Fabasoft®

Software Product Information

Fabasoft Approve 2026 October Release

Valid from September 27, 2026

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1 Introduction

Fabasoft Approve is divided into two solutions, which are licensed separately:

- Fabasoft Approve DMS
- Fabasoft Approve QMS

1.1 Fabasoft Approve DMS

Fabasoft Approve DMS includes the following application area:

- Correspondence Management
- Technical Records Management

1.2 Fabasoft Approve QMS

Fabasoft Approve QMS includes the following application areas:

- Correspondence Management
- Quality Management
- Technical Records Management

1.3 Mindbreeze AI

Fabasoft Approve also provides artificial intelligence features (hereinafter referred to as "AI Feature"), which require an additional license of Mindbreeze AI in order to use them.

2 Application Area: Correspondence Management

The following scope of services for the user and administrator relates to the Correspondence Management application area.

2.1 Scope of Services – User Perspective

Fabasoft Approve Correspondence Management offers the following functionality for end users:

Use Case	Description
Manage partners	Partners are stored in a partner list. The user can change the properties of the partner. The access rights to the partner are defined via the roles.
Manage projects	Projects are stored in a project list. The user can change the properties of the project. Access rights to the project are defined via the roles.

Manage shelves	Shelves can be accessed by combining a project and a partner. This combination can always be achieved via the project or via the partner. The user can change the properties of the shelf. The access rights to the shelf are defined via the roles.
Create directories	The user has the option of creating a directory. In a directory any objects can be created and managed.
Create letters	The user has the option of creating a letter on a shelf and providing corresponding attachments or texts. In addition, this letter can be sent by the user to the stored or an external partner.
Create events	Events can be created and managed in the shelf calendar.
Create tasks	Tasks can be created and managed in the shelf calendar.
Manage shelf documents	The specific documents in the document list can be changed and created by the user on the shelf.
Create manuals	Manuals can be created within shelf documents or other document "repositorys". The manual is divided into volumes and chapters which can have sub-chapters. The volumes can be sent to partners by letter. The chapters can reference documents from the entire project.
Create action item list	The user can create action item lists. These action item lists are necessary for managing action items.
Create action items	The user can create action items. These action items must be created in an action item list.
Create document list	The user can create document lists. These document lists are necessary for managing documents
Create documents	The user can create documents. These documents must be created in a document list.

Create open point list	The user can create open point lists. These open point lists are necessary for managing open points.
Create open points	The user can create open points. These open points must be created in an open point list.
Register registered e-mails/e-mails as letters	The user has the option of registering registered e-mails/e-mails as letters.
Archive emails to email folder	The user has the option of archiving e-mails in e-mail folders.

2.2 Scope of Services – Administration

Fabasoft Approve Correspondence Management offers the following administration functionalities:

Use Case	Description
Correspondence Management-Configuration	General settings can be made in the Correspondence Manager Configuration, which determines the configuration of all partners, projects, shelves, directories, and registrations in a directory. By assigning roles, users are authorized to use correspondence management.
Manage projects	The app administrator can create and manage projects in the configuration. The access rights for the project can be defined by assigning roles in the project.
Manage partners	The app administrator can create and manage partners in the configuration. The access rights for the project can be defined by assigning roles in the project.
Manage shelves	By composing a partner and a project, the app administrator can create and manage a shelf. By assigning roles to the shelf, the access rights for this can be defined.
Manage letters	Letters and e-mails can be managed by the app administrator within a shelf. Drafts can also be created in the course of sending letters, and corresponding processes can be stored for further processing of the attachment.

Manage action items	The app administrator can define and manage action items in an action item list on the project as well as on the partner and on the shelf.
Manage documents	The app administrator can define and manage documents in a document list on the project as well as on the partner and on the shelf.
Manage open points	The app administrator can define and manage open points in an open point list on the project as well as on the partner and on the shelf.

3 Application Area: Quality Management

The following scope of services for the user and administrator relates to the quality management application area

3.1 Scope of Services – User Perspective

Fabasoft Approve Quality Management offers the following functionality for end users:

Use Case	Description
Create issues	Authorized users can create issues on a site. Issues are stored in an issue archive, which is assigned to a site. Access rights are also defined via the roles on the site.
AI-supported issue creation	**AI Feature** The user can upload documents for which a new issue is created and pre-initialized using AI.
Define general issue metadata	The user can customize the metadata in the properties of the issue.
Define 8D team	The creator of an issue may define the coordinators and members of the 8D team who are authorized to make changes to the issue.
Define 8D schedule	The user has the option of defining the due dates for the steps of the 8D process at the issue.
Define problem summary	**AI Feature** The user can ask the AI to suggest a problem summary for the issue.

Define related issues	The user can add related issues to the issue.
Define corrections	The user can add corrections to the issue. Corrections can only be created from templates that were previously created in the configuration or on the site.
Suggest corrections	**AI Feature** The user can have the AI suggest corrections for an issue. In addition, a summary of the corrections will be prepared.
Define causes	The user can create and add causes to the issue.
Suggest causes	**AI Feature** The user is able to generate suggestions for causes of an or subordinate causes of a cause. In addition, a summary of the causes is prepared. A direct cause and a main cause are also determined.
Define corrective actions	The user can add corrective actions for the issue. Corrective actions can only be created from templates that were previously created in the configuration or on the site.
Suggest corrective actions	**AI Feature** The user can have the AI suggest corrective actions for an issue. In addition, a summary of the corrective actions will be prepared.
Define preventive actions	The user can add preventive actions for the defect. Preventive actions can only be created from templates that were previously created in the configuration or in the site.
Suggest preventive actions	**AI Feature** The user can have the AI suggest preventive actions for an issue. In addition, a summary of the preventive actions will be prepared.

Create 8D report	The user can create an 8D report for the issue. This requires the storage of a template based on a Microsoft Word Document in the configuration.
Administrate projects and instances	The site administrator can create and manage projects in the site. Instances can be created and manage in a project.
Define equipment class and equipment	An authorized user (in the roles of "Site Administrator" and "Inspection Planner") can create and manage equipment classes on the site. Equipment can be created and managed in an equipment class.
Manage inspection plans and inspection phases	Authorized users (in the "Site Administrator" and "Inspection Planner" roles) can create and manage master inspection plans in the issue. Inspection plans can be created and managed under a master inspection plan. Inspection phases can also be created and managed in the issue. Inspection plans can be assigned to these inspection phases. Furthermore, test steps can be created and managed in the issue, and these test steps can then be assigned to inspection plans.
Release inspection plans	Authorized users (in the "Site Administrator" and "Inspection Planner" roles) can release inspection plans for use so that they can then be instantiated for products.
Create inspection plans	Users can create instances of the approved inspection plans for products.
Check inspection plans	Users can test inspection plans instantiated for products. The test steps of the inspection plan must be completed during the test.
Create audits	Authorized users (in the "Site Administrator" and "Auditor" roles) can create audits in a site. Audits can also be created from templates.
Create checklists	Authorized users (in the "Site Administrator" and "Auditor" roles) can create checklists in an audit. Checklists can also be generated from templates.

Create checklist entries	Authorized users (in the “Site Administrator” and “Auditor” roles) can create checklist entries in a checklist. Checklist entries can also be created from templates.
Create findings	Authorized users (in the “Site Administrator” and “Auditor” roles) can create findings for an audit, a checklist or a checklist entry.
Create audit actions	Authorized users (in the “Site Administrator” and “Auditor” roles) can create audit actions for an audit, a checklist, a checklist entry or a finding.
Create FMEAs	The user can create design or process FMEAs in a site.
Create structure elements	The user can create structure elements in an FMEA. These can also contain subordinate structure elements to describe a hierarchy.
Create functions	The user can create functions for a structure element. These can describe a hierarchy.
Create failure modes	The user can create failure modes for a function. These can reference other failure modes as failure causes or failure consequences. Also, issues can be assigned to failure modes.
Suggest effects and causes	**AI Feature** The user is able to generate suggestions for effects and causes of a failure mode within an FMEA.
Save evaluation status	For the risk evaluation of a cause, users can evaluate the probability of its occurrence and detection, create and manage preventive and detection actions and save the evaluation status.
Create preventive actions and detection actions	The user can create preventive and detection actions for a risk analysis or optimization, which are handled by an action process.
Create form	The user can create a report in the style of the AIAG/VDA 2019 form. This can be executed on a structure element.
Export FMEA to XML file	The user can export an FMEA to an XML file.

Import FMEA from XML file	The user can import an FMEA from an XML file.
Ask questions	**AI Feature** The user is able to chat with a document and ask questions answered by the AI based on the context of the opened document.
Complete form	**AI Feature** The user is able to complete a form with questions with the help of AI. The answers are based on a set of documents which the user can define. To identify the source of information, the documents used and the text sections of the document used are therefore listed.
Extract metadata	**AI Feature** The user is able to extract metadata from a document with the help of AI.
Answer questionnaire	**AI Feature** The user is able to answer simple questionnaires (based on Microsoft Excel spreadsheets) with the help of AI. To identify the source of information, the documents used and the text sections of the document used are therefore listed.
Generate translation	**AI Feature** The user is able to translate the issue description into the corporate language selected in the configuration with the help of AI.
360° view	**AI Feature** The user is able to open a 360° view for suppliers and materials, which provides an overview of relevant information and relationships.

3.2 Scope of Services – Administration

Fabasoft Approve Quality Management offers the following administration functionalities:

Use Case	Description
Quality Management Configuration	General settings that apply to all sites are made in the quality manager configuration. Users are authorized to use the quality management system by assigning roles.

Manage sites	The app administrator can create and manage sites in the configuration. The access rights for the site can be defined by assigning roles in the plant.
Manage measuring units	The app administrator can create and manage measuring units in the configuration. Measuring units can also be imported from a CSV file.
Manage failure locations and failure sublocations	The app administrator can create and manage failure locations in the configuration. Failure sublocations can be created and managed for a failure location. Failure locations and failure sublocations can also be imported from a CSV file.
Manage failure and failure types	The app administrator can create and manage failure types in the configuration. Failure can be created and managed for a failure type. Failure types and failures can also be imported from a CSV file.
Manage purchase orders and purchase order positions	The site administrator can create and manage purchase orders for a site. Purchase order positions can be created and managed for a purchase order.
Manage material classes and materials	The app administrator can create and manage material classes in the configuration or additionally by the site administrator in a site (depending on the configuration settings). Materials can be created and managed for a material class. Material classes and materials can also be imported from a CSV file.
Manage customers	The app administrator can create and manage customers in the configuration or additionally by the site administrator in a site (depending on the configuration settings). Customers can also be imported from a CSV file.
Manage suppliers	The app administrator can create and manage suppliers in the configuration or additionally by the site

	administrator in a site (depending on the configuration settings). Suppliers can also be imported from a CSV file.
Manage equipment types	The app administrator can create and manage equipment types in the configuration.
Define 8D process	The app administrator can define the 8D process in the configuration on the basis of a BPMN process diagram.
Manage processes for actions	The app administrator can define processes in the configuration for processing actions.

3.3 Scope of Services – Interfaces

The following interfaces are available for the Quality Management:

Use Case	Description
Import Issues	Imports issues from a CSV file.
Import Actions	Imports actions for existing issues from a CSV file.

4 Application Area: Technical Records Management

The following scope of services for users and administrators relates to the Technical Records Management application are.

4.1 Scope of Services – User Perspective

Fabasoft Approve Technical File Management offers the following functionality for end users:

Use Case	Description
Create records	Authorized users can create records. Records are stored in a record register. Access rights are also defined via the roles in the record register.
Define general record metadata	The user can customize the metadata in the properties of the record.
Create following record	The user can create a following record in a record.
Create subordinated record	The user can create a subordinate record in a record.

Create case	The user can create a case. The cases are stored in a subject. Access rights are also defined via the roles in the subject. The user also has the option of creating a case within a record.
Define general case metadata	The user can customize the metadata in the properties of the case.
Create Request	The user can create a request. This is used for communication with administrators of record registers or subjects The user also has the option of creating a request within a record.
Set legal hold	At record level, the user has the option of setting a legal hold.
Define tasks	The user can manage tasks for the record, at record level.
Add documents to assignments	Authorized users can store and edit documents in the various assignments.

4.2 Scope of Services – Administration

Fabasoft Approve Technical File Management offers the following administration functionalities:

Use Case	Description
Record Management-Configuration	General settings can be made in the Records Manager Configuration, which determine the configuration of records types, subjects' categories, case types, request types, document categories, text module categories, and special intervals. By assigning roles, users are authorized to use record management.
Manage configuration lists	The app administrator can create and manage a configuration list in the configuration. Within a configuration list, the app administrator can activate the use of assignments. By assigning roles in the configuration list, the access rights for these can be defined.

Manage assignments	The app administrator can manage assignments. The app administrator can add further assignments within this assignment.
Manage record registers	The app administrator can manage record registers. The app administrator can set or further restrict record types within a record register.
Manage subjects	The app administrator can manage subjects. The app administrator can set up cases within the subject. By assigning roles to a subject, the access rights for these can be defined.
Manage records	The app administrator can manage records. Subordinated and following records can be configured in the context of the record. In addition, cases and any tasks can be stored. By assigning roles to a record, the access rights for these can be defined, provided they also restricted rights in the record register.
Specify tasks	Within a record, the app administrator can define tasks that can be assigned corresponding data.

4.3 Scope of Services – Interfaces

The following interfaces are available for the Technical File Management:

Use Case	Description
Import Zip	Imports zip content to an existing base list.
Get Exported Zips	Retrieves a list of all keys for zip contents that contain base files in a base list. Zip content specified by a key can be retrieved.
Export Zip	Retrieves individual zip content for a base file.
Import Baselists and Roles	Imports a list of base lists from XLSX content. After the import, new Microsoft Excel content is created that contains the ids of the created base lists. If roles are set, users and organizational units are assigned to the organization of the current user.
Import Suppliers	Imports a list of suppliers from XML content (list of IDOCs).

Create/Update Record	Creates or updates a record in a record register.
Create/Update Record Document	Creates or updates a document in a record.

5 General Use Cases

The following general use cases are available to you in the context of all application areas:

Use Case	Description
Manage contacts	The management of persons is possible in the Contact Management. You can: • Create contact persons • Create organizations • Perform duplicate • Import and export contacts • Delete contacts
OCR Scan	PDF files can be OCR scanned for better useability
3D viewer	CAD 3D models can be displayed in the integrated 3D viewer.
Define intervals	In addition to the predefined time periods, user-defined time periods can also be created.
Define thesauri	Thesauri allow terms to be defined and thus categorized.
Define structure thesauri	Structure thesauri enable the hierarchical structuring of various templates.
Define reminders and notifications	For various objects for which a date or end date can be set, it is possible to use reminders. This sends reminder e-mails to the stored users. There are also notifications, which can be used for various events of an object.
Generate summary	**AI Feature** The user can define templates for summaries. When a summary is generated for an object, the AI evaluates the documents attached to the object for this purpose.

Perform document checks	**AI Feature** The user can define templates for document checks consisting of document check entries. When triggering a document check for an object, the AI evaluates the document check entries based on the documents attached to the object.

6 General Interfaces

The following general interfaces are available:

Use Case	Description
Import Data	Imports data from a provided file to the specified container.
Import Content Object	Imports a content object to the specified container.
Extract Zip	Extracts zip content to container specified by the user.
Consolidate Folders	Consolidates child folders of a container with the same name into a single folder.
Cleanup Folders	Deletes empty content objects and empty folders in the container.
Generate Folder Report	Generates details about the child folders of a container.
Generate Content Object Report	Generates details about the child content object of a container.
Lock Object	Tries to lock the object and generates an error if the object cannot be locked. If the object has been successfully locked, the lock is released immediately, and no error is generated. Can be used to check whether the report generation in an asynchronous expression has been completed.
Assign Attribute Value	Assigns a value to an attribute to an object.

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 Approve. 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).