Fabasoft®

Software Product Information

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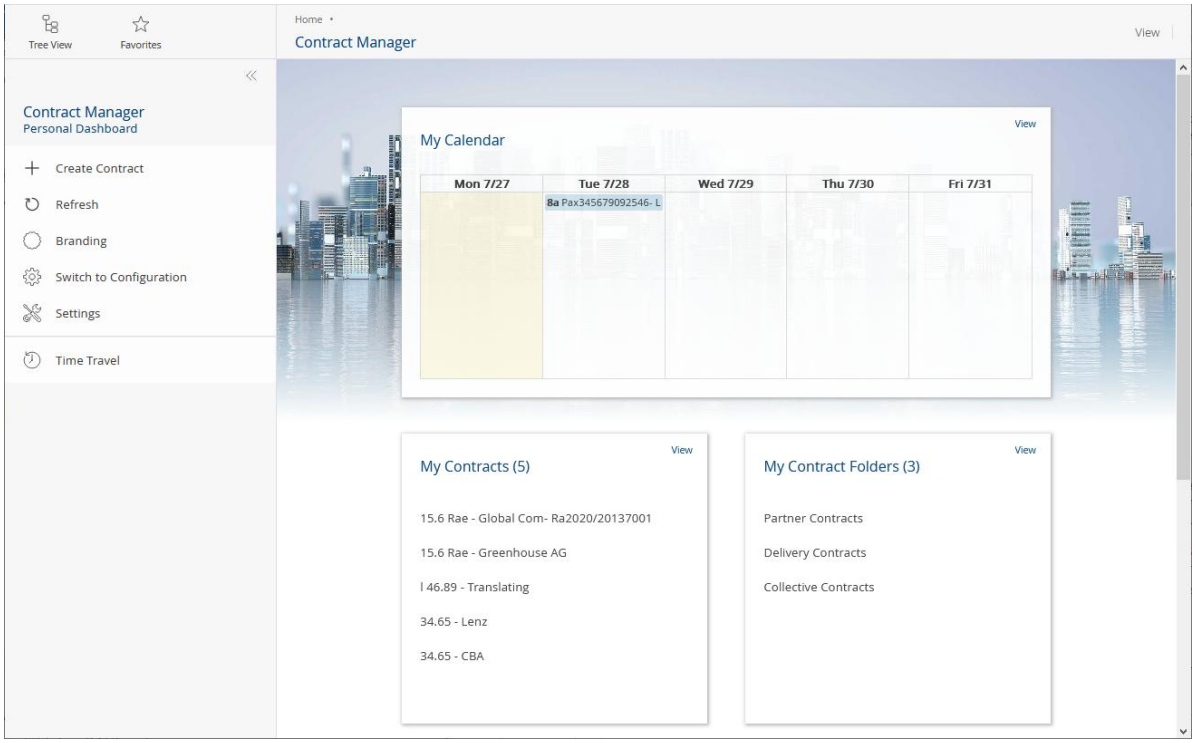
1 Introduction

Fabasoft Contracts supports you throughout the entire contract life cycle: from cross-company contract preparation, efficient handling of review and approval processes, to audit-proof archiving.



Cloud-based and process-driven contract management provides a number of benefits to the day-to-day collaboration with internal departments and external partners:

- Automatic generation of contracts
- Automatic versioning of contracts
- Automated approval and release processes
- Overview and notifications for dates and deadlines
- Clearly structured dashboards and automated reports for transparency
- Audit-proof archiving of all contracts and related documents
  Fabasoft Contracts has been certified by KPMG Advisory GmbH according to IDW PS 880 and therefor fulfills the storage requirements in accordance with applicable commercial and tax law (GoB-compliant archiving).

2 Scope of Services – User Perspective

Fabasoft Contracts offers the following functionality for end users.

2.1 Contracts

The following use cases support you in managing contracts.

Use Case	Description
Creating contracts	Contracts are created and organized in contract folders. The access rights are defined via contract folders as well.
Creating contracts based on documents	Contracts can be created directly from imported documents.
Recognizing contract types and extract metadata	If possible, contract-relevant metadata and clauses are extracted from imported documents and stored in the contracts. **Note:** To use this functionality, separate licensing is required.
Defining general contract metadata	In the properties of a contract, general metadata such as contact information can be entered in addition to the contract documents.
Reassigning contracts	Contracts can be moved from one contract folder to another.
Canceling, deleting and restoring contracts	Contracts can be canceled, and canceled contracts can be deleted or restored.
Defining dates for contracts	In the properties of a contract, all relevant dates and reminders of the contract can be entered.
Defining special contract terms and special termination rights	Special contract terms and special termination rights can be defined for a contract.
Defining roles for contracts	Roles (e.g. internal signatories) can be defined for a contract.
Assigning contracts to an assignment target	A contract can be assigned to one or more assignment targets (e.g., suppliers or customers).
Tagging contracts	Contracts can be tagged using terms.
Adding Incoterms to contracts	Incoterms can be added to contracts.
Adding tasks to contracts	Tasks can be defined for contracts, which are also displayed in the integrated calendar.

Managing retention for contracts	Contracts can be assigned a retention requirement and retention period, which prevents them from being canceled and deleted.
Adding documents to contracts	Documents can be assigned to contracts, e.g., by uploading them via drag and drop.
Adding remarks to contracts	Remarks on contracts can be entered as free text.
Adding internal remarks to contracts	Internal remarks are not visible to users with restricted access.
Creating confidential rooms in the contract documents	Confidential rooms allow creating confidential contract documents accessible only to a selected group of users.
Creating external rooms in the contract documents	External rooms allow creating contract documents accessible to a selected group of external users.
Conducting approvals	Contracts can be approved using an approval process based on approval levels, limits, and roles.
Signing contracts	Contracts can be digitally signed. Depending on the project's needs, external signature services DocuSign and Skribble can also be integrated.
Creating following contracts	For a contract, following contracts can be created. For a following contract, further following contracts can be created to represent contract chains.
Creating subordinated contracts	Subordinated contracts can be created for a contract, for example, to map outline agreements with subordinate contracts. Further subordinated contracts can be created for a subordinated contract to represent a multilevel contract hierarchy.
Creating legal files from contracts	Starting from a contract, a legal file can be created.

2.2 Legal Files

The following use cases support you in managing legal files.

Note: To use this functionality, separate licensing is required.

Use Case	Description

Creating legal files	Legal files are created and organized in legal areas. The access rights are defined via legal areas as well.
Defining general legal file metadata	In the properties of a legal file, general metadata can be entered in addition to the legal file documents.
Reassigning legal files	Legal files can be moved from one legal area to another.
Canceling, deleting and restoring legal files	Legal files can be canceled, and canceled legal files can be deleted or restored.
Defining dates for legal files	In the properties of a legal file, all relevant dates and reminders of the legal file can be entered.
Assigning legal files to an assignment target	A legal file can be assigned to one or more assignment targets (e.g., suppliers or customers).
Managing retention for legal files	Legal files can be assigned a retention requirement and retention period, which prevents them from being canceled and deleted.
Adding documents to legal files	Documents can be assigned to legal files, for example, by uploading them via drag and drop.
Adding remarks to legal files	Remarks on legal files can be entered as free text.
Adding internal remarks to legal files	Internal remarks are not visible to users with restricted access.
Creating confidential rooms in the legal file documents	Confidential rooms allow creating confidential legal file documents accessible only to a selected group of users.
Creating external rooms in the legal file documents	External rooms allow creating legal file documents accessible to a selected group of external users.
Creating contracts from legal files	Starting from a legal file, a contract can be created.

2.3 Requests

The following use cases support you in managing requests.

Use Case	Description

Allowing requests	Requests can be allowed for contract folders or legal areas.
Creating requests	Requests are used to communicate with contract folder or legal area managers.
Assigning requests to an assignment target	A request can be assigned to one or more assignment targets (e.g., suppliers or customers).
Managing retention for requests	Requests can be assigned a retention requirement and retention period, which prevents them from being canceled and deleted.
Adding documents to requests	Documents can be assigned to requests, for example, by uploading them via drag and drop.
Adding remarks to requests	Remarks on requests can be entered as free text.
Adding internal remarks to requests	Internal remarks are not visible to users with restricted access.
Creating contracts/legal files from requests	Starting from a request, a contract or a legal file can be created.

2.4 General

In addition, the following general use cases are available.

Use Case	Description
Contract manager dashboard	The contract manager dashboard is the central access point to Fabasoft Contracts.
Using forms and categories	Custom forms can be used to, for example, extend contracts with fields for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.
Using processes	By starting processes, users can be involved in the editing of business objects via workflow. Typical processes are approval and release processes.
Using templates	Contracts and legal files can be created using templates. Individual documents can be created using document templates.

Using text modules	Text modules with standard texts can be inserted into Word documents (documents and document templates).
Generating reports	Reports provide an overview of contracts based on definable criteria.
Using interactive reports	Interactive reports provide a visual and always up-to-date overview of the contracts. **Note:** This functionality is available in the "Fabasoft Contracts AI" edition.
Commenting documents	PDF documents or documents that can be converted to PDF documents can be commented using an integrated PDF viewer.
Signing documents digitally	Information can be found in the "Software Product Information (SPI) Fabasoft Cloud" document (see https://www.fabasoft.com/spi).
Using a calendar	With the help of the integrated calendar, an overview of all appointments is provided. The calendar can also be integrated into Microsoft Outlook.
Managing contacts	The management of signatories is available in the contact management. You can: • create contact persons • create organizations • perform duplicate checks • import and export contacts • delete contacts
Performing text recognition	An inbox rule can be used to perform text recognition (German, English) in documents that can be converted to PDF. **Note:** To use this functionality, either a storage package with OCR functionality or a volume-based license (based on the number of pages) is required that must be purchased separately. The page count for PDF documents and TIF files is determined by the page information. For images without page information (e.g. JPG, PNG), each individual image is considered a page.
Integration for OData	With the integration for OData, structured data in the Fabasphere can be accessed via the standardized OData protocol.

	Note: To use this functionality, a volume-based license (based on query objects) is required which must be purchased separately. A query object is understood to be an object queried via the OData interface. If the same object is queried multiple 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.
3D viewer	CAD 3D models can be displayed in the integrated 3D viewer. **Note:** To use this functionality, separate licensing is required.
Insight apps	Insight apps provide aggregated access to information in your Fabasphere organization, customized to your needs.
Searching	The integrated full-text search allows you to quickly find the desired information. Actions can be executed directly on the search result. The search is carried out in accordance with user access rights. Only accessible results are presented.

3 Scope of Services – Administration

Settings for the behavior of Fabasoft Contracts can be made in the contract manager configuration, configuration lists, contract folders, and legal areas.

Use Case	Description
Contract manager configuration	In the contract manager configuration, general settings are made that apply to all contract folders and legal areas. By assigning roles, users are authorized to use Fabasoft Contracts. In addition, the respective role defines the possible use.
Administrating configuration lists	Configuration lists are lists that define basic settings for contract folders or legal areas.
Administrating contract folders	Contracts are organized and stored in contract folders. In addition, various configuration settings are defined for contract folders.

	By assigning roles, access rights can be defined for each contract folder.
Administrating legal areas	Legal files are organized and stored in legal areas. In addition, various configuration settings are defined for legal areas. By assigning roles, access rights can be defined for each legal area. **Note:** To use this functionality, separate licensing is required.
Defining contract types, legal file types, and request types	Contract types, legal file types, or request types allow you to categorize contracts, legal files, or requests, to assign additional authorizations, and to extend contracts with user-defined fields.
Defining assignment targets	Assignment targets can be used to assign contracts to these assignment targets. Examples of assignment targets are suppliers or customers.
Defining forms and categories	Custom forms can be used, for example, to extend contracts with fields for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.
Defining processes	Users can be involved in the processing of business objects via workflow by starting a process that can be processed via the worklist. Typical processes are approval and release processes.
Defining templates	Templates (which can contain documents) enable the efficient creation of contracts and legal files. Document templates are offered for selection in the documents when a document is created.
Defining text modules	Text modules can be inserted into Word documents (documents and document templates). Text modules can be inserted into document templates both directly and as placeholders. If a text module is inserted as a placeholder in a template, this placeholder is not replaced by the content of the text module in question until the template is instantiated.
Defining time intervals	In addition to the predefined time intervals, user-defined time intervals can be created.

Defining reports	To create reports, Microsoft Excel reports or BIRT reports can be defined.
Defining thesauri	Thesauri allow the definition of terms and thus the keywording.
Defining structure thesauri	Structure thesauri allow hierarchical structuring of contract and legal file templates.
Defining presettings	Predefined view settings and search patterns can be provided to users.
Defining reminders	For contracts whose contract period or cancellation period expires, reminder e-mails can be sent to the defined users.
Registering contracts, legal files, and requests in the background	Stored documents can be registered in the background to contracts, legal files, and requests.
Importing contracts using Excel workbooks	Contracts with the corresponding metadata can be generated from an Excel worksheet.
Adding contract documents from a ZIP archive, Teamroom, or folder	Contract documents can be added to contracts from a ZIP archive, Teamroom, or folder.
Importing contracts and documents together	Contracts and documents can be imported together using an Excel worksheets.

4 Scope of Services – Interfaces

Fabasoft Contracts provides a web service interface that enables the following use cases.

Use Case
Importing a ZIP archive into a contract manager folder
Retrieving a list of all keys of ZIP archives in a contract manager folder
Importing contract manager folders and roles from an Excel workbook
Importing suppliers from an XML file in IDoc format

5 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 Contracts. For AI use cases, the software product information "Mindbreeze AI" also applies (see https://www.fabasoft.com/spi).

6 Technical Information

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