



# Software Product Information

Fabasoft Cloud Add-on Products 2024 May Release

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## 1 Introduction

Your solutions can be extended by the following add-on products, which must be licensed separately.

The add-on products are based on the Fabasoft Cloud. Thus, in addition to this software product information, the "Fabasoft Cloud" software product information that describes the basic functionality available to you (see <https://www.fabasoft.com/spi>) also applies to the use of the add-on products.

## 2 3D Viewer

The 3D viewer enables the integrated display of CAD 3D models.

Use Case	Description
3D viewer	CAD 3D models can be displayed in the integrated 3D viewer.

## 3 Change and Asset Management

The change and asset management enables you to create and manage change processes. This allows carrying out adaptations to an IT infrastructure in a controlled, efficient and risk-minimized manner.

In addition, problem records can be managed and processed using a problem management process. IT asset shelves are used to manage the inventory passed to employees.

Use Case	Description
Dashboard	The change and asset management dashboard is the central access point to the change and asset management. When a user is added at least to one shelf, a dashboard is automatically created and placed on "Home". When a user is removed again, the dashboard is also removed.
Configuration	In the change and asset management configuration, app administrators can manage shelves, artifacts, general settings and app users.
CMDB shelves	Configuration management database (CMDB) shelves are used to manage artifacts and to define access rights. The artifacts can be created in the following folders: Servers, Virtual Machines/Servers, IT Services, Application Services, Network Components, Locations, Cluster and Checks.
RFC shelves	RFC shelves are used to manage RFCs (requests for change) and to define access rights.

Creating request for change	Requests for change (RFCs) are used to request a change.
Change process	RFCs can be processed through a change process in the workflow.
IT asset shelves	IT asset shelves are used to manage the inventory passed to employees and to define access rights. Assets can be handed over to or handed back by employees through a workflow.
Managing IT assets	The inventory handed over to employees can be managed using assets.
Problem record shelves	Problem record shelves are used to manage problem records and to define access rights.
Creating problem records	Problem records are used to document the details of a problem.
Problem management process	Problem records can be processed through a problem management process in the workflow.

## 4 Purchase

The purchase management enables you to conduct an efficient, digital purchase process.

Use Case	Description
Dashboard	The purchase management dashboard is the central access point to the purchase management.  When a user is added to a purchase management configuration, a dashboard is automatically created and placed on "Home". When a user is removed again, the dashboard is also removed.
Configuration	In the purchase configuration, app administrators can manage shelves, artifacts, general settings and app users.
Shelves	Shelves are used to manage requirement requests, orders, goods receipts, invoices and to define access rights.
Requirement requests	Employees can start a purchase process using requirement requests.
Orders	Order documents and a requirement request can be stored in orders.
Goods receipts	A goods receipt can be created for a delivery and assigned to an order.

Invoices	An invoice can be created for a delivery and assigned to an order.
Registering	Documents can be registered as order documents, goods receipts or invoices. You do this either by carrying out the corresponding steps in the worklist or using the "Register as" context menu command. Thereby the corresponding metadata for the documents can be entered.
Purchase process	<p>The purchase process differs from organization to organization. Therefore, you have to define the required BPMN processes by yourself.</p> <p>Basically, the following applies: The purchase workflow begins with an employee's requirement request and goes through defined approvals by supervisors. If the appropriate permissions are present, then the order can be accomplished by the purchasing department. With the goods receipt the delivery note is stored for the order. The invoice is also stored for the order.</p>

## 5 Outgoing Invoices

The outgoing invoice management allows to administer outgoing invoices. Using forms and processes, the outgoing invoice management can be customized to meet the needs of your organization.

Using a web service, a draft invoice can be uploaded from an ERP system and an approval process can be started. The approval status can be queried in the ERP system and changed or newly added documents can be transferred to the ERP system. The original invoice sent via the ERP system can in turn be taken over.

Use Case	Description
Dashboard	<p>The outgoing invoice dashboard is the central access point to the outgoing invoice management.</p> <p>When a user is added to a outgoing invoice configuration, a dashboard is automatically created and placed on "Home". When a user is removed again, the dashboard is also removed.</p>
Configuration	In the outgoing invoice configuration, app administrators can manage shelves, artifacts, general settings and app users.
Shelves	Shelves are used to manage outgoing invoices and to define access rights.

Outgoing invoices	In an outgoing invoice, the invoice documents and additional attachments can be stored in addition to the metadata.
Approval Process	<p>The approval process varies from organization to organization. Therefore, you have to define the required BPMN processes by yourself.</p> <p>Basically, an outgoing invoice is forwarded to the defined approver for approval. The approver can approve or discard the outgoing invoice. If necessary, a second approval can be obtained, for example, from the "Invoicing" management.</p>
Web service interface	Outgoing invoices can be uploaded and updated from an ERP system via a web service.