



Software Product Information

Fabasoft Contracts 2021 September Release

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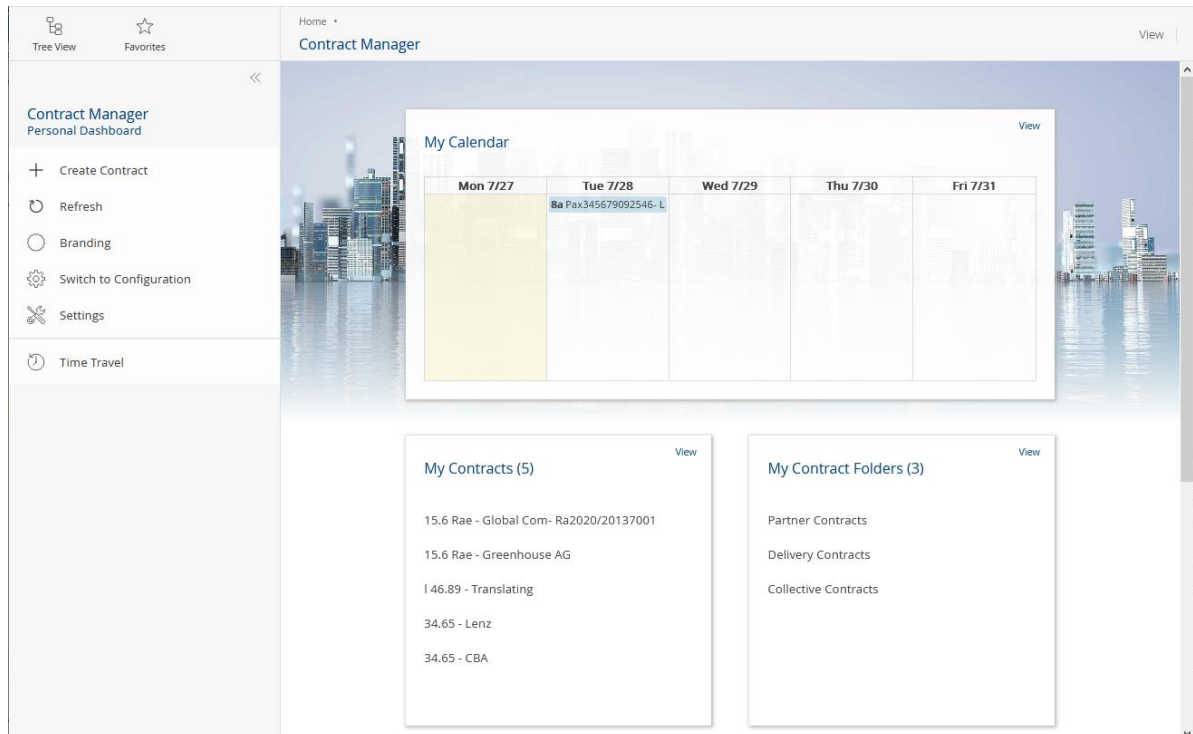
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1 Introduction

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 of 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 Fabasoft Contracts Editions

Fabasoft Contracts is available in two editions with different scope of services:

- Fabasoft Contracts
- Fabasoft Contracts AI

Note: Fabasoft Contracts AI is only available in the data location Germany.

The editions are available in the following variants:

- 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.

3 Scope of Services - User Perspective

Fabasoft Contracts offers the following functionality for end users.

Use Case	Description
Contract manager dashboard	The contract manager dashboard is the central access point to Fabasoft Contracts.
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.
Performing text recognition	An inbox rule can be used to perform text recognition on documents that can be converted to PDF. Note: This functionality must be licensed separately.
Recognizing contract types and extract metadata	If possible, contract-relevant metadata and clauses are extracted from imported documents and stored in the contracts. Note: This functionality is available in the "Fabasoft Contracts AI" edition.
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.

Defining dates	In the properties of a contract, all relevant dates of the contract can be entered.
Assigning contracts to an assignment target	A contract can be assigned to one or more assignment targets (e.g., suppliers or customers).
Keywording contracts	Contracts can be keyworded using terms.
Adding documents	Documents can be assigned to contracts, e.g., by uploading them via drag and drop.
Adding remarks	Remarks on contracts can be entered as free text.
Adding internal remarks	Internal remarks are not visible to users with restricted access.
Adding tasks	Tasks can be defined for contracts, which are also displayed in the integrated calendar.
Creating confidential rooms	Confidential rooms allow creating confidential contract documents accessible only to a selected group of users.
Creating external rooms	External rooms allow creating contract documents accessible to a selected group of external users.
Creating follow-on contracts	For a contract, follow-on contracts can be created. For a follow-on contract, further follow-on contracts can be created to represent contract chains.
Creating subordinate contracts	Subordinate contracts can be created for a contract, e.g., to map outline agreements with subordinate contracts. Further subordinate contracts can be created for a subordinate contract to represent a multilevel contract hierarchy.
Using forms and categories	Custom forms can be used to, e.g., 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 can be created using contract templates. Individual documents of a contract can be created using document templates.
Using text modules	Text modules with standard texts can be inserted into Word documents (contract 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	<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 stored in the Fabasoft Cloud 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>
Using calendar	With the help of the integrated calendar, an overview of all appointments is provided. The calendar can also be integrated into Microsoft Outlook.
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.
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4 Scope of Services - Administration

Settings for the behavior of Fabasoft Contracts can be made in the contract manager configuration or in contract lists.

Use Case	Description
Contract manager configuration	In the contract manager configuration, general settings are made that apply to all contract folders. By assigning roles, users are authorized to use Fabasoft Contracts. In addition, the respective role defines the possible use.
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.
Defining contract types	Contract types allow you to categorize contracts, to assign additional authorizations and to extend contracts with user-defined fields.
Defining assignment targets	Assignment targets are managed in a contract folder and 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, e.g., 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	Contract templates (which can contain documents) enable the efficient creation of contracts. Document templates are offered for selection in the documents of a contract when a document is created.
Defining text modules	Text modules can be inserted into Word documents (contract 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 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 of contracts.
Defining presets	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.
Importing contracts	Contracts and their metadata can be imported from an Excel workbook or CSV file.
Importing and assigning contract templates	Contract documents can be automatically assigned to the corresponding contracts.

5 Scope of Services - Interfaces

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

Use Case
Import contracts from a ZIP archive
Import roles for contract folders from an Excel workbook

6 Technical Information

Information about system requirements and supported platforms can be found here:

[Technical Information](#)