XCON202305 (USER - d.velop contracts for Microsoft 365 1.0)

Table of Contents

1. d.velop contracts for Microsoft 365

1.1. Basic information about the application and the manual

Here you will learn more about d.velop for Microsoft 365 and how a contract is defined.

- About d.velop contracts for Microsoft 365
- What does a contract file contain?

1.1.1. About d.velop contracts for Microsoft 365

d.velop contracts for Microsoft 365 allow efficient and clear digital contract management for your Microsoft SharePoint Online instance.

Store all the information relating to your contracts in digital contract files. This allows you to shorten search times when you wish to look out information about a contract quickly. You can set deadlines which allow the key date for contract cancelations, etc. to be calculated automatically.

Use the extensive team collaboration capabilities of SharePoint and your Office apps. No matter whether you wish to work on a document together in a team, distribute tasks or release your contract: The in-depth Office integration allows you to work even across different locations – including the involvement of external contractual partners. The complete documentation ensures that you will be able to retrace the process at a later date.

Functions at a glance:

- Simple creation of contracts – The integrated wizard allows you to create contracts quickly and save documents in your contract files.
- Deadline management – You can quickly create dates and deadlines and use the automatic key date calculation.
- Search for contracts – The quick search function and the handy metadata search are available to assist.

1.1.2. What does a contract file contain?

Within d.velop contracts for Microsoft 365, contracts represent a frame around several related pieces of information. Properties (metadata) and documents form a digital contract file.

Contract documents, correspondence and other documents form the basis and are added to a contract as files (e.g. Microsoft Word or PDF).

The properties of the contract describe the entire contract process. The properties include the subject matter of the contract, the contractual partner or information on the duration and termination.

Tasks can also be added to the contract to transparently record and manage all tasks during the contract life cycle.

Depending on the configuration it is possible to add further lists to the contract (e.g. for costs or notes).

The following contract details are available:

- Master data
- Details
- Duration
- Documents
- Tasks
- Lists (optional) (e.g. for costs or notes)

- Permissions
- Contract type

1.2. Start page of d.velop contracts for Microsoft 365

You can reach the start page of d.velop contract via your customer-specific link (https://contracts.d-velop365.com/<instance name>)

Alternatively, you can choose your configuration by opening the following link: https://contracts.d-velop365.com/

This chapter describes the actions you can perform on the start page. You can also return to the start page at any time.

Further options on the start page are described in the following articles:

- Finding a contract via quick search
- Finding contracts, documents or tasks using the advanced search
- Creating a new contract
- Using search templates
- How can I access the online help?

1.2.1. Navigating to the start page

You can navigate to the start page of d.velop contracts for Microsoft 365 from any page.

Nine-point menu – This is how it works

1. Click on the nine-point menu (app launcher) in the navigation bar.
2. Select **Start page**.

Alternatively, click on the logo **d.velop contracts for Microsoft 365** in the navigation bar.

1.2.2. User menu

The user menu can be found on the right in the navigation bar. In the user menu, you can see the user with which you are logged in and you can log out. The user menu also shows you which language settings have been selected. You can choose **Reset saved language** to reset the saved language if your user interface is not displayed in the language you expect. If your administrator has enabled language selection, you can change the language in which the user interface is displayed using a selection box.

1.2.3. Tabs

On the start page you will find tabs with contracts which are displayed based on the configured filtering.

The following filters are available as standard. The number in brackets indicates the number of results:

- Last modified: Shows the contracts for which the logged-in user is assigned as the last editor.
- Upcoming deadlines: Shows the contracts with upcoming deadlines for which the logged-in user is assigned as the internal responsible person.
- My tasks: Shows the tasks which are assigned to the logged-in user.
- Incomplete: Shows the contracts which are considered incomplete because the start date of the contract is not filled.

The filters and names of the tabs, as well as the heading, can be modified by your administrator.

In each tab, you can view the most important contract features or switch to Contract view.

This is how it works

1. Select a tab.
2. Select the desired contract from the Overview.
3. Move the mouse pointer over **Subject of contract** to get an overview of important information.
4. Click on **Subject of contract** to switch to the full display of the desired contract.

1.2.4. Displaying contracts by status

On the start page, you will find an overview of the contracts based on the contract status.

This is how it works

1. A diagram is displayed in the area **Contracts by status**.
2. Move the mouse pointer over the diagram to see the number of contracts that have each status.
3. Limit the selection in **Filter by contract type** if necessary to a certain contract type.

> **Note**
>
> You will only see contracts to which you have access rights. Your access rights are also considered in the number of contracts.
>
> If there are more than five contract lists in SharePoint in the contract management instance, the pie chart can no longer be displayed due to the high number of contracts.

1.3. Finding a contract

In this chapter, you will learn how to find a contract file.

Various search options are available for this purpose. You can also use search templates. You will learn how to customize the search result list and how to export the search results.

- Finding contracts, documents or tasks using the advanced search
- Finding a contract via quick search
- Using search templates

1.3.1. Finding contracts, documents or tasks using the advanced search

You can use the **advanced search** function to search for contracts, documents or tasks in d.velop contracts for Microsoft 365.

You can use a full-text search across all the properties of the contract, document or task. Alternatively, you can limit the search by using filters.

There are several options available to you for finding a contract, document or task, which you can combine as needed.

- Using the full text search

Refining the search by selecting filters is optional. Refining your search will reduce the number of results in the result list.

- Adding filters to the search

Note also the possibility to Saving search templates after you have executed an advanced search.

Using the full text search

Limit whether you wish to search for contracts, documents or tasks. You can start a full text search with a search term via the search field.

This is how it works

1. Navigate to the start page of d.velop contracts for Microsoft 365 or open the nine-point menu.
2. Select **Advanced search** to open the search mask.
3. Select whether you wish to search for contracts, documents or tasks.
4. Enter the search term you are looking for in the **Search term** field.
5. Start the search.

Adding filters to the search

Refine your search with **Add filter**. For certain contract fields, you can select the value you are looking for from the existing contract field values.

This is how it works

1. Click **Add filter** to select a field from the list of existing contract properties or document properties.

   > **Note**
   > Specific fields of a contract type are only displayed if you have previously selected a contract type.

2. Enter or select the desired value. Repeat the previous steps for all additional fields.

   > **Note**
   > Searching for empty or unspecified values is not supported. Filters without values are not taken into account.

   > **Note**
   > For multiple selection fields, you can only select one value. The filter checks whether the selected value is contained.

3. Search for contracts with the specified criteria.

Details on how to handle special contract fields can be found in the chapter How do I use special contract fields in the advanced search?.

Using the search result list

In this chapter, you will learn how to customize and export the search result list.

- Customizing the columns in the search result list
- Exporting the search result list

> **Note**
> A maximum of 500 search results can be displayed in the result list. For larger numbers of results, you can use the export function.

Customizing the columns in the search result list

In the contract search function, you can customize the columns of the result table for each contract type. These adjustments are saved individually for each user.

This is how it works

1. Run any search with the contract types you want.
2. Click **Select columns**.
3. Select the columns you want to display in the result table.

4. Drag and drop the columns into the desired order.
5. Click **Save**.

Exporting the search result list

When searching for contracts, documents and tasks, you can export the search results as an Excel file.

This is how it works

1. Run any search.
2. Click **Export search results**.

> **Warning**
> If you have more than 500 search results, the export may take a few minutes due to the high number of search results.

1.3.2. Finding a contract via quick search

Use the input field **Quick search** on the start page to easily search for contracts. This search field is used to search all properties of the contracts as well as the content of the documents.

The quick search currently does not search content from tasks or other lists that may be enabled (e.g. notes, costs).

This is how it works

1. Navigate to the start page of d.velop contracts for Microsoft 365.
2. Enter the search term in the field **Quick search**.
3. Select the desired contract from the search result list. You will be forwarded to the contract. Alternatively, you can switch to the advanced search using **Search for <your search term> in advanced search**. Your search term remains the same.

> **Note**
> Enter at least three characters to perform a quick search.

1.3.3. Using search templates

Search templates make it easy to perform recurring searches. In this chapter, you will learn how to create, use and delete a search template.

You have the following options:

- Saving search templates
- Using search templates
- Deleting search templates

Saving search templates

You can save recurring searches as templates. The saved search templates are available on the start page and in the advanced search.

This is how it works

1. Perform the desired search.
2. Click **Save as search template**.
3. Give the search template a title.
4. Optional: Enter a description for the search template. The description is displayed below the title when you are selecting a search template.

5. Save the search template.

Using search templates

You can use the saved search templates to perform an advanced search. You can find the search templates on the start page and in the advanced search.

This is how it works

1. Go to the start page or the advanced search.
2. Navigate to **My search templates** to view your saved search templates.
3. Select the desired search template. An advanced search with the saved search parameters is automatically executed.

Deleting search templates

You can delete search templates you no longer need.

This is how it works

1. Go to the start page or the advanced search.
2. Navigate to **My search templates** to view your saved search templates.
3. Select the appropriate search template.
4. In the search template's context menu, click **Delete**.

1.4. Managing contracts

You have different possibilities to manage contracts. This includes creating, editing and deleting a contract.

- Creating a new contract
- Editing a contract
- Deleting a contract

The different options for finding a contract are explained in the corresponding chapter.

> **Note**
> Please only make adjustments to contract metadata in the contract management interface. This is the only way to ensure that all further processes function as expected.

1.4.1. Creating a new contract

Contract information and contract documents are managed in contracts. See also the What is a contract? chapter.

You can create new contracts using the wizard. The wizard guides you through the following contract areas:

- Master data
- Details
- Duration
- Permissions

This is how it works

1. Navigate to the start page of d.velop contracts for Microsoft 365.
2. Click **New contract**. The **Create new contract** wizard is started.
3. Add one or more documents to the contract.

4. Manage the master data.
5. Navigate to the **Details** area and manage the desired properties.
6. Navigate to the **Duration** area and manage the desired duration information.
7. Optional: If your administrator has activated this for you, navigate to the **Permissions** area to manage the options **Additionally grant read access for** and **Additionally grant write access for**.
8. Save your entries. The contract is created and you will be directed to the start page or you can open the newly created contract directly.

> **Note**
> Please note that according to the configuration in your system additional information may be required.
>
> Mandatory fields are marked by a red star behind the title.

Master data

In the area **Master data** you assign the following values:

- **Select contract type** (Mandatory field)
- **Contract status** (Mandatory field)
- **Subject of contract** (Mandatory field)
- **Contract partner** (Mandatory field)
  You will receive suggestions after entering the third character. You have the option to create a new contract partner, provided this function is enabled in your system. If your administrator enabled searching of the description column, in addition to the title column, the description column of the contract partner will also be searched for the value you entered.
  If your administrator enabled multiple selection, you can add another contract partner line using **Add contractual partner**. You can use **Delete line** to remove the contract partner line you just added.

  > **Note**
  > You can only add contract partners to a contract once. Any repeat assignment of the same contract partner will be ignored.

- **Contact person of the contractual partner**You can select the contact persons of the selected contract partner from a list or create a new contact person, if this function is enabled in your system.
- **External contract ID**
- **Organizational assignment** if enabled
- **Responsible person internal** (mandatory field)

This is how it works:

1. Enter all master data.
2. **Save** the information.

Details on editing the master data can be found in the chapter Editing the master data.

In the **Master data** area you can also add documents directly to the contract. For details please refer to the chapter Managing documents.

Details

In the **Details** area you assign the following values:

- Comment
- Contract details assigned to the selected contract type.

This is how it works:

1. Enter the contract details.
2. Save the information.

Duration

The **Duration** area is used to manage the run time data and includes a run time calculation. There are three limitation types which affect the entry fields shown.

You can enable or disable the duration data calculation via **Calculations**. If the calculation is enabled, the durations of the contracts are automatically updated, provided the contract has not been canceled. If the calculation is disabled, the durations of the contracts are not automatically updated.

In the following, the three different limitation types and the calculation are explained.

Limitation type “Perpetual”

A perpetual contract has no defined duration and can only be ended by cancelation. If a minimum duration has been defined, the contract cannot be ended before the minimum duration has elapsed.

Calculating the duration data:

- If there is a minimum duration, the end of the minimum duration is calculated. The end is calculated from the start of the contract plus the minimum duration. The next possible date of cancelation is determined using the cancelation effect (e.g. at the end of the year) less the period of notice (e.g. one month). If a minimum duration has been agreed, the next possible cancelation date is once the minimum duration has elapsed. The next possible end of the contract is calculated from the cancelation effect which is added to the determined date of cancelation for calculating the next possible end of contract.
- In the case of the **Any time** cancelation effect, the next possible date of cancelation is always the current date and, for the next possible end of contract, the period of notice is added to this date.

Limitation type “Limited with renewal”

A limited contract with renewal has an initial fixed duration and is then renewed repeatedly by a specific interval until the contract is ended by way of cancelation.

If a minimum duration has been defined, the contract cannot be ended before the minimum duration has elapsed. Once the minimum duration has elapsed, the contract is renewed by the defined renewal interval, provided the contract has not been canceled.

In the case of cancelation effects at the end of the month, quarter, 6-month period or year, there are two calculation variants which differ in terms of the calculation of the end of contract:

1. The priority of the duration calculation is the renewal
   a. The calculated end of contract refers to the renewal, and thus, after a cancelation, the contract only ends once the last renewal has elapsed. For example, if a contract is renewed at the end of September for a further six months and is canceled in November with effect at the end of the year, the contract does not end until the end of March, and consequently once the last renewal interval has elapsed.
   b. If there is a minimum duration, the end of the minimum duration is calculated. The end is calculated from the start of the contract plus the minimum duration. Once the minimum duration has elapsed, the renewal is added in order to calculate the next possible end of contract. The next possible date of cancelation is determined using the cancelation effect (e.g. at the end of the year) less the period of notice (e.g. one month). In the example of the **At end of year** cancelation effect, the end of the year is assumed to be before the next possible end of the contract.
2. The priority of the duration calculation is the cancelation effect
   a. The selected cancelation effect defines the next possible end of contract and thus, the contract ends after a cancelation, corresponding to the cancelation effect, e.g. at the end of the year.

b. If there is a minimum duration, the end of the minimum duration is calculated. The end is calculated from the start of the contract plus the minimum duration. The next possible end of contract is the next end of month, quarter, 6-month period or year once the minimum duration has elapsed, or once the renewal period has elapsed. To calculate the next possible date of cancelation, the period of notice is deducted from the next possible end of the contract.

Limitation type "Limited without renewal"

Limited contracts without renewal have an agreed duration and do not require cancelation once the duration has elapsed. If this type has been agreed, these kinds of contracts can also be canceled during their duration.

Calculation in the case of contracts without cancelation options during the duration: The end of contract is calculated by adding the duration to the contract start date.

Calculation in the case of contracts with cancelation options during the duration: The maximum end of contract is calculated by adding the duration to the contract start date. The next possible end of the contract is calculated from the cancelation effect (e.g. at the end of the year), provided the maximum end of contract is not exceeded. To calculate the cancelation date, the period of notice is deducted from the next possible end of the contract.

Notification

For notifications, you can set the Notification start. From this date, an e-mail will be sent to the responsible person internal as well as to additional recipients. The notifications are sent until the contract is renewed, manually canceled or the notifications are manually deactivated.

You specify in which interval the notifications are sent. The following intervals are distinguished:

- **None**: No notifications will be sent.
- **Once**: If this option is enabled, the notification will be sent once when the notification start date is reached.
- **Daily**, **Weekly**, **Monthly**: With these options, notifications are sent according to the selected interval until the status of the contract is manually changed or the contract is automatically renewed.

> **Note**
> The configured notification is basically only sent if the contract is in an active contract status (e.g. **valid**).

> **Note**
> Please note that when a contract is renewed, the Notification start is updated as well.
>
> In this case, the interval from the Notification start to the next Date of cancelation is maintained. If no date of cancelation can be calculated, the distance to the next possible end of the contract is maintained.
>
> Enable the **Fixed notification start** option to prevent the notification start from also being updated when the contract is renewed. This can be useful, for example, if you want to have the contract renewed several times but do not wish to receive notification until a fixed date. Similarly, for open-ended contracts, this option causes the notification start date not to update daily.

Creating links

You can link contracts to each other in the **Links** area.

This is how it works

1. Click **New** or **Add link**.
2. Select the contract you want to link. The search only applies to the properties of the contract. Attachments and the attachments' full text are not searched.
3. Select a link type. You have the following options:
   - Is linked to
   - Is framework contract of
   - Is predecessor contract
   - Refers to
4. Save the selected link.

> **Note**
> You cannot edit configured links. If you accidentally link the wrong contract, you must delete the link and create a new one.
>
> Your administrator can add other link types.

Deleting a link – This is how it works

1. Click the three dots next to the link that you want to delete.
2. Click **Delete**.
3. In the dialog, click **Delete** again to confirm the process.

Permissions

In the **Permissions** area you can assign additional write or read permissions:

- **Grant additional read access to**
- **Grant additional write access to**

You can grant permissions for users and groups. You will receive suggestions after entering the third character.

1.4.2. Editing a contract

The contract view is divided into different sections. You can edit master data, details as well as information on duration and manual permissions.

This is how it works

1. Open the contract.
2. Activate the edit mode for the areas **Master data**, **Details**, **Duration** and **Permissions** by clicking **Edit** underneath the subject of contract.
3. Edit the desired fields and values.
4. Save the changes.

You can find more information on editing documents and tasks in the following chapters:

- Managing documents
- Managing tasks

1.4.3. Useful information about the version history

You can open the version history of a contract in the contract view by clicking on the Info symbol above the document preview.

If changes are made by a user, a new version is always generated which is based on the settings in SharePoint.

If an update is performed with the system account and the last version of a user has been generated, a new version is generated. If the system account goes through another update and the last version is a version which was generated by the system account, this version is updated and no new version is generated.

A version history is also available at document level.

1.4.4. Changing the contract type

You can change the contract type retroactively in the contract view. A retroactive change is possible while editing the other areas and must be done separately, as the fields shown in the **Details** area are dependent on the selected contract type.

This is how it works:

1. Open the contract.
2. Click **Change contract type** underneath the subject of contract.
3. Select the desired contract type in the selection field which is located in a panel at the side.
4. Save the change.

1.4.5. Deleting a contract

You can delete a contract.

This is how it works

1. Open the contract to be deleted.
2. Click **Delete contract**.
3. Delete the contract by clicking **Delete** once more when responding to the dialog with the security prompt.

> **Note**
> The menu option **Delete contract** is displayed depending on your permissions. The contract status must not be **Valid**.

1.5. Managing documents

You have different possibilities of managing the documents of a contract. This includes adding, viewing and deleting documents belonging to a contract and changing the document type.

- Adding documents to a contract
- Viewing a document
- Displaying document details
- Deleting a document
- Changing the document type

1.5.1. Adding documents to a contract

You can add one or more documents to a contract. Adding can be done by drag & drop or via the menu.

Drag & drop - This is how it works

1. Open the contract.
2. Drag & drop the document to the display area.

Menu - This is how it works

1. Open the contract.

2. Select **Documents > Search computer**.
3. The dialog for selecting documents opens. Navigate to the desired file and select it.

If a document with the same name already exists, a dialog appears. You can now select whether you want to upload the document anyway or cancel the upload. If versioning is enabled, a new version of the document is created when you upload it. If versioning is disabled, the file is overwritten.

The following special conditions apply to Office files:

- Office files have their own title. This means that if you previously set a different title in the detail view and then upload an Office file, the title of the Office file will be set by SharePoint.
- PPTX files exhibit an error whereby after you set the title, only the title and possibly other fields are displayed until you change the document type.
  This behavior also occurs in SharePoint. In SharePoint, however, the other properties are also displayed in the table view, though they are missing in the info view.
  After you change the document type, the other fields are visible again and the previously saved values are retained.

1.5.2. Viewing a document

You can display a document of a contract for viewing.

This is how it works

1. Open the contract.
2. Navigate to the **Documents** area.
3. Select the desired file to display it in the document preview.
4. Alternatively, you can click on the tile of the document above the document preview which will allow it to be displayed in the preview.

1.5.3. Displaying document details

You have the possibility to view the details for each document in the **Documents** section within the contract view.

This is how it works

1. Open the contract.
2. Select the desired document.
3. Open the context menu using the three-dot menu.
4. Click **Details**.

A window will open with all the information about the selected document. You can also edit them here.

1.5.4. Deleting a document

You can delete a document added to the contract.

This is how it works

1. Open the contract.
2. Navigate to the desired document in the **Documents** section.
3. Open the menu for context actions of the desired document.
4. Click **Delete**. Alternatively: Select the document and click **Delete** above the document.
5. Delete the document by clicking **Delete** once more when responding to the dialog with the security prompt.

1.5.5. Changing the document type

You can change the document type.

This is how it works

1. Open the contract.
2. Navigate to the desired document in the **Documents** section.
3. Open the menu for context actions of the desired document. Alternatively: Select the document and click **Set document type** above the document.
4. Select the desired document type.

> **Note**
> In order to use document types, the document types must have been defined in SharePoint by the administrator.

1.5.6. Sharing a document

You can share individual documents with other people. Your administrator must enable the **Share** function beforehand.

This is how it works

1. Select the document that you want to share.
2. Click the three dots to open the context menu.
3. Click **Share**. The sharing dialog opens in a new browser window.

> **Note**
> To use the **Share** functions, you must be logged into Microsoft SharePoint Online or Microsoft 365.

1.5.7. Signing contract documents

You have the possibility to trigger signature processes from within d.velop contracts for Microsoft 365.

Currently, amxSign and DocuSign are available as signature providers. These components are available in the d.velop store under **Sign digitally** and can be configured and activated by your administrator.

Signing with amxSign

If amxSign has been activated and configured for you, you can start the document signature process with amxSign in the document area.

This is how it works

1. Select the desired document.
2. Open the **context menu** using the three-dot menu.
3. Expand the **Sign** submenu.
4. Choose between the following options:
   a. Simple signature
   b. Advanced signature
   c. Qualified signature
   d. Request signatures
5. The desired signature process is started.

The signature solution amxSign supports the following file types: PDF

> **Note**
> You can only sign single documents.

Signing with DocuSign

Provided that DocuSign has been activated and configured for you, you can start the document signature process with DocuSign in the document area of a contract.

This is how it works

1. Select the document or documents to be signed.
2. Click on **Sign**.
3. Alternatively, for single documents you can open the context menu via the three-dot menu and click **Sign** there.

A new window will open. Within this window you will be redirected to DocuSign. The corresponding documents are uploaded there and the signature process can be continued in the DocuSign interface.

Once the signature process is complete, the signed document is automatically stored in d.velop contracts for Microsoft 365. The corresponding document type is set. Do not delete the original document. If the function has been enabled by your administrator, the signature protocol is also stored.

The following file types are supported for the signature process with DocuSign:

- Document
  .doc, .docm, .docx, .dot, .dotm, .dotx, .htm, .html, .msg, .pdf, .rtf, .txt, .wpd, .xhtml, .xps
- Image
  .bmp, .gif, .heic, .jpg, .jpeg, .png, .tif, .tiff
- Presentation
  .pot, .potx, .pps, .ppt, .pptm, .pptx
- Table
  .csv, .xls, .xlsm, .xlsx

Please note that a signed document is always returned by DocuSign as a PDF.

1.6. Managing tasks

Here you will learn how to manage tasks. Each contract can have tasks. You can create, view, edit and delete tasks. You can activate notifications for each task.

- Creating a task
- Viewing a task
- Editing a task
- Deleting a task
- Setting up task notifications
- Configuration of serial tasks

1.6.1. Creating a task

You can create tasks to facilitate their tracking for a contract.

This is how it works

1. Open the contract.
2. Change to the **Tasks** area.
3. Click **New** or **Add task**.
4. Enter all required fields and additional information about the task.
5. You also have the option to configure a task as a serial task.
   a. To do this, select the desired interval under **Repeat task**.
   b. After marking the status of a serial task with **completed**, a new task is automatically created according to the configured interval. An entered due date and reminder periods are created again automatically.

6. You have the option to set up notifications for the tasks.
   a. Specify the Notification interval.
   b. Specify the Notification start.
   c. Define further persons or groups who are to receive this notification.
7. Save the information.

> **Note**
> Notifications are sent until the task is completed.

1.6.2. Viewing a task

You can display the detailed view of a task in several ways.

Context menu - This is how it works

1. Navigate to the desired task in the **Tasks** area.
2. In the menu for context actions, click **Details**. The detail view of the task is displayed.

Click on the title - This is how it works

1. Navigate to the desired task in the **Tasks** area.
2. Click on the title of the task. The detail view of the task is displayed.

1.6.3. Editing a task

You have several options of how to open a task for editing.

Context menu - This is how it works

1. Open the contract to edit a task.
2. Navigate to the desired task in the **Tasks** area.
3. Open the menu for context actions of the desired task.
4. Select **Edit**. The detail view of the task opens.
5. Click **Edit**. Edit the desired fields and values.
6. **Save** the task.

Click on the title - This is how it works

1. Open the contract to edit a task.
2. Navigate to the desired task in the **Tasks** area.
3. Click on the title of the task.
4. Click **Edit**. Edit the desired fields and values.
5. **Save** the task.

1.6.4. Deleting a task

You can delete created tasks.

This is how it works

1. Open the contract to delete a task.
2. Navigate to the desired task in the **Tasks** area.
3. Open the menu for context actions of the desired task.
4. Select **Delete**. The **Delete task** dialogue appears.
5. Confirm with **Delete**.

1.7. Managing contractual partners and contacts

Provided that this function has been activated for you, you can manage, create and edit new contractual partners and contact persons in various ways.

Managing contractual partners and contacts in SharePoint – This is how it works

1. Click on the nine dots menu in the navigation bar of d.velop contracts for Microsoft 365.
2. Click **Manage contractual partners** or **Manage contact persons**.
   The respective list will open in SharePoint in a new tab.
3. Edit the data.

Creating contractual partners within d.velop contracts for Microsoft 365 - This is how it works

1. When creating a contract, click **Create contractual partner**.
   A control panel opens.
2. Enter the corresponding data in the control panel.

Editing contractual partners within d.velop contracts for Microsoft 365 - This is how it works

1. Click **Edit contractual partner** when creating a contract or editing master data of an existing contract (if a contractual partner has already been defined).
   A control panel opens.
2. Enter the corresponding data in the control panel.

Selecting or creating contact persons within d.velop contracts for Microsoft 365 - This is how it works

1. When creating a contract or editing master data of an existing contract, select the desired contact person.
2. If the desired contact person is not included in the dropdown menu, click **Create contact person** when creating a contract or editing master data of an existing contract.
   A control panel opens.
3. Enter the corresponding data in the control panel.

Editing contact persons within d.velop contracts for Microsoft 365 - This is how it works

1. Click **Edit contact person** when creating a contract or editing master data of an existing contract (if a contact person has already been defined).
   A control panel opens.
2. Enter the corresponding data in the control panel.

1.8. Tips and tricks

Here you will find useful additional information:

- How do I change the color scheme?
- How do I manage list items?
- How do I use special contract fields in the advanced search?
- How can I access the online help?
- How do I change the display language of the online help?
- How can I export the online help as a PDF?
- How do I send user feedback to d.velop?

1.8.1. How do I manage additional lists?

The administrator can integrate additional lists into a contract. This is used to manage costs, notes or other items in the form of a list.

The use of the lists, the creation, editing and deletion of list items corresponds to the use of tasks. Find more information in chapter Managing tasks.

1.8.2. How do I retrieve search results from SharePoint using the Search Query tool?

This is how it works

1. Open the Search Query tool at https://admin.d-velop365.com/searchQueryTool. You can perform searches at root or site level.
2. Searching at root level:
   1. Enter the root URL in the first text box.
   2. Select / from the drop-down menu.
3. Searching at site level:
   1. Enter the root URL in the first text box.
   2. Select **/sites/** from the drop-down menu.
   3. In the second text box, enter the name of the site.
4. In the **Search query** text box, enter the relevant search query. You can view the search query in the contracts application interface.
   1. Perform any search using the advanced search.
   2. Click on the magnifying glass (**Show technical information for the search**) next to the column selection. The search query is displayed under **Search query**.
5. Use the **Parameter** checkbox to control the corresponding settings.
6. In the **Add managed property** text box, enter the columns to be displayed in the search results, separated by commas.

   > **Note**
   >
   > **Example**
   >
   > ecsContractIdOWSTEXT,ecsSubjectOfContractOWSTEXT,RefinableDate02

7. Click **Search**.

1.8.3. How do I use special contract fields in the advanced search?

For some special contract field types, you can narrow down the search results even further by using search or comparison operators.

These contract fields are:

- Number fields, date fields, currency fields
  - A restriction by comparison is possible.
- Document of the type
  - Contracts that contain or explicitly do not contain documents of a certain document type.

Date, number or currency field

If the field is a date, number or currency field, there are several comparison operators available:

Date:

- **before**
  The search returns all contracts whose saved date is before the entered date.
- **after**
  The search returns all contracts whose saved date is after the entered date.

Date, number or currency field:

- **equals**
  The search returns all contracts whose date or number/currency field exactly matches the entered value.
- **between**
  The search returns all contracts whose saved date or number/currency field lies between the entered values.

Document of the type

By selecting the field **Document of type** you can find all the contracts that contain or do not contain a document of the selected type.

The following comparison operators are available:

- **included**
- **not included**

1.8.4. How can I access the online help?

The online help (this document) can be accessed directly from the start page of the application. Simply click on the question mark.

The displayed language of the online help depends on the language settings of your browser.

Please also note the chapter on How do I change the display language of the online help?

1.8.5. How do I change the display language of the online help?

The displayed language of the online help depends on the language settings of your browser.

You can change the display language in the d.velop service portal. The currently displayed language is shown next to the search.

You can choose from the following:

- German
- English

1.9. Frequently asked questions (FAQ)

Here you can learn more about the most frequently asked questions.

1.9.1. Why do the search results show no more than 500 contracts?

Due to a limit in Microsoft SharePoint Online, a maximum of 500 rows are returned in a result. When you export the search result list, all results are exported.

Learn more about SharePoint search limits at: https://docs.microsoft.com/en-us/sharepoint/search-limits

1.9.2. Why is the desired contract not returned by the search?

After creating a contract or provisioning documents in a contract, the content is returned once the content has been captured by the SharePoint online search.

The process can take from a few minutes up to an hour.

1.9.3. What notifications can be sent by the system?

d.velop contracts for Microsoft 365 can send automatic e-mail notifications for various use cases.

The form and content of the e-mails can be customized by your application administrator and thus differ.

- **Mandatory notifications**: These notifications are always sent by the system.

  - Information about an automatic extension of contract duration that has taken place.
  - Information about an assignment of a task by another person.

- **By the user for each contract individually**: As a user, you can configure this notification individually for each contract or task.
  - Reminder for a contract (usually for notification when the date of cancellation is approaching).
  - Reminder of a task due date.

- **Configurable by your application administration**: These notifications can be configured by your application administration.
  - Information about creation or modification of a contract and assignment as responsible person.
  - Information about the granting of a read or write permission to a contract.

See also the following chapters:

Configurable by the user for each contract individually:

- Setting up task notifications
- Editing the notification on the date of cancelation

Configurable by your application administration:

- Defining e-mail notifications
- Configuring e-mail notifications

1.10. Troubleshooting

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/

1.11. 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.