



Service Description

d.velop contracts for Microsoft 365

1 Brief description of the scope of functions

Digital contract management with SharePoint and Microsoft Office 365. d.velop contracts for Microsoft 365 extends SharePoint by adding an efficient and clear, digital contract management program using which contract dossiers can be created and managed.

2 Licensing

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

- License metric: Named User
- Quantity: 1

3 General information

d.velop contracts 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 the d.velop contract for Microsoft 365, you also receive the following function-related usage right:

4.1 Working with Contract Dossiers

- Create contract files step-by-step using the Assistant - the Assistant guides users step-by-step through the creation of a new contract dossier. Related documents can be uploaded and metadata and runtime information can be specified for the contract dossier. Depending on the selected contract type, specific metadata can be requested in the detail area. Depending on the project, the fields can be defined as mandatory or optional fields
- Edit contract dossiers - integrated in the display of contracts, both the metadata and the term information can be changed.
- Organize documents in contract dossiers - as part of the contract display, additional documents can be uploaded and existing documents can be deleted. In the case of Office documents, there is the option to jump directly to the corresponding Office application for editing. Documents can also be assigned to a document type.
- Use document templates - with the template mechanism, templates can be saved for each contract type to enable standardized and quick creation of new documents.
- Linking of further list-based data objects to contract dossier, e.g. risks, costs, deadlines, notes.

- Link contracts - Contracts can be linked to one another in order to be able to present the entire contract structure transparently. When the links are created, the information is stored in both the source and target contracts.

4.2 Dashboard

- Quick search for contract dossiers - the subject of the contract, contract partner name and contract ID are searched through. The results are displayed while the search term is being entered. You can jump directly to the contract dossier.
- Relevant contracts (e.g. upcoming notice periods, due tasks, recently processed contracts) - contracts that may be relevant for me as a user are automatically listed on the home page. The criteria here are:
 - Last changed by me.
 - Deadlines for contracts for which I am responsible.
 - Tasks that are assigned to me.
- If the user moves the mouse pointer over a displayed contract, a data sheet is displayed which directly shows the most important key points of the contract.
- Customer-specific adjustment of the dashboard
 - Contracts and tasks can be organized in up to 5 tabs by means of configurable queries.

4.3 Advanced Search

- With the advanced search, users can search for specific contracts. The results list can be filtered according to various properties such as the contract type or the metadata of a contract. Multiple search criteria can be linked so that only contracts that meet all criteria are displayed.
- The first 500 results are displayed as a table. Users can choose which columns should be shown.
- You can jump from the list of results to the display of a contract with a single click.
- The results list can be exported as an Excel table.
- Associated documents and tasks for the contracts found are displayed on a separate tab.
- Save search template
Users can save search criteria as a personal search template. The templates are displayed on the start page. From there, you can jump directly to the search page. A search is carried out there immediately with the saved criteria.

4.4 Automatically applying Authorization Rules to Contract Dossiers

- When creating and changing a contract dossier, the system can determine and apply access rights (read or write rights).
- Authorizations affect the entire contract dossier, including related documents and tasks.
- Rules can relate to properties of a contract
 - For example, all contracts for CST XY should be viewed or processed by the following persons or groups
 - For example, all persons named in field X and field y on the contract should be given read and write rights.

4.5 Calculation of Deadlines

- When creating a contract, the system can calculate a termination date.
- If the termination date expires and the contract is not terminated, the system calculates a new termination date based on the rules.

4.6 Tasks

- Any number of individual tasks can be stored for a contract.

4.7 E-mail Notifications

- Notice of termination for the responsible persons and those who have also been saved
- Notification when a task is due or when a task is assigned
- Notification when authorizations or responsibilities are granted
- The contents of the e-mails can be customized with available placeholders

4.8 Multiple languages

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

4.9 Support of Modern Browsers using Windows 10

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

5 Setup and Operating Instructions

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

- Microsoft 365 SharePoint Online and corresponding user licenses
 - Microsoft 365 Business Basic
 - Microsoft 365 E3
- An empty SharePoint team site

Setup Instructions for d.velop documents for Microsoft 365

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

6 Administration

6.1 Support

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

6.2 Backup and Disaster Recovery

d.velop carries out regular backups of the content of d.velop contracts 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 contracts for Microsoft 365. Content such as list items or documents that are stored in the customer's Microsoft 365 tenant are not affected.

6.3 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 contracts for Microsoft 365. The content of the customer's Microsoft 365 tenant remains unaffected by the deletion.

6.4 Information Security

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

6.4.1 Data Location

d.velop contracts 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.

6.4.2 Encryption of Content (Data at Rest)

All sensitive data and content that is stored and processed by d.velop contracts 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.

6.4.3 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.

6.4.4 Tenant Isolation

Data from different tenants is strictly separated in d.velop contracts for Microsoft 365. The tenant ID of your Microsoft 365 tenant is used for this. This is used by d.velop contracts 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.

6.4.5 Access Logging

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

Access to your tenant and the content and data stored there, including logging into d.velop contracts 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.

6.4.6 Authentication

Your users authenticate themselves exclusively via Azure AD with the user profiles provided in your tenant. So that d.velop contracts for Microsoft 365 has access to data in your SharePoint client, the user

must agree to the app accessing the data in their 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. 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 contracts 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.

Individual functions of d.velop contracts for Microsoft 365 require contract information to be accessible within SharePoint without a user being active. For this purpose, a system user is stored and used in the context of the Azure Enterprise App for communication between SharePoint Online and d.velop contracts for Microsoft 365. Details on the system user can be found in the system requirements.

6.4.7 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 contracts 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 contracts 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, the performance of d.velop contracts 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 automatism (import) or mass uploads via the client.