



Software Product Information

Fabasoft Approve 2022 June Release

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1 Introduction

Fabasoft Approve is the standard product for technical data, document, transmittal and quality management based on the Fabasoft Cloud and enables solutions across organizational, IT infrastructural, and international boundaries. Basic functionalities like intuitively creating automated workflows, seamless versioning, digital signatures, and full-text search enable a wide range of applications. Information on the individual solutions can be found in the respective software product information.

2 Licensing

The following license types are available:

- Full Access
 - Provides the full functionality.
 - Can be used for members and external members.
- Read Access + Comments
 - Functional scope:
 - Read access (incl. search)
 - Commenting documents
 - Digitally signing documents
 - Performing workflow activities that do not require change access (incl. applying signatures)
 - Can be used for members.
- Access for External Members
 - Provides the full functionality from a user perspective.
 - Can be used for external members.

Storage Packages

To be able to store data, storage packages are required. A storage package provides a defined number of objects and a defined storage amount in gigabytes (1024 megabytes). Additionally, volumes are provided for volume-based use cases.

- Each object (item with "Fabasoft Cloud ID"; e.g. folder, text document or activity) assigned to your organization reduces the available number of objects.
 - A permanent deletion of objects reduces the object usage accordingly.
- Any multimedia content assigned to your organization reduces the available storage amount.
 - Generated content such as PDF previews also count towards storage usage.
 - Modified content in object versions counts towards storage usage per version.
 - A permanent deletion of objects or object versions with content reduces the storage usage accordingly.

Service Levels

The entire hard and software environment is constructed for high availability, reliability, scalability and high security, as well as simple maintenance due to the high requirements of our data center.

You will find all details of the performance characteristics of data center operation at <https://www.fabasoft.com/data-center>.

A report on the availability of the Fabasoft Cloud is published at <https://www.fabasoft.com/monitoring-reports>.

Support

Fabasoft provides first level support for all cloud users. The support service levels depend on the respective edition. More information can be found here: <https://www.fabasoft.com/data-center>

3 Scope of Services – User Perspective

The functionality described in the following chapters is available to end users.

3.1 Log-in and Data Access

Fabasoft Approve provides different log-in methods and access possibilities.

Use Case	Description
Log in	<p>Users can log in with user name and password, Digital ID (German ID Card, Austrian Citizen Card with Mobile Signature, SuisseID), client certificates, SAML 2.0 or Active Directory.</p> <p>For two-factor authentication SMS PIN, e-mail PIN and one-time password with RADIUS server are available.</p>
Access possibilities	<p>Access is possible with all common web browsers, WebDAV and an own iOS or Android app. For more information, see the document “Technical Information”.</p> <p>With data locations you can define the physical data location of your data.</p> <p>The following data locations are available:</p> <ul style="list-style-type: none">• Germany• Austria• Switzerland
Insight Apps	<p>Insight apps provide aggregated access to information in your cloud organization, customized to your needs.</p>
Integration for OData	<p>With the integration for OData, structured data can be accessed via the standardized OData protocol.</p>

	Note: This functionality is licensed volume-based.
Accessibility	<p>Accessibility is a basic concept of Fabasoft Products. Operation with assistive technologies such as screen readers and screen magnifiers is nearly generally possible.</p> <p>For more information, see the document “Technical Information”.</p>
Languages	<p>The user interface is available in 22 languages:</p> <p>Bulgarian, Chinese (simplified), German, English, French, Croatian, Indonesian, Italian, Japanese, Dutch, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian, Slovak, Slovenian, Spanish, Czech, Turkish and Hungarian.</p>

3.2 Usability

The web client provides superb ease of use, which you often miss in other web applications.

Use Case	Description
Responsive design	The layout of the web client adapts to the size of the display.
Editing documents	Documents can be edited and saved directly in the corresponding third-party application. You will not notice any difference to the work in a file system.
Drag and drop	Within the web client drag and drop is used to move documents and folders.
Uploading	<p>Files and complete folder structures can be easily imported via drag and drop, <code>Ctrl + C</code> and <code>Ctrl + V</code> or the “Upload” menu.</p> <p>A comprehensive list of import options depending on the web browser and the chosen method, see the document “Technical information”.</p>
Downloading	<p>Documents can be saved in the file system via <code>Ctrl + C</code> and <code>Ctrl + V</code> or the “Download” menu.</p> <p>Folder structures or documents are downloaded as a ZIP file.</p>
Sending links	Hyperlinks to folders and documents can be directly inserted into an e-mail via a menu command. The documents stay in the solution with secure access rights and the recipients have access to the current state of the documents.

Full keyboard access	The web client can be completely handled with the keyboard.
Navigation	Complex storage structures are no problem. The tree navigation and breadcrumbs quickly lead to the desired folder. Navigating is even faster with personal favorites.
Views	The presentation of documents in Teamrooms and folders can be customized. The focus is either on the preview of the contents or the metadata of the documents.
Column view	The column view can be used to manage many documents in a single list. For adapting the representation following options are available: <ul style="list-style-type: none"> • Add column • Remove column • Move column • Order • Group • Filter • Fix
Follow-ups	Users can define follow-ups for documents. Upon reaching the follow-up date, an e-mail is sent or a process is started.

3.3 Teamrooms

Exchanging documents and collaboration with users is offered via so called Teamrooms.

Within a Teamroom the collaboration of a team is managed – from inviting members to managing individual access rights.

Use Case	Description
Managing Teamrooms	The collaboration is achieved through Teamrooms and the teams defined therein. Teamrooms can be structured with folders.
Providing access rights	Team members can be granted access rights on Teamrooms (read access, change access, full control). The restriction of members of a Teamroom to certain organizations is also possible.
Personalizing Teamrooms	The branding functionality allows defining a logo and description for Teamrooms.

Encrypting Teamrooms	For Teamrooms it can be defined whether assigned documents are encrypted. Documents that are uploaded into encrypted Teamrooms are encrypted on the client before the transfer.
Transferring/Publishing Teamrooms	<p>Teamrooms, including folder structures and documents, can be transferred or published from one system to a target system.</p> <p>Teamrooms can also be transferred or published to another data location.</p> <p>Transferred Teamrooms can be further processed in the target system and, if necessary, retrieved with the changes.</p> <p>Published Teamrooms are available for reading in the target system and can be published again if necessary.</p>
Using the calendar	The team calendar provides a common calendar to coordinate team activities. The CalDAV support allows integrating the calendar into third-party products (e.g. Apple iCal or Apple Calendar app).
Using the newsfeed	Newsfeeds provide the team the possibility to informally share news and discuss within a Teamroom.
Showing new events	If there are changes in a Teamroom, they can be viewed and also received by e-mail.
Wastebasket	The Teamroom wastebasket protects against accidental deletion of documents. Only team members with full control are entitled to empty the wastebasket.
Inbox	In an inbox, rules can be defined for processing incoming objects. A rule consists of conditions and actions.
Form Inbox	The form inbox allows to upload files from any website using an HTML form.

3.4 Working With Documents

Documents can be directly opened in the corresponding third-party application and saved.

Use Case	Description
Editing documents	Documents can be edited and resaved directly in the corresponding third-party application. You will not notice any difference to the work in a file system. This functionality is provided by the Fabasoft Cloud Client.

	<p>A wide support for common office software on all platforms is offered (e.g. Microsoft Office, Apple iWork and LibreOffice).</p> <p>For more information about the supported third-party products, see the document "Technical Information".</p>
Commenting documents	<p>PDF documents or documents that can be converted into PDF documents can be commented using an external PDF viewer.</p> <p>The comments are extracted from the PDF document and saved in a public or personal layer.</p>
Signing documents digitally	<p>Documents can be signed digitally with a certificate.</p> <p>Note: In the course of the "Signing documents digitally" use case, a logged-in user can digitally sign documents using the "Fabasoft Business Process Cloud Digital Signatures" certificate ("Sign Digitally" function). 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.</p> <p>Fabasoft will not be</p> <ul style="list-style-type: none"> • 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. <p>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.</p> <p>The "Sign Digitally" function is not an electronic signature within the meaning of the Federal Act on Electronic Signatures (Signature Act).</p>
Classifying documents	<p>In conjunction with Mindbreeze InSpire, documents can be automatically classified and metadata can be extracted.</p>

	<p>Note: The classification and metadata extraction is provided by Mindbreeze InSpire. This appliance must be purchased separately.</p>
Editing encrypted documents	<p>When editing documents, the encrypted documents are automatically decrypted locally and opened in the corresponding third-party product. When saving, the documents are encrypted again before transmission. For the end user, this means no loss of convenience.</p>
Performing text recognition	<p>An inbox rule can be used to perform text recognition (German, English) on documents that can be converted to PDF.</p> <p>Note: This functionality is licensed volume-based.</p>
Importing e-mails	<p>E-mails (Microsoft Outlook, Mozilla Thunderbird) can be imported with drag and drop or <code>Ctrl + C</code> and <code>Ctrl + V</code>. The e-mail content and attachments are viewable directly without a third-party application.</p>
Playing video and audio files	<p>Depending on the web browser and video format, videos can be directly played in the web client.</p> <p>For more information about the supported formats, see the document "Technical Information".</p>
Editing images	<p>A basic editing of images (rotate, zoom, crop) is directly possible in the web client.</p> <p>To use images outside the solution (e.g. for presentations) export possibilities are offered in a variety of formats and sizes.</p>
Using public links	<p>For each Teamroom can be defined whether public links are allowed. Public links allow people without an account to read and download documents.</p>
Auditability	<p>The so-called "time travel" allows viewing documents and even whole Teamrooms at certain time in the past. As a result, changes are traceable and older states can be restored if necessary.</p> <p>In addition, the possibility is offered, to compare metadata and content (Microsoft Word) of an older version with the current version.</p> <p>Release versions allow continuing to work on a document while users with read access see the release version.</p> <p>The continuous versioning ensures complete traceability.</p> <p>Note: When deleting versions or objects (empty</p>

	wastebasket, dissolve Teamroom) the data is also no longer available in the history.
User-defined forms	Starting from a graphical form editor additional metadata can be added to objects.

3.5 Workflow

Users can be involved in the processing of business objects via a workflow.

Use Case	Description
Workflow	The workflow enables the digital mapping and running of your business processes.
Modelling processes with BPMN 2.0	With a graphical process editor, you can model business processes based on BPMN 2.0 (Business Process Model and Notation). With the workflow engine the modelled business processes can be executed digitally.
Workflow Substitutions	The substitutes receive all activities of the user they substitute within the defined period of time. Objects to which the substitute has no access are filtered.
Process statistics	To obtain an overview of the running processes, several process statistics are available that illuminate the individual aspects of process execution.
Mobile workflow access	The Fabasoft Cloud App for iOS or Android enables convenient processing of work steps on the go.

3.6 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 find quickly the desired information. Actions can be performed directly on the search result. When searching the access rights are taken into account. Only hits are displayed that can be accessed by the respective user.

3.7 Synchronization With the Local File System

The Cloud Folder allows synchronizing contents with your local devices. So, the current state of your data is not only available in the web client but also directly on your local hard disk.

Use Case	Description
Synchronization	<p>The Cloud Folder allows synchronizing folders and documents automatically to the local file system and vice versa.</p> <p>This functionality is available on Microsoft Windows and Apple macOS (see "Technical Information").</p>

3.8 Mobility

Whether with laptop, tablet or smartphone, whether with web browser, iOS App or Android App, you have access to your data and documents.

Web Browser

Access with a web browser is available on all major mobile devices. The web client adapts to the size of your mobile device. Note that when using the web client on tablets and smartphones no documents can be directly edited.

iOS App

With the iOS App "Fabasoft Cloud" you can access your Teamrooms and data on your iPad or iPhone.

Use Case	Description
Navigating in lists	<p>The app allows easy navigation in lists and offers the following additional options:</p> <ul style="list-style-type: none">• Sorting lists• Changing the view• Filtering lists
Creating Teamrooms and folders	Teamrooms and folders can be created via the app.
Uploading documents	Documents can be uploaded directly from your smartphone or tablet.
Reading documents	The documents can be read either directly in the app or via third-party apps like Apple Pages.
Commenting documents	Documents can be commented via the integrated PDF viewer.
Using the offline mode	Synchronized documents can also be accessed without an Internet connection.

Searching	The search for data can be performed on all Teamrooms with access rights.
Workflow access	The worklist enables mobile processing of work items.

Android App

With the Android App "Fabasoft Cloud" you can access your Teamrooms and data on your Android tablet or smartphone.

Use Case	Description
Navigating in lists	The app allows easy navigation in lists and offers the following additional options: <ul style="list-style-type: none"> • Sorting lists • Changing the view • Filtering lists
Creating Teamrooms and folders	Teamrooms and folders can be created via the app.
Uploading documents	Documents can be uploaded directly from your smartphone or tablet.
Reading documents	The documents can be read either directly in the app or via third-party apps like ThinkFree Office.
Editing documents	Depending on the functionality of the third-party apps, documents can be edited and resaved.
Commenting documents	Documents can be commented via the integrated PDF viewer.
Using the offline mode	Synchronized documents can also be accessed without an Internet connection.
Searching	The search for data can be performed on all Teamrooms with access rights.
Workflow access	The worklist enables mobile processing of work items.

3.9 Customizing

You can adapt the solution to your requirements by means of model-based customizing.

Use Case	Description
Dashboard	The templates and presettings dashboard is the central access point to the customizing.

	When a user is added to a customizing configuration, a dashboard is automatically created and placed on "Home". When a user is removed again, the dashboard is also removed.
Configuration	In the customizing configuration, app administrators can manage collections, general settings and app users.
Collections for templates and presettings	Collections are used to manage templates, text modules, insight apps, forms, categories, processes, presettings and to define access rights.
Defining templates	<p>Almost all object types can serve as templates. In addition, settings can be made in that are particularly relevant when using fields in Word templates.</p> <p>Text module placeholders can also be inserted in Word templates, which are replaced by the content of the text module when the template is instantiated.</p>
Using templates	In the create dialog the templates with the template category as additional text are displayed in the "Templates" area. For templates without a template category, "Miscellaneous" is used as additional text. During creation, a copy of the template is created, which you can edit independently of the template.
Defining text modules	<p>Text modules can be used to insert predefined standard texts in Microsoft Word documents.</p> <p>There are two types of text modules:</p> <ul style="list-style-type: none"> • Static Text Module (Text) Allows you to enter unformatted text. • Static Text Module (Word) Allows you to enter formatted text in a Word document.
Using text modules	In Microsoft Word an own ribbon is provided that allows you to insert text modules.
Defining and using insight apps	Insight apps provide aggregated access to information in your cloud organization, customized to your needs.
Defining and using forms and categories	User-defined forms can be used to add fields to objects for storing application-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.
Defining processes	<p>There are two types of process templates:</p> <ul style="list-style-type: none"> • Ad Hoc Process Template

	<ul style="list-style-type: none"> • BPMN Process Diagram
Using processes	The defined processes are offered for selection when using processes (e.g. "Tools" > "Start New Process").
Defining presets	<p>There are three types of presets:</p> <ul style="list-style-type: none"> • Display Settings • Search Form • Time Interval
Using presets	<p>You can apply the display settings in lists.</p> <p>Search forms can be selected during a search (e.g. in a search folder).</p> <p>Time intervals can be selected for a follow-up, for example.</p>
Personal templates, processes and presets	Each user can define his own templates, processes and presets in the "Personal Templates", "Personal Processes" and "Personal Presets" area.

3.10 Contact Management

The contact management allows you to create and manage contacts in contact rooms. Based on user-defined criteria you can specify address lists that can be exported for sending newsletters, for example.

Use Case	Description
Dashboard	<p>The contact management dashboard is the central access point to the contact management.</p> <p>When a user is added to a contact management configuration, a dashboard is automatically created and placed on "Home". When a user is removed again, the dashboard is also removed.</p>
Configuration	In the contacts configuration, contact administrators can define settings for the metadata of contacts and manage app users.
Contact rooms	Contact rooms are used to manage contacts in a structured way and to define access rights and default categories.
Creating contact persons	A contact object is used to manage a contact's metadata.
Creating organizations	An organization object is used to manage an organization's metadata.

Duplicate check	When creating or changing contacts, the system checks whether a corresponding contact already exists. Duplicate matching is only performed with contacts that are accessible to the user performing the action. If a duplicate has been found, the contacts can be cleaned up or merged in a dialog.
Changing the assignment of contacts	Contacts can be assigned to another contact room.
Using address lists	Address lists can be created in a contact room (rights context). However, the contacts in address lists can be collected from different contact rooms.
Importing and exporting contacts	The import and export of contacts is possible in address lists. Contacts can be imported and updated using a CSV or XLSX file or exported as a CSV file. A serial e-mail can be used to send personalized e-mails to defined recipients from the contact management (an own SMTP server has to be defined in the organization).
Deleting contacts	In order to delete a contact (put it in the wastebasket), change rights are required. If property values of the contact are assigned to another contact room, change rights are also required in this room.
Using address books	Read-only access to contacts is also possible via third-party products such as "Apple Contacts", which support the CardDAV standard.

4 Scope of Services – Security

The security of your personal data and your documents is of utmost importance for Fabasoft.

Common

High flexibility and security at the same time is provided to you.

Use Case	Description
Encrypted communication	The communication between is always encrypted via an HTTPS connection. This also applies when using a smartphone.
Access rights	Access to Teamrooms is defined by access rights.
Access for applications	Access with third-party applications can be secured by specially generated passwords. For the passwords a

	validity can be set and also revoking passwords is possible.
Search within the access rights context	When searching, only objects can be found for which the user has search rights.
Watermark	Instead of the original document a PDF document with a watermark can be displayed to team members with only read access.
Malware check	An automated malware scanning service checks the stored files for malware at regular intervals.
Auditing	With the auditing functionality, accesses to objects are logged. Not only changes of properties are displayed, but also when and by whom an object was read.

Certifications and Audits

External and internal security analyses and audits of technical, physical, and organizational security measures and operating processes play a crucial role in ensuring the security of your data. A list of current certificates, attestations and tests can be found in the document [Fabasoft Technical and Organizational Measures](#). Further information can be found here: <https://www.fabasoft.com/trust>.

5 Scope of Services – Administration

The administration tasks can be easily carried out via the user interface.

Use Case	Description
Managing organization members	<p>Users are managed through an organization. Typical organizational tasks are:</p> <ul style="list-style-type: none"> • 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 structure
Managing licenses	Licenses are required to use the solution.

Using reports	Reports can be used to maintain an overview of the organization.
Defining advanced settings	<p>The advanced settings provide additional configuration options:</p> <ul style="list-style-type: none"> • Defining holiday tables • Defining contact data • Defining logos • Defining policies • Defining SMTP settings • Defining organization roles • Defining target domains for transferring Teamrooms • Defining OAuth clients • Defining Mindbreeze InSpire services • Defining log-in options • Configuring encryption • Configuring digital signatures
Defining default Teamrooms	The defined default Teamrooms are displayed in the organization shelves of the respective members.
Further managing options	<p>The following further management options are available:</p> <ul style="list-style-type: none"> • Anonymizing users • Dissolving all Teamrooms • Deactivating and resetting the organization • Showing the Teamroom usage • Defining permanent log-in • Defining privacy settings • Defining trusted networks • Defining the organization branding • Viewing e-mail communication • Defining the default data location • Checking the files for malware

6 Technical Information

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