Service Description
d.velop documents

1 Overview

In addition to the "d.velop cloud platform service description", the product-specific functionalities of d.velop documents are described herein.

The services support, availability and update of d.velop documents are described in the "Service Level Agreement Cloud & SaaS".

2 Scope of d.velop documents

With d.velop documents, you may intelligently accelerate, simplify and optimize the administration of documents and information. d.velop documents provides a smart filing system for quick and easy document retrieval. With this cloud solution you focus on comprehensive collaboration and digital business processes that are optimally supporting your work. Covering the entire process cycle, your documents are always securely archived.

In case of termination of the contract, the customer will have his documents in the same (original) format in which they were saved (Tiff, JPG, docx, PDF etc.) as well as a file in "JSON" format containing all attribute information for the respective file.

d.velop documents „free for 30 days"

By booking d.velop documents – "free for 30 days" you get the fully-featured d.velop documents (comparable to d.velop documents ultimate) free for 30 days. After expiration of a 30 days period you decide for one of the d.velop documents editions (basic, business, ultimate). The 30 days free trial period ends automatically when you do nothing and all your documents and data are deleted after a period of 30 days. However, if you decide to continue using documents within this period, all your documents and data are restored and you may continue your work where you left it.

The following overview shows the scope of the three editions "documents basic", "documents business" and "documents ultimate".

  ✓   = Feature is included in the edition
Text = feature is included according to the description
  €   = Feature can be added through the **d.velop Store** (subject to a charge)

Inbound Documents	basic	business	ultimate
Capture documents via scan (local and network scanners)	✓	✓	✓
Capture documents via e-mail mailboxes	✓	✓	✓
Capture documents via upload	✓	✓	✓
Batch capturing of multiple documents	✓	✓	✓
Manual post-processing of captured documents	✓	✓	✓
Capture Metadata via Barcode/QR code recognition	✓	✓	✓
Document separation with barcode/QR code	✓	✓	✓
Validation/Check of metadata against master data	✓	✓	✓
Automatic recognition of xRechnungen	✓	✓	✓
Creation of Microsoft Office 365 documents		✓	✓
Automatic separation of document batches using deep learning[1]		✓	✓
Automatic categorization of documents using deep learning[1]		✓	✓

	basic	business	ultimate
REST-API (interface) for importing document batches	✓		✓
Automatic extraction of key information from unstructured documents using deep learning[1]			✓
Scanning via mobile device			✓

Document Management and Archiving	basic	business	ultimate
Central cloud storage	100 GB[2]	500 GB[2]	1000 GB[2]
Versioning and version overview	✓	✓	✓
Individual filing structures and file plans	✓	✓	✓
Category and metadata management	✓	✓	✓
Definition of retention periods	✓	✓	✓
Check-in and check-out (download und upload)	✓	✓	✓
Full text search (OCR)	✓	✓	✓
Metadata search	✓	✓	✓
Search in file structure	✓	✓	✓
Search filters	✓	✓	✓
Storable search templates	✓	✓	✓
Storable filing templates	✓	✓	✓
Individual favorites for documents and records	✓	✓	✓
Automatic PDF generation for digital long-term archiving[3]	✓	✓	✓
Viewer for different file formats	✓	✓	✓
PDF annotations, comments and markings	✓	✓	✓
Notes for documents and records	✓	✓	✓
Observe functionality with change notification	✓	✓	✓
Legal digital signature	€	€	€
Advances hotkey support	€	€	€
Search in documents, Google Mail/Calendar/Drive, MediaWiki		✓	✓
Search in Confluence, MS Exchange and MS Sharepoint		€	✓

Workflows und Business Processes	basic	business	ultimate
Task management (creation, processing und forwarding)	✓	✓	✓
Substitution rules for documents and processes	✓	✓	✓
Contract management workflows	€	€	€
Web-based editor for simple workflows and simple forms		✓	✓
Execution of simple workflows[4]		✓	✓
Process monitoring		✓	✓
Import and execution of individual BPMN workflows		✓	✓
Fully integrated accounts payable process		€	€
Digital car file with workflows		€	€

Systems Integration und Combination	basic	business	ultimate
Integration of external data sources for data validation and acquisition	✓	✓	✓
Digital document delivery (e. g. digital payroll)	€	€	€
Usage of the REST-API for integrating various third-party software[5]		✓	✓
Microsoft 365 office integration (creation and editing)		✓	✓
DATEV integration		€	€
Microsoft Dynamics 365 integration		€	€
Salesforce integration		€	€

Collaboration	basic	business	ultimate
Task management (creation, processing und forwarding)	✓	✓	✓
Sharing of batches (captured documents)	✓	✓	✓
Sharing of search templates via link	✓	✓	✓
Sharing of documents via link and e-mail	✓	✓	✓
Electronic signature[6]	✓	✓	✓
Easy sharing of documents with externals		✓	✓

Configuration, Infrastructure and Security	basic	business	ultimate
Web-based administration assistant	✓	✓	✓
Integrated user management	✓	✓	✓
Role-based digital rights management	✓	✓	✓
Usable with different devices (smart phone, tablet, PC)	✓	✓	✓
Multi-language support	✓	✓	✓
Transport encryption (SSL)	✓	✓	✓
Data encryption (AES 265-Bit)	✓	✓	✓
Two-factor authentication	✓	✓	✓
Automatic updates	✓	✓	✓
Single sign-on (SSO)		✓	✓
Active directory (AD) integration		✓	✓
Authentication via additional identity providers (OpenID connect)		✓	✓
Native mobile iOS app (for offline usage)	€	€	✓

Training	basic	business	ultimate
Access to various e-learning offerings of the d.velop academy	✓	✓	✓
Administrator training[7]	€	€	€
User Training[7]	€	€	€

[1] Deep learning is a special form of information processing that relies on the evaluation of large amounts of data. We utilize user inputs to continuously improve the recognition of our deep learning methods. For this purpose, we store imported documents and associated metadata (e.g. document type and properties such as addresses, dates, invoice numbers, etc.) for a maximum period of 90 days. You have the option to object at any time to our using your imported documents to improve our deep learning methods. In this case, the service will not make any adjustments to the contents you process. This may reduce the recognition success rate. This does not constitute a material defect.

[2] Cloud storage is declared per tenant, i. e. per document repository. Storage space can be flexibly extended for 0,19 € / GB and month. Billing takes place on a monthly and usage-bound basis.

[3] The following file formats are automatically being converted to PDF: doc, docx, dot, dotx, xls, xlsx, xlsb, ppt, pptx, pot, potx, jpeg, tif, bmp, gif, png, pdf, txt, msg, eml, zip, rar, dgix, dgia, dgim

[4] Simple workflows are workflows that have been created with the integrated workflow and forms editor of d.velop documents and that consist of a linear sequence of activities.

[5] The customer is liable to pay for using the open REST-API in the context of connecting portal solutions with d.velop documents. Prices result from the d.velop documents pricing model.

[6] In documents basic, 25 advanced signatures are included per client and per year. In documents business, 50 advanced signatures are included per client and per year. In documents ultimate, 100 advanced signatures are included per client and per year. Additional signatures are subject to a fee and can be added via one of the available packages of the Product d.velop sign for documents in the **d.velop store**.

[7] According to the current training offering of the **d.velop academy**.