Product Description
d.velop documents for Microsoft 365

1 Brief description of the scope of functions

d.velop documents for Microsoft 365 enables the creation and management of digital dossiers based on Microsoft 365 and SharePoint Online.

SharePoint content from various team websites can be displayed using flexible structures in the form of hierarchical dossiers in order to obtain a 360° overview of the information.

Dossiers can be managed in the web interface of d.velop documents for Microsoft 365. As well as automatic indexing of information and document previewing, new content can easily be uploaded to the dossiers or created from the template management.

2 Licensing

By purchasing d.velop documents for Microsoft 365, you receive the following quantity-related usage right:

- License metric: Named User
- Quantity: 1

3 General Information

d.velop documents for Microsoft 365 is an SaaS application. The software is operated as cloud software by d.velop. All metadata and documents are stored in the customer's Microsoft 365 SharePoint website. The SharePoint website is within the customer's Microsoft 365 tenant. Users work with the data by means of an application interface that is provided. The SharePoint website serves as the repository for the data.

The software is multi-tenant capable. As this is cloud software, patches, updates and new functions are provided without the need for any manual effort. d.velop performs the installation, configuration and activation.

The customer's Azure Active Directory (Azure AD) is consulted for user registration. All SharePoint communication is carried out via official SharePoint APIs and Microsoft Graph endpoints as part of Azure AD apps in a user context. By using Azure AD Authentication, its security and compliance functions can be accessed. By using Azure AD, the SharePoint authorization model also forms the basis.

4 Acquired Scope of Functions

By purchasing d.velop documents for Microsoft 365, you will also receive the following function-related usage right:

4.1 Working with Digital Dossiers

- Quick access to digital documents and dossiers with the application interface of d.velop documents for Microsoft 365, taking into account the individual SharePoint authorizations
- Easy navigation through the structure as a whole provides users with a 360° view of the dossier
- The integrated preview allows you to view documents without leaving d.velop documents for Microsoft 365.
- The properties area clearly shows the dossiers' important information, for example by grouping
- Documents can be added to dossiers using drag & drop
- The most important properties are set automatically by means of inheritance. Users can edit or add to the properties manually.

- By using the document templates, new documents can be created directly in d.velop documents for Microsoft 365
- Displaying the contents of a dossier in groupable tabs
- Tabular representation of a dossier's contents with access to SharePoint standard functions such as versioning and check-out

4.2 Searching for Dossiers and Documents

- The quick search enables you to switch quickly between different dossiers
- Specific searches for documents and dossiers can be carried out in the advanced search using the metadata
- Search results are clearly displayed, jumping to the dossiers displays the result in the complete structure.

4.3 Using Microsoft Outlook

- With d.velop documents for Microsoft 365, digital dossiers can be used in Outlook (desktop). This includes saving documents directly in dossiers, searching for specific files or documents in the structure as a whole, and opening the documents.
- E-mails can be assigned directly to dossiers in Outlook
- Access to the structures within Outlook makes it easy to send existing documents from digital dossiers
- Filter and search functions as well as favorites and history make it easy for users to find the dossiers they want
- The configuration of regular expressions allows users to perform a predefined search for dossiers on the basis of an incoming or outgoing e-mail
- d.velop documents for Microsoft 365 can also be integrated into Outlook and the desktop apps Word, Excel and PowerPoint. This means existing documents can be edited quickly and new documents can be stored directly in the correct structure

4.4 Integrating Dossiers

- Use d.velop documents for Microsoft 365 in your leading applications such as SAP or Microsoft Dynamics
- Structures can be integrated into Microsoft Dynamics. Users navigate through the digital dossiers without leaving the leading applications
- Integrated into Microsoft Teams, d.velop documents for Microsoft 365 displays digital dossiers and documents in channels or chats in tabs
- Automatic document import via file system interface from on-premises systems including transfer of metadata

4.5 Designing Digital Dossier Structures

- The structure designer can be used to create logical structures based on SharePoint lists, libraries and content types
- Configuration of the properties to be inherited automatically
- By configuring the properties area, the user interface and various application scenarios can be clearly structured
- Configurable views enable users to have the most important information in view at all times
- The customizable user interface allows you to create additional buttons for opening dialog boxes and windows, parts of the current item or other functions

- By configuring additional tabs, external content can be integrated into iFrames, and SharePoint search results can be displayed
- Exporting and importing structures make it possible for structures to be reused in different tenants or site collections

4.6 Multiple languages

- German
- English
- French
- Italian
- Dutch
- Portuguese
- Expansions on request

4.7 Support of Modern Browsers using Windows 10

- Microsoft Edge (Chrome-based)
- Mozilla Firefox
- Google Chrome

5 Integrability

5.1 Integration into your Application

d.velop documents for Microsoft 365 can be integrated into your application (e.g. ERP or CRM system) via IFrame. For this purpose, parameterized calls can be stored in order to display the structured SharePoint content with optimized views within your systems.

5.2 Integrated Authentication

If the user is already logged in with their Microsoft 365 account in their browser-based application (Microsoft Dynamics 365, Microsoft Teams, etc.), then they should also be automatically logged into d.velop documents for Microsoft 365. If the application does not run in the Microsoft 365 context or in the browser, the user must log in manually when calling up the d.velop documents for Microsoft 365 center or other d.velop documents for Microsoft 365 apps.

6 Optional Software Components

To expand the standard functions, the following software components can be installed from the acquired functions:

- d.velop documents for Microsoft 365 button, calling up dossiers from SharePoint lists and libraries
- ecspand sidebar, integration of d.velop documents for Microsoft 365 in Microsoft Office including upload of e-mails
- ecspand Import Service, import of documents into d.velop documents for Microsoft 365 from the file system

The setups for installing the optional software components are available via the d.velop service portal.

Note

Purchasing our software solutions entitles you to download and execute the necessary setups. The setups can contain components of other software solutions. Downloading and executing the setups and installing and using the components is only permitted within the framework of the software solutions you have purchased.

Important

To ensure that the software solution runs smoothly, we recommend that you always use the latest version of the software components you need. Information on new software versions can be found in the d.velop service portal.

6.1 Setup and Operating Instructions for d.velop documents for Microsoft 365

You may need the following cloud services to operate d.velop documents for Microsoft 365. These may be subject to an additional charge:

- Microsoft 365 SharePoint Online and corresponding user licenses, e.g.
  - Microsoft 365 Business Basic
  - Microsoft 365 E3

Setup instructions for d.velop documents for Microsoft 365

- Setup of Azure AD company applications in Azure Active Directory (see Documentation)

7 Administration

7.1 Support

Information on support can be found in our "Service Description for Support Services Agreement for d.velop for Microsoft 365".

7.2 Backup and Disaster Recovery

d.velop carries out regular backups of the content of d.velop documents for Microsoft 365.

- Backups are created at least once a day, depending on technical capabilities (RPO: 24 hours).
- Backups are retained for 30 days.
- Disaster recovery tests are performed twice per year.

The backups only concern the configurations saved in d.velop documents for Microsoft 365. Content such as list items or documents that are stored in the customer's Microsoft 365 tenant are not affected.

7.3 Deletion of Data

Data is deleted at the customer's request (text form is sufficient) or after the appropriate period of time following a contract termination.

If the customer has requested deletion of their data, d.velop AG will retain the data for 30 days before it is finally and irretrievably deleted.

This only applies to data that is stored in d.velop documents for Microsoft 365. The content of the customer's Microsoft 365 tenant remains unaffected by the deletion.

7.4 Information Security

Data security in d.velop documents for Microsoft 365 is ensured by a series of technical and organizational measures.

7.4.1 Data Location

d.velop documents for Microsoft 365 is provided in data centers with locations in Germany and Western Europe. Our partner's data centers are certified according to the following guidelines, among others:

- ISO 9001
- ISO 27001
- ISO 27017
- ISO 27018
- C5

Documents, list elements and their metadata are only stored in your Microsoft 365 tenant.

7.4.2 Encryption of Content (Data at Rest)

All sensitive data and content that is stored and processed by d.velop documents for Microsoft 365 is stored in encrypted form and according to the current industry standard. This applies to personal data stored by us, and to any metadata that may be stored. Separate keys are used to encrypt the data in different storage media. An access log records access to the keys.

7.4.3 Transport Encryption (Data in Transit)

Transport encryption according to current industry standards is used for communication between the application components. This is re-evaluated at regular intervals to ensure compliance with any new requirements and recommendations of the Federal Office for Safety in Information Technology. At the time this document was created, this means at least TLS version 1.2 for HTTPS connections. For other connections (depending on the application), either TLS or comparable transport encryption is used.

7.4.4 Tenant Isolation

Data from different tenants is strictly separated in d.velop documents for Microsoft 365. The tenant ID of your Microsoft 365 tenant is used for this. This is used by d.velop documents for Microsoft 365 to select the correct data storage for the tenant.

Microsoft is responsible for the storage and isolation of your data in Microsoft 365.

7.4.5 Access Logging

All accesses to the infrastructure of d.velop documents for Microsoft 365 are logged.

Access to your tenant and the content and data stored there, including logging into d.velop documents for Microsoft 365 apps, can be viewed in the Microsoft 365 audit log. The audit log must be activated and configured in the customer's Microsoft 365 tenant.

7.4.6 Authentication

Your users authenticate themselves exclusively via Azure AD with the user profiles provided in your tenant. So that d.velop documents for Microsoft 365 has access to data in your SharePoint tenant, the user must agree to the app accessing the data in your tenant. As a rule, however, this is done client-wide for all users by an administrator of their tenant.

A distinction is made between delegated authorizations and application authorizations. If a regular user is involved, only delegated authorizations are required. All actions carried out by d.velop documents for Microsoft 365 with these authorizations are carried out on behalf of the current user and logged in their tenant. Please note that the authorizations set in SharePoint are not overwritten or ignored. The permissions requested by the app only correspond to the maximum permissions required by d.velop documents for Microsoft 365 in order to guarantee the full range of functions. Your tenant still determines exclusively what the individual user is allowed to do and whether and to what extent they are allowed to access a SharePoint page.

At present, d.velop documents for Microsoft 365 does not require any application authorizations. However, d.velop AG reserves the right to extend authorizations for future use cases. We will notify you of this in good time.

7.4.7 Responsibilities

Since list elements, metadata, documents and user accounts are stored and managed in your tenant, these, along with the devices you operate (smartphones and PCs), are your responsibility. You are therefore responsible for the security of the passwords, whether two-factor authentication should be used and the general security of the accounts, authorizations and devices.

d.velop ensures that all necessary measures for optimal security, performance and availability of d.velop documents for Microsoft 365 are followed. Best practices and the recommendations of the cloud provider are strictly adhered to in this regard.

Since d.velop does not act as the operator of the cloud platform, the cloud provider is responsible, which may have an impact on the operation of d.velop documents for Microsoft 365. These potential effects are cumulated with our calculated availability and result in the availability promised in the Service Level Agreement (SLA).

Despite all measures taken by d.velop AG, the performance of d.velop documents for Microsoft 365 may be influenced by a restriction of your tenant. This can be the case, for example, as a result of excessively used automatisms (import) or mass uploads via the client.