Fabasoft

# Software Product Information

## Fabasoft Talents 2026 November Release

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# Contents


1 Introduction ..... 3

2 Licensing ..... 3

3 Scope of Services – User Perspective ..... 3

3.1 Personnel Files (Dashboard) ..... 3

3.2 Personnel File Shelf ..... 4

3.3 Personnel File ..... 4

3.4 Personnel File Folder ..... 6

3.5 Documents of a Personnel File ..... 7

3.6 Business Case Shelf ..... 9

3.7 Skills Management ..... 9

3.8 Applicant Management ..... 10

3.9 SAP Integration ..... 11

3.10 Follow-up ..... 11

3.11 Notifications ..... 12

3.12 Reports ..... 12

3.13 Search ..... 12

3.14 AI Functionality ..... 12

4 Scope of Services – Administration ..... 13

5 Scope of Services – Interfaces ..... 14

5.1 Web Interface ..... 14

5.2 SAP Interface ..... 14

6 Scope of Services – Security ..... 15

6.1 Access Rights ..... 15

6.2 Auditability ..... 15

7 Fabasphere AI Core ..... 15

8 Technical Information ..... 15

# 1 Introduction

Fabasoft Talents allows you to accelerate your HR processes securely and reliably. Fabasoft Talents offers digital personnel files, applicant management, and skills management.

- Personnel file
  The personnel file allows you to control access to HR documents on an individual basis. This ensures that only authorized persons have access to your data. The personnel file offers audit-proof and GDPR-compliant storage of various document types.
- Applicant management
  Applicant management enables the automatic creation of applicant files from applications, which can be efficiently forwarded from the HR department to the responsible supervisor via a workflow.
- Skills management
  Skills management allows you to keep track of your employees' skills and take targeted training measures.

# 2 Licensing

Fabasoft Talents offers four roles, which can be combined based on the requirements:

- Personnel File
  Provides the full scope of services described in this software product information (except skills management).
- Personnel File (Inspection)
  Allows users to access of personnel files only via a web browser (as employee or supervisor).
- Skills Management
  Allows managing qualifications (target and actual), job descriptions, and role descriptions. In addition, overviews of missing qualifications of employees can be generated.
- Applicant Management
  The applicant management enables an efficient, digital management of job applications.

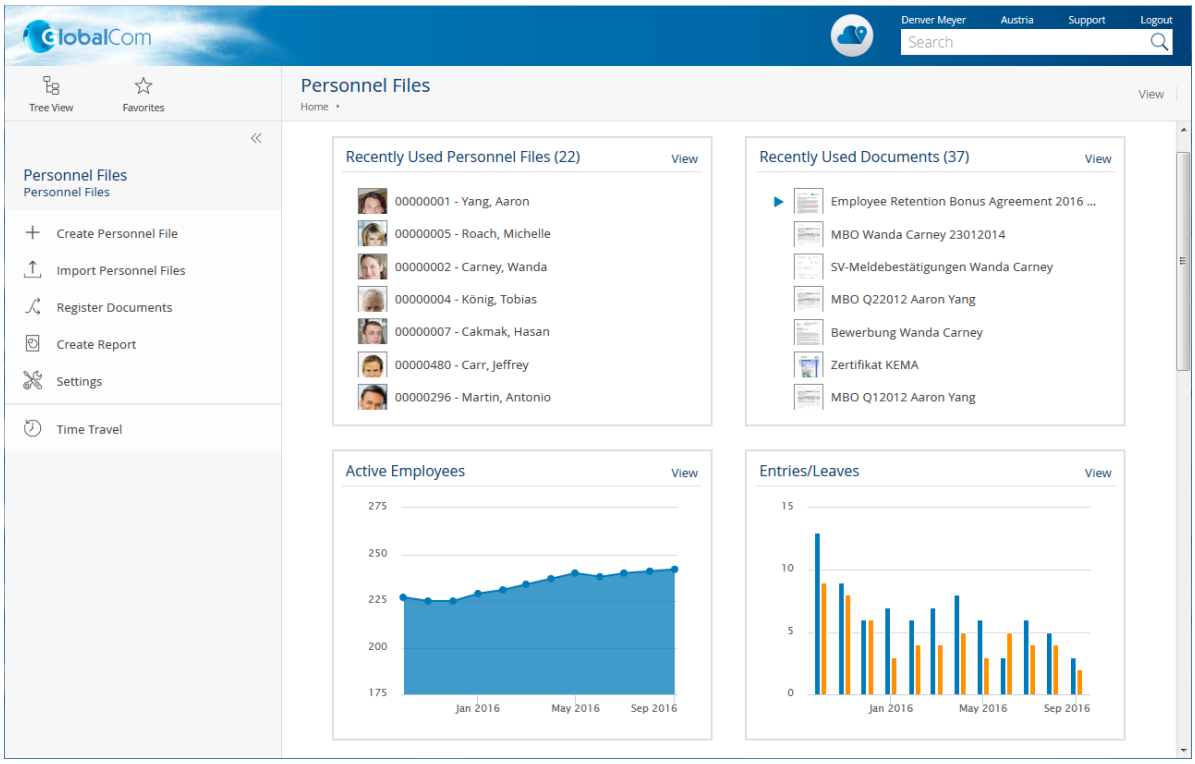
**Note:** Personnel files and applicant files are licensed on a file-by-file basis.

# 3 Scope of Services – User Perspective

The Personnel File provides rich functionality which is described in the following chapters.

## 3.1 Personnel Files (Dashboard)

The personnel files dashboard provides the access point to the personnel file for end-users. When a user receives access rights to a personal file shelf, a dashboard is automatically created and put on the user's "Home". If the access rights are deprived, also the dashboard is removed.



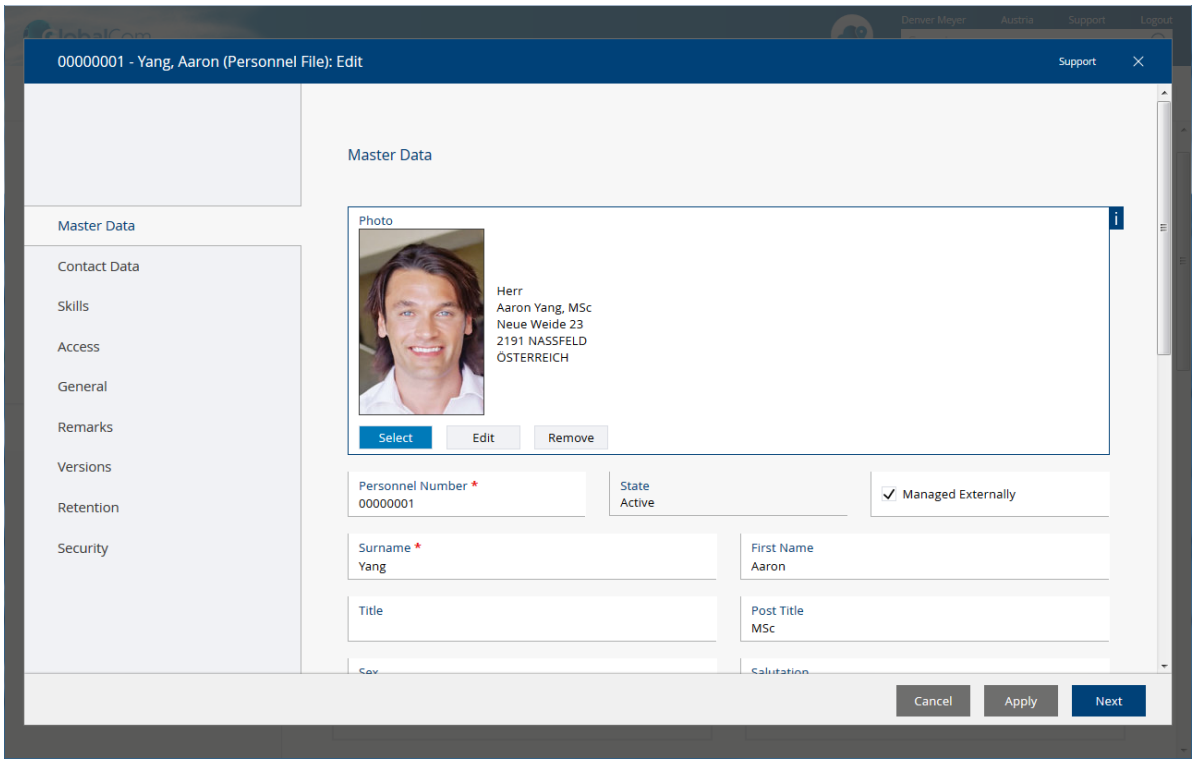

## 3.2 Personnel File Shelf

The personnel file shelf is based on a personnel file configuration, but the defined settings can be overwritten or extended. The personnel file shelf is used to manage the personnel files and to specify the access rights.

For personnel file shelves with a large number of personnel files, it is recommended to use the query-based view instead of the structured view. Personnel files can be searched and filtered efficiently in such personnel file shelves.

## 3.3 Personnel File

A personnel file is assigned to a person who was, will be, or is employed by the company.




Documents and metadata can be stored in a personnel file, and PDF overviews with an optional, dynamically computed watermark can be generated.

| Use Case | Description |
|---|---|
| Creating a personnel file | The personnel file is stored in the personnel file shelf. |
| Importing personnel files | Personnel files can be imported and updated using a CSV file. |
| Opening a personnel file | The most important metadata is displayed and the personnel file folders containing the documents are accessible. |
| Editing the master data of a personnel file | The metadata of a personnel file can be edited. |
| Reassigning a personnel file | Personnel files can be moved from one personnel file shelf to another. |
| Closing a personnel file | Personnel files with a defined separation date can be closed. After closing the personnel file, no further changes can be made (applies to master data and documents). |
| Removing the “Closed” state | The “Closed” state of a personnel file can be reverted. |

| | |
|---|---|
| Canceling a personnel file | Canceled personnel files are still accessible. |
| Restoring a personnel file | Canceled personnel files can be restored. |
| Deleting a personnel file | Canceled personnel files including the assigned documents can be permanently deleted, if no retention rules are violated. |
| Generating a PDF overview of a personnel file | The generated PDF document contains metadata of a personnel file and the contents of the assigned documents. |
| Generating a PDF list of contents of a personnel file | The generated PDF document contains metadata of a personnel file and a list of contents of the assigned documents. |
| Defining a retention period for a personnel file | Personnel files cannot be deleted within the retention period. The retention period can be defined differently for subordinate objects based on the category. |
| Granting temporary access to a personnel file | A user gets access to the personnel file for a predefined and limited timespan. |
| Displaying the history of a personnel file | The changes within a personnel file are displayed. |
| Displaying the master data of an employee in SAP | A link to the SAP transaction PA30 is opened. |
| Sending a hyperlink to a personnel file | An e-mail with a hyperlink to the personnel file will be sent. |

## 3.4 Personnel File Folder

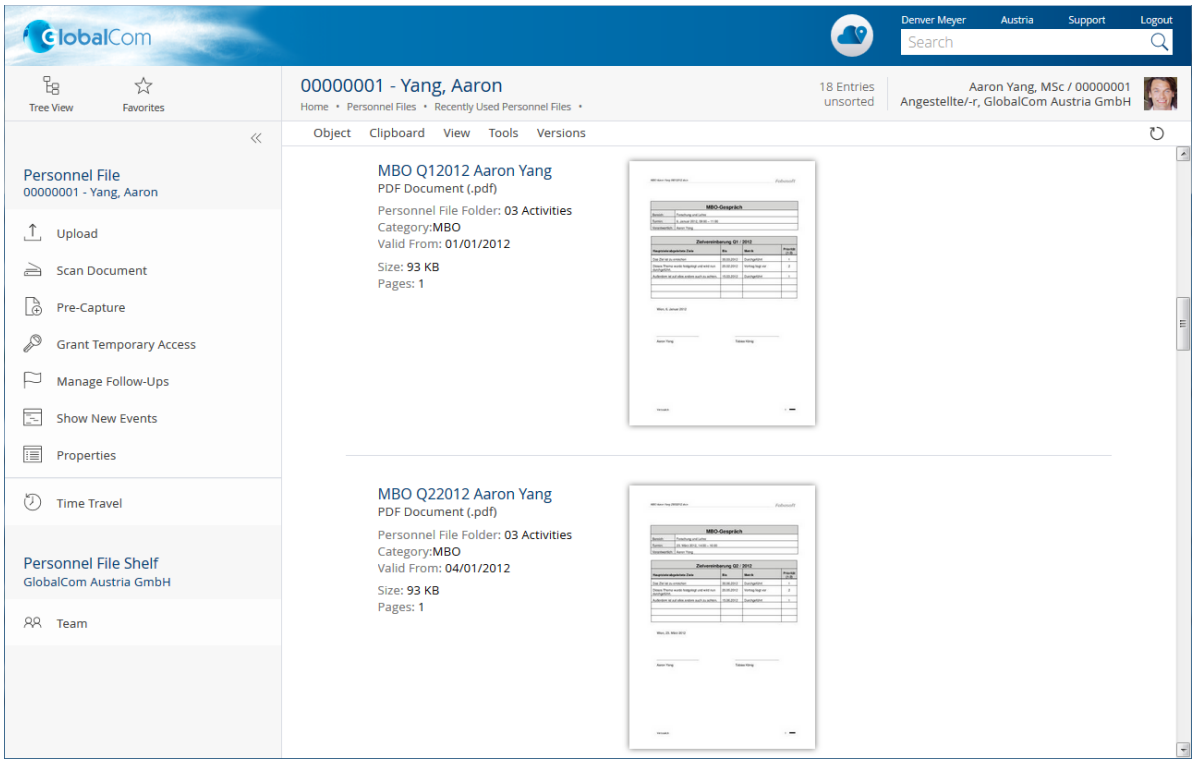
Personnel file folders are used for structuring personnel files. Besides the predefined folders that are defined in the personnel file shelf, additional personnel file folders can be created.

| Use Case | Description |
|---|---|
| Creating a personnel file folder | A personnel file folder corresponds to a standard folder that can be used to store documents. |
| Editing the metadata of a personnel file folder | The metadata of a personnel file folder is editable. To categorize the assigned documents the categories that are defined in the personnel file folder are available. |

| | |
|---|---|
| Canceling a personnel file folder | Canceled personnel file folders are still accessible. Predefined personnel file folders cannot be canceled or deleted. |
| Deleting a personnel file folder | Canceled personnel file folders can be permanently deleted if no retention rules are violated. |
| Displaying the history of a personnel file folder | The changes of a personnel file folder are displayed. |

## 3.5 Documents of a Personnel File

The documents of a personnel file are structured and stored within personnel file folders.




The following tables present the use cases that can be performed to handle documents.

| Use Case | Description |
|---|---|
| Creating a document | The document is stored in the personnel file folder and can be opened with a double-click in the corresponding third-party product. |
| Editing a document | The document can be edited with the corresponding third-party product. For Microsoft Word, the metadata of the personnel file is available as updateable fields. |

| | |
|---|---|
| Uploading a document | Files can be imported via drag and drop, via the shortcuts Ctrl + C and Ctrl + V, or via the menu command “Tools” > “Upload”. Depending on the web browser, not all options may be available. |
| Scanning a document | Paper documents can be scanned and imported directly on the device utilizing the clipboard. |
| Pre-capturing a document | Paper documents can be scanned and automatically assigned to the corresponding personnel file. The assignment is carried out with a barcode that must be entered in the scan dialog. An empty document is created, and later replaced with the content of the scanned document. |
| Signing a document | Documents can be signed manually. |
| Defining the validity of a document | Documents that need to be renewed recurrently can be provided with validity. |
| Canceling a document | The document is canceled and moved from the current personnel file folder to the “Canceled Documents” list. |
| Deleting a canceled document | Canceled documents can be permanently deleted by authorized users if no retention rules are violated. |
| Replacing a document | A document in the “In Progress” state can be replaced with another document. |
| Opening a document | The document can be edited in the corresponding third-party product. |
| Editing metadata of a document | The metadata of a document can be edited. |
| Registering documents automatically | Documents that are already in the system can be registered to personnel files using a CSV file. |
| Classifying a document | In conjunction with Mindbreeze AI, documents can be automatically classified and metadata can be extracted.<br>**Note:** The classification and extraction functionalities are provided by Mindbreeze AI. |
| Registering a document | The document is assigned to a personnel file. |

| | |
|---|---|
| Re-registering a document | The document is moved within a personnel file shelf from one personnel file to another, or from a personnel file folder to another. |
| Using the processing state | Each document has a processing state: In Progress, Closed, Replaced, Canceled |
| Displaying the history of a document | The changes within the document are displayed. |
| Sending a hyperlink to a document | An e-mail with a hyperlink to the document will be sent. |
| Sending a file | An e-mail with the attached document will be sent. |

## 3.6 Business Case Shelf

In a business case shelf, business cases and documents are managed which are not assigned to a single personnel file. Bulk documents can be used to generate and store individual documents for each personnel file.

| Use Case | Description |
|---|---|
| Using bulk documents | A bulk document can contain several documents (also of different types). One document in the bulk document can be defined as the main document. In addition, a setting can be made to determine which personalized personnel file documents can be generated from the bulk document. |

## 3.7 Skills Management

The skills management allows you to manage qualifications (target and actual), job descriptions and role descriptions. In addition, overviews of missing qualifications of employees can be generated.

**Note:** The skills management functionality must be licensed separately.

| Use Case | Description |
|---|---|
| Managing qualifications | Qualifications can be assigned to position descriptions, role descriptions and positions (target state). Acquired qualifications can be assigned to personnel files (actual state). |

| | |
|---|---|
| Managing job descriptions | A job description is used to determine the tasks and responsibilities of an employee. In addition, the qualifications required for the position are defined. |
| Managing role descriptions | A roles description is used to determine the tasks and responsibilities of an employee independent of the position (e.g. first responder). In addition, the qualifications required for the role are defined. |
| Managing the organizational structure | The organizational structure consists of organizational units and positions. |
| Calculate missing qualifications | Due to the difference between the actual qualifications (defined in the personnel file) and the target qualifications (defined in the positions), the missing qualifications can be determined for individual employees. |
| Checking job descriptions | Job descriptions must be regularly reviewed by the skills manager in co-operation with the supervisor, with regard to the tasks, powers and qualifications. This is supported by workflow activities. |

## 3.8 Applicant Management

The applicant management enables an efficient, digital management of job applications. Applicant files, job advertisements, applications, a talent pool, and corresponding workflow activities are available for this purpose.

**Note:** The applicant management must be licensed separately.

| Use Case | Description |
|---|---|
| Applicant Management Shelf | The applicant file shelf is used to manage applicant files and define access rights. |
| Managing Applicant Files | An applicant file contains an applicant's job applications and master or contact data. |
| Managing Job Advertisements | Job advertisements are stored in job applications. |
| Managing Job Applications | Application documents can be stored in job applications. |
| Managing the Talent Pool | The talent pool stores closed applicant files for which the corresponding option has been selected. |

| | |
|---|---|
| Personnel File Access | The supervisors have access to applications and job advertisements relating to their department via the personnel file access dashboard. |
| Website Integration | Job applications can also be created automatically using the data entered in an HTML form. |
| Applicant Management Process | Applicant managers, supervisors, and other departments can be integrated into the applicant management via the applicant management process. |

## 3.9 SAP Integration

The SAP integration allows the connection between SAP and the Personnel File.

| Use Case | Description |
|---|---|
| Creating a data set for the information type 9600 | The linking of HR master data in SAP with a personnel file is carried out using a custom information type 9600 “Personnel File”. |
| Managing links to personnel files | The link can be used to create, open and synchronize personnel files via the SAP GUI. |
| Storing pay slips | SAP-generated pay slips can be automatically stored in the respective personnel file. |
| Exporting and importing the organizational structure | A CSV file describing the organizational structure can be generated from the organizational chart and employee master data available in SAP. The organizational structure can be transferred using the import mechanism of the Personnel File. |

## 3.10 Follow-up

A follow-up can be defined for personnel files and documents.

| Use Case | Description |
|---|---|
| Defining a follow-up | The defined users get a follow-up e-mail or a process is started when the follow-up deadline is reached. |
| Defining an automatic follow-up | The defined users get a follow-up e-mail or a process is started when the follow-up deadline is reached. |
| Managing follow-ups | The user can edit the list of all follow-ups. |

## 3.11 Notifications

A notification can be defined for personnel files, personnel file folders, and documents.

| Use Case | Description |
| --- | --- |
| Activating a notification | Depending on the notification settings, the user is informed about relevant changes. |
| Managing notification settings | The user can change the notification settings. |

## 3.12 Reports

Reports can be generated based on predefined report templates. Dynamic analysis can be realized by using search folders.

| Use Case | Description |
| --- | --- |
| Creating a report | The content of the report can be defined.<br>**Note:** This functionality is only available to a limited extent for personnel file shelves with a query-based view. |

## 3.13 Search

Finding instead of searching. Enjoy the benefits of an intuitive full-text search.

| Use Case | Description |
| --- | --- |
| Searching | The integrated full-text search allows you to quickly find the desired information. Actions can be executed directly on the search result.<br>The search is carried out in accordance with user access rights. Only accessible results are presented. |

## 3.14 AI Functionality

Fabasoft Talents offers the following AI use cases using Mindbreeze AI.

| Use Case | Description |
| --- | --- |
| Asking questions about files and documents | Questions about personnel files and applicant files, as well as individual documents, can be asked in natural language. |

| | |
|---|---|
| Summarizing files and documents | The contents of personnel files and applicant files, as well as individual documents can be summarized based on user-defined perspectives. |
| Automatic classification and registration of documents into files | A rule action for automatic classification of documents and following registration into a personnel file can be defined in inboxes. |
| Metadata extraction from CVs | Applicant data is automatically extracted from an uploaded CV and saved to the applicant file. |

## 4 Scope of Services – Administration

The personnel file configuration and the personnel file shelf provide settings that define the behavior of personnel files. These following table presents the use cases.

| Use Case | Description |
|---|---|
| Using a personnel file configuration | In the personnel file configuration common settings, the structure of personnel files and the app users (licensing) are defined. |
| Authorizing the team | Only authorized users may access the personnel files. |
| Creating the folder structure for personnel files | The documents of a personnel file can be stored in an arbitrary folder hierarchy. |
| Creating categories | Categories can define access rights, retention rules and automatic follow-ups. |
| Creating report templates | Reports can be generated based on predefined report templates. |
| Defining predefined values for drop-down boxes | Predefined values for e.g. positions or qualifications help to use consistent names in all personnel files. |
| Defining SAP settings | By defining the SAP connection parameters, master data can be opened in SAP via the personnel file GUI (PA30 transaction). |
| Configuring the SAP integration | The SAP integration provides the connection between SAP and the Personnel File. |
| Defining watermark settings | The PDF overview of a personnel file can be provided with a watermark. |

| | |
|---|---|
| Defining personalized Word templates | Metadata (e.g. salutation or address) can be inserted into a Word document as updatable fields. Additionally, signature areas and elements can be inserted. |
| Providing the scan functionality (pre-capture) | The scan software must upload the document via a web service to the Personnel File system. |
| Check personnel files for inconsistencies | Personnel files can be checked for inconsistencies on the basis of predefined check factors.<br>**Note:** This functionality is only available for personnel file shelves with a query-based view. |

# 5 Scope of Services – Interfaces

The Personnel File provides the following interfaces for the communication with third-party products.

## 5.1 Web Interface

Third-party products can access personnel files with predefined URLs or web services. Personnel files can be displayed, e.g., in a web browser based on the personnel number or the user ID using a predefined URL.

Web services can be used to upload documents and to create or read personnel files.

| Use Case |
|---|
| Displaying a personnel file based on the personnel number in a web browser using a URL (for perusal) |
| Displaying a personnel file based on the user ID in a web browser using a URL (for perusal) |
| Creating a personnel file via a web service |
| Uploading a document in a personnel file via a web service |
| Reading a personnel file based on the personnel number via a web service |
| Reading a personnel file based on the user ID via a web service |

## 5.2 SAP Interface

The master data of the current employee can be displayed via the PA30 transaction in SAP. For this functionality, SAP control files (`.sap`) must be executable on the machine.

| Use Case | Description |
| --- | --- |
| Displaying master data of an employee in SAP | A link to the SAP transaction PA30 is opened. |

# 6 Scope of Services – Security

The Personnel File features extensive security settings.

## 6.1 Access Rights

The management of access rights is based on the defined team of the personnel file shelf. Additionally, categories can be used to assign fine-grained access rights to personnel files, personnel file folders, and documents.

Furthermore, the security concept allows defining retention rules and access by employees and supervisors.

## 6.2 Auditability

All access to personnel files, personnel file folders, and documents can be logged in an audit log. Distinctions can be made between read and write access, as well as between the access to content and metadata.

# 7 Fabasphere AI Core

The Fabasoft Cloud, together with Mindbreeze AI, forms the Fabasphere AI Core. In addition to this software product information, the software product information "Fabasoft Cloud" also applies to the use of Fabasoft Talents. For AI use cases, the software product information "Mindbreeze AI" also applies (see https://www.fabasoft.com/spi).

# 8 Technical Information

Information about system requirements and supported platforms can be found in the "Technical Information" document (see https://www.fabasoft.com/spi).