are displayed with all perspectives. The context action **Export properties** 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.

Maybe the administrator has limited the number of documents you can select. If you have any question, please contact your administrator.

1.3.18. Finding items using figures in specific ranges

You can use any field in the **Search** feature to find documents and other items. In some fields you can only enter numbers, e.g. ordinary numbers or sums of money. These fields are properties which belong to a document or dossier. Using these properties, you can not only search for concrete numbers or sums of money, but also across a certain range in which the numbers or sums of money are included.

The properties you can work with are, for example, advanced properties which are specifically created for your organization. However, you can also use the common properties to search across a certain range, provided the property is of type number or money.

If you have any questions about the common or advanced properties and the property types, contact your administrator.

The search for monetary amounts or for simple figures in a specific range is helpful when, for example, you would like to know your figures for a certain point in time for analyzing or evaluation purposes:

- Which customer paid invoices above 1,000 Euros within a certain year.
- Which customer paid invoices below 1,000 Euros within a certain year.
- Which company car has a mileage between 150,000 and 250,000 kilometers.

Supposed, you want to know which customer paid invoices above 1,000 Euros within a certain year.

This is how it works

1. Select the category which you want to check, e.g. **Incoming invoices**.
2. Enter the value **1,000..** in the **Billing amount** field (amount without the currency symbol followed by two dots).
3. The result contains all incoming invoices above 1,000 euros.
4. Use the properties for the invoice year and the customer number or the customer name to refine the result.

If you want to search for incoming invoices below 1,000 euros, first enter two dots followed by the value **..1,000** (no currency symbol) in the **Incoming invoices** field.

You can also search for negative amounts by enter a minus character followed by the sum (**-100**).

1.3.19. Customizing 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.

1.3.20. 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.

1.3.21. Saving files with the “Storage” feature

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**.

1.3.22. 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.

1.3.23. Merging documents into a 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.

1.3.24. Using the accessibility settings

d.velop documents provides features to improve accessibility. This chapter provides you with further information on how to use and enable these features.

This is how it works

1. Click on the three vertical dots next to your profile picture in d.velop documents.
2. Click **Accessibility**. A list of accessibility options is displayed. You can find descriptions of the individual options below.

3. Select as many options as you want.
4. Click **Apply**.

Enable high-contrast design

The high-contrast theme increases the contrast ratio on the user interface to make it easier to read. When you select the high-contrast theme, the **Enable focus borders** option is also selected automatically. After you select the high-contrast theme, you have to refresh the user interface.

Enable focus frame

The focus frame is a frame that is displayed around the item on the user interface that is currently in focus. This makes it easier for you to see where you are currently working on the user interface.

Disable time limits

Certain notifications are only displayed briefly by default and are automatically hidden, e.g. when selecting a new design or when storing a document. This option prevents these notifications from disappearing automatically. In this case, you can close the notifications manually.

The option to disable time limits is not available by default. If this option is not visible to you, you can enable the option in the settings dialog.

This is how it works - Cloud

Get in touch with the d.velop support. The support can enable a preview function for you. If you enable this preview function, the option to disable the time limits is available to you.

This is how it works - On-Premises

1. Navigate to the installation folder of d.velop documents on your d.velop documents server in the explorer.
2. Go to the **theming** folder. The default path is C:\d3\theming.
3. Open the file **ThemingApp.ini** in a text editor (such as Notepad++). If the file does not exist, create the file.
4. Add the parameter **TIMINGS_FEATUREFLAG_ENABLED = true**.
5. Save the file.
6. Restart the Theming app in d.3 process manager.

The function for disabling time limits is now available.

Disable animations

You can disable the animations that appear when you open a menu or switch apps, for example.

Open settings by pressing ALT + X

If you activate this option, you can use the shortcut **ALT + X** to access the dialog with the accessibility settings at any time. This option is activated by default.

1.4. Tip of the Day

Find out more about how to make your work easier and get useful tips regarding various functions.

1.4.1. Things to know about keyboard control in the table view

In the table view, you can use various keyboard shortcuts to perform actions. For instance, you can use the keyboard to navigate in the table, select rows or open the details of an item.

Navigation

You can navigate within the table view.

Use the arrow keys or the other keys for controlling the cursor (focus) to switch to another cell or row.

- **Down arrow**: Focuses on the next row.
- **Up arrow**: Focuses on the previous row.
- **Right arrow**: Focuses on the next cell. If you are already focused on the last cell in the row, nothing happens.
- **Left arrow**: Focuses on the previous cell. If you are already focused on the first cell in the row, nothing happens.
- **Home key:** Focuses on the first row.
- **End key**: Focuses on the last row.
- **Page up key**: Moves the focus one page up.
- **Page down key**: Moves the focus one page down.
- **ENTER key**: Opens the details of the item in the selected row.
- **Tab key**: Moves the focus from the table to the next item that can be focussed on.

Selection

You can select items in the table view to execute actions for multiple selected items. Once you have selected at least one item, you will see the actions above the table.

- **Space bar** or **Shift+space bar**: Selects the row that is in focus. If the row is already selected, the selection is cancelled (activates or deactivates the checkbox).
- **Shift+Down arrow**: Selects the row that is in focus and the next row. Then focuses on the next row (activates the checkbox).
- **Shift+Up arrow**: Selects the row that is in focus and the previous row. Then focuses on the previous row (activates the checkbox).
- **CTRL+A**: Selects all the rows if they have not all been selected yet. If all the rows are already selected, the selection is cancelled (activates or deactivates the checkboxes).

Sorting and grouping

You can sort and group the items in the table as follows:

- **ENTER key on the column heading:** Toggles the column sorting.
- **CTRL+ENTER on the column heading:** Opens the menu for the column.
- **ENTER key on the grouping row:** Opens the grouping to display subitems.

Other

You also have the following additional control options:

- **Context menu key**: Opens the context menu for the item in the row that is in focus.
- **ALT+X:** Shows the accessibility options. You can activate the focus border, deactivate animations and enable the contrast view.
- **F6**: Navigates through the various areas of the application (e.g. the content area of a document and the context action). Activate the focus border for optimum function. You can use the arrow keys to adjust the size of the areas.
- **Shift+F6**: Navigates backward through the various areas of the application. Activate the focus border for optimum function.

1.4.2. Creating a storage template

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.

1.4.3. Working with workflows and documents

You have the opportunity to collaborate digitally with other persons in your organization using workflows. Instead of carrying documents from desk to desk, in a workflow process the documents are part of a task which is forwarded or sent back from one person to another.

The function to collaborate by using workflows is optional. You can only participate in workflows, if your administrator has enabled the function and if you are granted the permission to participate in workflows.

Let's suppose, you received an invoice, which must be verified by several persons and finally must be approved by somebody. You want to initiate the appropriate workflow for this invoice.

This is how it works

1. Select the document in the result list.
2. Select the **Start workflow** context action.
3. Select the appropriate workflow.

The document is then forwarded to the next person and the collaboration begins.

1.4.4. Selecting other languages

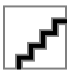
The displayed language of the application is dependent on the language settings in Internet Explorer. You can use the languages German and English as standard and also switch between these languages. Your organization can acquire licenses for other languages. If you use a language in Internet Explorer for which you do not own a license, the application is automatically shown in English.

To change the language, you only need to change the language settings in Internet Explorer.

Suppose you use the application in German and would now like to clarify a few matters with your team member in Denmark. For the clarification, it is necessary that you both complete the same steps in the application. For this reason, you change the display language to English.

This is how it works

1. In Internet Explorer, go to **Internet option > General > Languages**.
2. In the **Language preferences** dialog, click on **Set language preferences > Add language**.
3. If English is available as a language, move the language to the top position by clicking on **Move up**.
4. Confirm your selection until all the dialogs have closed.



The next time you open the application or when you press the **F5** key to refresh the browser, the application will be displayed to you in English.

1.4.5. Watching events in search templates

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.

See also: Managing e-mail notification settings

1.4.6. Watching events related to an item

You can keep yourself updated regarding changes done for a d.3 item (dossier or document). You can watch a couple of events so that you are informed, e.g. per e-mail, once there were changes.

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

- 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. You will not receive any notification about actions you perform yourself (e.g. adding your own comments).

Let's suppose, besides the default events you also want to be informed, once somebody adds an item manually to a dossier.

This is how it works

1. Select the item to watch in the result list.
2. Click on **Watch**.
3. Select the **Watched item was manually added to a parent item** event in the **Watched events** dialog, if you want to be informed once another user adds the item to a dossier.
4. Use **Save** to set the events for the item.

See also: Managing e-mail notification settings

1.4.7. Directly printing PDF documents in the browser

You can quickly print the content of PDF documents in the browser by using the Print icon on the toolbar in the **View** perspective.

The printing quality of a PDF document in a web application is not as good as printing a PDF file in an appropriate application.

If there are issues while printing or while printing large documents or the web application, you can download the document locally and then print it using a different application, e.g. Adobe Acrobat Reader DC.

To download the PDF file locally and print it by using a different application may also help in some other situations, e.g. if you want to print large PDF documents.

1.4.8. Direct closure of the storage dialog after saving a document

In the **Storage**feature, you have the option of saving an item quickly in a d.3 repository. When you perform a quick save, the storage dialog is closed automatically after a file is saved and you can begin with your next task.

This is how it works

1. Upload a file in the storing dialog.
2. Specify the properties to be stored with the document in the d.3 repository.
3. Next to **Save**, click or tap on the arrow to expand and select **Save and close** so that you go back to where you started from.

If you once decide to use the **Save and close** action, this action is used for the next save. Anytime you want, you can switch between **Save** and **Save and close**.

1.4.9. Creating a template for creating dossiers

If you are a member of the dossier creation group, you can save and manage complex dossier creation operations as templates for dossier creation in the **Dossier creation** feature.

Let's suppose, you often create project dossiers for the same project. In this case, it is worth creating a template for the dossier creation.

This is how it works

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

1.4.10. Configuring notification settings

By default, you are notified immediately when you are assigned a task in a workflow, for example. You can also adapt the time and frequency of notifications to your personal requirements.

You can define a specific time for receiving notifications. You can also specify the frequency with which notifications are received at the specified time (e.g. Monday to Friday, every two days or every month).

Let us assume that you want to receive your e-mail notifications in a message at a specific time every two days.

This is how it works

1. Choose the **Configuration** tile on the start page.

2. Under **Notifications** in the **Notification management** area, click the **E-mail delivery** entry.
3. Under **Time**, click the **Custom** entry.
4. Under **Time**, enter your desired value.
5. Choose **Every x days** and enter the value **2**.
6. Enable **Send messages collectively in one notification**.

After saving, you will receive e-mail notifications at the specified times.

See also: Managing e-mail notification settings

1.4.11. Finding items using the calendar function

You can also search for documents and dossiers for which a certain date is specified or which can be find in a certain time period. A date is a property which is part of the common properties, e.g. the creation date, the editing date or the date when an item was updated. Even advanced properties can be date fields. For example, the property **Invoicing date** can exist in an enterprise or organization.

You can use these properties to find items more systematically, which are either created at a certain date or which were updated at a certain date, for example. If you do not know the exact date, but you have a rough idea about the time period, you can of course search for the time period.

If there is already a complex search result, you can reduce the search result by specifying the date or the date range.

You can either enter the date or the date range into the field or use the calendar function which offer some more functions to speed-up.

> **Note**
>
> The following rules apply to properties for which you can specify a date or a date range, while the behavior is different depending on whether you use common properties or advanced properties to search for items:
>
> - If you define a date range, the start date must be before the end date.
> - You cannot enter any dates in the future in the fields **Last modified**, **Created on**, **Last file update** and **Access date**. These fields are common properties that are defined by the system. For example, if you use the **Last modified** field to search for documents which are changed in quarter 2 and in the current year only the first quarter (Q1) exists as the current period, then the results from the previous year are displayed.
> - You can use the fields with advanced properties to search for a date or a date range in the future.

This is how it works

Supposed, you want to find a certain incoming invoice which has the advanced property **Invoicing date** with a date in January. You do not know the exact date.

1. Specify all criteria and the dates for the month January.
2. Open the calendar by clicking on the three dots next to the **Invoicing date**.
3. In the first calendar select the month and the year and then the first day of the month.
4. In the second calendar select the month and the year and then the last day of the month.
5. Confirm your specifications.

The date range is added to the bouquet and you can start searching. This way, you can select any dates and date ranges. The calendar function also offers the option to directly select certain time specifications. This includes the functions **Today**, **Yesterday**, **This week**, **This month**, **This year**.

1.4.12. Working on Office documents collaboratively

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.

If you are unsure of the user to which a document is assigned for editing, you can check in the properties under **Editor**:

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.

1.4.13. Adding and modifying visual annotations and images in PDF documents

You can add colored annotations to PDF documents and change, move or even delete existing annotations in the text. You can also change the line color and line thickness of the lines, rectangles, connected lines, ovals, arrows and highlighting in the text or for pictures, and specify a fill color. You cannot make any parts of the text illegible using visual annotations ("blackening out" or redaction)

To use images, load the desired images from your locally stored files. You can also select these files as standard images to place images directly on the document without selecting files.

Let's suppose you view a PDF file in the document display and you want to comment on a phrase in the document by inserting a visual annotation in the form of a line.

This is how it works

1. Click the Connected lines icon in the Comment toolbar and position the starting point somewhere in the PDF document.
2. Click on the position to fix the start point and drag the line to the first end point.
3. Click to fix the end point of the line.
4. Add the next line.
5. Double-click the end point when you have finished the annotation.
6. Save the annotation.

You can change, delete or move the annotation anytime you want to.

It is possible that several users comment on or edit a PDF document at the same time. When editing simultaneously, the changes made by the person who saved the annotations first are adopted.

If you comment on a locally stored PDF document and save it in a d.3 repository, you can only read the already existing comments, but you cannot edit or delete them.

1.4.14. Adding and modifying comments in PDF documents

You can add comments to PDF documents, modify your comments, and move them within the PDF document.

Let's suppose you view a PDF file in the document display and you want to comment on a phrase in the document in the form of a note.

This is how it works

1. Select the desired comment type (**Note**) from the Comment toolbar.
2. Enter the required text in the Note field and create the note.
3. Select the desired location in the document and position the note.
4. Save the comment.

You can change, delete or move the note any time you want.

This is how it works

1. Select the note icon and switch to the editing mode using the pencil to change the text.
2. Select the note icon on the document and position it at the appropriate place.
3. Select the note icon on the document to view the comment as well as the delete icon.

It is possible that several users comment on or edit a PDF document at the same time. When it is edited simultaneously, the changes made by the person who saved the notes first, for example, are adopted.

1.4.15. Quickly marking list entries in PDF documents

In PDF documents, you can quickly add a check mark or a cross to individual entries in lists, e.g. in order to mark individual invoice items on an invoice as present (green check mark) or not present (red cross mark).

The document with the list (order list or invoice) must be a PDF document so that you can add the visual annotation.

This is how it works

1. From the Comment toolbar, select the desired icon for the list entry (check mark or cross).
2. Position the icon next to the list entry.
3. Repeat the process of adding an icon for each list item.
4. Save the annotation.

You can change, delete or move the annotation anytime you want to.

1.4.16. 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.

You can save your search criteria using the asterisk.

1.4.17. Saving an existing 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.

1.4.18. 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**.

1.4.19. Saving a search operation as a favorite in the browser

There is repeatedly a range of routine tasks you need to perform. Probably, on a regular basis, you may need to edit certain documents or dossiers which you identify by the various properties.

If you regularly perform certain search operations using identical data, you can easily "memorize" the specific search operation by saving the URL as a favorite in your browser. As soon as you need to perform the same search operation later on, open the search operation which you saved as favorite in the browser. You can also share this URL with other users.

This is how it works

1. Specify the properties and categories in the **Search** feature to find your dossiers or documents.
2. Save the URL as favorite in your browser.
3. If you want to show the result list directly, expand the copied URL by adding **&showresultlist=true** and then save the URL as favorite in your browser again.
4. To view the search operation and the result list, you can use the favorite in the browser.
5. You can refined the search operation any time by specifying different criteria.

1.4.20. Sharing storage templates

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.

1.4.21. 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.

1.4.22. 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.

1.4.23. Managing e-mail notification settings

You are monitoring search templates to keep up to date with changes to specific elements, for example. By default, you are notified of changes immediately. You can also individually define the time and frequency of notifications for one or more search templates.

Let us assume you want to be notified of changes to items in your monitored search templates with a message every two days.

This is how it works

1. Choose the **Configuration** tile on the start page.
2. Under **Notifications** in the **Notification management** area, click the **E-mail delivery** entry.
3. Click the plus sign to create a new configuration and enter a name.
4. Under **Message types**, select the search template.
5. Enter the desired value under **Time > Custom > Time**.
6. Choose **Every x days** and enter the value **2**.
7. Enable **Send messages collectively in one notification**.

After saving, you will receive notifications of changes to elements in the search template at the specified times.

See also:

- Watching events in search templates
- Watching events related to an item
- Configuring notification settings

1.4.24. 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.

1.4.25. How do I group the results in the table view?

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.

1.4.26. How do I sort the 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.

1.4.27. Things to know about date fields in the “Storage” feature

When storing documents, you can specify a date or a date and time for a document by clicking the calendar icon or clock icon next to the relevant fields in the properties of the document. If applicable, you can change the years, months, and days using the calendar function. You can also add times if the property permits them.

In addition, you can use the smart lookup functionality to identify date ranges, months, days, today, specific days relative to “today," calendar weeks, and quarters using keywords. There are various keywords and characters available to you to quickly and efficiently save items using a date.

> **Note**
>
> The following rules apply to the ranges and date formats:
>
> 1. If no year is specified for a range, then the current year is appended. You can also add a four-digit number representing the year, e.g. other than the current year, directly to the specifications in the field.
> 2. If you choose a range when saving an item, e.g. **W12** or **quarter 1**, then the first day of this range is always entered as the date in the calendar.
> 3. You can also enter a short form of a date without separators, like DDMMYYYY or DDMMYY. If you enter, for example, **11052019** or **110519**, then a browser with German language settings interprets this date as 05/11/2019.

1.4.28. Things to know about short forms for dates

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**

1.4.29. Things to know about the federated search with Windows Explorer (OpenSearch)

You have the option to use the standard search field in a browser and Windows Explorer to search a d.3 repository. The federated search is a simple full-text search in Windows Explorer that you can use only if a full-text search function is installed. Your administrator can configure a so-called OpenSearch search query as a URL and provide you with this URL. Depending on the application to be used with this URL, the administrator may provide you with several URLs.

To allow you to use the federated search in Windows Explorer, the URL is added to your **Favorites** dossier in Windows Explorer as a search connector.

Your administrator provides you with a URL which allows you to establish a connection between the d.3 repository and Windows Explorer (search connector), thus adding some type of search folder in your Favorites folder of Windows Explorer. Having added it, you can easily search for a keyword. The results are displayed in Windows Explorer.

You only need to add the search connector on your PC.

This is how it works

1. Insert this URL provided by your administrator into the Internet Explorer address bar and press the **ENTER** key.
2. Click on **Add** to add this search connector to the **Favorites** folder in Windows Explorer.

Note

In Windows 10, the **Favorites** folder and, thus, the provided Windows search connectors are no longer found in the Windows Explorer navigation pane. If you still want to quickly access the provided Windows search connectors, you can use one of the following options:

To add the **Searches** folder that contains the available Windows search connectors for quick access:

1. Open the profile directory in Windows Explorer.
2. Open the context menu for the **Searches** folder.
3. Click on **Pin to Quick access**.

To add a Windows search connector to the Windows Start menu:

1. Open the profile directory in Windows Explorer.
2. Go to the **Searches** folder.
3. Open the context menu for the Windows search connector you want to add.
4. In the context menu, click on **Pin to Start**.

By default, the search in Windows Explorer retrieves the first 100 results. There may be additional matches not yet displayed. If you have enabled the preview, you can display the common and advanced document properties.

1.4.30. Things to know about searching with relative dates

You have the following options for searching for items that are found in relative date ranges:

- **Combination of a negative number in braces ({-number})**: Finds items whose date is in the past, namely a certain number of days calculated as of today. The entry **{-3}** in a date field finds all items that were recently edited 3 days ago, for example. The point of reference is always "today".

- **Combination of a number in braces ({number})**: Finds items whose date is in the future, namely a certain number of days calculated as of today. The entry **{3}** in a date field finds all the items that are due in 3 days, for example. The point of reference is always "today".
- **Combination of negative numbers in braces separated by two dots ({-number1}..{-number2})**: Finds items in a past time period, namely calculated as of today. The entry **{-10}..{-3}** finds all items that are in the date range from 10 days ago up to 3 days ago. The point of reference is always "today".
- **Combination of numbers in braces separated by two dots ({number1}..{number2})**: Finds items in a future time period, namely calculated as of today. The entry **{3}..{10}** finds all items due in the period from in 3 days to in 10 days. The point of reference is always "today".

1.4.31. Things to know about searching for specific numerical value ranges

You have the following options for searching for items whose numerical values are found in specific value ranges:

- **Combination of greater than sign (>) and a value**: Finds items whose property contains a value above the specified one. The entry **>2000** finds any item that contains 2001 and more as a value in the property.
- **Combination of less than sign (>) and a value**: Finds items whose property contains a value below the specified one. The entry **<2000** finds any item that contains less than 1999 as a value in the property.
- **Combination of a value followed by two dots (..)**: Finds items whose property contain the specified value and higher values. The entry **2000..** finds any item that contains the value 2000 including and more in the property.
- **Combination of two dots (..) followed by a value**: Finds items whose property contain the specified value and values below the specified one. The entry **..2000** finds any item that contains less than 2000 including as a value in the property.
- **Combination of two values followed by two dots (..)**: Finds items whose property matches the specified values. The entry **1000..2000** finds any item that contains a value in the range of the lowest up to the highest value including in the property.

1.4.32. Things to know about keyboard controls in the storage area

In the storage area, you can use various keyboard shortcuts to perform actions. You can use the key combination **ALT+<number>** to switch between the **Advanced**, **Multi-value** and **General** tabs.

1.4.33. Useful information to know about keyboard controls in the list views in the Search and Personal space features

General controls in lists

In the list view, you can use various keyboard shortcuts to perform actions. For instance, you can use the keyboard to navigate in the list, select list items or open the details of an item.

Navigation

You can navigate within the list view.

Use the arrow keys or the other keys for controlling the cursor (focus) to switch to another cell or list item.

- **Down arrow**: Focuses on the next list item.
- **Up arrow**: Focuses on the previous list item.
- **Home key**: Focuses on the first list item.
- **End key**: Focuses on the last list item.
- **Page up key**: Moves the focus one page up.
- **Page down key**: Moves the focus one page down.
- **ENTER key**: Opens the details of the item in focus.
- **Tab key**: Moves the focus from the list to the next item that can be focussed on.

Other

You also have the following additional control options:

- **ALT+X**: Shows the accessibility options. You can activate the focus border, deactivate animations and enable the contrast view.
- **F6**: Navigates through the various areas of the application (e.g. the content area of a document and the context action). Activate the focus border for optimum function. You can use the arrow keys to adjust the size of the areas.
- **Shift+F6**: Navigates backward through the various areas of the application. Activate the focus border for optimum function.

Advanced controls for list views in the Search and Personal space features

The keyboard shortcuts under “General controls in lists” and “Navigation” also work for the lists in the **Search** and **Personal space** features. The **Search** and **Personal space** features contain special lists that offer additional controls. You can use additional shortcuts to perform actions in these lists.

Selection

You can select items in the list view to execute collective actions for multiple selected items. Once you have selected at least one item, you will see the collective actions above the list. You have the following control options at your disposal:

- **Space bar** or **Shift+space bar**: Selects the list item in focus. If the list item is already selected, the selection is cancelled (activates or deactivates the checkbox).
- **Shift+Down arrow**: Selects the list item that is in focus and the next list item. Then focuses on the next list item (activates the checkbox).
- **Shift+Up arrow**: Selects the list item that is in focus and the previous list item. Then focuses on the previous list item (activates the checkbox).
- **CTRL+A**: Selects all list items, provided all list items are not already selected. If all the list items are already selected, the selection is cancelled (activates or deactivates the checkboxes).

Item actions

You have the following additional control options for performing actions on an item:

- **Context menu key** or **Right arrow**: Opens the context menu for the item in focus.

1.4.34. Things to know about keyboard control in the table view

In the table view, you can use various keyboard shortcuts to perform actions. For instance, you can use the keyboard to navigate in the table, select rows or open the details of an item.

Navigation

You can navigate within the table view.

Use the arrow keys or the other keys for controlling the cursor (focus) to switch to another cell or row.

- **Down arrow**: Focuses on the next row.
- **Up arrow**: Focuses on the previous row.
- **Right arrow**: Focuses on the next cell. If you are already focused on the last cell in the row, nothing happens.
- **Left arrow**: Focuses on the previous cell. If you are already focused on the first cell in the row, nothing happens.
- **Home key:** Focuses on the first row.
- **End key**: Focuses on the last row.

- **Page up key**: Moves the focus one page up.
- **Page down key**: Moves the focus one page down.
- **ENTER key**: Opens the details of the item in the selected row.
- **Tab key**: Moves the focus from the table to the next item that can be focussed on.

Selection

You can select items in the table view to execute actions for multiple selected items. Once you have selected at least one item, you will see the actions above the table.

- **Space bar** or **Shift+space bar**: Selects the row that is in focus. If the row is already selected, the selection is cancelled (activates or deactivates the checkbox).
- **Shift+Down arrow**: Selects the row that is in focus and the next row. Then focuses on the next row (activates the checkbox).
- **Shift+Up arrow**: Selects the row that is in focus and the previous row. Then focuses on the previous row (activates the checkbox).
- **CTRL+A**: Selects all the rows if they have not all been selected yet. If all the rows are already selected, the selection is cancelled (activates or deactivates the checkboxes).

Sorting and grouping

You can sort and group the items in the table as follows:

- **ENTER key on the column heading:** Toggles the column sorting.
- **CTRL+ENTER on the column heading:** Opens the menu for the column.
- **ENTER key on the grouping row:** Opens the grouping to display subitems.

Other

You also have the following additional control options:

- **Context menu key**: Opens the context menu for the item in the row that is in focus.
- **ALT+X:** Shows the accessibility options. You can activate the focus border, deactivate animations and enable the contrast view.
- **F6**: Navigates through the various areas of the application (e.g. the content area of a document and the context action). Activate the focus border for optimum function. You can use the arrow keys to adjust the size of the areas.
- **Shift+F6**: Navigates backward through the various areas of the application. Activate the focus border for optimum function.

1.4.35. Collaborating using commented PDF documents

When collaborating in teams, it is useful to directly comment on documents. This can be a comment as a sticky note or as a visual annotation that you position in the PDF document to provide remarks, hints, or ask a team member any questions.

You can use the note function for PDF documents in order to comment in text form on contents in PDF documents. Use the visual annotations to highlight selected text passages.

If you comment on a locally stored PDF document and save it in a d.3 repository, you can only read the already existing comments, but you cannot edit or delete them.

It may happen that several users simultaneously comment on and edit the same PDF document if the permissions does not prevent any actions like these. When editing simultaneously, the changes of the editor who saved the notes first are applied. The comments of the other user are discarded.

1.4.36. Compiling thematic lists for documents and dossiers

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. Frequently asked questions

In this topic, you will find things to know about different aspects of the application and answers to frequently asked questions.

1.5.1. How do I delete search templates?

You can delete a single search template or several search templates within a folder at once.

Let's suppose you want to delete a single search template.

This is how it works

1. Select **Search operations**.
2. Select the search template under **My search templates** you want to delete.
3. Open the menu for context actions next to the entry and select **Delete**.

If you want to delete several search templates in a folder at once, just select the folder and then select **Delete** for the folder in the menu for context actions.

1.5.2. Can I double-save an item?

When you save an item again into your d.3 repository, the item is saved a second time with a new document number. To avoid storing identical items multiple times, there is the option of a single instance check. The single instance check must be set up by your d.3 administrator.

If the single instance check has been activated by your administrator, a note is displayed to you. You have two options as to how to react to it:

1. You realize that you mistakenly would like to save the item again. In this case, you confirm the note message. The document is not saved.
2. You would like to save the item a further time in the d.3 repository. After confirming the note message, you can save the item directly into a dossier using drag & drop. The single instance check detects that the item is already present. You receive the notice in the summary of the items to be saved. In the summary, you have the option of saving the duplicate in the corresponding dossier using the **Link existing item with dossier** option.

1.5.3. Can I watch a video?

As standard, you can watch a video in the **View** perspective and use standard functions, such as fast forward and rewind, pause, or stop the video.

Depending on the video file size, delays may occur before playing or when fast forwarding or rewinding the video. Which video formats are supported depends on the supported video format of your browser, e.g. MP4 format (Codec H.264).

1.5.4. Can I hide comments in a PDF document?

If you view a PDF document in the perspective **View**, it may already contain various comments or visual annotations. These comments may bother you when reading or printing the document. You can hide the comments and visual annotations so that only the PDF document’s text is displayed.

Click the eye icon to hide or show all comments.

If you notice that you cannot hide the comments, it is possible that the comments were added to the PDF document using an external PDF program, such as Adobe Acrobat Reader DC, or the comments have been write-protected. Further information on write protection: Working with comments and visual annotations in PDF documents

1.5.5. Why do the facets change time and again?

If you perform search processes and limit the search results using categories and properties, you will notice that this also causes the facets to change.

When selecting a category and a value (facet) of a property, the number of facets changes, for example. The displayed facets matches the values of the properties in the search result. Thus, the facets changes accordingly as soon as you changes the criteria for a search operation by selecting a category or the value (facet) of a property, for example. In addition, it is useful to know that changing the sort order of the results may also change the displayed facets per property. This fact has something to do with the maximum number of search results and a changed sort order.

Let's suppose, your d.3 repository contains a lot of documents and dossiers and a category **Contact dossier** with more than 50,000 documents. By default, a maximum number of 25,000 documents and dossiers are displayed as result in a d.3 repository. However, your administrator can specify a lower value.

You work on all contacts from L-Z and now you need to edit certain documents for your contacts.

You select the **Contact dossier** category and get already a search result. However, you recognize the plus sign next to the number of facets indicating that there are more facets available for some properties, e.g. for the **Contact name** property. Maybe the facets you need (all contacts from L-Z) are currently not displayed because the maximum number of displayed results were exceeded. You can now sort the result list in descending order by contact name in alphabetical descending order (Z-A) so that you display the range of letters you work on first.

In this case, not only the result list is represented differently due to re-sorting the results from A-Z to Z-A, but also the related facets are re-sorted so that they match the result list. The number of potentially displayed facets is also changed. Only what does not exceed the maximum number of search results is displayed.

1.5.6. Why does it take so long to download a document?

Downloading file may take a while, for example, if the file can only be downloaded with a watermark.

The watermark is "combined" with the PDF file once the download process started. Thus, the download process can take some time.

1.5.7. Why can I not collect all items in a PDF file?

It may be that you have a comprehensive number of documents that you would like to share with another person. With **Combine into PDF file**, you can select all the documents or just a partial amount for export into a PDF file. Although you would like to select all documents, it does not work.

Maybe the administrator has limited the number of documents you can select.

If you have any question, please contact your administrator.

1.5.8. 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.

1.5.9. 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.

1.5.10. What do the icons of the context actions mean?

When you view a document in the **View** perspective, you see various icons for context actions. You can unfold the bar by clicking on the arrow, in order to display the description of the context action.

The frequently used context actions include the following:

Download: Downloads a file.

Start editing: Allows to edit an item.

Finish editing: Allows you to save an item in the d.3 repository so that the item is available for other users.

Show in dossier: Shows the document in context of the parent dossier.

Start workflow: Allows to select and start a workflow for the item.

1.5.11. What do the numbers next to the properties mean?

For example, if you use the **Search** feature to find a document, you can either select a category first or use directly a keyword. Next to some properties a number is displayed, e.g. **116 available**. This number means that you can search for 116 values (facets in a property) in this property and you always get a result. You can refine your search result using the so-called facets for a property.

By selecting a facet in a property, the number of results is reduced and the number next to other properties is also changed.

1.5.12. What does the plus sign on the “Notes” perspective mean?

If you select a document in the results and you see the entry **1+**in the **Notes** perspective, there are notes for the selected document. Thus, you can immediate recognize whether there are notes for a document.

The plus sign indicates that there is at least a single note. If there is no note, the number **0** (zero) is displayed next to the perspective's title.

1.5.13. What does the plus sign mean beside a figure in the properties?

For example, if you use the **Search** feature to find a document, you can either select a category first or use directly a keyword. Beside a few properties, a figure is shown along with a plus sign, such as **25+**. The plus sign means that there is more than the displayed facets.

Use a property or select a category to refine the search result, i.e. reducing the number of values so that you get a reasonable set of values.

1.5.14. What is the process portal?

The process portal offers you a great number of opportunities to digitize business processes and provide integrated information at a glance.

With the functionality provided by the Process Portal you can, for example, initiate workflows (e.g. application for leave or investment request) or integrate forms as summaries or evaluations in the application, namely without a relation to a document or dossier. The name "Process portal" is a default value for the displayed term and can be changed by the d.3 administrator.

If there are any questions about business processes and the user interface in context of the process portal that were implemented by your organization, contact your d.3 administrator.

1.5.15. What is a perspective of an item?

With the perspectives, you view something from different points of view. Perspectives offer you the opportunity to view any document or any dossier by different aspects. As soon as you select an item in your result, you see the details that are grouped by topic in the **View**, **Properties**, **Notes** and **Versions** perspectives.

You will find the following information in the perspectives:

- View **perspective**: You will see the content of a document in the perspective if a preview is available. PDF documents, images, and videos are displayed as standard. You can browse PDF documents as usual and also provide them with comments if needed. However, the changes are not saved directly in the PDF file. Released documents are shown to you as standard. Only if there is no released version of a document will you see the document in the **Processing** status.
- Properties **perspective**: In this perspective, you receive an overview of the common (system-specific) and advanced properties as well as the multi-value properties for the selected item. At the first opening, you see only the advanced properties whose properties have values. Use **Show empty** for a complete overview of all the properties. If you would like to view the content of properties with multiple values, click on the three dots beside the field.
- Notes **perspective**: In this perspective, you can view the notes for a document, add your notes, or display the content of a document. You can see in the title of the **Notes** perspective whether there are notes available (**+1**) or not (**0**).
- Versions **perspective**: In this perspective, you see what versions there are for a document or a dossier. You can view each version, provided you have the permissions to do so. You will find the number of versions in the title of the perspective. The version list contains all the versions sorted in a chronological order from new to old. The status of the version is highlighted above the title of an item. In addition, the name of the person who released, archived, or verified a version is displayed. The version date is the date on which a version was created.

> **Note**
>
> Electronic signatures in PDF files are displayed as graphics. There is no automatic validation of the electronic signatures, when viewing them in the **View** perspective. You can locally save the document using the context action **Download** to validate the signature of the electronic signatures locally.

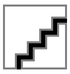
1.5.16. What is a context action?

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.

1.5.17. What is a saved search operation?

Saved search operations refer to both search templates and search history entries. You save and managed, for example, complex search operations with a search template. The search history contains the search criteria of your search operation and is generated automatically.

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

1.5.18. 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).

1.5.19. What do the icons mean for the file formats?

With the following icons, the different file types are visualized:

Microsoft Excel (for example XLSX)

Image (for example JPG)

Message (for example MSG)

PDF document

Microsoft PowerPoint (for example PPTX)

Microsoft Word (for example DOCX)

Text file (for example TXT)

Compressed file (for example ZIP)

Unknown file format (respectively no icon for this file type found)

Video file (for example MP4)

Audio file

CSV file

CAD file

Dossier (with content)

Dossier (without content)

D3L file

1.5.20. Which placeholders are there for search, e.g. inexact search, empty values, either-or search?

You have the following options for using placeholders and operators to search for specific values:

- **Dollar sign ($)**: Finds items whose property does not contain any value.
- **Combination of exclamation mark and dollar sign (!$)**: Finds items whose property contain a value. The exclamation mark negates the dollar sign so that all properties that are not empty are taken into account when searching.
- **Combination of exclamation mark and any keyword (!<keyword>)**: Finds items whose property does not contain the keyword. The exclamation mark negates the keyword, thus, all properties that does not contain the keyword are taken into account when searching.
- **Combination of two values separated by a pipe sign (|)**: Finds items whose property either contain the one of the specified values. The entry **2000|2010** finds any item that contains either 2000 or 2010 as a value in the property.
- **Asterisk before or after a string (*char*)**: The asterisk represents an unknown number of characters. The entry ***bank*** finds all items whose name contains the string "bank" while there are before and after the string some more characters. For example, using this search pattern, you get the following result: "local business bank" and "Sample bank of a town".
- **Question mark before or after a string (?char?)**: The question mark represents exact one character. The entry **Field?** finds all items whose name contains exactly an unknown letter after "Field". For example, using this search pattern, you get the following result: "Fields", "Fielde", and also "Fieldi".

1.5.21. How do I change the title and storage location of a search template?

You have noticed that the title of a search template or the folder, in which the search template is stored, no longer fit. You can change the title and location of the template at any time.

This is how it works

1. Select **Search operations**.
2. Select the search template under **My search templates** you want to change.
3. Open the menu for context actions next to the entry and select **Edit**.
4. Change the title under **Edit search template**. If applicable, select a different folder or create a new folder.
5. Select the **Update** action to save the changed search template.

1.5.22. How do I determine time periods in the past dynamically for a search?

You can use wildcards in date fields to dynamically calculate time periods in the past 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 **Last modified** property finds all documents which were edited 14 days ago, namely calculated as of today. However, if you want to determine a completed time period in the past, just compose a search pattern by combining the number of days in the braces. The search pattern **{-14}..{-3}** finds all documents which were edited during the time period from 14 days ago up to 3 days ago, namely calculated as of today.

This is how it works

Let's suppose, you are working in the Human Resources department and at a certain deadline (today) in the month, you want to review the applications which were received 14 days ago. For review purposes, your organization set up the date field as **Application received on** property.

1. Select a category, e.g. **Application** in the **Search** feature.
2. Enter the search pattern **{-14}** in the **Application received on** property.

As a result, you get the applications which were received 14 days ago.

Determining a completed time period in the past 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 determine the invoices which were received in the time frame of 3 weeks ago up to 1 week ago. For review purposes, your organization set up the date field as **Invoice received on** property.

1. Select a category, e.g. **Incoming invoice** in the **Search** feature.
2. Enter the search pattern **{-21}..{-7}** in the **Invoice received on** property.

As a result, you get the invoices which were received in the time frame of 3 weeks ago up to 1 week ago.

1.5.23. How do I determine time periods in the future dynamically for a search?

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.

1.5.24. How do I disable watched events for a single item?

There are a number of events that you watch to keep yourself updated regarding changes made to for a d.3 item (dossier or document). If you use the function to watch an item, it may happen that you receive notifications for irrelevant changes. You can easily disable single events that you are watching for an item or disable watching for all events.

Let's suppose you are watching the **Editor of the item was changed** event for a document and you don't want to watch this event any longer.

This is how it works

1. Select the item in the result list for which you want to change the watched events.
2. Click on **Change watch settings**.
3. Disable the **Editor of the item was changed** event in the **Change watch settings** dialog.
4. Save your changes.

If you want to disable the watching function for all events, select **Change watch settings** and then click **Stop watching**.

1.5.25. How do I create a new dossier 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.

1.5.26. How do I find the dossiers in which an item is found?

You can view to which dossier a document or dossier is associated. If the item is contained in several different dossier structures, the dossier structures are differentiated by the top-level dossier (main dossier).

The Terms and Conditions of an enterprise is an example for a document that is identical in each context. This document is only stored once in a d.3 repository, but is integrated in all dossiers.

Let's suppose, you want to have a look at the different dossier structures for an item.

This is how it works

1. Select the document in the result list.
2. Open the dossier navigation with the context action **Show in dossier**.

In the dossier navigation, you can see the first dossier that is the direct parent of the item as well as its content and the dossier structure the dossier is located. You can view the different dossier structures by selecting another main dossier under the dossier structure.

1.5.27. How do I find items with a date in the past or future from the perspective of “today”?

You have the following options for searching for items that are found in relative date ranges:

- **Combination of a negative number in braces ({-number})**: Finds items whose date is in the past, namely a certain number of days calculated as of today. The entry **{-3}** in a date field finds all items that were recently edited 3 days ago, for example. The point of reference is always "today".
- **Combination of a number in braces ({number})**: Finds items whose date is in the future, namely a certain number of days calculated as of today. The entry **{3}** in a date field finds all the items that are due in 3 days, for example. The point of reference is always "today".
- **Combination of negative numbers in braces separated by two dots ({-number1}..{-number2})**: Finds items in a past time period, namely calculated as of today. The entry **{-10}..{-3}** finds all items that are in the date range from 10 days ago up to 3 days ago. The point of reference is always "today".
- **Combination of numbers in braces separated by two dots ({number1}..{number2})**: Finds items in a future time period, namely calculated as of today. The entry **{3}..{10}** finds all items due in the period from in 3 days to in 10 days. The point of reference is always "today".

1.5.28. How do I get to another d.3 repository?

The option to switch a repository is only displayed if there is more than one d.3 repository in your organization available and you have the permission to access additional d.3 repositories. When starting the first time, the first repository is selected by default which was set up by the administrator. You can select another repository using the selection arrow. The newly selected repository is shown as standard the next time.

1.5.29. How can I prevent the printing of headers and footers in the browser?

When printing PDF documents in the **View** perspective, information may also be printed that is typically for printing in the browser in Internet Explorer. This information can be, for example, the number of pages or the URL.

You can also specify in the browser that this additional information should not be printed along with the content of the PDF file.

This is how it works

Let's suppose you want to quickly print an invoice with several pages, which is stored as PDF document. The paper printout must only display the content of the invoice. Thus, you need to modify the printing setting in your browser. Depending on the browser, the following steps and options may vary in naming.

1. In Internet Explorer, click on the **File** menu.
2. Click on the **Print** menu entry and then on **Page setup**.
3. Select the **Empty** option for headers and footers in the **Page Setup** dialog.

Once you save the settings, any PDF file you print from the browser are printed without header and footer.

If you do not see the **File** menu in Internet Explorer, click on the gear icon to open the dialog for setting up a page.

1.5.30. How can I prevent being asked to log in repeatedly?

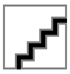
In some organizations, the option for the Single Sign-on feature is already enabled so that you do not need to log in or specify further settings.

However, if you are prompted to specify your credentials in the browser, then you can enable specific options and specify settings in order to log in only once. If so, your administrator provides you with the URL to be used during the following steps.

Let's suppose you use the browser Internet Explorer and want to avoid having to log in again each time.

This is how it works

1. Open **Internet options** in Internet Explorer.
2. On the **Advanced** tab in **Security**, enable the **Enable Integrated Windows Authentication**.



3. Then add the URL to the security zone **Trusted sites**.
4. In the **Internet options** dialog, go to the **Security** tab and select the zone **Trusted sites**.
5. Click on **Sites** and add the URL to the **Add this website to the zone** box.
6. Click on **Add** so that the URL is listed under **Websites**.
7. Confirm the changes.

Once you have specified all settings, you can also use Google Chrome as an alternative browser, since this browser uses the settings in Internet Explorer.

1.5.31. How do I copy the d.3 notes for an item?

In the **Notes** perspective, you can see the information that someone has added to a dossier or a document as a note. If necessary, you can copy these notes with **CTRL+C**.

1.5.32. How do I empty the search history?

You can clear the search history at any time. If you use a certain entry in your search history more often than others to perform a complex search operation, you can define this search operation as a search template before you clear the search history. You delete all entries under **Search history** when clearing it.

This is how it works

1. Select **Search operations**.
2. Select **Search history**.
3. Open the menu for context actions and select **Clear**.

1.5.33. How do I delete an item?

You can delete documents or dossiers in a d.3 repository, e.g. if the validity period is exceeded. However, you need the permission to delete documents in a certain status, this ensures that the context action for deleting is available.

You cannot delete documents which are currently being edited by a different person, for example.

Let's suppose, you edit a document. You find out that your changes are no longer up-to-date and you need to start your work again. You want to delete the document containing your own changes you have made so far.

This is how it works

1. Select the document in the result list to view the context action for deleting.
2. Click on the context action for deleting (garbage can icon).

If you want to delete documents or dossiers that have already been approved or archived, specify a reason why the items are to be deleted.

If you want to delete a dossier containing at least a document, the documents in the dossier still reside in the d.3 repository. You only delete the dossier.

1.5.34. How do I navigate through dossiers?

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**.

1.5.35. How do I sort the results in the list view?

The result list is sorted by default. The results are sorted according to the date when an item was last changed and in alphabetical order. You can change the sorting at any time. You will find more criteria under **Sort by**. These criteria are the available properties.

You can also change the alphabetical sorting.

If dossiers are shown in your results, these are always shown at the top position, regardless of which sorting you have chosen.

1.5.36. Why is the document not shown to me?

You may not be able to display documents exceeding the file size of 200 MB in the **View** perspective under certain circumstances. The visualization time is then exceeded by a certain duration.

You can save the document locally using the context action **Download** and then display it in the corresponding application.

1.5.37. How do I always start the search with the same search criteria?

As a daily routine, you may often search for the same documents or dossiers in a repository. In order not to repeatedly specify the same search criteria, you can use **Always start with this search** to save your specified search criteria. Once you have saved the search criteria, they are displayed when opening the feature **Search** next time.

If you can access different d.3 repositories, you need to specify search criteria for each repository.

This is how it works

1. In the **Search** feature, select the **New search** perspective.
2. Define the search criteria which should be contained by default in your search.
3. Click on the gear icon and select **Always start with this search**.

1.5.38. Is the electronic signature checked when displaying?

Some PDF documents contain an electronic signature. You can view the PDF document with the electronic signature in the **View** perspective. Since the electronic signature is shown as a graphic as standard, there is no automatic validation of the signature.

The document containing the electronic signature can be saved locally to validate the signature.

1.5.39. What is the purpose of search templates?

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.

1.5.40. What is the purpose of the document status?

The life cycle of an item is indicated by the different document statuses (e.g. **Processing**, **Release**, **Archive**) in d.3ecm. The document statuses serve to make the current status of a document quickly recognizable. Each item in status **Release** can usually be viewed by d.3 users, who were granted the permission to view the category (document type or dossier type). When creating a new version, saving an item in the status **Release**, you can specify any information while releasing. This information can help you or other d.3 users to understand, for example, the reasons for a release at a later point in time. To specify the status for each item in your repository can help to easily manage the items.

You can display the information about a release version of an item at any time in the **Versions** perspective of an item.

To save an item in the status **Release**, you need to be granted the permission to release (creation of a new version).

1.5.41. How do I display fewer properties for a document?

By default, certain document properties are displayed in the result lists for search results or favorites (among others these are category, title and four other properties). In some situations, e.g. to see more results of a search operations, you can use **Customize view** to adjust the properties to be displayed.

Let's suppose, the search result is so large that you want to display as many results as possible at a glance.

This is how it works

1. Expand the gear icon to customize the number of displayed properties.
2. Use the minus sign for zooming purposes to see less properties per item.

You can decide how many properties you want to hide. If you want to see more properties again, reset the view or zoom in step by step.

1.5.42. What is the purpose of the “Tasks and Messages” feature?

With the **Tasks and Messages** feature, you manage messages and tasks assigned to you for a document. Additionally, you can participate in workflows.

If needed, you can filter comprehensive lists with the functions **All**, **Tasks** and **Messages**. Sorting is also easy: You can sort the items in the list in an ascending or descending order with **Received on**, **Subject** or **Sender**.

In the **Summary** perspective you will find further details on the selected item. If, for example, you have been sent a task with a certain submission date, the due date is shown to you highlighted in color:

- Green background: The due date is specified in the future.
- Yellow background: The due date is tomorrow.
- Beige background: The due date is today.
- Red background: The due date is in the past.

If you participate in a workflow, you will find all the information you require in the **Workflow** perspective. The details displayed can differ depending on the workflow software.

1.5.43. What is the purpose of the “Personal area” feature?

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 search history.
- **Storage templates**: Directly access your favorite 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.

1.5.44. How do I save the column sequence 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.

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.

1.5.45. How do I change 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:

1.5.46. What happens when filtering the properties in the 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.

1.5.47. How do I group the results in the table view?

You can group the displayed results by a criterion in the table view.

Let's suppose, you want to get an overview of unpaid invoices per supplier. For example, the name of the supplier is displayed in the **Name** column. You can group the results by the name of the supplier to display all the supplier's invoices under their name.

For grouping, just drag the column and drop it on the **Drag columns here to group the displayed results.**

1.5.48. Why do I see neither icons or lettering for functions in the table view in IBM Notes?

Only in the IBM Notes integration, there are some display issues in the table view, which are present due to the software. Maybe you cannot see the labels of functions, selection fields or icons.

For example, the following functions are affected:

- The fields to select single documents, if you want to export the properties of documents into an Excel file.
- The fields to select single documents and dossiers, which you want to collect in a PDF file to provide them offline.

- The icons and labels for the grouping and sorting functions.

You can avoid the display issue if you use the table view in a browser exclusively instead of opening it in IBM Notes or switch to the list view.

1.5.49. 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.

1.5.50. Why is the document shown in PDF format, even though the document is a Word file?

If a document (e.g. Word document) has a watermark, the document is also display in PDF format. You can download the document exclusively in PDF format.

As soon as you start editing the d.3 document, the context actions for editing the document in a Microsoft Office application appears. You can edit the document and release it afterwards, for example.

However, when downloading this document, you will recognize that you can only download a PDF file under **Original** wie auch **Other formats**.

1.5.51. What is the purpose of storage templates?

Storage templates support you to easily save documents and create dossiers during routing tasks. If you need to specify several properties and categories to save certain documents or create dossiers, you can save the storage operations including these criteria as storage template.

You can apply a storage template at any time to save new documents or to create dossiers.

1.5.52. How do I delete a storage template?

You can delete individual storage templates which you no longer need.

This is how it works

Let's suppose, you want to delete a storage template.

1. Select the perspective **Storage templates** in the **Personal space** feature.
2. Select the storage template you want to delete under **Storage templates**.
3. Open the menu for context actions next to the entry and choose **Delete**.

1.5.53. Where can I find my templates and lists?

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.

1.5.54. Where can I find my favorites?

You can find your favorites in the **Personal space** feature. On the start page, you can find the **Personal space** tile containing your lists such as saved search operations or storage templates and the lists of watched items.

Under **List of favorites**, you can find your favorites and all the personal lists that you have marked as favorites and compiled as separate lists.

1.5.55. Why are my Microsoft Office templates saved as documents?

Applies to: only d.3one in Microsoft Office

In a d.3 repository, you can only store documents using the **Save** and **Save as** functions. If you store templates using the functions, the templates are stored as documents of the corresponding type in the repository.

1.5.56. How do I activate d.3one functions in Microsoft Office?

Applies to: only d.3one in Microsoft Office

By default, you can access the d.3one functions as soon as your administrator has provided you with the add-in.

If the add-in is not displayed automatically, enable the add-in.

This is how it works

1. In the menu ribbon of your Microsoft Office application, choose **Insert** and then **My Add-ins**.
2. In the **Office Add-ins** dialog box, click **SHARED FOLDER**.
3. Choose **d.3one** and add the add-in.

1.5.57. 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.

1.5.58. How do I store Microsoft Office documents in dossiers?

Applies to: only d.3one in Microsoft Office

You can store your Office documents directly in a dossier in your d.3 repository.

Let's suppose you have fully edited a document in your Microsoft Office application and you want to store the document in the appropriate customer dossier in the repository.

This is how it works

1. In your Microsoft Office application ribbon, choose **Start** and then **Show d.3one**.
2. Go to the relevant dossier.
3. Choose the context action **Store document in dossier**.
4. Enter the required properties for the document and save your entries.

1.5.59. How do I create a document using a Microsoft Word template?

Applies to: only d.3one in Microsoft Office

You can use Microsoft Word templates from a d.3 repository to create documents.

This is how it works

1. Go to the dossier in which the template is stored.
2. Select the context action **Create new document from template**.
3. Select the appropriate template.
4. Choose **Create and store**.
5. Enter the required properties and save your entries in the repository.

Alternatively, you can use the **Download** context action to save the template locally. You can then edit the template in your Office application and save it in the repository.

1.5.60. How do I store a local Microsoft Office document in different d.3 categories?

Applies to: only d.3one in Microsoft Office

If you have a local Microsoft Office document that you want to store in different categories, you can do so by going to the **d.3one** area on the **Start** tab in the ribbon of your Microsoft Office application and choosing **Save as**. You save the document as a new document with the appropriate properties in the applicable category in the d.3 repository. Two different documents then exist in the repository.

1.5.61. How do I store Microsoft Office documents in a d.3 repository?

Applies to: only d.3one in Microsoft Office

You can save local Microsoft Office documents directly in a d.3 repository. You can still edit your documents locally in your Microsoft Office application and then update them in the d.3 repository by choosing **Save**.

Let's suppose you have fully edited a document in your Microsoft Office application and you want to save the document in your d.3 repository to finish editing.

This is how it works

1. In your Microsoft Office application ribbon, go to **Start** and then press **Save** in the **d.3one** area.
2. Then click **Save as** in the **d.3one** area.
3. Enter the required properties for the document and save your entries.
4. Click **Save** to update the document or **Save as** to save the changes as a new document in the d.3 repository.
5. Choose the context action **Finish editing** to complete the process.

1.5.62. How do I update a Microsoft Office document in a d.3 repository?

If you want to update a Microsoft Office document saved in a d.3 repository, you can use the **Editing documents directly from a Microsoft Office application** extension in d.3one. Alternatively, you can also use d.velop local edit.

If you use d.3one, please note the following:

If you click **Save** in the Microsoft Office ribbon, the document will be updated. However, if you click **Save** in the d.3one ribbon, the document will not be updated. Therefore, make sure that you are in the correct ribbon before you save your changes to the document.

1.5.63. 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**.

1.5.64. How do I link a document to a dossier?

If necessary, you can link documents or dossiers to a dossier. Suppose that you are working on a project for which a dossier already exists. You can first “gather together” all the important documents for the project for easy access. Select the relevant documents in the result list using the context action **Mark for linking.** In the second step, go to the dossier to which you want to add the selected (marked) documents.

In the dossier, tap or click the link symbol to link the selected items to the dossier. You can check the list once again before adding it. If you discover a document that you did not want to add to the dossier, you can remove it from the list by tapping or clicking the symbol next to the document.

This is how it works

1. In the result list, tap or click the menu for context actions and select the context action **Mark for linking**.
2. Find the dossier that you want to link to the document and select the dossier in the result list.
3. In the result list, tap or click the menu for context actions and select the context action **Link marked items**.
4. Check the documents to be linked and click **Link**.

The documents are now in the selected dossier. If you want to link multiple items (documents or dossiers) to a dossier, choose **Mark multiple items for linking**.

1.5.65. How do I remove documents from a dossier?

While viewing the dossier content, you notice that at least one document or dossier has been added to the dossier by accident. You can remove one or more documents from the dossier, which also removes the link to the dossier. You can also remove dossiers from the dossier.

This is how it works

1. In the dossier, tap or click **Detach multiple items from dossier**.
2. Select the documents or dossiers that you want to remove.
3. Tap or click the detach icon.

The selected documents or dossiers are no longer linked to the dossier.

1.5.66. Where can I find the list of documents to be linked?

You have marked various documents that you want to add to a dossier. Since the list is long, you may not be able to remember whether you have already “gathered together” all the documents using the context action **Mark for linking**.

You can view the list of documents at any time if you have selected a document with the context action **Mark for linking**. Click or tap **Manage marked items** to view the list instantly.

If you are currently in the dossier, the list of documents is displayed for you before the documents are linked to the dossier. You can then choose whether you want to remove an item.

1.5.67. 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.

1.5.68. 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**
- **HEIF/HEIC 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.
- **D3L files**

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

1.5.69. How do I group, sort or filter results by multi-value property in the table view?

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.

1.5.70. 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.

1.6. 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.