Fabasoft®

Software Product Information

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1 Introduction

The Fabasoft Cloud for secure document and process management, together with Mindbreeze AI for AI-supported knowledge management, forms the Fabasphere AI Core.

Fabasoft Solutions offer tailor-made solutions for document-intensive processes. The Fabasphere is the digital ecosystem that unites Fabasphere AI Core and Fabasoft Solutions.

2 User Agreement

The following general conditions apply to the use of the Fabasoft Cloud.

2.1 Definition of Terms

The following terms are used in the context of the user agreement.

Operating Models

Four operating models are available for the Fabasoft Cloud:

- Public Cloud
- Government Cloud
- Private Cloud
- Hyperscaler Cloud

Depending on the operating model, functionality may vary as described.

Fabasphere Organization

Organization-wide administrative management tasks can be carried out via the Fabasphere organization (e.g., defining members or external members of the Fabasphere organization).

Member of the Fabasphere Organization

Members of the Fabasphere organization are users who support the customer's internal business process from the customer's perspective.

Members of the Fabasphere organization are thus:

- Employees from the customer's company.
- Employees from companies that are affiliated with the customer as part of a corporation. The term corporation is defined as follows: A group of legally independent companies that are combined for economic purposes under uniform management.

External Member of the Fabasphere Organization

External members of the Fabasphere organization are users who, from the customer's perspective, support external business transactions with its business partners and are not used to support the customer's internal business processes. In particular, it should be noted that users who fall under the definition of "Member of the Fabasphere Organization" must not be external members of the Fabasphere organization.

Named User (nu)

Only a named natural person may use the provided solution(s) under the name of the "Named User (nu)" (of type member or external member of the Fabasphere organization).

Named User (ud)

Only a named natural person may use the provided solution(s) under the name of the "Named User (ud)" (of type member of the Fabasphere organization) under the following conditions:

The customer has the right to use the solution(s) provided upon conclusion of the contract by as many "Named Users (ud)" as specified at the time of contract conclusion. Use is based on a daily usage quota, which was also specified upon conclusion of the contract.

The first use of a solution on a calendar day (00:00–24:00, UTC) by a "Named User (ud)" reduces the agreed daily usage quota by one day. The use of a solution is understood to mean that at least one action of any kind is carried out on an object assigned to the solution. The customer is aware that the licensed software contains technical measures to track how many "Named Users (ud)" have used the licensed solution(s) on a calendar day (UTC). To track usage, the customer can analyze the usage data.

If the agreed-upon daily usage quota for a solution, as specified at the time of contract conclusion, is exceeded, such usage is no longer covered by the granted usage rights, is prohibited, and is technically impossible.

Concurrent User (ccu)

The customer has the right to use the solution(s) provided upon conclusion of the contract on one calendar day (UTC) by as many external, registered individualized users (of type external member of the Fabasphere organization) as defined upon conclusion of the contract. An individualized user is defined as follows: a named natural person. Each individualized user is counted for the agreed quantity structure. Each individualized user is counted several times for the agreed quantity structure, in particular if this user uses the solution(s) on several devices on the same calendar day (UTC). A device is understood to be a physical or virtual system with an operating system instance (e.g., PC, tablet, virtual machine, container).

The customer is aware that the software provided contains technical provisions for measuring how many individualized users have used the solution(s) provided on a calendar day (UTC).

If the agreed quantity structure for a solution, as defined when the contract was concluded, is exceeded, such use is no longer covered by the granted authorization of use, is impermissible and technically impossible.

The first use of a solution on a calendar day (00:00 - 24:00, UTC) by a registered individualized user is used to calculate the agreed quantity structure for the corresponding solution. The use of a solution is understood to mean that at least one action of any kind is carried out on an object assigned to the solution.

The customer must inform its external members in an appropriate and verifiable manner that they can only use the solution(s) provided as long as their membership in the Fabasphere organization has not been terminated.

The customer acknowledges that the SaaS usage type "Access for External Members" (see chapter 2.2 "SaaS Usage Types") may only be used to support the customer's external business transactions with its business partners (external members of the Fabasphere organization), but not to support the customer's internal business processes. The SaaS usage types "Full Access" or "Read Access + Comments" are available for this purpose.

2.2 SaaS Usage Types

SaaS usage types can be assigned to members or external members of the Fabasphere organization, depending on the SaaS usage type. The SaaS usage type defines the basic scope of services available.

The following SaaS usage types are available.

Full Access

- **Scope of services**
  Provides the full scope of services for members or external members of the Fabasphere organization as defined in chapter 3 "Scope of Services".
- **SaaS usage unit**
  Named user (nu) (of type member or external member of the Fabasphere organization)
  or
  Named user (ud) (of type member of the Fabasphere organization)

Read Access + Comments

- **Scope of services**
  Provides a limited scope of services for members of the Fabasphere organization as defined in chapter 3 "Scope of Services".
- **SaaS usage unit**
  Named user (nu) (of type member of the Fabasphere organization)

Access for External Members

- **Scope of services**
  Provides a limited scope of services for external members of the Fabasphere organization as defined in chapter 3 "Scope of Services".
- **SaaS usage unit**
  Concurrent user (of type external member of the Fabasphere organization)

Access for External Members (Legacy)

Only for existing customers, can no longer be purchased.

- **Scope of services**
  Provides a limited scope of services for external members of the Fabasphere organization as defined in chapter 3 "Scope of Services".
- **SaaS usage unit**
  Named user (nu) (of type external member of the Fabasphere organization)
  Note: Existing customers can assign this legacy SaaS usage type to external members as

long as the SaaS usage type "Access for External Members" is not available to the Fabasphere organization.

2.3 Storage Packages

Note: Applies to the "Public Cloud" and "Government Cloud" operating models.

Storage packages (pkg) are required to store data. A storage package offers a defined number of objects and a defined storage volume in gigabytes (1024 megabytes). Storage packages can also be used to provide volumes for volume-based use cases.

- Each object (element with "Fabasphere ID"; e.g., folder, text document or activity) that is assigned to the Fabasphere organization reduces the number of objects available. The final deletion of objects reduces the object consumption accordingly.
- Any multimedia content (documents, images, etc.) assigned to your organization reduces the available storage volume. By permanently deleting objects or object versions with content, the storage consumption is reduced again accordingly.
  Note:
  - Generated content such as PDF previews also count towards storage consumption.
  - Changed contents in object versions count towards storage consumption for each version.
- OData service volume (based on query objects)
  A query object is an object queried via the OData interface. If the same object is queried several times, each query counts as a single query object. Objects that are processed as part of a query but are not directly included in the result (e.g., calculation of a number) are also counted.
- OCR volume (based on the number of pages)
  The number of pages is determined for PDF documents or TIFF images using the page information. For files without page information (e.g., JPG, PNG images), each individual file is counted as a page. Supported file types: `pdf`, `tif`, `tiff`, `jpg`, `jpeg`, `png`.
- iArchiveLink volume (based on the number of operations performed)
  An operation is understood to be `create`, `read`, `update` and `query`.

2.4 Service Levels

Note: Applies to the "Public Cloud" and "Government Cloud" operating models.

Details on the applicable performance features for data center operation can be found here: https://www.fabasoft.com/data-center

Availability is published here: https://www.fabasoft.com/monitoring-reports.

2.5 Support

Note: Applies to the "Public Cloud" and "Government Cloud" operating models.

Fabasoft offers first-level support for all users (except external members with SaaS usage type "Access for External Members"). You can find more information here: https://www.fabasoft.com/data-center

3 Scope of Services

The scope of services described in the following chapters is available to members or external members of the Fabasphere organization with the SaaS usage types specified in the use case.

For the sake of clarity, the SaaS usage types are indicated with the following abbreviations in the use cases:

- **[A] - Full Access**
  With this SaaS usage type, the full scope of services is available.
  However, in particular the following restrictions apply to external members. If the use case is only available to members but not to external members, this is indicated with **[AM]**.
  - External members may not carry out administrative tasks in the Fabasphere organization.
  - External members may not create Teamrooms, encrypt Teamrooms, transfer/publish Teamrooms, define forms and categories, model processes with BPMN 2.0, define insight apps, manage inbox rules or use search folders for audit logs.
  - External members cannot be stored in positions in the organizational plan.
  - External members may not log in via the customer's internal authentication infrastructure.
- **[B] - Read Access + Comments**
  In the use cases intended for this SaaS usage type, read-only access (including search) is generally possible. However, the scope of services includes the ability to comment on and digitally sign documents. In addition, workflow activities can be carried out that do not require change access (incl. attaching signatures, excl. releasing).
- **[C] - Access for External Members**
  The following restrictions apply in particular to this SaaS usage type:
  - External members may not carry out administrative tasks in the Fabasphere organization.
  - External members may not create Teamrooms, encrypt Teamrooms, transfer/publish Teamrooms, define forms and categories, model processes with BPMN 2.0, define insight apps, manage inbox rules or use search folders for audit logs.
  - External members cannot be stored in positions in the organizational plan.
  - External members may not be granted the “Full Control” access right in Teamrooms.
  - External members may not log in via the customer's internal authentication infrastructure.
  - First-level support is only available to external members if internal first-level support is configured in the Fabasphere organization.
    Note: Applies to the “Public Cloud” and “Government Cloud” operating models.
- **[D] - Access for External Members (Legacy)**
  The following restrictions apply in particular to this SaaS usage type:
  - External members may not carry out administrative tasks in the Fabasphere organization.

- External members may not create Teamrooms, encrypt Teamrooms, transfer/publish Teamrooms, define forms and categories, model processes with BPMN 2.0, define insight apps, manage inbox rules or use search folders for audit logs.
- External members cannot be stored in positions in the organizational plan.

3.1 Scope of Services – User Perspective

Depending on the assigned SaaS usage type, the following basic scope of services is available to members or external members of the Fabasphere organization.

3.1.1 Log-in and Data Access

The following login and data access options are available.

Use Case	Description
Log-in **Available for:** [A], [B], [C], [D]	Log-in can be carried out via user name and password, client certificates, ID Austria, SAML 2.0, Active Directory or OpenID Connect. Mobile PIN (SMS), e-mail PIN and one-time password via RADIUS server are available for two-factor authentication. **Note:** • External members may not log in via the customer's internal authentication infrastructure. • ID Austria and mobile PIN (SMS) are only available in the "Public Cloud" and "Government Cloud" operating models.
Data access **Available for:** [A], [B], [C], [D]	Access is possible via common web browsers and a dedicated iOS or Android app. In addition, the interfaces described in chapter 3.4 Scope of Services – Interfaces" are available. Further information can also be found in the "Technical Information" document.
Data locations **Available for:** [A], [B], [C], [D]	You can define the physical storage location of your data. The following data locations are available: • Germany • Austria • Switzerland **Note:** Only available in the "Public Cloud" operating model.

Insight apps **Available for:** [A], [B], [C], [D]	Insight apps provide aggregated access to the information in your Fabasphere organization, tailored to your needs.
Accessibility **Available for:** [A], [B], [C], [D]	Accessibility is a basic concept of Fabasoft solutions. Operation with assistive technologies such as screen readers or magnification software is possible almost everywhere. Further information can be found in the "Technical Information" document.
Languages **Available for:** [A], [B], [C], [D]	The Fabasoft Cloud user interface is available in 22 languages. Bulgarian, Chinese (simplified), Croatian, Czech, Dutch, English, French, German, Hungarian, Indonesian, Italian, Japanese, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian, Slovakian, Slovenian, Spanish and Turkish.

3.1.2 Usability

The web client offers the ease of use described below.

Use Case	Description
Responsive design **Available for:** [A], [B], [C], [D]	The layout of the web client adapts to the size of the screen.
Reading documents **Available for:** [A], [B], [C], [D]	Documents can be read directly in the corresponding third-party product.
Editing documents **Available for:** [A], [C], [D]	Documents can be edited and saved directly in the corresponding third-party product.
Drag-and-drop **Available for:** [A], [C], [D]	Drag-and-drop can be used within the web client to move documents and folders.
Uploading **Available for:** [A], [C], [D]	Files and entire folder structures can be easily imported using drag-and-drop, `Ctrl + C` and `Ctrl + V` or via the upload action. A list of the import options depending on the web browser and the selected method can be found in the "Technical Information" document.

Downloading **Available for:** [A], [B], [C], [D]	Documents and entire folder structures can be downloaded and saved in the file system (as a ZIP file if applicable).
Sending links **Available for:** [A], [B], [C], [D]	Hyperlinks to folders and documents can be inserted directly into an e-mail via an action. The documents remain in the solution with secure access rights management.
Keyboard operability **Available for:** [A], [B], [C], [D]	The web client can be operated almost entirely with the keyboard, allowing you to work efficiently without a mouse.
Navigation **Available for:** [A], [B], [C], [D]	Efficient navigation is possible using a tree structure, breadcrumbs and favorites.
Views **Available for:** [A], [B], [C], [D]	The presentation of documents in Teamrooms and folders can be customized. The focus is either on the preview of the content or on the metadata of the documents.
Column view **Available for:** [A], [B], [C], [D]	The column view can be used to clearly manage also many documents in a list. The following options are available for customizing the view: • Adding, removing and moving columns • Sorting, grouping, filtering • Fixing
Follow-ups **Available for:** [A], [B], [C], [D]	A follow-up can be defined on documents. When the follow-up date is reached, an e-mail is automatically sent or a process is started. **Note:** Members with SaaS usage type [B] can only define personal e-mail follow-ups.

3.1.3 Teamrooms

Collaboration and the exchange of documents and data is made possible via so-called Teamrooms with individual access rights.

Use Case	Description
Creating Teamrooms **Available for:** [AM]	Collaboration takes place via Teamrooms and the team members defined therein. Documents can be stored in Teamrooms in a structured manner in folders.

Granting access rights **Available for:** [A], [C], [D]	Access rights (read access, change access, full control) can be granted to team members for each Teamroom. **Note:** External members with SaaS usage type [C] may not be granted the "Full Control" access right in Teamrooms.
Personalizing Teamrooms **Available for:** [A], [D]	Teamrooms can be provided with their own logo and description text using the branding functionality.

Encrypting Teamrooms
Available for: [AM]
	For Teamrooms, you can define whether the assigned documents are encrypted. When you read, edit or upload documents, they are encrypted or decrypted on the client. This means that no unencrypted documents are transferred or saved.
	Note:
	• A Fabasoft Secomo installation is required for the "Private Cloud" and "Hyperscaler Cloud" operating models.
	• If you create new documents via the web client, the documents are not encrypted until content is available.
	• Working with encrypted Teamrooms is also possible without an installed Fabasphere Client, so documents can be uploaded and downloaded. The encrypted preview images and documents are also displayed.
	The following restrictions apply to working without the Fabasphere Client:
	  ○ The document size is limited to 100 MB.
	  ○ A maximum of 5 files can be downloaded at the same time.
	• If encryption is activated for a Teamroom, versions of the existing objects are deleted.
	• The Teamroom assignment cannot be changed for the objects of an encrypted Teamroom.
	• Collaboration in an encrypted Teamroom can only take place with users whose organization has also activated encryption.
	• The synchronization of encrypted Teamrooms to the local workstation is only possible when using encrypted file systems on Microsoft Windows and Apple macOS.
	• In an encrypted Teamroom, documents can only be decrypted at the workstation, so a document cannot be analyzed or updated within the Fabasoft Cloud. This results in the following security features:

	○ No full-text search Encrypted documents cannot be analyzed or searched for in full text. ○ No conversion Encrypted documents cannot be converted. ○ No preview Encrypted documents cannot be prepared for a viewer (e.g., PDF viewer). A preview image or PDF view that is created at the workstation (with the Fabasphere Client) is encrypted and can be displayed in the web client. ○ No analysis, updating or generation of encrypted documents on the server (affects e.g., Microsoft Excel, Microsoft Word, CSV and XML files). ○ No provision of encrypted documents via server-side interfaces (concerns e.g., WebDAV or the cloud network drive). ○ No AI functionality AI functionality is not available for encrypted documents.
Transferring/publishing Teamrooms **Available for:** [AM]	Teamrooms, including the folder structures and documents, can be transferred or published from one system to a target system or another data location ("Public Cloud" operating model). • Transferred Teamrooms can be further processed in the target system and, if necessary, retrieved with the changes. • Published Teamrooms are available for reading in the target system and can be republished if necessary.
Using calendars **Available for:** [A], [B], [C], [D]	Calendars offer the option of managing appointments and tasks. The CalDAV support allows the calendar to be integrated into third-party products (e.g., Apple iCal or Apple Calendar App). **Note:** Members with SaaS usage type [B] can only read calendars.
Using newsfeeds **Available for:** [A], [B], [C], [D]	Newsfeeds offer the opportunity to exchange and discuss news informally within a Teamroom. **Note:** Members with SaaS usage type [B] can only read newsfeeds.
Showing new events	If there are changes in a Teamroom, these can be viewed and also received by e-mail.

Available for: [A], [B], [C], [D]	
Using Teamroom wastebaskets **Available for:** [A], [C], [D]	The Teamroom wastebasket protects documents from being accidentally deleted. Only team members with full control are authorized to empty the wastebasket.
Managing inbox rules **Available for:** [AM]	Rules for processing incoming objects can be defined in an inbox folder. A rule consists of conditions and actions.
Using form inboxes **Available for:** [A], [C], [D]	The form inbox allows files to be uploaded via any website using an HTML form.

3.1.4 Working With Documents

Documents can be opened directly in the corresponding supported third-party product and saved back again.

Use Case	Description
Reading documents **Available for:** [A], [B], [C], [D]	Documents can be read directly in the corresponding third-party product. This functionality is made available via the Fabasphere Client. Further information on the supported third-party products can be found in the "Technical Information" document.
Editing documents **Available for:** [A], [C], [D]	Documents can be edited and saved directly in the corresponding third-party product. This functionality is made available via the Fabasphere Client. Further information on the supported third-party products can be found in the "Technical Information" document.
Commenting on documents **Available for:** [A], [B], [C], [D]	PDF documents or documents that can be converted to PDF documents can be commented using an integrated PDF viewer. The comments are extracted from the PDF document and saved in a public or personal level.
Digitally signing documents **Available for:** [A], [B], [C], [D]	PDF documents or documents that can be converted to PDF can be digitally signed using the third-party providers primesign and SwissSign. If supported by the third-party provider, qualified electronic signatures in accordance with the eIDAS Regulation or the Swiss Federal Act on Electronic

Signatures (ZertES) can also be applied. The services of third-party providers are not included in the scope of services of the Fabasoft Cloud. In the "Private Cloud" and "Hyperscaler Cloud" operating models, the connection of the Fabasoft Cloud to third-party providers must be established by the customer.

Alternatively, a digital PDF signature can be created using Fabasoft Secomo. This digital PDF signature complies with the PAdEs standard of conformity level B. The signatory must identify themselves to the Fabasphere using strong authentication methods (two-factor authentication). The digital PDF signature is uniquely assigned to the signatory's Fabasphere account. The signatory signs the PDF document interactively and under their sole control. The digital PDF signature ensures that any subsequent changes to the document can be detected. The requirements for an advanced electronic signature in accordance with Art. 26 of the eIDAS Regulation are therefore met.

Note: When applying advanced electronic signatures with Fabasoft Secomo in the "Public Cloud" and "Government Cloud" operating models, a logged-in user signs documents by default with the "Fabasoft Business Process Cloud Digital Signatures" certificate.. This certificate is not a personal or organizational certificate of the logged-in user. A signature with this certificate merely confirms that the logged-in user has executed the "Sign Digitally" function and that a document with a valid signature of this certificate has not been modified since the signature process.

Fabasoft will not be

- party to such a signed document;
- entitled and/or obligated under such signed document;
- responsible or liable for legal validity, content, quality and/or format; and
- responsible or liable for verifying the logged-in user's authorization and entitlement to use the electronic signature.

The "Sign Digitally" function is not a substitute for more extensive legal formal requirements. It is the sole responsibility of the customer or the logged-in user to verify the required legal validity of such a signature.

Note: In the "Private Cloud" and "Hyperscaler Cloud" operating models, a Fabasoft Secomo installation is required for digital PDF signatures using Fabasoft Secomo.

Stamping documents **Available for:** [A], [C], [D]	Stamps can be defined as Microsoft Word documents or images and applied to PDF documents.
Editing encrypted documents **Available for:** [A], [C], [D]	When editing documents, the encrypted documents are automatically decrypted locally with Fabasoft Secomo and opened in the corresponding third-party product. When saving, the documents are encrypted again before being transferred. **Note:** A Fabasoft Secomo installation is required for the "Private Cloud" and "Hyperscaler Cloud" operating models.
Performing text recognition **Available for:** [A], [C], [D]	Text recognition (German, English) can be carried out for documents that can be converted to PDF via an inbox rule. **Note:** This functionality is licensed on a volume basis in the "Public Cloud" and "Government Cloud" operating models.
Importing e-mails **Available for:** [A], [C], [D]	E-mails (Microsoft Outlook, Mozilla Thunderbird) can be imported using drag-and-drop or `Ctrl + C` and `Ctrl + V`. The e-mail content and attachments can also be viewed directly without a third-party product. **Note:** The automatic upload of e-mails to encrypted Teamrooms via Microsoft Outlook is not supported.
Playing video and audio files **Available for:** [A], [B], [C], [D]	Depending on the web browser used and the video or audio format, videos and audio files can be played directly in the web client. Further information on the supported formats can be found in the "Technical Information" document.
Editing images **Available for:** [A], [C], [D]	Basic editing of images is possible directly in the web client (rotate, zoom, crop). Export options in various formats and sizes are offered for the use of images outside the Fabasoft Cloud (e.g., for presentations).
Allowing public links **Available for: [**A], [D]	For each Teamroom, you can define whether public links are permitted and can be created.
Using public links **Available for:** [A], [B], [C], [D]	Public links allow people without an account to read and download documents.

Compliance **Available for:** [A], [B], [C], [D]	With the help of "time travel", documents and entire Teamrooms can be taken back to specific points in time in the past. This makes changes traceable and older states can be restored if necessary. It is also possible to compare metadata and content (Microsoft Word) from an older version with the current version. Release versions allow continuing to work on a document while users with read access see the release version. The continuous versioning ensures traceability. **Note:** When deleting versions or objects (empty wastebasket, dissolve Teamroom) the data is also no longer available in the history.

3.1.5 Workflow

Members and external members of the Fabasphere organization can be integrated into the processing of business objects via workflow.

Use Case	Description
Using workflow **Available for:** [A], [B], [C], [D]	The workflow enables the digital mapping and execution of business processes. **Note:** Members with SaaS usage type [B] can perform workflow activities that do not require change access (incl. attaching signatures, excl. releasing).
Modeling processes with BPMN 2.0 **Available for:** [AM]	A graphical process editor can be used to model business processes based on BPMN 2.0 (Business Process Model and Notation). The modeled business processes can be executed digitally via the workflow engine.
Defining workflow substitutions **Available for:** [A], [B], [C], [D]	The substitutes receive all activities of the user they substitute within the set time period. Objects to which the substitute does not have access are filtered.
Viewing process statistics **Available for:** [AM], [B]	In order to obtain an overview of the ongoing processes, a large number of process statistics are available that shed light on the individual aspects of process execution.
Receiving notifications **Available for:** [A], [B], [C], [D]	Users can be notified of workflow events via e-mail or push notifications.

	Note: In the “Private Cloud” and “Hyperscaler Cloud” operating models, the Fabasoft Cloud notification service in the “Public Cloud” operating model can be used to send push notifications.

3.1.6 Search

The Fabasoft Cloud offers a full-text search.

Use Case	Description
Searching **Available for:** [A], [B], [C], [D]	The integrated full-text search allows you to quickly find the information you are looking for. Actions can be carried out directly on the search result. The search takes access rights into account. Only hits that the respective user is authorized to access are displayed.

3.1.7 Synchronization With the Local File System

The Fabasphere Folder enables content to be synchronized with devices.

Use Case	Description
Synchronization **Available for:** [A], [B], [C], [D]	The Fabasphere Folder enables automatic synchronization of folders and documents to the local file system and vice versa. This functionality is provided via the Fabasphere Client under Microsoft Windows and Apple macOS (see the "Technical Information" document).

3.1.8 Mobility

The following mobile access options are available.

Web browser

Access with a supported web browser is also possible on mobile devices. The web client adapts to the size of the mobile device.

Note: When using the web client on mobile devices such as tablets or smartphones on which the Fabasphere Client is not supported, direct document editing is not possible (see the "Technical Information" document).

Fabasphere App (iOS or Android)

The Fabasphere App (iOS or Android) can be used to access Teamrooms and data on iPads, iPhones, Android smartphones and tablets.

Use Case	Description
Navigation **Available for:** [A], [B], [C], [D]	Even complex folder structures can be navigated efficiently.
Creating Teamrooms **Available for:** [AM]	Collaboration takes place via Teamrooms and the teams defined in them. Documents can be stored in Teamrooms in a structured manner in folders.
Granting access rights **Available for:** [A], [C], [D]	Access rights (read access, change access, full control) can be granted to team members for each Teamroom. **Note:** External members with SaaS usage type [C] may not be granted the "Full Control" access right in Teamrooms.
Views **Available for:** [A], [B], [C], [D]	The presentation of documents in Teamrooms and folders can be customized.
Uploading **Available for:** [A], [C], [D]	Files can be uploaded directly from a smartphone or tablet.
Reading documents **Available for:** [A], [B], [C], [D]	The documents can be read either directly in the app or, if applicable, via third-party apps.
Editing documents **Available for:** [A], [C], [D]	Depending on the functionality of the third-party apps, documents can be edited and saved back. **Note:** This functionality is only available on Android.
Commenting on documents **Available for:** [A], [B], [C], [D]	PDF documents or documents that can be converted to PDF documents can be commented using an integrated PDF viewer.
Accessing encrypted documents **Available for:** [A], [B], [C], [D]	The encryption and decryption of documents in encrypted Teamrooms is performed in the Fabasphere app using Fabasoft Secomo. **Note:** A Fabasoft Secomo installation is required in the "Private Cloud" and "Hyperscaler Cloud" operating models.
Playing video and audio files **Available for:** [A], [B], [C], [D]	Video and audio files can be played either directly in the app or, if applicable, via third-party apps.

Sending links **Available for:** [A], [B], [C], [D]	Hyperlinks to folders and documents can be sent. The documents remain in the solution with secure access rights management.
Searching **Available for:** [A], [B], [C], [D]	The integrated full-text search makes it possible to find the desired information quickly.
Mobile workflow access **Available for:** [A], [B], [C], [D]	The worklist enables mobile processing of work steps.
Using offline mode **Available for:** [A], [B], [C], [D]	Synchronized Teamrooms, folders and documents can also be accessed without an Internet connection.

3.1.9 Customizing

The Fabasphere organization can be adapted to customer-specific requirements using model-based customizing.

Note: Members with SaaS usage type [B] can only read the customizing artefacts described below.

Use Case	Description
Using the dashboard **Available for:** [A], [B], [C], [D]	The "Templates and Presettings" dashboard is the central access point for customizing.
Managing configurations **Available for:** [A], [D]	In the customizing configuration, app administrators can manage collections, general settings and app users.
Managing collections for templates and presets **Available for:** [A], [D]	Collections for templates and presettings are used to manage templates, text modules, insight apps, forms, categories, processes, presettings and to define access rights.
Defining templates **Available for:** [A], [C], [D]	Almost all object types can be used as templates. In addition, settings can be made in templates that are particularly relevant when using fields in Word templates.
Using templates **Available for:** [A], [C], [D]	The templates are displayed in the "Templates" area in the create dialog. A copy of the template is created.
Defining text modules	Text modules can be used to insert predefined standard texts into Microsoft Word documents.

Available for: [A], [C], [D]	There are two types of text modules: • Static text module (text) Enables the entry of non-formatted text. • Static text module (Word) Enables formatted text to be entered as a Word document.
Using text modules **Available for:** [A], [C], [D]	Microsoft Word has a separate tab that allows you to insert text modules.
Defining insight apps **Available for:** [AM]	Insight apps can be defined on a customer-specific basis.
Using insight apps **Available for:** [A], [B], [C], [D]	Insight apps enable aggregated access to the Fabasphere organization's information.
Defining forms and categories **Available for:** [AM]	User-defined forms (allow additional data to be saved) and categories can be defined on a customer-specific basis.
Using forms and categories **Available for:** [A], [C], [D]	User-defined forms and categories can be assigned to objects and thus influence the behavior of the objects.
Defining ad hoc process templates **Available for:** [A], [C], [D]	Ad hoc process templates can be defined on a customer-specific basis.
Defining BPMN process templates **Available for:** [AM]	BPMN process templates can be defined on a customer-specific basis.
Using processes **Available for:** [A], [C], [D]	The defined process templates are offered for selection when processes are used.
Define default settings **Available for:** [A], [C], [D]	Presettings can be defined on a customer-specific basis. There are three types of presettings: • View settings • Search form • Time interval
Using default settings **Available for:** [A], [B], [C], [D]	You can use the view settings in lists.

	Search forms can be selected during a search (e.g., in a search folder). Time intervals can be selected for a follow-up, for example.
Personal templates, processes and default settings **Available for:** [A], [C], [D]	Each user can define their own templates, processes and default settings in the "Personal Templates", "Personal Processes" and "Personal Presettings" areas.

3.1.10 Contact Management

Contact management enables contacts to be created and managed in contact rooms. User-defined criteria can be used to define address lists that can be exported for sending newsletters, for example.

Note: Members with SaaS usage type [B] can only read the contact management artifacts described below.

Use Case	Description
Using the dashboard **Available for:** [A], [B], [C], [D]	The contacts dashboard is the central access point for contact management.
Managing configurations **Available for:** [A], [D]	In the contacts configuration, contacts administrators can define settings for the metadata of contacts and manage app users.
Managing contact rooms **Available for:** [A], [D]	Contact rooms are used for the structured management of contacts and for defining access rights and standard categories.
Using contact persons **Available for:** [A], [B], [C], [D]	The metadata of a contact person is managed in a contact person object.
Using organizations **Available for:** [A], [B], [C], [D]	The metadata of an organization is managed in an organization object.
Performing duplicate check **Available for:** [A], [C], [D]	When contacts are created or changed, the system checks whether a corresponding contact already exists. Duplicate matching is only carried out with contacts to which the user carrying out the action has access. If a duplicate is found, a dialog can be used to clean up or merge the contacts.
Changing the assignment of contacts	Contacts can be assigned to another contact room.

Available for: [A], [D]	
Using addressee lists **Available for:** [A], [B], [C], [D]	The contacts in address lists can be collected from different contact rooms.
Importing and exporting contacts **Available for:** [A], [C], [D]	It is possible to import and export contacts in address lists. Contacts can be imported and updated using a CSV or XLSX file or exported as a CSV file. Personalized e-mails can be sent to defined recipients from the contact management via a serial e-mail (a separate SMTP server must be configured in the Fabasphere organization).
Merging contacts **Available for:** [A], [C], [D]	If contact persons or organizations have been created twice, they can be merged.
Deleting contacts **Available for:** [A], [C], [D]	Change access is required to delete a contact (put it in the wastebasket). If property values of the contact are assigned to another contact room, change access is also required in this room.
Using address books **Available for:** [A], [B], [C], [D]	Read access to contacts is also possible via third-party products such as "Apple Contacts", which support the CardDAV standard.

3.1.11 Scrum

Scrum enables the coordination of agile software projects.

Note:

- Only available in the “Public Cloud” and “Government Cloud” operating models.
- Members with SaaS usage type [B] can only read the Scrum artifacts described below.

Use Case	Description
Using the dashboard **Available for:** [A], [B], [C], [D]	The Scrum dashboard is the central access point to Scrum.
Managing Scrum centers **Available for:** [A], [D]	Scrum administrators can manage Scrum projects, general settings and app users in the Scrum center.
Managing Scrum projects **Available for:** [A], [D]	Scrum projects are used to manage the Scrum elements (stories, defects, etc.) and define the Scrum team.

Using stories, defects and impediments **Available for:** [A], [B], [C], [D]	Stories, defects and impediments are the tasks that a Scrum team works on. The respective status shows the progress of the work.
Using tasks **Available for:** [A], [B], [C], [D]	Stories and defects can be divided into work units using tasks. The respective status shows the progress of the work.
Using sprints **Available for:** [A], [B], [C], [D]	A sprint comprises stories and defects to be processed and usually lasts a few weeks.
Using product versions and releases **Available for:** [A], [B], [C], [D]	Stories can be assigned to product versions and releases. This allows the progress of the stories required for a shipment to be monitored.
Creating reports **Available for:** [A], [C], [D]	Defect reports, burn-down and velocity graphics provide a quick status overview.

3.1.12 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.

Note:

- Only available in the "Public Cloud" and "Government Cloud" operating models.
- Members with SaaS usage type [B] can only read the change and asset management artifacts described below.

Use Case	Description
Using the dashboard **Available for:** [A], [B], [C], [D]	The change and asset management dashboard is the central access point to the change and asset management.
Managing configurations **Available for:** [A], [D]	In the change and asset management configuration, app administrators can manage shelves, artifacts, general settings and app users.
Managing CMDB shelves **Available for:** [A], [D]	Configuration management database (CMDB) shelves are used to manage artifacts and to define access rights.

Managing CMDB artifacts **Available for:** [A], [B], [C], [D]	CMDB artifacts describe the IT infrastructure.
Managing RFC shelves **Available for:** [A], [D]	RFC shelves are used to manage RFCs (requests for change) and to define access rights.
Using requests for change **Available for:** [A], [C], [D]	Requests for change (RFCs) are used to request a change.
Using the change process **Available for:** [A], [C], [D]	RFCs can be processed through a change process in the workflow.
Managing IT asset shelves **Available for:** [A], [D]	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.
Using IT assets **Available for:** [A], [B], [C], [D]	The inventory handed over to employees can be managed using assets.
Managing problem record shelves **Available for:** [A], [D]	Problem record shelves are used to manage problem records and to define access rights.
Using problem records **Available for:** [A], [C], [D]	Problem records are used to document the details of a problem.
Using the problem management process **Available for:** [A], [C], [D]	Problem records can be processed through a problem management process in the workflow.

3.2 Scope of Services – Security

The security of your data is ensured by the following measures.

Use Case	Description
Encrypted communication **Available for:** [A], [B], [C], [D]	Communication is encrypted via an HTTPS connection. This also applies to access via a smartphone. **Note:** Has to be provided by the customer in the "Private Cloud" and "Hyperscaler Cloud" operating models.

Access rights **Available for:** [A], [B], [C], [D]	Access to Teamrooms is defined via access rights. In addition, access rights and executable use cases are determined via organizational roles and policies.
Access for applications **Available for:** [A], [B], [C], [D]	Access with third-party applications can be carried out using your own API tokens generated for this purpose. A validity can be defined for the API tokens and revocation is also possible.
Search takes place in the access rights context **Available for:** [A], [B], [C], [D]	Only objects for which the user has search rights can be found via the search.
Watermark **Available for:** [A], [B], [C], [D]	Read-only team members can be shown a PDF document with a configurable watermark instead of the original document.
Malware scan **Available for:** [A], [B], [C], [D]	An automated malware scanning service checks the stored files for malware at regular intervals. **Note:** Only available in the "Public Cloud" and "Government Cloud" operating models.
Auditing **Available for:** [A], [B], [C], [D]	The following auditing information is collected as part of the compliance process: • Deleting objects • Reading the property • Reading the content • Changing the property • Calling the action **Note:** Only selected action calls and properties are logged in the audit log.

3.3 Scope of Services – Administration

The administration tasks can be carried out by owners or administrators of the Fabasphere organization via the web client.

Use Case	Description
Managing members and external members **Available for:** [AM]	Members and external members are managed via the Fabasphere organization. Typical administrative tasks are • Importing members • Adding members

	• Inviting members • Changing the membership • Terminating the membership • Managing teams • Defining authentication and the second factor • Showing the account activity of members • Managing external members • Managing the organizational plan **Note:** External members cannot be defined in positions in the organizational plan.
Managing SaaS usage types **Available for:** [AM]	In order for members or external members of the Fabasphere organization to be able to use a solution, they must be assigned a corresponding SaaS usage type.
Monitoring SaaS usage units **Available for:** [AM]	The SaaS usage units used are monitored in a dedicated dashboard. For concurrent users and usage days, additional information on usage behavior, peak evaluations and warnings are provided.
Using reports **Available for:** [AM]	Reports can be used to identify problems in the context of the Fabasphere organization.
Defining advanced settings **Available for:** [AM]	The advanced settings provide additional configuration options: • Managing app configurations • Defining target domains for transferring Teamrooms • Defining OAuth clients • Defining holiday tables • Defining contact data • Defining data protection • Defining logo • Defining organization roles • Defining support team • Defining policies • Defining presettings • Defining log-in options • Defining SMTP settings • Configuring encryption • Configuring digital signatures

	• Configuring Fabasphere Client
Defining default Teamrooms **Available for:** [AM]	The defined default Teamrooms are displayed in the organization shelves of the respective members.
Carrying out further administrative tasks **Available for:** [AM]	The following further management options are available: • Anonymizing users • Dissolving all Teamrooms • Deactivating and resetting the organization • Showing New Events • Showing the Teamroom usage • Defining permanent log-in • Defining trusted networks • Defining the organization branding • Viewing e-mail communication of organizational use cases (e.g., invitations) • Defining the default data location **Note:** Only available in the "Public Cloud" operating model. • Checking the files for malware **Note:** Only available in the "Public Cloud" and "Government Cloud" operating models. • Using search folders for audit logs

3.4 Scope of Services – Interfaces

The following interfaces are provided for accessing data in the Fabasoft Cloud. Please note that the range of functions and compatibility may be limited, particularly depending on the third-party product.

Interface	Description
CalDAV (Calendaring Extensions to WebDAV)	The CalDAV protocol enables standardized access to calendar and scheduling information based on the iCalendar format via the Internet. **Use Case:** Accessing calendars in the Fabasoft Cloud with a CalDAV-capable client (e.g., Apple Calendar).
CardDAV (vCard Extensions to WebDAV)	The CardDAV protocol enables standardized access to address books via the Internet. **Use Case:**

	Accessing contact data in the Fabasoft Cloud with a CardDAV-capable client (e.g., Microsoft Outlook).
CMIS (Content Management Interoperability Services)	The CMIS protocol enables standardized access to content management systems via the Internet. **Use Case:** • Accessing a user's filing structure with a CMIS-capable client. • Synchronizing folders and documents in the Fabasoft Cloud with the Fabasphere Folder. • Accessing and synchronizing folders and documents in the Fabasoft Cloud with the Fabasphere App.
CSC standard (Cloud Signature Consortium)	The CSC standard describes architectures and protocols for cloud-based digital signatures. **Use Case:** Applying qualified electronic signatures to documents in the Fabasoft Cloud.
Microsoft Office Add-ins	Microsoft Office enables an extension with add-ins. **Use Case:** The Fabasphere Client offers extensions to execute actions directly in the Office product.
Microsoft Teams Platform	Microsoft Teams offers a collection of apps that are provided by Microsoft or external services. **Note:** Only available in the "Public Cloud" and "Government Cloud" operating models. **Use Case:** Fabasoft provides a Teams app with which you can, for example, search for Cloud objects and insert links directly into your channels. In addition, Teamrooms can be opened in a separate tab.
OAuth 2.0 (Open Authorization)	The OAuth 2.0 protocol enables standardized authorization to enable access to resources. **Use Case:** • Transferring Teamrooms. • Importing e-mails (when using Microsoft Graph API). • Integrating external applications.

OData (Open Data Protocol)	The OData protocol enables the standardized creation and use of REST-based data services. **Use Case:** Accessing data in the Fabasoft Cloud with an OData-capable client (e.g., Microsoft Power BI). **Note:** Access via OData is licensed on a volume basis in the "Public Cloud" and "Government Cloud" operating models.
OpenAPI Specification (OAS)	The OpenAPI Specification defines a formal standard for the description of HTTP programming interfaces (APIs). **Use Case:** Accessing the Fabasoft Cloud via OpenAPI services defined by solution developers.
RSS (Rich Site Summary)	RSS defines file formats for web feeds. **Use Case:** Accessing Fabasoft Cloud RSS feeds with an RSS-capable client.
SFTP (Secure File Transfer Protocol)	The SFTP protocol enables the standardized transfer of files via the Internet. **Use Case:** Uploading documents in the Fabasoft Cloud to an SFTP server.
WebDAV (Web-based Distributed Authoring and Versioning)	The WebDAV protocol enables standardized access to folders and files via the Internet. **Use Case:** • Accessing folders and documents in the Fabasoft Cloud with a WebDAV-capable client (e.g., Microsoft Windows Explorer). • Synchronizing folders and documents in the Fabasoft Cloud with the Fabasphere Folder. • Uploading documents to the Fabasoft Cloud with the Fabasphere App.
WOPI (Web Application Open Platform Interface)	The WOPI protocol enables standardized access to files via the Internet. **Use Case:** Opening Office documents in the Fabasoft Cloud with Microsoft Office for the Web.

Note: Opening Office documents with Microsoft Office for the Web is only available in the "Public Cloud" and "Government Cloud" operating models.

4 Fabasphere AI Core

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

5 Technical Information

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