Product Description
d.velop documents platform edition

1 Overview

This product description outlines the software bundle d.velop documents platform edition for the deployment models "Cloud" and "On Premises (with and without hybrid use of cloud services)".

The scope of services depends on the booked edition and the booked deployment model (Cloud, Hybrid, On Premises).

A hybrid system is defined as a system in which the document repository is operated on premises at the customer's site, while additional services are operated either on premises by the customer or in the multi-tenant cloud.

Support and maintenance services for the d.velop documents platform edition are described in the Service Level Agreement.

The *d.velop documents platform edition* consolidates several partly independent products and solutions of d.velop AG into one edition.

2 Scope of Services

Depending on the selected edition (basic, business, ultimate) and deployment model, the following d.velop products and their respective functionalities (as defined in the functional or product descriptions) are included in the *d.velop documents platform edition*:

d.velop documents	Functional Description
d.velop sign	Product Description
d.velop mobile	Product Description
d.velop pilot	Functional Description
d.velop process studio	Functional Description
Collaboration Tools	Functional Description
Microsoft Teams Integration	Product Description
d.velop cloud platform	Product Description

2.1 Editions and Service Scope

The d.velop documents platform edition is available in three editions: basic, business, ultimate.

The d.velop products included in each edition are distributed as follows:

Legend:

✓	Product is included in the respective plan.
✗	Product is not included in the respective plan.
Text	Product is included according to specification.

Product Components	basic	business	ultimate
d.velop documents	✓	✓	✓
Cloud Storage[1]	100 GB / tenant[1]	1.000 GB / tenant[1]	2.000 GB / tenant[1]
d.velop platform connect	✗	✓	✓
d.velop sign	✗	✓ 50 AES[2]	✓ 100 AES[2]
d.velop mobile	✗	✓	✓
d.velop pilot	✗	✓ [3]	✓ [3]
d.velop process studio	✗	✓ [4]	✓ [5]
Collaboration Tools	✗	✓	✓
Microsoft Teams Integration	✗	✓	✓

1) Applies only for operating models Cloud and Hybrid.

2) Advanced electronic seals / month / tenant.

3) Each user is allocated 100,000 d.velop AI Credits per month.

4) 1,000 workflow executions / month / tenant. This restriction applies exclusively to the use of Process Studio services in multi-tenant cloud operations (deployment models: Cloud AWS, Cloud T Cloud and Hybrid).

5) Unlimited workflow executions / month / tenant.

2.2 Functional Scope

The product functionalities of the d.velop products included in the d.velop documents platform edition are distributed across the editions as follows.

Explanation of deployment models:

C1 = Available in the multi-tenant cloud at Amazon Web Services (AWS)
C2 = Available in the multi-tenant cloud at T Cloud Public
H = Available in the hybrid deployment model (on-premises repository with multi-tenant cloud services according to availability in the model)
O = Available in the on-premises deployment model (without use of cloud services)

Legend:

● = Function is included in the product
\- = Function is not included in the product
Text = Product is included according to specification
€ = Additional Costs apply

2.2.1 d.velop documents

Incoming Documents	Deployment model	basic	business	ultimate
(Batch-based) scanning*	C1, C2, H, O	●	●	●
E-mail archiving via e-mail inboxes**	C1, C2, H, O	●	●	●
Barcode recognition for properties	C1, C2, H, O	●	●	●
Document separation using barcodes/QR codes	C1, C2, H, O	●	●	●
Manual document upload	C1, C2, H, O	●	●	●
Reusable templates for document import	C1, C2, H, O	●	●	●
Edit pages during import	C1, C2, H, O	●	●	●
Optical character recognition (OCR)	C1, C2, H, O	●	●	●
Automatic storage in the document management system	C1, C2, H, O	●	●	●
Import via REST API	C1, C2, H, O	●	●	●
Job-based conversion and pre-processing	H, O	●	●	●
AI-based automatic separation of document batches***	C1, H		●	●
AI-based automatic categorization of documents****	C1, H		●	●
Scan from mobile devices	C1, C2, H, O		●	●

*) In all deployment models, a limit of 10,000 documents per month and tenant applies.

**) In operating modes C1, H, and O, there is a limit of 10,000 emails per month per mailbox. In operating mode C2, the function is implemented via Microsoft 365™ mailbox monitoring. Here, the limitation applies to one M365 mailbox with any number of aliases.

***) The automatic document separation using the d.velop AI service "documentsplitting" is included. When using external AI service providers for AI-based document separation, additional costs may apply. When using d.velop pilot for AI-based document separation, the service limits defined in the d.velop pilot service description apply.

****) The automatic AI-based categorization using the d.velop AI service "documentclassification" is included. Additional costs may apply when using d.velop document reader or external AI service providers for categorization. When using d.velop pilot for AI-based categorization, the service limits defined in the d.velop pilot service description apply.

Document management and archiving	Deployment model	basic	business	ultimate
Cloud storage*	C1, C2, H	100 GB	1000 GB	2000 GB
Versioning and version overview	C1, C2, H, O	●	●	●
Digital dossier generation (also automatically based on document properties)	C1, C2, H, O	●	●	●
Status concept for documents and dossiers	C1, C2, H, O	●	●	●
Manage categories and metadata	C1, C2, H, O	●	●	●
Define retention periods	C1, C2, H, O	●	●	●
Activity logs	C1, C2, H, O	●	●	●
Edit with check-in and check-out	C1, C2, H, O	●	●	●
Full-text search in documents (also using OCR)	C1, C2, H, O	●	●	●
Metadata search and search filter	C1, C2, H, O	●	●	●
Search in dossier trees	C1, C2, H, O	●	●	●
Reusable search templates and search history	C1, C2, H, O	●	●	●
Lists of favorites for dossiers and documents	C1, C2, H, O	●	●	●
Automatic PDF/A generation for long-term archiving	C1, C2, H, O	●	●	●
Viewer for different file formats	C1, C2**, H, O	●	●	●
Visualization of supported XML-based invoice formats	C1, C2, H, O	●	●	●
PDF editing (annotations, markups, drawings, freehand notes, rotating, templates)	C1, C2, H, O	●	●	●
Note function for documents and dossiers	C1, C2, H, O	●	●	●

Watch documents and dossiers (with change notifications)	C1, C2, H, O	●	●	●
Merge and export PDF documents	C1, C2, H, O		●	●
Local editing of various file formats	C1, C2, H, O		●	●
Create and edit Microsoft 365™ Office documents***	C1, C2, H		●	●
Bulk editing of properties	C1, O		●	●

*) The cloud storage applies per tenant, i.e. per booked cloud archive. The amount of cloud storage space is determined by the total size of all uploaded documents and document versions. The cloud storage space required for automatically generated PDF/A files, including OCR data and metadata, is not included in the calculation. The storage can be flexibly expanded at the prices stated in the price list valid at the time.

**) In deployment model C2 (T Cloud Public), preview/display of original e-mail files is not included. E-mails can be displayed as generated PDF/A documents (rendition).

***) To use this function, you additionally require a Microsoft 365™ Business subscription if Office documents are to be created or edited. Additional costs may apply.

Task management	Deployment model	basic	business	ultimate
Create, display, assign, forward, edit, remind, or automatically accept tasks.	C1, C2, H, O	●	●	●
Monitor and administer task lists	C1, C2, H, O	●	●	●
Task notifications	C1, C2, H, O	●	●	●
Delegation rules for documents and processes	C1, C2, H, O	●	●	●

Connecting systems and data	Betriebsform	basic	business	ultimate
Connect third-party systems (ERP, CRM and others) via API	C1, C2, H, O	●	●	●
Central Integrated Master Data Management*	C1, C2, H		●	●
Configurable Master Data-Based Attribution**	C1		●	●
Integration in Microsoft 365™ Outlook	C1, H, O		●	●
Integration in Microsoft 365™ Office	H, O		●	●
Integration in HCL Notes	H, O		●	●
Access via Model Context Protocol (MCP)***	C1, C2, H		●	●
Connect portals via the API****	C1, C2, H, O		€[2]	€[2]

*) Further information on the scope of functions and limits can be found in the „Product Description d.velop business objects".

**) Further information on the scope of functions and limits can be found in the „Product Description d.velop custom logics".

***) The following tools are available: d.velop pilot Assistant Search (AI-based research within multiple documents), d.velop pilot Document Prompt (AI-based research within a single document), and d.velop agents (AI agents and capabilities of d.velop pilot). Further information on functionality and limits can be found in the "d.velop MCP Functional Description".

****) The use of the open interface (REST API) in connection with the integration of portals by the customer and the resulting provision of documents for users without access to d.velop documents is subject to a fee and can be flexibly added at the prices stated in the price list valid at the time.

Collaboration	Deployment model	basic	business	ultimate
Forward tasks	C1, C2, H, O	●	●	●
Share/forward batches (document import)	C1, C2, H, O	●	●	●
Share search/import templates using links	C1, C2, H, O	●	●	●
Absence function with delegation rules	C1, C2, H, O	●	●	●
Share/release task lists	C1, C2, H, O	●	●	●

Configuration, infrastructure and security	Deployment model	basic	business	ultimate
Customizing options through entry points for scripts	C1, C2, H, O	●	●	●

Integrated user management (with mass import)	C1, C2, H, O	●	●	●
Role-based and property-based entitlement management	C1, C2, H, O	●	●	●
Can be used with different devices (smartphone, tablet, PC)	C1, C2, H, O	●	●	●
Multiple languages and translation option	C1, C2, H, O	●	●	●
Two-factor authentication	C1, C2, H, O	●	●	●
Single sign-on (SSO)	C1, C2, H, O	●	●	●
Basic health monitoring (by customer)	H, O	●	●	●
Active Directory (AD) integration (via ADFS, LDAP) (with filter function)	C1, C2, H, O	●	●	●
Authentication using additional identity providers	C1, C2, H, O	●	●	●
Advanced health monitoring (by customer)	H, O		●	●

2.2.2 d.velop sign

Digital signatures	Deployment model	basic	business	ultimate
Digital signing	C1, C2, H		●	●
Included advanced seals	C1, C2, H		50*	100*

*) The customer can have documents digitally signed directly from the d.velop documents platform edition. The number of included signatures depends on the chosen documents product (in d.velop documents platform edition business, 50 advanced seals per tenant per month are included; in d.velop documents platform edition ultimate, 100 advanced seals per tenant per month are included). Additional signatures (personal or seal-based) are subject to a fee and can be purchased through one of the available packages of the product d.velop sign for documents in the d.velop Store or as an individual package.

2.2.3 d.velop mobile

Native Mobile Access	Deployment model	basic	business	ultimate
Login profiles	C1, C2, H, O		●	●
Store login data	C1, C2, H, O		●	●
Lock screen with access protection	C1, C2, H, O		●	●
Access to all d.velop cloud apps	C1, C2, H, O		●	●
Quick access	C1, C2, H, O		●	●
Dark mode support	C1, C2, H, O		●	●
Offline provision of documents and dossiers	C1, C2, H, O		●	●
Push notifications	H, O		●	●
Access to offline documents via file app	C1, C2, H, O		●	●
Versioning of offline documents	C1, C2, H, O		●	●
Deleting local edits	C1, C2, H, O		●	●
iOS document scanner	C1, C2, H, O		●	●
Preview for downloads	C1, C2, H, O		●	●
Set absence status	C1, C2, H, O		●	●

2.2.4 d.velop pilot

Artifical Intelligence	Deployment model	basic	business	ultimate
Context action for individual documents*	C1, C2, H		●	●
Context action for several documents*	C1, C2, H		●	●
Smart assistant*	C1, C2, H		●	●
Integration in d.velop process studio*	C1, C2, H		●	●
Autonomous agents for repetitive tasks*	C1, H		●	●

*) Billing is usage-based and calculated using d.velop AI Credits.

2.2.5 d.velop process studio

Digital Workflows	Deployment model	basic	business	ultimate
Execute digital processes (engine)	C1, C2, H, O		1000 WFLs*	Unlimited WFLs*
Form designer	C1, C2, H, O		●	●
Process modeling tool	C1, C2, H, O		●	●
Business rules (decision tables)	C1, C2, H, O		●	●
Scripting engine	C1, C2, H, O		●	●
Process monitoring	C1, C2, H, O		●	●
Task management	C1, C2, H, O	●	●	●
Microsoft Power Platform connector	C1, H		●	●
Template library	C1, C2, H, O		●	●
Reporting and analysis options	C1, C2, H, O		●	●
Managing user rights	C1, C2, H, O		●	●
Web frontend	C1, C2, H, O		●	●
Authentication	C1, C2, H, O		●	●
Import/Export	C1, C2, H, O		●	●

*) In the d.velop documents platform edition business, 1,000 workflow executions per productive tenant per month are included. This restriction applies exclusively to the use of Process Studio services in multi-tenant cloud operations (deployment models: Cloud (AWS and T Cloud) and Hybrid). In the d.velop documents platform edition ultimate, unlimited workflow executions are included.

2.2.6 Collaboration Tools

Collaboration	Deployment model	basic	business	ultimate
Share files via e-mail attachment	C1, C2, H, O		●	●
Share internal links to documents via e-mail	C1, C2, H, O		●	●
Share files via cloud storage link	C1*, C2*, H		●	●

*) The technical implementation and functionality of this feature may differ in detail between deployment models C1 and C2. The fundamental service promise "Share files via cloud storage link" remains valid in both deployment models.

2.2.8 Microsoft Teams Integration

Collaboration	Deployment model	basic	business	ultimate
Integration of d.velop documents into a Microsoft Teams channel as a tab	C1, C2, H		●	●
Share links to dossiers or documents in Microsoft Teams	C1, C2, H		●	●