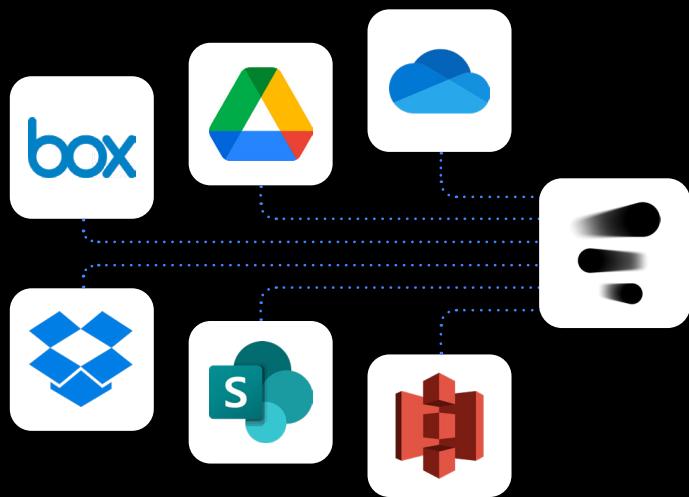


Getting started: integrating Evisort with your document repositories

Easily connect your document repositories — local, cloud, or email — with Evisort to create a single source of truth for all your contracts.

Evisort works with the systems you already use and offers a self-serve, secure, extensible document synchronization capability that enables you to connect your preferred storage systems with Evisort. This provides a single point of access to folders and files and creates a continuous data exchange between Evisort and your current document repositories, allowing your users to continue to use their existing systems and keep their existing file and folder structures. This process is fast — in many cases, takes only a few minutes to configure and only a few hours to automatically sync your contracts — and intuitive, requires minimal IT involvement, and ensures you realize rapid ROI with Evisort.



Evisort's document repository integration options

1 Cloud and custom integration and synchronization

Evisort supports built-in integrations with these cloud storage providers:

- Box
- DropBox
- Google Drive
- Sharepoint 365
- OneDrive
- AWS S3

Evisort's public API enables customers to integrate and sync with other in-house, SaaS, or custom systems. Talk to your account rep to learn more.

2 Local storage and email uploads to Evisort repository

For customers who do not wish to integrate their cloud storage systems with Evisort, users can directly upload documents from local storage drives or can import documents by sending emails with contracts attached to a personalized and secure Evisort email address.

Overview of Evisort's document repository integrations

Evisort provides a central contract repository that integrates and syncs all your contracts from different document repositories in one place while keeping your existing file names and folder structures.

1 What does Evisort's document repository integrations and syncing do?

- Quickly ingest documents into Evisort and turn contracts into searchable data
- Allows you to maintain and continue to use your existing document storage systems
- Provides the option to use Evisort as your sole document repository
- Preserve file and folder structure while syncing all files into Evisort
- Create a two-way sync and data exchange between existing files and folders in existing systems and Evisort within seconds
- Provide a central contract repository that serves as a single source of truth for all your contracts spread across your different document repositories

2 Why is this important?

- You can quickly ingest and analyze large volumes of contracts using Evisort – Evisort can ingest and analyze 72,000 contracts in less than one day
- Working with your existing systems reduces change management and allows for a faster implementation giving you immediate ROI. A shorter implementation means quicker time-to-value.
- Working with existing systems reduces operational overhead and eliminates the need for massive data migration projects
- Two-way data syncs mitigate against data silos, and tedious parsing of documents by providing real-time contract visibility and transparency
- Minimize disruption to existing work processes, as your teams can continue using existing storage systems for their contracts, while other team members can choose to use Evisort as their central repository
- Scale and deploy Evisort to additional teams based on your company needs

FAQs

1 What does it mean that Evisort's document repository integrations are self-service?

Users can integrate Evisort to Box, DropBox, Google Drive, SharePoint 365, OneDrive, and AWS S3 through Evisort's Admin console. This requires minimal IT involvement and within a few clicks of a button, Evisort can ingest, analyze, and sync your files and folders stored in your existing document repositories.

2 How quickly do files import and sync with Evisort?

There may be several factors that influence the exact speed, but in general, Evisort is capable of ingesting and analyzing tens of thousands of contracts in less than 24 hours.

3 What does “syncing” mean?

Evisort offers two-way data syncs with your cloud storage providers. A two-way sync means that if a change is made to the contract data in either Evisort or your cloud storage provider, that change will automatically be updated in the other system, so your documents are always in sync. Either system can always be referred to as the master system of record.

4 Are Evisort's integrations with document repositories and on-going syncs with cloud storage systems secure?

Yes. We use OAuth2 to authenticate with most storage systems, except AWS S3, which uses AWS-standard IAM role security. When a user provides their username/password/SSO/an IAM role to their storage provider, that in turn sends Evisort an access token, so that we never have access to the user's credentials nor can we access files that aren't accessible by the service account they're authenticating with.

Evisort is the first AI-native CLM company to be ISO 27001:2013 certified for information security and ISO 27701:2019 certified for data privacy. Evisort's diligent management system ensures the confidentiality, integrity and availability of all corporate data. These certifications establish, implement, and maintain privacy information management protocols that comply with a wide array of international privacy regulations, including the GDPR and CCPA.

Evisort is SOC 2 Type II certified, runs a global, continuously running bug bounty program, conducts regular penetration testing, and is compliant with the EU's General Data Protection Regulation (GDPR). All cloud storage integrations have been fully vetted by Evisort's internal security team from design to release.

Evisort has passed the additional verification requirements of our cloud storage integration partners.

Evisort encrypts data at rest and in transit.

5 What file types are supported?

Evisort's Document Repository Integrations can support folders and all file types. Note that Evisort's OCR and AI will only work on .pdf, .doc, and .docx formats – meaning those are the doc types from which Evisort will extract, analyze, and track contract data.

6 We have a storage system that is not listed above. Can Evisort still integrate with my systems?

Yes. Evisort has an Open RESTful API, so integrations are extensible and customizable. If you use a system not listed above, you can use Evisort's API to integrate and sync with the system of your choice. This custom integration may require the support of one of Evisort's systems integrator partners or an internal IT team. Evisort has strong relationships with tech partners who can help your IT team in this effort. Talk to your Evisort account representative to learn more.

7 Can I use Evisort as my sole document management system?

Yes. Evisort can be used as a single contract repository and storage system. As an alternative to an on-going sync between multiple systems, customers can perform a one-time import of their documents into Evisort from their local storage system, email, or cloud storage providers. This would make Evisort the sole repository of record allowing customers to retire pre-existing storage systems. This may help streamline processes and save operational expenses. Talk to your Evisort account representative to learn more.

8 What if I don't want to continuously sync data between Evisort and my cloud storage systems?

Customers have the ability to stop the data synchronization at any time. However, most Evisort customers prefer to have a continuous two-way sync of documents between their cloud storage systems and Evisort because if changes are made to contracts, those changes will be reflected in both systems.

How do I start integrating my document repositories?

Below are simple steps to follow to quickly and easily integrate with Evisort.

1 Identify your systems

Identify which local, email, cloud storage, or custom systems contain your contracts and determine which contracts you want to import into and sync with Evisort.

2 Determine sync frequency and repository configuration

Decide if you want to do a one-time import and sync with Evisort or if you want to do an on-going two-way sync. Customers who want to use Evisort as their sole repository and retire their pre-existing storage systems may elect to do a one-time import and sync, and stop the sync once all files are imported into the platform.

Customers who want to continue to use their existing cloud storage systems may elect to do the on-going two way sync. Talk to your Evisort account representative to learn more and ensure you select the option best for your business.

3 Get your username and password

Get the login credentials – username and password – for accessing the relevant document repositories.

- This step may require the support of your IT or Ops team so, if needed, contact and brief them on Evisort and how you'd like to integrate the Evisort platform with your document repositories. Share with them this document and support article on how to complete the configuration.
- Here are best practices we recommend for ease of use and security with cloud storage systems:
 - Use a dedicated service account for your storage provider for all integrations. For example, you can create an account for an "evisort@yourcompany.com", and only use this account for Evisort integrations. This ensures continuity of service regardless of who is using Evisort.
 - Limit this service account to the minimal possible permissions. This means we recommend keeping the permissions as restrictive as possible, so you do not need an administrative account with your storage provider to successfully configure the integration.
 - Depending on permissioning configurations, you can alternatively create a dedicated shared drive for the storage of files you intend to share with Evisort, and grant the service account access only to this shared drive. This way, it is very clear what files can be shared with Evisort within your storage provider, reducing the risk of your employees accidentally syncing a file you did not intend to upload to Evisort. This ensures that the access Evisort has into your storage provider can only ever include files you definitely intend to share with Evisort.

4 Connect with Evisort

- Configure the cloud storage integrations by navigating to the Admin console in Evisort then click Integrations and follow the onscreen instructions for the appropriate cloud storage system. Import and sync your contracts with a few clicks. The import and sync process typically takes a few minutes to begin. The import and sync completion time depends on the number of documents. Talk to your Evisort account representative about any questions.
- For importing documents from local, email, or custom systems – talk to your Evisort account representative to determine the best approach.

5 Set access controls

Determine, configure, and review user access controls so that each user and team has the appropriate access to folders and files within Evisort.

- **Create departments:** Navigate to the Admin console within Evisort. Click on Manage Departments, and create the departments for each team that needs to have unique access controls.
- **Assign users to departments:** Navigate to the Admin console within Evisort. Click on Manage Users and assign users to the appropriate departments.
- **Set folder access controls:** Navigate to the Documents console within Evisort. For each folder, select the three dots menu (...) next to the folder name and select Access Settings to set the appropriate permissions.

Notes: Admin users have access to all folders and files.

6 Start using Evisort

