

opensourceCM © - Contract Lifecycle Management Solution

opensourceCM is a secured contract management SaaS (software-as-a-service) solution that allows organizations to tap into their contracts portfolio. The software completely transforms how organizations manage cost, risk and liabilities as seeing in the illustration bellow that outlines the base capabilities of this application. These include authoring of a contract request, negotiating contracts, controlling work-flow and execution. The opensourceCM API access allows for the import and export of data to a variety of business applications and tools. opensourceCM have the flexibility to adapt to customer business processes, while embracing contract management best practices. The solution takes CLM configuration, ease and speed of implementation to an entirely new level and includes a breath of new functionality. opensourceCM uses the client business process that works and will replicate it. Each customer uses their own separate instance of the opensourceCM database, so that its data is securely isolated from that of other customers. opensourceCM is currently available in English, Spanish and Hebrew, it is also



utilizing a database which supports 190 international languages. When uploading a text or PDF document in any one the 190 supported languages, opensourceCM indexes it and then it can find words, values, phrases, terms of art or specific legal language within the documents. The searches are hyperlinked to the actual paragraph in each document. This can be accomplished across document data sets that may comprise tens of thousands of documents.

opensourceCM Main Feature List & Options

- ✓ **Secure centralized repository** – Multi-tenant architecture with customizable front end, unique customer login URL, and individual customer database instances
- ✓ **Access Rights Management** – on a folder view, term sheet and meta-data view and on all document level. Highly secure, encrypted sessions, triple-DES 2048 bit passwords
- ✓ **Compliance/Audit Trail** - full audit trail (who, when & what) that provides proper oversight of enterprise risk. The audit trail activity at every document and user level and is automatically generated to document all user actions by user, all users, type action and specific action, etc.
- ✓ **Elastic search engine and reporting tools** - search file and folder names, internal document content and term sheet meta data simultaneously, individually or in combination
- ✓ **Monitoring Alerts & Calendar** - track dates, events, and contract milestone to keep on top of commitments and obligations. Enables you to send notification by role assignments (owner, collaborator etc.)
- ✓ **Connectivity with other business applications** - API connectivity to 3rd party business applications such as DocuSign/EchoSign, OKTA SSO, Box, NetSuite, Dropbox, Google Drive, SharePoint, MS Dynamics, Salesforce

- ✓ **Easy uploading of all documents with unlimited storage space** - drag and drop files or documents to your predetermined location within minutes.
- ✓ **inbound-email** - uploading files directly from your registered emails.
- ✓ **Upload related documents as "parent" version or an attachment** - Specify document type/relation during upload and file in the relevant folder
- ✓ **Unlimited views of term-sheets/meta-data** – infinite types of relevant fields can be created and entered in each term sheet view based on the parameters needed
- ✓ **Compare tools enabling user to track changes in related documents** - overview of changes by section without the need to scroll through a redlined document, view side by side comparison.
- ✓ **Versions tools** - full contract version control with latest contract or parent document.
- ✓ **Authoring of templates & clauses editor** - allows admins to easily create new document templates or existing templates with associated contract terms. Can create documents from templates and allow population of contract fields during document creation.
- ✓ **Work flow templates** – enables an organization to copy existing work flow methodologies to an automated process in the system.
- ✓ **Intuitive interface** – ease of use enables users to navigate through the platform easily and effectively
- ✓ **Contract negotiation deal-room** - negotiation team to use a secured access only for the deal room
- ✓ **Customizable Dashboards** - customizable repository dashboard on a per user basis
- ✓ **Archive** – single centralized repository for all your company's contracts and documents with unlimited storage space
- ✓ **Backup** - automated various data set backups
- ✓ **Performance / Scalability** - supports unlimited users/contracts, rapid growth and fast deployment, automated total archive migration in less than 24 hours (including file structure and meta data), fast system response time and 24 hours' operation with global web access.
- ✓ **Options** - customer banner/logo, SSO/Active Directory integration via SAML 2.0, eSignature via DocuSign or Echosign, authoring, sync to BOX, CRM integration, deal room and more
- ✓ **Corporate Personalization/Branding** - Personalize login screen and header with your screen and logo
- ✓ **White Label** – Service provider login screen, header and support contact information
- ✓ **Organizational structure** – folder library can be designed based on the way a company conducts its business i.e. departments, client types, international divisions etc

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