d.velop

d.velop share and d.velop collaboration: User

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1. User Manual d.velop share and d.velop collaboration

1.1. Basic information about the application and manual

You can find general product information about d.velop share and d.velop collaboration in this chapter.

1.1.1. About d.velop share and d.velop collaboration

d.velop share and d.velop collaboration enhance your d.3one environment with collaborative functions. Following the installation, you are able to share documents with people outside your organization. You can also send documents by e-mail directly from your d.3one environment or start chats based on documents and dossiers.

d.velop share is designed for on-premises systems and has a smaller scope of functions. d.velop collaboration is designed for cloud and hybrid systems and offers the full scope of functions.

1.2. Getting started

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

1.2.1. Sharing documents with people outside your company

Applies for cloud and hybrid environments only (d.velop collaboration):

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

This is how it works

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

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

1.2.2. Updating documents

Applies for cloud and hybrid environments only (d.velop collaboration):

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

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

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

This is how it works

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

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

1.2.3. Ending the validity of a share link

Applies for cloud and hybrid environments only (d.velop collaboration):

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

This is how it works

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

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

1.3. Additional functions and settings

You can find information about additional functions and useful tips for settings in this chapter.

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

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

This is how it works

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

1.3.2. Connecting to Microsoft Teams

If you use Microsoft Teams in your company, you can connect documents with your Microsoft Teams channels. You can also talk to your team members about document and dossier content in Microsoft Teams.

This is how it works

1. Select the team or team channel in Microsoft Teams.
2. In the context menu, click **Get link to channel** or **Get link to team** and copy the link to the clipboard.
3. Select a document from your document management program.
4. Click the context action **Chat**.
5. Paste the link from the clipboard.

6. Click **Save**.

You have connected Microsoft Teams to the document. You can now navigate directly from your document to the relevant Microsoft Teams channel.

1.3.3. Sending documents by e-mail

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

This is how it works

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

1.4. Frequently asked questions

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

1.4.1. How can I display links for sharing documents again?

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

This is how it works

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

1.4.2. How do I stop sharing a document before the actual expiry date?

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

This is how it works

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

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

1.5. 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.