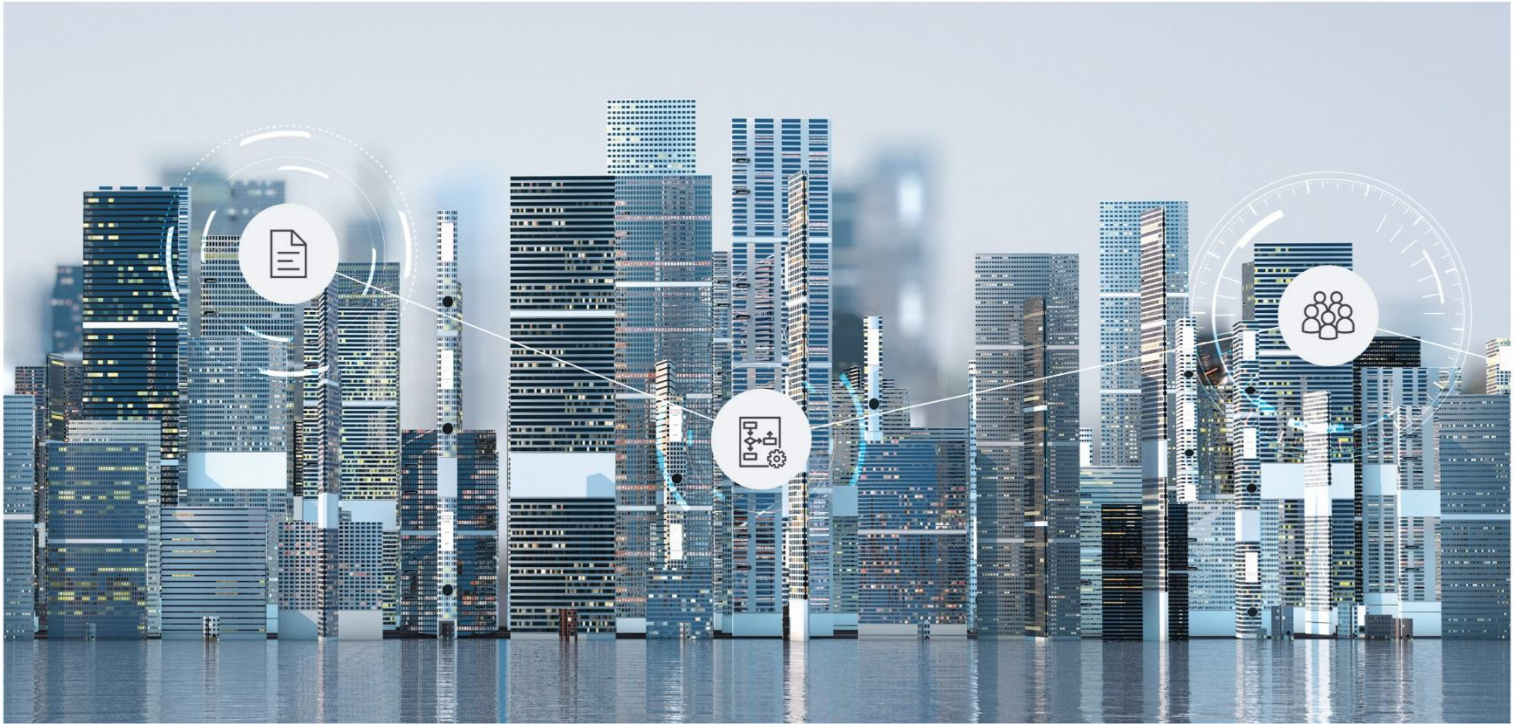


User Help

Fabasoft Approve

Contents

1 Introduction Fabasoft Approve

Fabasoft Approve offers powerful document and quality management in technical projects and supports companies in the efficient management of technical documentation, quality-relevant documents and processes, as well as project-related correspondence - traceable, structured and compliant.

Fabasoft Approve is divided into two solutions with different scopes of services, Fabasoft Approve DMS and Fabasoft Approve QMS.

1.1 Fabasoft Approve DMS

Fabasoft Approve DMS contains the following application area:

- Correspondence Management (see chapter 2 "Application Area: Correspondence Management")

1.2 Fabasoft Approve QMS

Fabasoft Approve QMS contains the following application areas:

- Correspondence Management (see chapter 2 "Application Area: Correspondence Management")
- Quality Management (see chapter 3 "Application Area: Quality Management")
- Technical Records Management (see chapter 4 "Application Area: Technical Records Management")

1.3 Integration of artificial intelligence with Mindbreeze AI

Fabasoft Approve also integrates AI functionalities to support users and reduce the workload. These AI functionalities are based on Mindbreeze AI. With Mindbreeze AI, it is possible to chat with your internal company documents in natural language and receive answers based on the data you provide. This is just one of many ways to use AI to save time and minimize errors in your company.

In order to use the AI functionalities, it is necessary to purchase a corresponding license for Mindbreeze AI.

Each AI-supported functionality is labeled "AI" and can also be found in the SPI.

1.4 Basic information about the Fabasoft Cloud

Fabasoft Approve builds on the many functions of the Fabasoft Cloud, which are documented in the User Help Fabasoft Cloud and the Administration Help Fabasoft Cloud.

2 Application Area: Correspondence Management

The application area correspondence management of Fabasoft Approve offers you a pioneering solution for the innovative management of your correspondence. The application enables extremely uncomplicated, intuitive and collaborative handling of correspondence.

- Speed up documentation creation with Xeditor
  By integrating Xeditor into Approve, standardized, structured content can be created,

edited and reviewed together as a team. The documents are structured and semantically enriched on the basis of sets of rules (such as DITA, S10000D, Pi-Mod etc.) or individual schemas.
Standardized format templates ensure a uniform layout for all your technical documents. The division of information into chapters ensures easy reuse as well as automatic, fast and precise publication on all publication channels, from digital to print. Thanks to the Word-like user interface, authors do not need in-depth knowledge of XML to easily generate structured content.

- Integrate suppliers into your processes
  Approve automates checking and approval processes and integrates your suppliers, including their documentation services, directly into the digital workflow. In this way, documents entered by the supplier can be automatically renamed based on predefined specifications and assigned to the existing order item of an order. Automatically sent deadline reminders ensure that deadlines are met and tasks are completed on time. This prevents delivery delays and reduces the risk of penalties for late delivery.
- Access relevant information at any time
  Thanks to the seamless connection to your existing ERP system, for example SAP, Approve links customer orders, supplier orders and documentation. The software thus provides all relevant stakeholders (suppliers, customers, etc.) with all necessary data such as scope of documentation, deadlines, document status, revisions, etc. at a glance.
  Thanks to numerous standard interfaces and the modelling of specialized web services based on standard protocols such as SAP or Rest, systems such as drawing databases can also be synchronized. This means that dimensional drawings, for example, are automatically assigned to the correct customer package.
- Create your customer documentation with just a few clicks
  Combine your product documentation and your suppliers' documents to create complete technical documentation.
  By conveniently integrating your customers into the correction processes, approval is completed in the shortest possible time. Thanks to automated packaging, the entire documentation is structured according to customer specifications and all information is available at all times in a comprehensible form. This simplifies collaboration with your customers.

2.1 Application Areas

The application area correspondence management can be used for the following application areas. These are described in more detail below.

2.1.1 Document Management

Due to the application approach of the document management system, you must first create the basic structure, such as corresponding projects (see chapter 2.4 “Projects”), partner (see chapter 2.6 “Partner”) and shelves (see chapter 2.7 “Shelf”). Optionally you have the possibility to use areas (see chapter 2.5 “Area”) for a simple document management without corresponding partners. Once you have configured this structure as described in the object structure, you are able to create various document lists (see chapter 2.10 “Document List”) within these containers. These document lists allow you to configure a variety of settings that affect the documents (see chapter 2.11 “Documents”) within the list. In addition, you can use these lists to efficiently manage and organize the documents in your document management system.

After a document list (see chapter 2.10 “Document List”) has been created, it is possible to create documents (see chapter 2.11 “Documents”) within the list. These documents are based on the previously defined settings in the areas (see chapter 2.5 “Area”), projects (see chapter 2.4 “Projects”), partners (see chapter 2.6 “Partner”), shelves (see chapter 2.7 “Shelf”), directories (see chapter 2.8 “Directory”) and document lists. The documents created can now be managed effectively and contain the corresponding files. Everywhere, except in areas, you have the option of requesting these documents from your suppliers and labeling them using previously configured categories. Various properties can be specified, which enables the documents provided to be handled in an organized manner.

Revisions can also be created within these documents (see chapter 2.11 “Documents”) in order to track the status of the documents. By adding revisions, you enable a transparent history of changes to a specific document. This is particularly important for tracking the development process, updates and modifications.

Document revisions give users the ability to access previous versions, review the change history and understand the current state of the document. This is particularly helpful when it comes to compliance, quality control or ensuring the accuracy and reliability of information.

In addition, it is possible to check documents according to individual requirements and integrate them into a special document process that enables important checks. Once the document has been comprehensively checked, there is the option of integrating it into a Transmittal and sending it accordingly. This step leads seamlessly to the next application area, which emphasizes the advantages of Transmittal dispatch.

The process of integrating verified documents into letters enables a seamless connection between document management and transmittal management. This helps to ensure that only verified and authorized documents are included in the letters and sent, further strengthening the security and integrity of the entire communication process. This integrated functionality therefore not only optimizes efficiency, but also the security and reliability of the entire system.

2.1.2 Transmittal Management

If you follow the Transmittal Management application approach, you must first create the basic structure. This includes, for example, projects (see chapter 2.4 “Projects”), partner (see chapter 2.6 “Partner”) and shelves (see chapter 2.7 “Shelf”). This structure lays the organizational foundation for the efficient management of Transmittal (transfers of information, documents (see chapter 2.11 “Documents”), actions (see chapter 2.17 “Action Items”) or open points (see chapter 2.15 “Open Points”)) in your System.

Once this structure has been configured accordingly, you can create letters for specific projects and partners.

Using a transmittal management system allows for an organized and traceable transfer of information between different project partners. This is particularly important in environments where clear communication and tracking of information is crucial.

Once you have implemented the structure in accordance with the object structure, you have the option of creating letters (see chapter 2.20 “Letters”) within these containers. You can configure these letters according to the specifications in the object structure. Once you have created the letters according to your requirements, you have the option of sending them directly or saving them as drafts.

Configuring the letters in accordance with the object structure allows you to specify relevant information such as recipient, subject, content, cover letter and attachments. The ability to save letters as drafts allows you to review steps or make adjustments before final delivery.

This approach provides a structured and efficient method for creating, customizing and submitting letters within your system, especially when a clear and repeatable process structure is required. Within these letters, you can view corresponding previous or subsequent letters and modify the letters accordingly.

Certain functions give you the option of forwarding or recalling letters. The forwarding function allows you to send a created letter to other users or recipients within the system. This is useful if you need to include specific people in the communication process.

The recall function allows you to recall a letter that has already been sent before it has been read or edited by the recipient. This is particularly helpful if you realize that changes need to be made or if the letter was sent in error.

Diese Funktionen tragen dazu bei, die Flexibilität und Kontrolle über den Briefverkehr in Ihrem System zu erhöhen und ermöglichen es Ihnen, schnell auf Änderungen oder unvorhergesehene Anforderungen zu reagieren.

An additional essential main function in the context of Transmittal Management is to enable the customization of individual processes for specific instances concerning the sending of letters and the initiation of processes. Here it is possible to define customized processes for each corresponding instance for both the receipt and dispatch of letters and the associated creation of processes. These can be individually set and configured with regard to checks and the reaction to them.

With regard to document management, it is also possible to relate corresponding documents to each other and use them for further processing steps. This function enables comprehensive integration of documents into the workflow, ensuring efficient and transparent management. This extended functionality helps to optimize the flexibility and adaptability of the Transmittal Management System to the specific requirements and processes of an organization.

2.1.3 Entity Management

If you follow the entity management application approach, you must first create the basic structure. This includes areas (see chapter 2.5 “Area”), projects (see chapter 2.4 “Projects”), partner (see chapter 2.6 “Partner”) and possibly also shelves (see chapter 2.7 “Shelf”). This structure lays the organizational foundation for the efficient management of action items (see chapter 2.17 “Action Items”) and open points (see chapter 2.15 “Open Points”) in your System.

Once this structure has been configured accordingly, you can configure action items and open points for specific areas, projects and partners within the corresponding lists.

The lists enable specific settings that are applied accordingly in terms of actions and open points.

In addition, you can use these lists to efficiently manage and organize the action items and open points in your entity management system.

The entities created can now be managed effectively and contain the corresponding associated files. There is also the option to send these entities by using previously configured categories.

Various properties can be specified, which enables the entities provided to be handled in an organized manner.

Revisions can also be created within these entities in order to track the status of the entities. By adding revisions, you enable a transparent history of changes to a particular entity. This is particularly important for tracking the development process, updates and modifications.

Entity revision gives users the ability to access previous versions, review the change history and understand the current state of the entity. This is particularly helpful when it comes to compliance, quality control or ensuring accuracy and reliability of information.

The management of responsibilities on these entities makes it possible to assign individual responsibilities. The respective managers have the authority to customize the entities according to specifications and design them accordingly. It is also possible to manage and set due dates for the respective entity, which affects the time component.

The principle of LOP lists (list of open points) is used to read the progress from the entities. These lists provide an overview of all entities and their respective status. In this way, open tasks can be read off and progress to date can be documented.

It is also possible to initiate relevant meetings within these entities. The relevant entities and their current status can be discussed. This promotes effective communication and collaboration within the system, as all relevant information and discussions are brought together in one central location.

2.2 Correspondence Manager Dashboard

Once successfully added to a correspondence manager configuration, a dashboard is automatically created for you and placed on the "Home" page. This correspondence dashboard serves as your central access point to the correspondence management.

Note: It is important to note that depending on your role and the previous settings made prior to your first access to the correspondence management, certain objects and settings may vary. There may be differences in terms of user help. In case of ambiguities or specific adjustments, you should contact the relevant administrators for detailed information.

2.2.1 Areas

The correspondence manager dashboard is divided into the following areas:

- *My Calendar*
  This is a calendar that contains all the events in the shelf calendar (see chapter 2.18 "Calendar").
- *My Areas* (see chapter 2.5 "Area")
  These are all areas that are assigned to you at least in part.
- *My Projects* (see chapter 2.4 "Projects")
  These are all projects that are assigned to you at least in part.
- My Partners (see chapter 2.6 "Partner")
  These are all partners that are assigned to you at least in part.
- *My Shelves* (see chapter 2.7 "Shelf")
  These are all the shelves that are assigned to you at least in part.

- *My Scopes* (see chapter 2.19 “Scopes & Packages”)
  These are all scopes that are assigned to you at least in part.
- *My Report Packages* (see chapter 2.19 “Scopes & Packages”)
  These are all report packages that are assigned to you at least in part.
- *My Submission Packages* (see chapter 2.19 “Scopes & Packages”)
  These are all submission packages, at least part of which are assigned to you.
- *My Documents* (see chapter 2.11 “Documents”)
  These are all documents that are assigned to you at least in part.
- *All Letters* (see chapter 2.20 “Letters”)
  These are all letters that are available in the application.
- *All Cases* (see chapter 2.21 “Cases”)
  These are all cases that exist in the application.
- *All Documents* (see chapter 2.11 “Documents”)
  These are all documents that are available in the application.
- *My Meetings* (see chapter 2.22 “Meetings”)
  These are all meetings that are assigned to you at least in part.
- *My Action Items* (see chapter 2.17 “Action Items”)
  These are all action items that are assigned to you at least in part.
- *All Actions Items* (see chapter 2.17 “Action Items”)
  These are all action items that are available in the application.
- *My Open Points* (see chapter 2.15 “Open Points”)
  These are all open points, at least some of which are assigned to you.
- *All Open Points* (see chapter 2.15 “Open Points”)
  These are all open points that exist in the application.
- *My Search Folders*
  These are search folders that are instantiated and administered by you or are assigned to you.

2.2.2 Actions

You can find the following actions in the correspondence manager dashboard:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create Project* (see chapter 2.4 “Projects”)
  This action opens a dialog box in which any settings for the new project can be made.
- *Create Partner* (see chapter 2.6 “Partner”)
  This action opens a dialog box where you can make any settings for the new partner.
- *Refresh*
  Refreshes the dashboard of the correspondence manager.
- *Switch to Configuration* (see chapter 2.3 “Correspondence Manager Configuration”)
  This action allows you to switch from the dashboard to the correspondence manager configuration.
- *Settings*
  Opens the dashboard settings.

2.3 Correspondence Manager Configuration

In the correspondence manager configuration, you can define the following application-specific settings, which are described in more detail below.

2.3.1 Areas

The correspondence manager configuration is divided into different areas to provide you with clear access and efficient use of the correspondence management.

The following areas are typically available:

- *Areas* (see chapter 2.5 “Area”)
  These are all areas that were created in the application.
- *Projects* (see chapter 2.4 “Projects”)
  These are all projects that were created in the application.
- *Partners* (see chapter 2.6 “Partner”)
  These are all partners that exist in the application.
- *Configuration Data* (see chapter 2.9 “Configuration Data”)
  These are various documents for which various configuration-specific attributes and metadata can be set.
- *Async Data Objects*
  Contains basic objects that save input data from a web service and process it in the background. If such processing is running, entries are visible in this area.
- *Users Without Login (Last 90 Days)*
  This section shows all users assigned to the application who have not logged in for 90 days.
- *Orphan Objects*
  This is a list of objects, which are not assigned to a Teamroom.
- *Insight Apps*
  Insight Apps provide aggregated access to the information in your cloud organization, tailored to your needs. You can use Insight Apps to display and highlight important information without users having to search for it explicitly.
- *Forms and Categories*
  Shows the forms and categories provided via the configuration. With the help of user-defined forms, for example, contracts can be expanded to include fields for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.
  Note: Further information can be found in the white paper “Model-Based Customizing”.
- *Processes*
  Shows the processes provided via the configuration. Users, organizations, organizational units and external organizations can be integrated into the processing of business objects via workflow by starting a process that can be processed via the worklist (these are usually approval and release processes).
  Further information can be found in the white paper “Model-Based Customizing” and in the “Workflow” chapter in the “User Help Fabasoft Cloud”.
- *Templates*
  Shows the templates provided via the configuration. The templates are displayed in the Create dialog (e.g., using the “New” context menu command). You can define contract and

document templates both in the correspondence manager configuration and in areas, projects, partner and shelves. Templates defined in the correspondence manager configuration are offered for selection in all areas, projects, partner and shelves.
Note: A template can only be used once it has been released via the “Release for Usage” context menu command. Changes must be released using the “Re-release” context menu command. Sharing can also be deactivated.

- *Text Modules*
  Shows the text modules provided via the configuration that can be inserted into Word documents. Text modules can be inserted in documents and also in document templates. You can define text modules both in the correspondence manager configuration and in areas, projects, partners and shelves. Text modules defined in the correspondence manager configuration are available in all areas, projects, partner and shelves.
- *Reports and OData Services*
  Contains templates for reports and OData services. Corresponding BIRT reports, Microsoft Excel reports and OData services can be generated within this list. These reports essentially offer the possibility of data visualization and analysis. They can also be integrated into any web applications (BIRT).
- *Thesauri*
  Shows the Thesauri provided in the configuration.
- *Presettings*
  Contains default settings such as self-generated search patterns or time spans.
- *Failed Background Tasks*
  This area shows failed background tasks. You can perform the following manual actions: “Define Next Execution”, “Send Link” and “Delete”.
  Note: This area is only displayed if there is at least one failed background task.

2.3.2 Actions

- *Create Project* (see chapter 2.4 “Projects”)
  This opens a window in which a project can be configured according to the given settings and placed in the corresponding project list.
- *Create Partner* (see chapter 2.6 “Partner”)
  This opens a window in which a partner can be configured according to the given settings and added to the partner list.
- *Import Translations*
  Imports a CSV of translations for various languages.
- *Export Translations*
  Exports a CSV of translations for various languages you can select.
- *Show New Events*
  This action opens the news of the quality manager configuration.
- *Settings*
  This opens a window in which the configuration-specific settings corresponding to the adjustments to be made can be manipulated.

2.3.3 Settings

The following settings can be made within the correspondence manager configuration:

2.3.3.1 Tab "General Settings"

- *Name*
  Defines the name of the configuration.
- *Subject*
  Defines the description of the configuration.
- *Holiday Table*
  Defines the public holiday table to be used in the context of the configuration (otherwise the default public holiday table is used).
- *Access Protection*
  Defines the access settings. By default, only the specified team can access objects.
- *Restrict Shortcuts Within Teamroom*
  Defines what type of links may be stored in the configuration. You can restrict the permitted links to objects that are assigned to the organization or to objects that are assigned to the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows you to restrict the team members who are allowed to open or download content on the end device.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which authorizations a team member must have so that the team member can open or download content on the end device.
- *All Team Members May Add Members*
  Determines whether all team members are allowed to add users to the team or only team members with "All Rights". Members with change rights may grant or revoke change rights or read rights to other members. Members with read rights may grant or withdraw read rights from other members.
- *Restrict Team Members*
  Defines the organizations, organizational units, teams and external organizations whose members may be added to the configuration. If the list does not contain any entries, members can be added without restriction.
- *Main Administrator*
  Defines the user who receives the automatically generated e-mail messages relating to the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as a contact in the event of missing authorizations.
- *Support Coordinator*
  The support coordinator team has access to all support requests in the corresponding context and can perform the same actions as the submitters of the support requests.
- *Support Team*
  The support team takes over the organization-internal administration of support requests in the appropriate context.
- *Enable Advanced Mode*
  Activates a mode that allows you to work with multiple Shelves and manage templates and presets, among other things.
- *Activate Trace Output*
  Enables the output of information about the progress of a code execution. For example, if you are a form designer using expressions for calculation or validation, it can sometimes be

difficult to identify errors in the expressions. To simplify the analysis, you can have trace output written to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

2.3.3.2 Tab “Details”

You have the following setting options within the configuration of the correspondence manager:

- *Default Dashboard Name*
  This is a field that determines the name of the dashboard. You can provide a required name.
- *Default Dashboard Class*
  This is a field that indicates which class is behind the dashboard. This class provides all the necessary objects, lists and properties of the dashboard and prepares the dashboard.
- *Default Dashboard Form*
  This setting enables the storage of a form specified in the configuration, which is derived from the dashboard class.
- *Show Calendar in Dashboard* (see chapter 2.18 “Calendar”)
  This field determines whether a calendar is displayed in the dashboard.
- *Use Letters in Shelves* (see chapter 2.20 “Letters”)
  This field determines whether letters should be displayed in shelves.
- *Use Correspondences for Related Letters in Shelves* (see chapter 2.20 “Letters”)
  This field determines whether letters belonging together in shelves should be displayed in a correspondence field.
- *Show Letters in Dashboard* (see chapter 2.20 “Letters”)
  This field determines whether letters should be displayed in the dashboard.
- *Show Cases in Dashboard* (see chapter 2.21 “Cases”)
  This field determines whether cases should be displayed in the dashboard.
- *Default Partner* (see chapter 2.6 “Partner”)
  This field offers the option of providing a standard partner. If no partner is to be selected, this is selected when an object is created.
- *Default Partner Shelf Template*
  if a partner (see chapter 2.6 “Partner”) is stored, a template can be stored for the partner. This template must first be created in the configuration and derived from the partner class.
- *Categories for Registration to a Directory*
  Corresponding categories for registration can be stored in a directory. These categories must first be made available in the configuration.
- *Categories for Registration as a Letter*
  Here you can define categories for registration as a letter.
- *Default Form for New Projects*
  A form that was created in the configuration and is derived from the project class can be stored here.
- *Default Form for New Partners*
  A form that was created in the configuration and derives from the partner class can be stored here.

- *Default Form for New Shelves*
  A form that was created in the configuration and derives from the shelf class can be stored here.
- *Default Form for New Directories*
  A form that was created in the configuration and derives from the directory class can be stored here.
- *Default Form for Registration to a Directory*
  A form that was created in the configuration and is derived from the registration class can be stored here.
- *Default Form for New Letters*
  A form that was created in the configuration and is derived from the letter class can be stored here.
- *Default Form for E-Mails/Folders Registered as Letters*
  A form that was created in the configuration and is derived from the e-mail or folder class can be stored here.
- *Default Form for New Cases*
  A form that was created in the configuration and is derived from the cases class can be stored here.
- *Default Form for New Comments*
  A form that was created in the configuration and derives from the comment class can be stored here.
- *Default Form for New Incoming Document Items*
  A form that was created in the configuration and is derived from the document item class can be stored here.
- *Default Form for New Outgoing Document Items*
  A form that was created in the configuration and is derived from the document item class can be stored here.
- *Default Form for New Correspondences*
  A form that was created in the configuration and is derived from the correspondence class can be stored here.
- *Default Form for New Document Lists*
  A form that was created in the configuration and is derived from the document list class can be stored here.
- *Default Form for New Scopes*
  A form created in the configuration and derived from the scope class can be stored here.
- *Default Form for New Report Packages*
  A form that was created in the configuration and is derived from the report package class can be stored here.
- *Default Form for New Submission Packages*
  A form that was created in the configuration and is derived from the submission class can be stored here.
- *Default Form for New Work Packages*
  A form that was created in the configuration and is derived from the work package class can be stored here.

- *Default Form for New Documents in a Document List*
  A form that was created in the configuration and is derived from the document class can be stored here.
- *Default Form for New Document Instances in a Document List*
  A form that was created in the configuration and is derived from the document instance class can be stored here.
- *Default Form for New Action Item Lists*
  A form that was created in the configuration and is derived from the action item list class can be stored here.
- *Default Form for New Meetings*
  A form that was created in the configuration and is derived from the meeting class can be stored here.
- *Default Form for New Meeting Sequences*
  A form that was created in the configuration and is derived from the meeting sequence class can be stored here.
- *Default Form for New Action Items*
  A form that was created in the configuration and is derived from the action item class can be stored here.
- *Default Form for E-Mail Folders*
  A form that was created in the configuration and is derived from the e-mail folder class can be stored here.
- *Default Form for Registered E-Mails*
  A form that was created in the configuration and is derived from the registered e-mail class can be stored here.
- *Process Triggers*
  This allows you to set different triggers in order to start specific processes.
  - *Trigger*
    This field is for specifying the trigger for starting a specified process.
  - *Process*
    This field is for specifying the desired process that gets started when the specified trigger gets.
- *Intervals*
  This allows you to set intervals that are available throughout the application.
- *Documents Export Template*
  A template for exporting documents can be stored here. This template must first be specified in the configuration.
- *Comments Export Template*
  A template for exporting comments can be stored here. This template must first be specified in the configuration.
- *Action Items Export Template*
  A template for exporting action items can be stored here. This template must first be specified in the configuration.
- *Open Points Export Template*
  A template for exporting open points can be stored. This template must first be specified in the configuration.

- *Document Due Date Fulfilling States*
  The corresponding states to be used in the application can be specified here.
- *Purposes of Sending* (see chapter 2.29 “Purpose of Sending”)
  The corresponding states to be used in the application can be specified here.
- *Enable Polling for New Letters* (see chapter 2.20 “Letters”)
  Here you can activate the automatic checking of incoming letters.
- Terminate Migration
  Here you can cancel a migration.
- *Metadata Container Mappings*
  Various mappings can be defined here, which link categories with containers and their attributes.

2.3.3.3 Tab „Process configuration “

- Standard process for selecting optional documents
  A previously specified process for selecting optional documents can be stored here.
- *Standard process for selecting documents from document lists*
  A previously specified process for selecting documents can be stored on document lists.

2.4 Projects

In a project, you can define the following possible areas, actions and settings, which are described in more detail below.

2.4.1 Areas

These areas exist within a project:

- *General Documents*
  These are general documents that are relevant to the project. Directories (see chapter 2.8 “Directory”), documents (see chapter 2.11 “Documents”) with document lists (see chapter 2.10 “Document List”), action items (see chapter 2.17 “Action Items”) in action item lists (see chapter 2.16 “Action Item List”), open points (see chapter 2.15 “Open Points”) in open points lists (see chapter 2.14 “Open Points List”) and other documents can be generated.
- *Calendar* (see chapter 2.18 “Calendar”)
  This is a project-specific calendar that displays all events and tasks that are relevant within the project.
- *E-Mails*
  These are all emails that have been stored in this project.
- *E-Mail Folders* (see chapter 2.27 “E-Mail Folder”)
  This is a folder that contains all e-mails relating to the project.
- *Shelves*
  These are the project-specific shelves that have been created in the context of a project.
- *All Documents* (see chapter 2.11 “Documents”)
  These are all project-specific documents that have been generated within the project.
- *All Action Items* (see chapter 2.17 “Action Items”)
  These are all project-specific action items that have been generated within the project.

- *All Open Points* (see chapter 2.15 "Open Points")
  These are all project-specific open points that have been created within the project.

2.4.2 Actions

The following actions are available to you within the project:

- *Synchronize*
  Synchronizes the project.
- *Define Logo*
  Defines a logo for the respective project.
- *Show Project Usage*
  Shows the usage of the project and all assigned shelves, where a window has been opened and corresponding usages can be viewed. This data can be exported using a CSV file.
- *Settings*
  This action opens the project settings.

2.4.3 Settings

You can make the following settings in a project:

2.4.3.1 Tab "Project"

You can make the following settings in the "Project" tab:

- *Name*
  This is the project name.
- *Project ID*
  This field offers the option of providing a unique identification number for the project.
- *Category*
  This is a category that can be stored for the project. This category must be provided in the configuration, whereby the category must be derived from the project class.
- *Subject*
  This is a subject for the project.
- *Customer Reference Number*
  A number can be stored for the customer reference.
- *Customer Reference Description*
  A description for the customer reference can be stored here.
- *Partner* (see chapter 2.6 "Partner")
  Here you can view the partner that was referenced in the project.
- *Use Expression for Letter Number*
  It can be activated here, that an expression can be provided for processing letter numbers.
- *Expression for Letter Number*
  If this has been activated, the corresponding expression for letter number processing can be stored.
- *Pattern for Letter Number*
  If the *Use Expression for Letter Number* field has not been activated, this field is available. It allows you to specify a template for the letter numbers.

- *Pattern for Letter Ordinal* (see chapter 2.20 “Letters”)
  This is a pattern for the ordinal number of the letter. This pattern can be set within this field and applies to the entire project.
- *Separator for Subject*
  A separator can be set for the subject. This separator is therefore valid for the entire project scope.
- *Letter Name Requires Subject* (see chapter 2.20 “Letters”)
  This field activates the need for the subject in the case of the letter.
- *Pattern for Capturing Letter Number/Letter Subject From an E-Mail Subject*
  A pattern can be specified here which enables letter numbers and letter subjects to be recognized from an e-mail subject. This applies within the project.
- *Processing Instructions During Registration as a Letter* (see chapter 2.20 “Letters”)
  A processing instruction for registration as a letter can be set here. This processing instruction applies to the entire project.
  - *Scope*
    A distinction can be made here as to which area the processing instruction relates to. You can choose between “Disabled”, “Source” and “Letter”.
  - *Regular Expression to Parse an E-Mail Body*
    This is the expression that is executed if e-mail content needs to be analyzed.
  - *Flags for the Regular Expression*
    An option for the regular expression can be stored here.
- *Reference Dates* (see chapter 2.26 “Reference Dates”)
  This field offers the option of storing any reference dates. This results in the following properties, which must be set:
  - *Name*
    This is the name of the reference date.
  - *Date*
    This field offers the option of setting a date for the reference date.
  - *Teamroom*
    This field shows the Teamroom of the reference date.
- *Users/Teams not Allowed to Close Letters*
  This is an explicit list of users and teams who are not authorized to conclude letters.
- *Restrict Purposes of Sending*
  The purposes of sending can be limited at project level.
- *Purposes of Sending*
  Shows the purposes of sending that are active for the project. If the Restrict shipping purposes option is activated, it is possible to explicitly activate individual shipping purposes.
- *Default Process for Document Item Review*
  This field allows you to store processes to be used for reviewing document items.
- *Default Process for Document Review*
  This field allows you to store processes to be used for reviewing documents.
- *Default Process for Internal Document Review*
  This field allows you to store processes to be used for reviewing internal documents.
- *Default Process for Action Item Processing*
  This field allows you to store processes to be used to work through action items.

- *Default Process for Open Point Processing*
  This field allows you to store processes to be used to work through open points.
- *Use E-Mail Folders*
  This field allows you to use email folders. In the e-mail folder, the registered e-mails are grouped according to e-mail domains.
- *Default Change Access for New E-Mail Folders*
  This field allows you to store persons who have change rights for newly created e-mail folders by default.
- *Default Read Access for New E-Mail Folders*
  This field allows you to store persons who have read rights for newly created e-mail folders by default.
- *Expression to Determine if Registration Process Should be Started for Registered E-Mails*
  This field allows you to define an expression that will be evaluated to determine if the registration process should be started when a new registered e-mail is created.
- *Registered E-Mail Registration Process*
  This field allows you to define the process for the registration of a new registered e-mail.
- *Users With Change Access Can Create Directories*
  It can be activated here that users with change rights can create directories.
- *Users With Change Access Can Create E-Mail Folders*
  It can be activated here that users with change rights can create e-mail folders.
- *Visible to all App Users*
  Here you can activate that any settings are visible to all app users.
- *App Configurations for Controlling Restricted Access*
  This field only appears if the *Visible to all App Users* field has been selected. It can be activated that the app configurations for controlling the restricted rights are possible.
- *Send ICS Files With Notification E-Mails*
  ICS data transmission can be activated here.
- *Calendar URL*
  This field provides the URL to the project's calendar (see chapter 2.18 "Calendar").
- *Metadata Container Mappings*
  Various mappings can be defined here, which link categories with containers and their attributes.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.4.3.2 Tab "Advanced Settings"

You can make the following settings in the "Advanced settings" tab:

- *Default Form for New Directories*
  This field offers the option of storing a standard form that was previously specified in the configuration and can be used for the directory class accordingly.
- *Default Form for Registration to a Directory*
  This field offers the option of storing a standard form that was previously specified in the configuration and can be used for the directory class accordingly.

- *Default Form for New Document Code Parts*
  This field offers the option of storing a standard form that was previously specified in the configuration and can be used for the document coding parts class.
- *Document Code Import*
  A document code import can be described here.
- *Document Code Parts*
  Corresponding document coding parts can be generated. This results in the following properties, which must be set:
  - *Collaboration*
    This is the link to the current project.
  - *Code*
    This is the code of the code part.
  - *Description*
    This is the description of the coding.
  - *Type*
    This field allows you to specify the type of coding. A distinction can be made between "None", "Sequential Numbering", "Date" and "Meeting ID".
- *Default Form for Reference Dates*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the reference dates class.
- *Unique Document Numbers*
  This field offers the option of enabling unique numbers for documents.
- *Calculated Document Numbers*
  This field offers the possibility to enable calculated numbers for documents.
- *Default Form for Document Lists*
  This field offers the option of storing a default form, which was previously specified in the configuration and can be used for the document list class accordingly.
- *Document Lists* (see chapter 2.10 "Document List")
  This field offers the option of providing document lists within a project.
- *Unique Action Item Numbers* (see chapter 2.17 "Action Items")
  This field offers the possibility to enable unique numbers for action items.
- *Calculated Action Item Numbers*
  This field offers the possibility to enable calculated numbers for action items.
- *Default Form for New Action Item Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the action item list class.
- *Action Item Lists* (see chapter 2.16 "Action Item List")
  This field offers the possibility to provide action item lists within a project.
- *Unique Open Point Numbers* (see chapter 2.15 "Open Points")
  This field offers the option of enabling unique numbers for open points.
- *Calculated Open Point Numbers*
  This field offers the option of enabling calculated numbers for open points.
- *Default Form for Open Point Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the open points list class.

- *Open Point Lists* (see chapter 2.14 “Open Points List”)
  This field offers the option of providing open points lists within a project.
- *Default Form for E-Mail Folders*
  This field is used for providing a default form for e-mail folders.
- *Default Form for Registered E-Mails*
  This field is used for providing a default form for registered emails.
- *Documents Export Template*
  This field offers the possibility to store a template for the export of documents.
- *Comments Export Template*
  This field offers the possibility to store a template for the export of comments.
- *Action Items Export Template*
  This field offers the possibility to store a template for the export of action items.
- *Open Points Export Template*
  This field offers the possibility to store a template for the export of open points.

2.5 Area

An area is a simplified version of a project (see chapter 2.4 “Projects”), where no correspondence is needed with different partners is needed. This could be used for internal projects. In an area, you can define the following possible areas, actions and settings, which are described in more detail below.

2.5.1 Areas

These areas exist within an area:

- *General Documents*
  These are general documents that are relevant to the area. Directories (see chapter 2.8 “Directory”), documents (see chapter 2.11 “Documents”) with document lists (see chapter 2.10 “Document List”), action items (see chapter 2.17 “Action Items”) in action item lists (see chapter 2.16 “Action Item List”), open points (see chapter 2.15 “Open Points”) in open points lists (see chapter 2.14 “Open Points List”) and other documents can be generated.
- *Calendar* (see chapter 2.18 “Calendar”)
  This is an area-specific calendar that displays all events and tasks that are relevant within the area.
- *All Documents* (see chapter 2.11 “Documents”)
  These are all area-specific documents that have been generated within the area.
- *All Action Items* (see chapter 2.17 “Action Items”)
  These are all area-specific action items that have been generated within the area.
- *All Open Points* (see chapter 2.15 “Open Points”)
  These are all area-specific open points that have been generated within the area.

2.5.2 Actions

The following Actions are available to you within the area:

- *Synchronize*
  Synchronizes the area.

- *Define Logo*
  Defines a logo for the respective area.
- *Show Project Usage*
  Shows the usage of the
- *Settings*
  This action opens the area settings.

2.5.3 Settings

You can make the following settings in an area:

2.5.3.1 Tab “Area”

You can make the following settings in the “Area” tab:

- *Name*
  This is the area’s name.
- *Area ID*
  This field offers the possibility to provide a unique identification number for the area.
- *Category*
  This is a category that can be stored for the area. This category must be provided in the configuration, whereby the category must be derived from the area class.
- *Subject*
  This is a subject for the area.
- *Reference Dates* (see chapter 2.26 “Reference Dates”)
  This field offers the option of storing any reference dates. This results in the following properties, which must be set:
    - *Name*
      This is the name of the reference date.
    - *Date*
      This field offers the option of setting a date for the reference date.
    - *Teamroom*
      This field shows the Teamroom of the reference date.
- *Default Process for Document Item Review*
  This field allows you to store processes to be used for reviewing document items.
- *Default Process for Document Review*
  This field allows you to store processes to be used for reviewing documents.
- *Default Process for Internal Document Review*
  This field allows you to store processes to be used for reviewing internal documents.
- *Default Process for Action Item Processing*
  This field allows you to store processes to be used for processing action items.
- *Default Process for Open Point Processing*
  This field allows you to store processes to be used for processing open points.
- *Use E-Mail Folders*
  This field enables the use of e-mail folders within areas.

- *Default Change Access for New E-Mail Folders*
  This field allows you to store persons who have change rights for newly created e-mail folders by default.
- *Default Read Access for New E-Mail Folders*
  This field allows you to store persons who have read access to newly created e-mail folders by default
- *Users With Change Access Can Create Directories*
  It can be activated here that users with change rights can create directories.
- *Users With Change Access Can Create E-Mail Folders*
  It can be activated here that users with change rights can create e-mail folders.
- *Contact Room*
  This field contains the corresponding contact room, where users can be assigned and managed.
- *Synchronize Permissions*
  Here you can activate whether the authorizations should be synchronized.
- *Project Roles*
  This field allows you to create individual project roles with specific users and grant them different access rights. A project role has the following parameters:
  - Project Role
    Here you can add the Project Role, which should be manageable in the area.
  - Members
    Here you can add the individual users, which should be part of the project role
- *Project Roles With Change Access*
  This field allows you to tick a project role and grant it change access rights.
- *Project Roles With Read Access*
  This field allows you to tick a project role and grant it read access rights.
- *Visible to all App Users*
  Here you can activate that any settings are visible to all app users.
- *App Configurations for Controlling Restricted Access*
  This field only appears if the *Visible to all App Users* field has been selected. It can be activated that the app configurations for controlling the restricted rights are possible.
- *Send ICS Files With Notification E-Mails*
  ICS data transmission can be activated here.
- *Calendar URL*
  This field provides the URL to the area's calendar (see chapter 2.18 "Calendar").

2.5.3.2 Tab "Advanced Settings"

You can make the following settings in the "Advanced settings" tab:

- *Default Form for New Directories*
  This field offers the option of storing a standard form that was previously specified in the configuration and can be used for the directory class accordingly.
- *Default Form for Registration to a Directory*
  This field offers the option of storing a standard form that was previously specified in the configuration and can be used for the directory class accordingly.

- *Default Form for New Document Code Parts*
  This field offers the option of storing a standard form that was previously specified in the configuration and can be used for the document coding parts class.
- *Document Code Import*
  A document code import can be described here.
- *Document Code Parts*
  Corresponding document coding parts can be generated. This results in the following properties, which must be set:
  - *Collaboration*
    This is the link to the current project.
  - *Code*
    This is the code of the code part.
  - *Description*
    This is the description of the coding.
  - *Type*
    This field allows you to specify the type of coding. A distinction can be made between “None”, “Sequential Numbering”, “Date” and “Meeting ID”.
- *Default Form for Reference Dates*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the reference dates class.
- *Unique Document Numbers*
  This field offers the option of enabling unique numbers for documents.
- *Calculated Document Numbers*
  This field offers the possibility to enable calculated numbers for documents.
- *Default Form for Document Lists*
  This field offers the option of storing a default form, which was previously specified in the configuration and can be used for the document list class accordingly.
- *Document Lists* (see chapter 2.10 “Document List”)
  This field offers the option of providing document lists within an area.
- *Unique Action Item Numbers* (see chapter 2.17 “Action Items”)
  This field offers the possibility to enable unique numbers for action items.
- *Calculated Action Item Numbers*
  This field offers the possibility to enable calculated numbers for action items.
- *Default Form for New Action Item Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the action item list class.
- *Action Item Lists* (see chapter 2.16 “Action Item List”)
  This field offers the possibility to provide action item lists within an area.
- *Unique Open Point Number* (see chapter 2.15 “Open Points”)
  This field offers the option of enabling unique numbers for open points.
- *Calculated Open Point Numbers*
  This field offers the option of enabling calculated numbers for open points.
- *Default Form for Open Point Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the open points list class.

- *Open Point Lists* (see chapter 2.14 “Open Points List”)
  This field offers the option of providing open point lists within an area.
- *Default Form for E-Mail Folders*
  This field is used for providing a default form for e-mail folders.
- *Default Form for Registered E-Mails*
  This field is used for providing a default form for registered emails.
- *Documents Export Template*
  This field offers the possibility to store a template for the export of documents.
- *Comments Export Template*
  This field offers the possibility to store a template for the export of comments.
- *Action Items Export Template*
  This field offers the possibility to store a template for the export of action items.
- *Open Points Export Template*
  This field offers the possibility to store a template for the export of open points.

2.6 Partner

In a partner, you can define the following possible areas, actions and settings, which are described in more detail below.

2.6.1 Areas

These areas exist within a partner:

- *General Documents*
  These are general documents that are relevant to the partner. Directories (see chapter 2.8 “Directory”), documents (see chapter 2.11 “Documents”) with document lists (see chapter 2.10 “Document List”), action items (see chapter 2.17 “Action Items”) in action item lists (see chapter 2.16 “Action Item List”), open points (see chapter 2.15 “Open Points”) in open points lists (see chapter 2.14 “Open Points List”) and other documents can be generated.
- *E-Mails*
  These are all emails that have been filed in this shelf.
- *E-Mail Folders* (see chapter 2.27 “E-Mail Folder”)
  This is a folder that contains all emails of the shelf.
- *Calendar* (see chapter 2.18 “Calendar”)
  This is a partner-specific calendar that displays all events and tasks that are relevant within the partner.
- *Shelves* (see chapter 2.7 “Shelf”)
  These are the partner-specific shelves that have been created in the context of a partner.
- *All Documents* (see chapter 2.11 “Documents”)
  These are all partner-specific documents that have been generated within the partner.
- *All Action Items* (see chapter 2.17 “Action Items”)
  These are all partner-specific action items that have been generated within the partner.
- *All Open Points* (see chapter 2.15 “Open Points”)
  These are all partner-specific open points that have been generated within the partner.

2.6.2 Actions

The following actions are available to you within the partner:

- *Synchronize*
  Synchronizes the partner.
- *Define Logo*
  Defines a logo for the respective partner.
- *Show Project Usage*
  Shows the usage of the partner and all assigned shelves, where a window has been opened and corresponding usages can be viewed. This data can be exported using a CSV file.
- *Settings*
  This action opens the partner's settings.

2.6.3 Settings

You can make the following settings in a partner:

2.6.3.1 Tab “Partner”

You can make the following settings in the “Partner” tab:

- *Name*
  This is the partner’s name.
- *Partner ID*
  This field offers the possibility to provide a unique identification number for the partner.
- *Partner E-Mail Domains*
  This field allows you to specify a partner e-mail domain.
- *New Partner Who Replaces This Partner*
  This field allows you to replace a partner with a new partner. This new partner takes over all settings and compositions with the project.
- *Category*
  This is a category that can be stored for the partner. This category must be provided in the configuration, whereby the category must be derived from the partner class.
- *Subject*
  This is a subject for the partner.
- *Projects* (see chapter 2.4 “Projects”)
  Here you can view the projects that were referenced in the partner.
- *Reference Dates* (see chapter 2.26 “Reference Dates”)
  This field offers the option of storing any reference dates. This results in the following properties, which must be set:
  - *Name*
    This is the name of the reference date.
  - *Date*
    This field offers the option of setting a date for the reference date.
  - *Teamroom*
    This field shows the Teamroom of the reference date.

- *Default Process for Document Item Review*
  This field allows you to store processes to be used for reviewing document items.
- *Default Process for Document Review*
  This field allows you to store processes to be used for reviewing documents.
- *Default Process for Internal Document Review*
  This field allows you to store processes to be used for reviewing internal documents.
- *Use E-Mail Folders*
  This field enables the use of e-mail folders within partners.
- *Default Change Access for New E-Mail Folders*
  This field allows you to store persons who have change rights for newly created e-mail folders by default.
- *Default Read Access for New E-Mail Folders*
  This field allows you to store persons who have read access to newly created e-mail folders by default
- *Users With Change Access Can Create Directories*
  It can be activated here that users with change rights can create directories.
- *Users With Change Access Can Create E-Mail Folders*
  It can be activated here that users with change rights can create e-mail folders.
- *Visible to all App Users*
  Here you can activate that any settings are visible to all app users.
- *App Configurations for Controlling Restricted Access*
  This field only appears if the *Visible to all App Users* field has been selected. It can be activated that the app configurations for controlling the restricted rights are possible.
- *Send ICS Files With Notification E-Mails*
  ICS data transmission can be activated here.
- *Calendar URL*
  This field provides the URL to the partner's calendar (see chapter 2.18 "Calendar").

2.6.3.2 Tab "Advanced Settings"

You can make the following settings in the "Advanced settings" tab:

- *Default Form for New Directories*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the directory class accordingly.
- *Default Form for Registration to a Directory*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the directory class accordingly.
- *Default Form for New Document Code Parts*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the document code parts class.
- *Document Code Import*
  A document code import can be described here.
- *Document Code Parts*
  Corresponding document code parts can be generated. This results in the following properties, which must be set:

  - *Collaboration*
    This is the link to the current partner.
  - *Code*
    This is the code of the code part.
  - *Description*
    This is the description of the code.
  - *Type*
    This field allows you to specify the type of coding. A distinction can be made between "None", "Sequential Numbering", "Date" and "Meeting ID".
- *Default Form for Reference Dates*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the Reference data class.
- *Unique Document Numbers*
  This field offers the option of enabling unique numbers for documents.
- *Calculated Document Numbers*
  This field offers the possibility to enable calculated numbers for documents.
- *Default Form for Document Lists*
  This field offers the possibility to store a default form, which was previously specified in the configuration and can be used for the document list class.
- *Document Lists* (see chapter 2.10 "Document List")
  This field offers the option of providing document lists within a partner.
- *Unique Action Item Numbers* (see chapter 2.17 "Action Items")
  This field offers the possibility to enable unique numbers for action items.
- *Calculated Action Item Numbers*
  This field offers the possibility to enable calculated numbers for action items.
- *Default Form for New Action Item Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the action item list class.
- *Action Item Lists* (see chapter 2.16 "Action Item List")
  This field offers the possibility to provide action item lists within a partner.
- *Unique Open Point Number* (see chapter 2.15 "Open Points")
  This field offers the option of enabling unique numbers for open points.
- *Calculated Open Point Numbers*
  This field offers the option of enabling calculated numbers for open points.
- *Default Form for Open Point Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the open points list class.
- *Open Point Lists* (see chapter 2.14 "Open Points List")
  This field offers the option of providing open point lists within a partner.
- *Default Form for E-Mail Folders*
  A form that was created in the configuration and is derived from the e-mail folder class can be stored here.
- *Default Form for Registered E-Mails*
  A form that was created in the configuration and is derived from the registered e-mail class can be stored here.

- *Documents Export Template* (see chapter 2.11 “Documents”)
  This field offers the possibility to store a template for the export of documents.
- *Comments Export Template* (see chapter 2.24 “Comment”)
  This field offers the possibility to store a template for the export of comments.
- *Action Items Export Template* (see chapter 2.17 “Action Items”)
  This field offers the possibility to store a template for the export of action items.
- *Open Points Export Template* (see chapter 2.15 “Open Points”)
  This field offers the possibility to store a template for the export of open points.

2.7 Shelf

In a shelf, which consists of the composition of the project (see chapter 2.4 “Projects”) and the partner (see chapter 2.6 “Partner”), you can define the following possible areas, actions and settings, which are described in more detail below.

2.7.1 Areas

- *Shelf Documents*
  These are general documents that are relevant to the shelf. Directories (see chapter 2.8 “Directory”), documents (see chapter 2.11 “Documents”) with document lists (see chapter 2.10 “Document List”), action items (see chapter 2.17 “Action Items”) in action item lists (see chapter 2.16 “Action Item List”), open points (see chapter 2.15 “Open Points”) in open points lists (see chapter 2.14 “Open Points List”) and other documents can be generated.
- *Calendar* (see chapter 2.18 “Calendar”)
  This is a shelf-specific calendar that displays all appointments and tasks that are relevant within the partner (see chapter 2.6 “Partner”).
- *E-Mails*
  These are all emails that have been filed in this shelf.
- *E-Mail Folders* (see chapter 2.27 “E-Mail Folder”)
  This is a folder that contains all emails on the shelf.
- *Drafts*
  This is a list of draft letters, whereby the letters (see chapter 2.20 “Letters”) that have not been sent are included in this list.
- *Inbox*
  This is a list of letters (see chapter 2.20 “Letters”) received, whereby these were sent from a different shelf.
- *Sent Letters* (see chapter 2.20 “Letters”)
  This is a list of sent letters (see chapter 2.20 “Letters”), these were sent to another shelf.
- *All Documents* (see chapter 2.11 “Documents”)
  These are all shelf-specific documents, whereby these have also been created in the shelf.
- *Requested Documents* (see chapter 2.11 “Documents”)
  This is the list of requested documents. These documents have been linked to this shelf.
- *Expected Documents* (see chapter 2.11 “Documents”)
  This is the list of expected documents. This documents haven been linked to this shelf.
- *All Action Items* (see chapter 2.17 “Action Items”)
  These are all shelf-specific action items, whereby these have also been created in the shelf.

- *All Open Points* (see chapter 2.15 “Open Points”)
  These are all shelf-specific open points, whereby these have also been created in the shelf.
- *Cases* (see chapter 2.21 “Cases”)
  These are all cases relating to the shelf.
- *Correspondences* (see chapter 2.25 “Correspondence”)
  This list contains all objects relating to correspondence within the shelf.

2.7.2 Actions

The following actions are available to you within the shelf:

- *Create Letter* (see chapter 2.20 “Letters”)
  Opens a window in which the settings of the letter are displayed. This letter is stored in the shelf again.
- *Create Case (see chapter 2.21 “Cases”)*
  Opens a window in which the settings for the case are displayed. This process is stored in the shelf.
- *Synchronize*
  Synchronizes the shelf.
- *Define Logo*
  Defines a logo for the respective shelf.
- *Show Project Usage*
  Shows the usage of the shelves, whereby a window has been opened and corresponding usages can be viewed. This data can be exported using a CSV file.
- *Settings*
  This action opens the shelf settings.

2.7.3 Settings

You can make the following settings in a shelf:

2.7.3.1 Tab “Shelf”

You can make the following settings within the “Shelf” tab:

- *Project* (see chapter 2.4 “Projects”)
  This is the referenced project with which the shelf is related.
- *Partner* (see chapter 2.6 “Partner”)
  This is the referenced partner with which the shelf is related.
- *Partner Reference Number*
  This is the partner reference number, which identifies the partner (see chapter 2.6 “Partner”). This serves as additional information.
- *Project E-Mail*
  This is an e-mail address that is used as the main e-mail address for the project (see chapter 2.4 “Projects”).
- *Standard Users for Explicit Notifications*
  Here you can activate whether there should be a standard user for explicit notifications.

- *Additional Users for Explicit Notifications*
  This field is only visible if the default user for explicit notifications field has been activated. Multiple users, organizations and/or teams can be added for explicit notifications.
- *Category*
  This is a category that can be used for the shelf. This category must first be provided in the configuration and be applicable to the shelf class.
- *Subject*
  This is a subject that is valid for the respective shelf.
- *Use Letters*
  This determines whether or not letters are to be used within this shelf.
- *Use Correspondences for Related Letters*
  This determines whether or not an extra area should be used for the correspondence of the letters.
- *No Generated Names for Letters* (see chapter 2.20 “Letters”)
  Here you can activate whether names should be generated for letters.
- *No Automatic Ordinals for Letters*
  Here you can activate whether numbering should be generated for letters.
- *Use New Letter Number for Replies/Forwards*
  Here you can activate that the letter number can be used for replies/forwarding.
- *Use Explicit To: and Cc: Recipients*
  This field enables the activation of To and Cc recipients, which must be specified explicitly.
- *Use Primary To: Recipient Contact*
  This field enables the use of primary to-receiver contacts to be activated.
- *Allow Author Definition*
  The author definition can be activated here.
- *Use Letter Message Template* (see chapter 2.20 “Letters”)
  Here you can activate that a template should be used for messages in letters.
- *Letter Message Template*
  This field is only visible if the *Use Letter Message Template* field is activated. This field allows you to provide a template message for letters.
- *Send E-Mail Attachments Instead of Download Links*
  This field allows you to activate the use of attachments instead of links when sending.
  If this field is activated, document, action item or open point lists can be used to send the documents and comments they contain as a ZIP archive. These ZIP files each contain a reference to the original object - i.e. the associated action item, open point or document. The recipient can download and edit the contained files. Please note: Sending is only possible if the specified ‘Maximum size for lists of attachments (in KB)’ is not exceeded.
- *Maximum Size for List of Attachments (in KB)*
  This field is only visible if the *Send E-Mail Attachments Instead of Download Links* field is activated. This field allows you to specify the maximum KB for attachments.
- *Default Period for Public Link Validity of Letters* (see chapter 2.20 “Letters”)
  This field allows you to specify a default validity period for public links to letters.
- *Reference Dates* (see chapter 2.26 “Reference Dates”)
  This field offers the option of storing any reference date. This results in the following properties, which must be set:

  - *Name*
    This is the name of the reference date.
  - *Date*
    This field offers the option of setting a date for the reference date.
  - *Teamroom*
    This field shows the Teamroom of the reference date.
- *Directory Roles*
  This field allows you to activate directory roles that can be used in the respective shelf.
- *Default Process for Incoming Cases* (see chapter 2.21 “Cases”)
  This field allows you to store processes to be used for incoming cases.
- *Default Process for Outgoing Cases*
  This field allows you to store processes to be used for outgoing cases.
- *Default Process for Requesting Document Revision*
  This field allows you to store processes to be used for requesting new revisions.
- *Default Process for Document Item Review*
  This field allows you to store processes to be used for reviewing document items.
- *Default Process for Document Submission*
  This field allows you to store processes to be used for the transmission of documents.
- *Default Process for Document Review*
  This field allows you to store processes to be used for reviewing documents.
- *Default Process for Internal Document Review*
  This field allows you to store processes to be used for the review of internal documents.
- *Use E-Mail Folders* (see chapter 2.27 “E-Mail Folder”)
  This field allows you to activate e-mail folders.
- *Default Change Access for New E-Mail Folders*
  This field allows you to define users, organizational units, teams and external organizations as change authorizations for new email folders.
- *Default Read Access for New E-Mail Folders* (see chapter 2.27 “E-Mail Folder”)
  This field allows you to store users, organizational units, teams and external organizations as read permissions for new email folders.
- *Users With Change Access Can Create Directories*
  This field enables the creation of directories for users with modification rights.
- *Users With Change Access Can Create E-Mail Folders*
  This field enables the creation of e-mail folders for users with change rights.
- *Synchronize Permissions*
  Here you can activate whether the authorizations should be synchronized.
- *Visible to all App Users*
  Here you can activate that any settings are visible to all app users.
- *App Configurations for Controlling Restricted Access*
  This field only appears if the *Visible for All App Users* field has been selected. It can be activated that the app configurations for controlling the restricted rights are possible.
- *Send ICS Files With Notification E-Mails*
  ICS data transmission can be activated here.

- *Calendar URL*
  This field provides the URL to the calendar (see chapter 2.18 "Calendar") of the shelf (see chapter 2.7 "Shelf").
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.7.3.2 Tab "Advanced Settings"

You can make the following settings in the "Advanced settings" tab:

- *Default Form for New Directories*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the Directory class.
- *Default Form for Registration to a Directory*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the Directory class.
- *Default Form for New Document Code Parts*
  This field offers the possibility to store a default form, which was previously specified in the configuration and can be used for the document code parts class.
- *Document Code Import*
  A document code import can be described here.
- *Document Code Parts*
  Corresponding document code parts can be generated. This results in the following properties, which must be set:
  - *Collaboration*
    This is the link to the current project (see chapter 2.4 "Projects").
  - *Code*
    This is the code of the code part.
  - *Description*
    This is the description of the code.
  - *Type*
    This field allows you to specify the type of coding. A distinction can be made between "None", "Sequential Numbering", "Date" and "Meeting ID".
- *Default Form for Reference Dates*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the Reference date class.
- *Unique Document Numbers*
  This field offers the option of enabling unique numbers for documents.
- *Calculated Document Numbers*
  This field offers the possibility to enable calculated numbers for documents.
- *Default Form for Document Lists*
  This field offers the possibility to store a default form, which was previously specified in the configuration and can be used for the document list class.

- *Document Lists* (see chapter 2.10 “Document List”)
  This field offers the option of providing document lists within a shelf (see chapter 2.7 “Shelf”).
- *Unique Action item Numbers* (see chapter 2.17 “Action Items”)
  This field offers the possibility to enable unique numbers for action items.
- *Calculated Action Item Numbers*
  This field offers the possibility to enable calculated numbers for action items.
- *Default Form for New Action Item Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the action item list class.
- *Action Item Lists* (see chapter 2.16 “Action Item List”)
  This field offers the possibility to provide action item lists within a shelf (see chapter 2.7 “Shelf”).
- *Unique Open Point Numbers* (see chapter 2.15 “Open Points”)
  This field offers the option of enabling unique numbers for open points.
- *Calculated Open Point Numbers*
  This field offers the option of enabling calculated numbers for open points.
- *Default Form for Open Point Lists*
  This field offers the option of storing a default form that was previously specified in the configuration and can be used for the open points list class (see chapter 2.15 “Open Points”).
- *Open Point Lists* (see chapter 2.14 “Open Points List”)
  This field offers the option of providing open points lists within a shelf (see chapter 2.7 “Shelf”).
- *Default Form for New Letters*
  A form that was created in the configuration and is derived from the letter class can be stored here.
- *Default Form for E-Mails/Folders Registered as Letters*
  A form that was created in the configuration and is derived from the e-mail or folder class can be stored here.
- *Default Form for New Cases*
  A form that was created in the configuration and is derived from the case class can be stored here.
- *Default Form for New Comments*
  A form that was created in the configuration and derives from the comment class can be stored here.
- *Default Form for New Incoming Document Items*
  A form that was created in the configuration and is derived from the document item class can be stored here.
- *Default Form for New Outgoing Document Items*
  A form that was created in the configuration and is derived from the document item class can be stored here.
- *Default Form for New Correspondences*
  A form that was created in the configuration and is derived from the correspondence class can be stored here.

- *Default Form for New E-Mail Folders*
  A form that was created in the configuration and is derived from the e-mail folder class can be stored here.
- *Default Form for Registered E-Mails*
  A form that was created in the configuration and is derived from the email class can be stored here.
- *Documents Export Template*
  This field offers the possibility to store a template for the export of documents.
- *Comments Export Template*
  This field offers the possibility to store a template for the export of comments.
- *Action Items Export Template*
  This field offers the possibility to store a template for the export of action items.
- *Open Points Export Template*
  This field offers the possibility to store a template for the export of open points.

2.8 Directory

Directories can be created in areas (see chapter 2.5 "Area"), projects (see chapter 2.4 "Projects"), as well as in partners (see chapter 2.6 "Partner") and shelves (see chapter 2.7 "Shelf"). These represent an opportunity to create and manage corresponding document lists and various other objects within. In addition, corresponding cases (see chapter 2.21 "Cases") and letters (see chapter 2.20 "Letters") can be managed within a directory.

2.8.1 Actions

You will find the following actions within a directory:

- *Create Folder*
  Creates a folder and places it within the directory in the list of objects belonging to the directory.
- *Create Directory*
  Creates another directory and places it within the directory in the list of objects belonging to the directory.
- *Upload*
  Uploads an object and places it within the directory in the list of objects belonging to the directory.
- *Synchronize*
  Synchronizes the directory.
- *Define Logo*
  Defines a logo for the directory.
- *Define Description*
  Defines a description for the directory.
- *Settings*
  Opens the settings for the directory.

2.8.2 Settings

You can define the following settings for the directory.

2.8.2.1 Tab "Directory"

The following settings can be defined within this tab:

- *Name*
  This field describes the name of the corresponding directory.
- *Category*
  A corresponding category can be defined for the directory. This category must first be defined within the configuration.
- *Subject*
  A subject can be defined for the directory.
- *Collaboration*
  This field shows the corresponding collaboration in which the directory is located. This is the combination of the partner (see chapter 2.6 "Partner") and the project (see chapter 2.4 "Projects").
- *Use Directory as Category for Letters/Cases*
  This field allows you to use the directory as a category for letters/cases.

2.9 Configuration Data

This list on the configuration allows you to store objects that can be used within the entire configuration and also in the entire application.

2.10 Document List

Within an area (see chapter 2.5 "Area"), project (see chapter 2.4 "Projects"), partner (see chapter 2.6 "Partner") or a shelf (see chapter 2.7 "Shelf"), or a directory (see chapter 2.8 "Directory"), it is possible to create a document list. Corresponding documents can be created within this document list. These documents can be manipulated according to the document list settings. The document list thus serves as a "living place" for documents.

2.10.1 Areas

The following areas can be accessed within a document list:

- *Documents*
  Within the document list, there is a list where documents can be added.
- *Scopes* (see chapter 2.19 "Scopes & Packages")
  Within the document list, it is possible to define scopes of application.
- *Report Packages*
  Corresponding report packages can be stored within a document list.
- *Submission Packages*
  Corresponding submission packages can be stored in a document list.

2.10.2 Actions

The following actions can be performed within a document list:

- *Enable Text Wrapping*
  This action can be used to activate text breaks in the columns of the list.

- *Create Document*
  This action creates another document. A window opens which allows you to configure the properties of the document.
- *Create Scope*
  This action creates another scope, opening a window that allows you to configure the properties of the scope.
- *Create Report Package*
  This action creates another report package, opening a window that allows you to configure the properties of the report package.
- *Create Submission Package*
  This action creates another submission package, opening a window that allows you to configure the properties of the submission package.
- *Export Documents*
  It is possible to download the list of documents using WIN-Word-Excel.
- *Import Documents*
  It is possible to upload the list of documents using WIN-Word-Excel.
- *Properties*
  It is possible to change the properties of the list.

2.10.3 Properties

The following settings can be made within the document list.

2.10.3.1 Tab "Document List"

The following setting options are available within this tab:

- *Collaboration*
  This field shows the corresponding collaboration in which the directory (see chapter 2.8 "Directory") is located. This is the combination of the partner (see chapter 2.6 "Partner") and the project (see chapter 2.4 "Projects").
- *Name*
  This is the name of the document list.
- *Prefix for Document Names*
  This is the setting of a prefix for the name of the documents in the document list.
- *Initial Revision ("-", "A", "0", "00", "000", "1", "01" or "001")*
  Here you can set revisions for the respective documents in the document list. These revisions only apply to the documents within the document list.
- *No Automatic Document Numbers*
  Here you can deactivate the generation of automatic document numbers.
- *Pattern for Document Ordinal*
  Here you can set the pattern for ordinal numbers of a document.
- *Use Scopes* (see chapter 2.19 "Scopes & Packages")
  This field allows you to activate the use of scopes within the document list.
- *Require Scope*
  This field only appears if the *Use Scopes* field has been activated. This field offers the option of making scopes required within the document list.

- *Default Form for New Scopes*
  This field only appears if the *Use Scopes* field has been activated. A default form for new scopes of application can be stored here. This must first be created in the configuration.
- *Use Report Packages* (see chapter 2.19 “Scopes & Packages”)
  This field offers the option of activating the use of report packages within the document list.
- *Require Report Package*
  This field only appears if the *Use Report Packages* field has been activated. This field offers the option of making report packages required within the document list.
- *Default Form for New Report Packages*
  This field only appears if the *Use Report Packages* field has been activated. A default form for new report packages can be stored here. This must first be created in the configuration.
- *Use Submission Packages* (see chapter 2.19 “Scopes & Packages”)
  This field offers the option of activating the use of submission packages within the document list.
- *Require Submission Package*
  This field only appears if the *Use Submission Packages* field has been activated. This field offers the option of making submission packages required within the document list.
- *Default Form for New Submission Packages*
  This field only appears if the *Use Submission Packages* field has been activated. A default form for new submission packages can be stored here. This must first be created in the configuration.
- *Use Work Packages* (see chapter 2.19 “Scopes & Packages”)
  This field only appears if the *Use Submission Packages* field has been activated. This field offers the option of activating the use of work packages within the document list.
- *Require Work Package*
  This field only appears if the *Use Submission Packages* field and then the *Use Work Packages* field have been activated. This field offers the option of making the use of work packages within the document list mandatory.
- *Default Form for New Work Packages*
  This field only appears if the *Use Submission Packages* field and then the *Use Work Packages* field have been activated. A default form for new work packages can be stored here. This must first be created in the configuration.
- *Default Form for New Documents in a Document List*
  A default form for new documents can be stored here. This must first be created in the configuration.
- *Default Form for New Document Instances in a Document List*
  A default form for new document instances can be stored here. This must first be created in the configuration.
- *Manage Document State Manually*
  Here you can select whether the document status should be managed manually.
- *Standard Users for Explicit Notifications*
  Here you can select whether standard users can be set for explicit notifications.
- *Additional Users for Explicit Notifications*
  This field offers the possibility to add multiple users, organizations and/or teams for explicit notifications.

- *Assigned Action Item Lists* (see chapter 2.16 "Action Item List")
  Any action item lists can be linked here.
- *Assigned Open Point Lists* (see chapter 2.14 "Open Points List")
  Any open point lists can be linked here.
- *Regular Expression to Identify Document Items*
  An Expression for the identification of document entries can be stored here.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.10.3.2 Tab "Export"

The following setting options are available within this tab:

- *Use Specific Columns for Export*
  Here you can select whether special columns should be used for the document export.
- *Export Template*
  This is a template for exporting documents within the document list. This field gets hidden if the *Use Specific Columns for Export* field has been activated.
- *Use Extended Columns Selections*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. Additional properties can be added to the Excel export.
- *Specific Columns for Export*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. The corresponding properties can be added to the Excel export.
- *Generate Link to Document in Last Column* (see chapter 2.15 "Open Points")
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. The generation of a link to documents in the last column can be activated here.
- *Export Template (Specific Columns)*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. In this field different templates can be created and chosen for exporting.

2.11 Documents

It is possible to create documents within a document list. Corresponding document entries can be created within these documents.

2.11.1 Areas

The following areas can be reached within a document:

- *Document Items*
  These are all objects that belong to the document.
- *Comment Items* (see chapter 2.24 "Comment")
  These are all comments that have been added to the document.
- *Aggregated Comments Log*
  This is an aggregated list of comments (see chapter 2.24 "Comment") that have been added to the document.

- *Aggregated Action Items* (see chapter 2.17 “Action Items”)
  These are all action items that have been assigned to the document.
- *Aggregated Open Points* (see chapter 2.15 “Open Points”)
  These are all open points that have been assigned to the document.
- *Revisioned Documents*
  These are all generated revisions of the document.
- *Subordinated Documents*
  These are referenced documents that are stored in the same document list.
- *Referencing Letters* (see chapter 2.20 “Letters”)
  These are all letters referenced by the documents.
- *Remarks*
  These are all remarks in the document.
- *Internal Remarks*
  These are all internal remarks in the document.

2.11.2 Actions

You can perform the following actions within the document:

- *Attach to Letter*
  Adds the document to the selected letter as an attachment.
- *Add Remark*
  Adds a remark to the document.
- *Add Internal Remark*
  Adds an internal remark to the document.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create New Revision*
  Creates a revision of the document and places it in the list of revised documents.
- *Close Document*
  Revisions the document and closes it afterwards.
- *Reopen Document*
  Opens a closed document in a new revision.
- *Revoke Document Revision*
  Revokes the last revision of the document.
- *Create Action Item*
  Creates an action item within a document.
- *Create Open Point*
  Creates an open point within a document.
- *Start Process*
  Opens a dialog in which various ad hoc processes or predefined processes can be started.
- *Request Document*
  Requests the document by the supplier, if one is set on the document. If comment entries are available, a new dialog opens which allows you to select and send them.

- *Request Document Adjustment*
  Requests a document adjustment within the same revision of the document and applies the according state and signature. Remarks provided will be transferred to the supplier.
- *Request Document Correction*
  Requests a document correction in a new revision and applies the according state and signature. Remarks provided will be transferred to the supplier.
- *Review*
  Opens the properties of the document to check them. If this document contains document entries, its PDF previews are displayed in a split view. By pressing the "*Switch Mode*" button, text can also be marked in this PDF preview and action item (see chapter 2.17 "Action Items") and open points (see chapter 2.15 "Open Points") can be created from it.
- *Set as Reviewed*
  Sets the document status of the document to "Reviewed".
- *Properties*
  Opens the properties of the document. This opens a window that allows you to configure the properties of the document.

2.11.3 Properties

You can make the following settings for the document:

2.11.3.1 Tab "Document"

The following settings can be defined within this tab:

- *Document List* (see chapter 2.10 "Document List")
  The document list in which the document is located can be changed. This property is prefilled by the current document list.
- *Shelf* (see chapter 2.7 "Shelf")
  This is the displayed shelf in which the document is located.
- *Scope* (see chapter 2.19 "Scopes & Packages")
  If this has been specified in the document list, a scope must be defined.
- *Report Package* (see chapter 2.19 "Scopes & Packages")
  If this has been specified in the document list, a report package must be stored.
- *Submission Package* (see chapter 2.19 "Scopes & Packages")
  If specified in the document list, a submission package must be stored.
- *Work Package* (see chapter 2.19 "Scopes & Packages")
  If this has been specified in the document list, a work package must be stored.
- *Document Number*
  This field shows the current document number of the document. The number is generated once when the document is created. If the document is re-registered in another document list, it receives a new number.
- *State*
  This field shows the current status of the document.
- *Document Title*
  The document title of the document can be displayed here.

- *Revision*
  This field shows the current revision of the document.
- *Supplier Document Number*
  The document number for the supplier can be set here.
- *Supplier Document Revision*
  The document revision for the supplier can be set here.
- *Supplier Document Title*
  The document title for the supplier can be set here.
- *Customer Document Number*
  The document number for the customer can be set here.
- *Customer Document Revision*
  The document revision for the customer can be set here.
- *Customer Document Title*
  The document title for the customer can be set here.
- *Subject*
  The subject of the document can be set here.
- *Owner*
  A person responsible for the document can be set here.
- *Supplier*
  A supplier can be set for the document.
- *Recipients*
  Here you can specify the recipients of the document.
- *Interval*
  A interval can be set for the document. In combination with the operator and the reference date, the resulting date is set as the provision due date/ adjusted provision due date.
- *Operator*
  A operator can be set for the document. In combination with the interval and the reference date, the resulting date is set as the provision due date/ adjusted provision due date.
- *Reference Date*
  A reference date (see chapter 2.26 “Reference Dates”), which has to be defined on the project (see chapter 2.4 “Projects”), area (see chapter 2.5 “Area”), partner (see chapter 2.6 “Partner”) or shelf (see chapter 2.7 “Shelf”); can be set for the document. In combination with the interval and the operator, the resulting date is set as the provision due date/ adjusted provision due date. The reference date can also be used alone, without the interval and the operator.
- *Provision Due Date*
  A provision due date can be set for the document, which should be provided by the supplier. This can only be set at the first time, when no date was set before.
- *Adjusted Provision Due Date*
  A adjusted provision due date can be set for the document, which should be provided by the supplier.
- *Consolidated Provision Due Date*
  The currently valid provision due date for the document, which should be provided by the supplier, is displayed. This date is used for the calculation of the due icons.

- *Interval*
  A interval can be set for the document. In combination with the operator and the reference date, the resulting date is set as the submission due date/ adjusted submission due date.
- *Operator*
  A operator can be set for the document. In combination with the interval and the reference date, the resulting date is set as the submission due date/ adjusted submission due date.
- *Reference Date*
  A reference date (see chapter 2.26 “Reference Dates”), which has to be defined on the project (see chapter 2.4 “Projects”), area (see chapter 2.5 “Area”), partner (see chapter 2.6 “Partner”) or shelf (see chapter 2.7 “Shelf”); can be set for the document. In combination with the interval and the operator, the resulting date is set as the submission due date/ adjusted submission due date. The reference date can also be used alone, without the interval and the operator.
- *Submission Due Date*
  A submission due date can be set for the document, which you should submit to all recipients. This can only be set at the first time, when no date was set before.
- *Adjusted Submission Due Date*
  A adjusted submission due date can be set for the document, which you should submit to all recipients.
- *Consolidated Submission Due Date*
  The currently valid submission due date for the document, which you should submit to all recipients, is displayed. This date is used for the calculation of the due icons.
- *Document Instance Received on/at*
  This is the date of receipt of the document instance that was received by the supplier.
- *Initial Letter* (see chapter 2.20 “Letters”)
  A first letter can be set for the document.
- *Closing Letter*
  A closing letter can be set for the document.
- *Requested Document Instance*
  The requested instance of the document is displayed.
- *Associated Document Item IDs*
  Several IDs can be stored for the document items to be assigned.
- *Default Form for New Document Items*
  This is a form that has been set up in the configuration and is used accordingly for document items within the document. This entry is also used for any derived document instances
- *Parent Document*
  A superordinate document can be stored here.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.
- *Manual Entries*
  Hereby chapters (see chapter 2.32 “Chapters”) in which the document should be part of can be entered here.

2.11.3.2 Tab “Action Items”

The following settings can be made within this tab:

- *Action Items* (see chapter 2.17 “Action Items”)
  Various associated action items can be added or created.

2.11.3.3 Tab “Open Points”

The following settings can be made within this tab:

- *Open Points* (see chapter 2.15 “Open Points”)
  Various associated open points can be added or created.

2.11.3.4 Tab “Referencing Letters”

The following settings can be made within this tab:

- *Referencing Letters* (see chapter 2.20 “Letters”)
  This field shows the referencing letters in a list.

2.11.3.5 Tab “Remarks”

The following settings can be made within this tab:

- *Enter Remark*
  This field offers the possibility to add a corresponding note to the document.
- *Remarks*
  This field shows the previous annotations that have been added to the document.

2.11.3.6 Tab “Internal Remarks”

The following settings can be made within this tab:

- *Enter Internal Remark*
  This field offers the possibility to add an internal note to the document.
- *Internal Remarks*
  This field shows the previous internal annotations that have been added to the document.
- *Internal Remarks Details*
  This list shows the internal annotations that have been added to the document so far.

2.12 Document Instance

If a document (see chapter 2.11 “Documents”) has been requested, a document instance is created within the linked partner (see chapter 2.6 “Partner”)in the list of requested documents using a background task. This document instance has the following areas, actions and settings.

2.12.1 Areas

The following areas can be accessed within a document instance:

- *Document Items*
  These are all objects that belong to the document instance.

- *Comment Items* (see chapter 2.24 “Comment”)
  These are all comments that have been added to the document instance.
- *Aggregated Comments Log*
  This is an aggregated list of comments (see chapter 2.24 “Comment”) that have been added to the document instance.
- *Aggregated Action Items* (see chapter 2.17 “Action Items”)
  These are all action items that have been assigned to the document instance.
- *Aggregated Open Points* (see chapter 2.15 “Open Points”)
  These are all open points that have been assigned to the document instance.
- *Revisioned Document Instances*
  These are all generated revisions of the document instance.
- *Remarks*
  These are all remarks of the document instance.

2.12.2 Actions

You can perform the following actions within the document instance.

- *Add Remarks*
  This action offers the possibility to add a remark to the document instance.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Submit Document*
  This action sends the document to the requester.
- *Open Feedbacks*
  This action opens a history of the requester's feedback relating to specific revisions.
- *Create Action Item* (see chapter 2.17 “Action Items”)
  This action allows you to create an action item, which is then added to the list of aggregated action items. Clicking on this action opens a window in which all the necessary settings relating to the action item can be made.
- *Create Open Point* (see chapter 2.15 “Open Points”)
  This action allows you to create an open point; this open point is stored in the list of aggregated open points. Clicking on this action opens a window in which all the necessary settings relating to the open point can be made.
- *Properties*
  This action allows you to manipulate the document instance-specific properties. This opens a window that shows the settings of the document instance.

2.12.3 Properties

The following properties can be found or manipulated within the document instance.

2.12.3.1 Tab “Document Instance”

You can find the following settings within this tab:

- *Scope*
  This field shows the scope selected in the document (see chapter 2.11 “Documents”).

- *Report Package*
  This field shows the report package selected in the document.
- *Submission Package*
  This field shows the submission package selected in the document.
- *Work Package*
  This field shows the work package selected in the document.
- *Document Number*
  This field shows the document number generated in the document.
- *State*
  This field shows the state of the document instance.
- *Document Title*
  This field shows the document title created in the document.
- *Revision*
  This field shows the revision created in the document.
- *Supplier Document Number*
  This field offers the option of providing a document number for the supplier.
- *Supplier Document Revision*
  This field offers the option of providing a document revision for the supplier.
- *Supplier Document Title*
  This field offers the possibility to provide a document title for the supplier.
- *Supplier*
  This field shows the supplier stored in the document.
- *Due Date*
  This field shows the due date selected in the document.
- *Adjusted Due Date*
  This field shows the adjusted due date selected in the document.
- *Consolidated Due Date*
  The currently valid due date for the document is displayed.
- *Submitted on/at*
  This is the date, whereby the document instance was submitted.
- *Feedbacks*
  A history of the requestor's feedback is displayed.

2.12.3.2 Tab “Action Items”

You can find the following settings within this tab:

- *Action Items* (see chapter 2.17 “Action Items”)
  This list offers the possibility to store or create corresponding action items for the document instance.

2.12.3.3 Tab “Open Points”

You can find the following settings within this tab:

- *Open Points* (see chapter 2.15 “Open Points”)
  This list offers the option of storing or creating corresponding open points for the document instance.

2.12.3.4 Tab “Remarks”

You can find the following settings within this tab:

- *Enter Remark*
  This field offers the possibility to add a remark to the document instance.
- *Remarks*
  Here, you can edit all remarks assigned to the document instance.

2.13 Document Sleeve

If a document (see chapter 2.11 “Documents”) has a recipient, a document sleeve is created within the linked partner’s shelf (see chapter 2.7 “Shelf”) in the list of expected documents using a background task. This document sleeve is an information for the recipient, that there will come this specific document in the near future. The document sleeve keeps track of the said document, and all its iterations throughout a letter correspondence.

2.14 Open Points List

Within an area (see chapter 2.5 “Area”), project (see chapter 2.4 “Projects”), partner (see chapter 2.6 “Partner”) or a shelf (see chapter 2.7 “Shelf”), or a directory (see chapter 2.8 “Directory”) , it is possible to create an open points list. Corresponding open points (see chapter 2.15 “Open Points”) can be created within this open points list. These open points can be manipulated according to the settings of the open points list. The open points list thus serves as a "living place" for open points.

2.14.1 Areas

The following areas can be achieved within an open points list:

- *Open Points* (see chapter 2.15 “Open Points”)
  Within the open points list, there is a list where open points can be added.
- *Scope* (see chapter 2.19 “Scopes & Packages”)
  Within the open points list, it is possible to define scopes.
- *Report Package* (see chapter 2.19 “Scopes & Packages”)
  Corresponding report packages can be stored within an open points list.
- *Submission Package* (see chapter 2.19 “Scopes & Packages”)
  Corresponding submission packages can be stored in an open points list.

2.14.2 Actions

The following actions can be achieved within an open points list:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.

- *Create Open Point* (see chapter 2.15 “Open Points”)
  This action creates another open point. This opens a window that allows you to configure the properties of the open point.
- *Create Submission Package*
  This action creates another submission package, opening a window that allows you to configure the properties of the submission package.
- *Properties*
  It is possible to change the properties of the list.

2.14.3 Properties

The following settings can be made as part of the open points list:

2.14.3.1 Tab “Open Point List”

You can find the following settings within this tab:

- *Collaboration*
  This field shows the corresponding collaboration in which the directory (see chapter 2.8 “Directory”) s located. This is the combination of the partner (see chapter 2.6 “Partner”) and the project (see chapter 2.4 “Projects”).
- *Name*
  This is the name of the open points list.
- *Prefix for Names of Open Points*
  This is the setting of a prefix for the name of the open points (see chapter 2.15 “Open Points”), which are located within the open points list.
- *Initial Revision (“-“, “A“, “0“, “00“, “000“, “1“, “01“ or “001“)*
  Here you can set revisions for the respective open points in the open points list. These revisions only apply to the open points within the open points list.
- *No Automatic Open Point Numbers*
  Here you can deactivate the generation of automatic numbers for open points.
- *Pattern for Open Point Ordinal*
  Here you can set the pattern for ordinal numbers of an open point.
- *Use Scopes* (see chapter 2.19 “Scopes & Packages”)
  This field offers the option of activating the use of scopes within the open points list.
- *Require Scope*
  This field only appears if the *Use Scopes* field has been activated. This field offers the option of making scopes required within the open points list.
- *Default Form for New Scopes*
  This field only appears if the *Use Scopes* field has been activated. A standard form for new scopes of application can be stored here. This must first be created in the configuration.
- *Use Report Packages* (see chapter 2.19 “Scopes & Packages”)
  This field offers the option of activating the use of report packages within the open points list.
- *Require Report Package*
  This field only appears if the *Use Report Packages* field has been activated. This field offers the option of making report packages required within the open points list.

- *Default Form for New Report Packages*
  This field only appears if the *Use Report Packages* field has been activated. A standard form for new report packages can be stored here. This must first be created in the configuration.
- *Use Submission Packages* (see chapter 2.19 “Scopes & Packages”)
  This field offers the option of activating the use of submission packages within the open points list.
- *Require Submission Packages*
  This field only appears if the *Use Submission Packages* field has been activated. This field offers the option of making submission packages required within the open points list.
- *Default Form for New Submission Packages*
  This field only appears if the *Use Submission Packages* field has been activated. A standard form for new submission packages can be stored here. This must first be created in the configuration.
- *Use Work Packages* (see chapter 2.19 “Scopes & Packages”)
  This field only appears if the *Use Submission Packages* field has been activated. This field offers the option of activating the use of work packages within the open points list.
- *Require Work Package*
  This field only appears if the *Use Submission Packages* field and then the Use work packages field have been activated. This field offers the option of making the use of work packages within the open points list mandatory.
- *Default Form for New Work Packages*
  This field only appears if the *Use Submission Packages* field and then the Use work packages field have been activated. A standard form for new work packages can be stored here. This must first be created in the configuration.
- *Default Form for New Open Points*
  A default form can be stored for new open points.
- *Manage Open Point State Manually*
  Here you can select whether the open points status should be managed manually.
- *Standard Users for Explicit Notifications*
  Here you can select whether standard users can be set for explicit notifications.
- *Additional Users for Explicit Notifications*
  This field offers the possibility to add multiple users, organizations and/or teams for explicit notifications.
- *Assigned Document Lists*
  Any document lists can be linked here.
- *Assigned Action Item Lists*
  Any action item lists can be linked here.
- *Regular Expression to Identify Document Items*
  A expression can be stored here to identify document entries.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.14.3.2 Tab “Export”

You can find the following settings within this tab:

- *Use Specific Columns for Export*
  Here you can select whether special columns should be used for the open points export.
- *Export Template*
  This is a template for exporting open points within the open points list. This field gets hidden if the *Use Specific Columns for Export* field has been activated.
- *Use Extended Columns Selection*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. Additional properties can be added to the Excel export.
- *Specific Columns for Export*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. The corresponding properties can be added to the Excel export.
- *Generate Link to Open Point in Last Column* (see chapter 2.15 "Open Points")
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. The generation of a link to open points in the last column can be activated here.
- *Export Template (Specific Columns)*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. In this field different templates can be created and chosen for exporting.

2.15 Open Points

It is possible to create open points within an open points list (see chapter 2.14 "Open Points List"). Corresponding objects can be created within these open points, which are assigned to these open points.

2.15.1 Areas

You can find the following areas within the open point:

- *Open Point* (see chapter 2.15 "Open Points")
  This is an overview of the settings for the open point.
- *Description*
  This is a description of the open point.
- *Document Items*
  These are all objects that are assigned to the open point.
- *Comment Items* (see chapter 2.24 "Comment")
  These are comment items, whereby the comments belong to the open item.
- *Aggregated Comments Log*
  This is a list of comments that belong to the open point.
- *Registered E-Mails* (see chapter 2.28 "Registered E-Mail")
  This are all the registered E-Mails within the open point.
- *Documents* (see chapter 2.11 "Documents")
  These are all documents that are assigned to the open point.
- *Document Instances* (see chapter 2.12 "Document Instance")
  These are all document instances that are assigned to the open point.
- *Action Items* (see chapter 2.17 "Action Items")
  These are all action items that belong to the open item.

- *Revisioned Open Points*
  These are all revisions of the open point.
- *Referencing Letters* (see chapter 2.20 “Letters”)
  These are all referencing letters.
- *Remarks*
  These are all the remarks in the document.
- *Internal Remarks*
  These are all internal remarks in the document.

2.15.2 Actions

You can find the following actions within the open point:

- *Attach To Letter*
  Adds the document to the selected letter as an attachment.
- *Add Remark*
  Adds a remark to the open point.
- *Add Internal Remark*
  Adds an internal remark to the open point.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create New Revision*
  Creates a new revision of the open point and places it in the list of revised open points.
- *Create Action Item*
  This is the ability to create a new action item within an open point.
- *Start Process*
  Opens a dialog in which various ad hoc processes or predefined processes can be started.
- *Properties*
  Opens a window in which any settings relating to the open point can be made.

2.15.3 Properties

You can make the following settings for the open point:

2.15.3.1 Tab “Open Point”

You can view and make the following settings in the "Open point" tab:

- *Open Point List* (see chapter 2.14 “Open Points List”)
  The open points list in which the open point is located can be changed. This property is prefilled by the current open points in the open points list.
- *Shelf* (see chapter 2.7 “Shelf”)
  This is the displayed shelf in which the open point is located.
- *Scope* (see chapter 2.19 “Scopes & Packages”)
  If specified in the open points list, a scope must be defined.
- *Report Package* (see chapter 2.19 “Scopes & Packages”)
  If specified in the open points list, a report package must be stored.

- *Submission Package* (see chapter 2.19 “Scopes & Packages”)
  If specified in the open points list, a submission package must be deposited.
- *Work Package* (see chapter 2.19 “Scopes & Packages”)
  If specified in the open points list, a work package must be defined.
- *Open Point Number*
  This field shows the current number of the open point. The number is generated once when the open point is created. If the open point is re-registered in another open point list, it receives a new number.
- *State*
  This field shows the current status of the open point.
- *Open Point Title*
  The title of the open point can be displayed here.
- *Revision*
  This field shows the current revision of the open point.
- *Detailed Description*
  This field offers the option of adding a detailed description of the open point.
- *Owner*
  A person responsible for the open point can be appointed.
- *Date Initiated*
  A date can be entered here. This describes the time at which the open point was recorded.
- *Due Date*
  A due date can be set for the open point.
- *Reference Date*
  A reference date can be set for the document.
- *Adjusted Due Date*
  An adjusted due date can be set for the open item.
- *Consolidated Due Date*
  The currently valid due date for the document is displayed.
- *Associated Document Item IDs*
  Several IDs can be stored for the document entries to be assigned.
- *Default Form for New Document Items*
  This is a form that was set up in the configuration and is used accordingly for document items within the document. This entry is also used for any derived document instances.
- *Source*
  This field shows the source from which the open point was created. This field is only displayed if the open point was created on the basis of another object.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.15.3.2 Tab “Documents”

You can find the following settings within this tab:

- *Documents* (see chapter 2.11 “Documents”)
  Various associated documents can be added here.

2.15.3.3 Tab “Action Items”

You can find the following settings within this tab:

- *Action Items* (see chapter 2.17 “Action Items”)
  Various associated action items can be added or created.

2.15.3.4 Tab “Referencing Letters”

You can find the following settings within this tab:

- *Referencing Letters* (see chapter 2.20 “Letters”)
  This field shows the referencing letters in a list.

2.15.3.5 Tab “Remarks”

You can find the following settings within this tab:

- *Enter Remark*
  This field offers the possibility to add a remark to the open point.
- *Remarks*
  This field shows the remarks that have been added to the open point so far.

2.15.3.6 Tab “Internal Remarks”

You can find the following settings within this tab:

- *Enter Internal Remark*
  This field offers the possibility to add an internal remark to the open point.
- *Internal Remarks*
  This field shows the previous internal remarks that have been added to the open point.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the open item so far.

2.16 Action Item List

Within an area (see chapter 2.5 “Area”), project (see chapter 2.4 “Projects”), partner (see chapter 2.6 “Partner”) or a shelf (see chapter 2.7 “Shelf”), or a directory (see chapter 2.8 “Directory”), it is possible to create an action item list. Corresponding action items (see chapter 2.17 “Action Items”) can be created within this action list. These action items can be manipulated according to the settings of the action list. The action list thus serves as a “living place” for action items.

2.16.1 Areas

The following areas can be achieved within a list of action items:

- *Action Items* (see chapter 2.17 “Action Items”)
  Within the action items list, there is a list where action items can be added.
- *Scopes* (see chapter 2.19 “Scopes & Packages”)
  Within the list of action items, it is possible to define scopes.
- *Report Packages* (see chapter 2.19 “Scopes & Packages”)
  Corresponding report packages can be stored within an action item list.

- *Submission Packages* (see chapter 2.19 “Scopes & Packages”)
  Corresponding submission packages can be stored in a list of action items.
- *Meetings* (see chapter 2.22 “Meetings”)
  Corresponding meetings can be stored in an action item list.

2.16.2 Actions

The following actions can be achieved within an action item list:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create Action Item* (see chapter 2.17 “Action Items”)
  This action creates another action item. A window opens that allows you to configure the properties of the action item.
- *Create Scope*
  This action creates another scope. A window opens that allows you to configure the properties of the scope.
- *Create Report Package*
  This action creates another report package. A window opens which allows you to configure the properties of the report package.
- *Create Submission Package*
  This action creates another submission package. This opens a window that allows you to configure the properties of the submission package.
- *Create Meeting*
  This action creates another meeting. A window opens which allows you to configure the properties of the meeting.
- *Properties*
  This action calls up the properties of an action item list, which can be manipulated within the dialog that appears.

2.16.3 Properties

The following settings can be made within the action item list:

2.16.3.1 Tab “Action Item List”

- *Collaboration*
  This field shows the corresponding collaboration in which the directory (see chapter 2.8 “Directory”) is located. This is the combination of the partner (see chapter 2.6 “Partner”) and the project (see chapter 2.4 “Projects”).
- *Name*
  This is the name of the action item list.
- *Prefix for Action Item Numbers*
  This involves setting a prefix for the name of the action items in the action items list.
- *Initial Revision (“-“, “A“, “0“, “00“, “000“, “1“, “01“ or “001“)*
  This allows you to set revisions for the respective action items (see chapter 2.17 “Action Items”) in the action list. These revisions only apply to the action items within the action list.

- *No Automatic Action Item Numbers*
  This allows you to deactivate the generation of automatic numbers for action items.
- *Pattern for Action Item Ordinal*
  This allows you to set the ordinal number pattern for an action item.
- *Use Scope* (see chapter 2.19 “Scopes & Packages”)
  This field allows you to activate the use of scopes within the action item.
- *Require Scopes*
  This field only appears if the *Use Scopes* field has been activated. This field offers the option of making scopes of application required within the action item list.
- *Default Form for New Scopes*
  This field only appears if the *Use Scopes* field has been activated. A default form for new scopes of application can be stored here. This must first be created in the configuration.
- *Use Report Packages* (see chapter 2.19 “Scopes & Packages”)
  This field offers the option of activating the use of report packages within the action items list.
- *Require Report Packages*
  This field only appears if the *Use Report Packages* field has been activated. This field offers the option of making report packages required within the action item list.
- *Default Form for Report Package*
  This field only appears if the *Use Report Packages* field has been activated. A default form for new report packages can be stored here. This must first be created in the configuration.
- *Use Submission Packages* (see chapter 2.19 “Scopes & Packages”)
  This field offers the possibility to activate the use of submission packages within the action items list.
- *Require Submission Packages*
  This field only appears if the *Use Submission Packages* field has been activated. This field offers the option of making submission packages required within the action item list.
- *Default Form for Submission Package*
  This field only appears if the *Use Submission Packages* field has been activated. A default form for new submission packages can be stored here. This must first be created in the configuration.
- *Use Work Packages* (see chapter 2.19 “Scopes & Packages”)
  This field only appears if the *Use Submission Packages* field has been activated. This field allows you to activate the use of work packages within the action items list.
- *Require Work Packages*
  This field only appears if the *Use Submission Packages* field and then the *Use Work Packages* field have been activated. This field offers the option of making the use of work packages within the action item list mandatory.
- *Default Form for Work Packages*
  This field only appears if the *Use Submission Packages* field and then the *Use Work Packages* field have been activated. A default form for new work packages can be stored here. This must first be created in the configuration.
- *Use Meetings* (see chapter 2.22 “Meetings”)
  This field offers the possibility to activate the use of meetings within the action items list.

- *Require Meeting*
  This field only appears if the *Use Meetings* field has been activated. This field offers the option of making meetings necessary within the action item list.
- *Default Form for New Meetings*
  This field only appears if the *Use Meetings* field has been activated. A default form for new meetings can be stored here. This must first be created in the configuration.
- *Use Meeting Sequences* (see chapter 2.23 “Meeting Sequences”)
  This field only appears if the *Use Meetings* field has been activated. This field offers the option of activating the use of meeting sequences within the action items list.
- *Require Meeting Sequence*
  This field only appears if the *Use Meetings* field and then the *Use Meeting Sequence* field have been activated. This field offers the option of making the use of meeting sequences mandatory within the action item list.
- *Default Form for New Meeting Sequences*
  This field only appears if the *Use Meetings* field and then the *Use Meeting Sequence* field have been activated. This field offers the option of making the use of meeting sequences mandatory within the action item list.
- *Default Form for New Action Items*
  A default form can be stored for new action items.
- *Standard Users for Explicit Notifications*
  Here you can select whether standard users can be set for explicit notifications.
- *Additional Users for Explicit Notifications*
  This field offers the possibility to add multiple users, organizations and/or teams for explicit notifications.
- *Assigned Document Lists* (see chapter 2.10 “Document List”)
  Any document lists can be linked here.
- *Assigned Open Point Lists* (see chapter 2.14 “Open Points List”)
  Any open point lists can be linked here.
- *Regular Expression to identify Document Items*
  An expression for identifying document entries can be stored here.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.16.3.2 Tab “Export”

You can find the following settings within this tab:

- *Use Specific Columns for Export*
  Here you can select whether special columns should be used for the action item export.
- *Export Template*
  This is a template for exporting action items within the action items list. This field gets hidden if the *Use Specific Columns for Export* field has been activated.
- *Use Extended Columns Selection*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. Additional properties can be added to the Excel export.

- *Specific Columns for Export*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. The corresponding properties can be added to the Excel export.
- *Generate Link to Action Item in Last Column* (see chapter 2.17 “Action Items”)
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. The generation of a link to action items in the last column can be activated here.
- *Export Template (Specific Columns)*
  This field only becomes visible if the *Use Specific Columns for Export* field has been activated. In this field different templates can be created and chosen for exporting.

2.17 Action Items

Within an action item list (see chapter 2.16 “Action Item List”), it is possible to create action items. Corresponding objects can be created within these action items, which are assigned to these action items. These action items contain the following areas, actions and settings.

2.17.1 Areas

The following areas can be expected within the action item:

- *Action Item*
  This is an overview of the settings for the action item.
- *Description*
  This is a description of the action item.
- *Document Items*
  These are all objects that are assigned to the action item.
- *Comment Items* (see chapter 2.24 “Comment”)
  These are commentary entries, whereby the comments belong to the action item.
- *Aggregated Comments Log*
  This is a list of comments (see chapter 2.24 “Comment”) that belong to the action item.
- *Documents* (see chapter 2.11 “Documents”)
  These are all documents that are assigned to the action item.
- *Document Instances* (see chapter 2.12 “Document Instance”)
  These are all document instances that are assigned to the action item.
- *Open Points* (see chapter 2.15 “Open Points”)
  These are all open items that are part of the action item.
- *Revisioned Action Items*
  These are all revisions to the action item.
- *Referencing Letters* (see chapter 2.20 “Letters”)
  These are all referencing letters.
- *Remarks*
  These are all the remarks in the document.
- *Internal Remarks*
  These are all internal remarks in the document.

2.17.2 Actions

The following actions can be expected within the action item:

- *Attach to Letter*
  Adds the document to the selected letter as an attachment.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create New Revision*
  Creates a new revision of the action item and places it in the list of revised action items.
- *Create Open Point*
  Creates a new open point and places it in the open point list.
- *Start Process*
  Opens a dialog in which various ad hoc processes or predefined processes can be started.
- *Properties*
  Opens a window where any settings relating to the action item can be made.

2.17.3 Properties

You can make the following settings for the action item:

2.17.3.1 Tab “Action Item”

You can view and make the following settings in the "Action item" tab:

- *Action Item List* (see chapter 2.16 “Action Item List”)
  The action item list in which the action item is located can be changed. This property is prefilled by the current action item list.
- *Shelf* (see chapter 2.7 “Shelf”)
  This is the displayed shelf in which the action item is located.
- *Scope* (see chapter 2.19 “Scopes & Packages”)
  If specified in the action item list (see chapter 2.16 “Action Item List”), a scope must be defined.
- *Report Package* (see chapter 2.19 “Scopes & Packages”)
  If specified in the action item list, a report package must be stored.
- *Submission Package* (see chapter 2.19 “Scopes & Packages”)
  If specified in the action item list, a submission package must be deposited.
- *Work Package* (see chapter 2.19 “Scopes & Packages”)
  If specified in the action item list, a work package must be defined.
- *Meeting* (see chapter 2.22 “Meetings”)
  If specified in the action item list, a meeting must be created.
- *Meeting Sequence* (see chapter 2.23 “Meeting Sequences”)
  If specified in the action item list, a meeting sequence must be created.
- *Meeting Sequence ID*
  This field allows you to specify a meeting sequence ID.
- *Item ID*
  This field allows you to specify an item ID.

- *Action Item Number*
  This field shows the current number of the action item. The number is generated once when the action item is created. If the action item is re-registered in another action item list, it receives a new number.
- *Type*
  This field allows you to store a type for the action item, whereby a distinction can be made between action, decision and information.
- *Subject*
  A subject can be specified for the corresponding action item.
- *Detailed Description*
  This field is used to store a detailed description of the action item.
- *Owner*
  A person responsible for the action item can be appointed.
- *Status*
  This field shows the state of the action item, whereby a distinction can be made between “Open”, “In progress”, “Completion requested”, “Completed” and “Revised”.
- *Date Initiated*
  A date can be entered here. This describes the time at which the action item was recorded.
- *Due Date*
  A due date can be set for the action item.
- *Reference Date*
  This.
- *Adjusted Due Date*
  An adjusted due date can be set for the action item.
- *Consolidated Due Date*
  The currently valid due date for the document is displayed.
- *Comment to Status*
  A comment (see chapter 2.24 “Comment”) can be added to the status of the action item.
- *Comment to Add* (see chapter 2.24 “Comment”)
  A further comment can be provided here.
- *Associated Document Item IDs*
  Several IDs can be stored for the document item to be assigned.
- *Default Form for New Document Items*
  This is a form that has been set up in the configuration and is used accordingly for document items within the document. This item is also used for any derived document instances.
- *Source*
  This field shows the source from which this action item was created. This field is only displayed if the action item was created on the basis of another object.
- *Cover Sheet Template*
  A cover sheet template can be stored here. This template must first be created and released.

2.17.3.2 Tab "Documents"

You can find the following settings within this tab:

- *Documents* (see chapter 2.11 "Documents")
  Various associated documents can be added here.

2.17.3.3 Tab "Open Points"

You can find the following settings within this tab:

- *Open Points* (see chapter 2.15 "Open Points")
  Various associated open points can be added or created.

2.17.3.4 Tab "Referencing Letters"

You can find the following settings within this tab:

- *Referencing Letters* (see chapter 2.20 "Letters")
  This field shows the referencing letters in a list.

2.17.3.5 Tab "Remarks"

You can find the following settings within this tab:

- *Enter Remarks*
  This field offers the possibility to add a remark to the action item.
- *Remarks*
  This field shows the remarks that have been added to the action item so far.

2.17.3.6 Tab "Internal Remarks"

You can find the following settings within this tab:

- *Enter Internal Remarks*
  This field offers the possibility to add an internal remark to the action item.
- *Internal Remarks*
  This field shows the previous internal remarks that have been added to the action item.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the action item so far.

2.18 Calendar

The calendar can be displayed in an area (see chapter 2.5 "Area"), project (see chapter 2.4 "Projects"), partner (see chapter 2.6 "Partner") or in a shelf (see chapter 2.7 "Shelf").This allows you to display tasks or events. The following actions can be performed in a calendar.

2.18.1 Actions

The following actions are possible within a calendar:

- *Create Event*
  Creates an event and displays it within the calendar.

- *Create Task*
  Creates a task and displays it within the calendar.
- *Restrict Calendar*
  Removes or sets the restriction that has been set on a calendar.

2.19 Scopes & Packages

Areas and packages can be created within an action item (see chapter 2.17 “Action Items”), in a document (see chapter 2.11 “Documents”) or in an open point (see chapter 2.15 “Open Points”). These are related to these objects and therefore have the following areas, actions and settings.

2.19.1 Areas

You can find the following areas within scopes and packages:

- *Documents* (see chapter 2.11 “Documents”)
  This list shows all documents belonging to the corresponding scope or package.
- *Action Items* (see chapter 2.17 “Action Items”)
  This list shows all action items associated with the corresponding scope or package.
- *Open Points* (see chapter 2.15 “Open Points”)
  This list shows all open points associated with the corresponding scope or package.

2.19.2 Actions

You can find the following actions within scopes and packages:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create Document* (see chapter 2.11 “Documents”)
  Enables the creation of a document within the corresponding scope or package. This document is stored in the list of documents and thus references the corresponding scope or package.
- *Create Action Item* (see chapter 2.17 “Action Items”)
  Enables the creation of an action item within the corresponding scope or package. This action item is stored in the list of action items and thus references the corresponding scope or package.
- *Create Open Point* (see chapter 2.15 “Open Points”)
  Enables the creation of an open point within the corresponding scope or package. This open point is stored in the list of open points and thus references the corresponding scope or package.
- *Properties*
  This action allows you to open the settings of the package or scope. All necessary changes relating to the object can be made.

2.19.3 Properties

Within the packages and scopes, the names of the tabs can be different, therefore only the fields within the tabs are referenced. In principle, the corresponding referenced list can also be different.

- *Document List* (see chapter 2.10 “Document List”)/*Action Item List* (see chapter 2.16 “Action Item List”)/*Open Point List* (see chapter 2.14 “Open Points List”)
  This is the corresponding list in which the scope or package is included.
- *Submission Package*
  This field is only available for work packages. This is the associated submission package of a work package.
- *ID*
  This is the ID of the specific scope or package.
- *Name*
  This is the name of the specific scope or package.

2.20 Letters

Letters can be created within a shelf (see chapter 2.7 “Shelf”). The following corresponding scopes, actions and settings can be accessed within the letters.

2.20.1 Areas

The following areas can be found in a letter:

- *Letter*
  This is an overview field that shows all the settings for the letter.
- *Message*
  This is a field that contains the message of the letter.
- *Cover Letter*
  This is a list containing all the letters prepared and referenced for the letter.
- *Attachments*
  This is a list containing all the attachments prepared and referenced for the letter.
- *Comments Log*
  This is a list containing all comments (see chapter 2.24 “Comment”) relating to the letter.
- *Remarks*
  These are all the remarks in the document.
- *Internal Remarks*
  These are all internal remarks in the document.
- Previous Letters
  This is a list containing all previous letters.
- Following Letters
  This is a list which contains all the following letters.
- *Referenced Volumes* (see chapter 2.31 “Volumes”)
  This is a list that contains all referenced volumes.
- *Referenced Documents* (see chapter 2.11 “Documents”)
  This is a list that contains all referenced documents.
- *Referenced Action Items* (see chapter 2.17 “Action Items”)
  This is a list that contains all referenced action items.
- *Referenced Open Points* (see chapter 2.15 “Open Points”)
  This is a list that contains all referenced open points.

2.20.2 Actions

The following actions can be carried out in a letter:

- *Add Remark*
  Here you can add remarks to the respective letter.
- *Add Internal Remark*
  Here you can add internal remarks to the respective letter.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Send*
  This action enables the letter to be sent to the referenced recipient. If comment entries are available, a new dialog opens which allows you to select and send them.
- *Cancel*
  This action allows you to cancel the letter.
- *Start Process*
  Opens a dialog in which various ad hoc processes or predefined processes can be started.
- *Properties*
  This action allows you to open a window and make all the necessary settings for the letter.

If the letter has been sent, there will be further actions:

- Forward
  Settings can be made to the letter again. This can then be sent.
- Recall
  The letter can be recalled and is no longer displayed to the recipient.

2.20.3 Properties

The following settings can be made in a letter:

2.20.3.1 Tab "Letter"

You will find the following settings in the "Letter" tab:

- *External*
  This field allows you to activate or deactivate sending to an external recipient.
- *Importance*
  This field allows you to set the importance of the letter, whereby a distinction can be made between "Normal", "High" and "Low".
- *Purpose of Sending*
  A purpose of sending can be set for the letter. This can be adjusted dynamically on the shelf (see chapter 2.7 "Shelf").
- *Reply Required*
  Here you can set whether the recipient of the letter must send a reply.
- *Reply Required within (in days)*
  Here you can set the deadline by which the recipient of the letter must provide a reply. This number of days is calculated from the day the letter was sent. This field is displayed if *Reply Required* field is true.

- *Reply Required by*
  Here you can set the deadline by which the recipient of the letter must provide a reply. This field is displayed if *Reply Required* field is true.
- *For Information Only*
  Here you can set that the letter can only be sent to the recipient for information purposes.
- *To*
  The receiver can be set here.
- *Cc*
  If the *External* field is activated, this field becomes visible. A CC receiver can be set here.
- *Bcc*
  If the *External* field is activated, this field becomes visible. A BCC recipient can be set here.
- *Referenced Letters*
  This field allows you to reference another letter.
- *Subject*
  This field allows you to enter a subject for the letter.
- *Message*
  This field allows you to enter a message. This only works if no cover letter or attachment has been entered.
- *Public Link Validity Period*
  The validity period for the public link relating to the letter is displayed.

2.20.3.2 Tab "Cover Letter"

You will find the following settings in the "Cover letter" tab:

- *Cover Letter*
  This list offers the possibility of depositing a cover letter.

2.20.3.3 Tab "Attachments"

You will find the following settings in the "Attachments" tab:

- *Attachments*
  This list offers the option of adding an attachment.

2.20.3.4 Tab "Comments Log"

You will find the following settings in the "Comments log" tab:

- *Comments Log*
  This list shows the comments of the attachments to the letter.

2.20.3.5 Tab "Remarks"

You will find the following settings in the "Remarks" tab:

- *Enter Remark*
  This field offers the possibility to add a remark to the letter.
- *Remarks*
  This field shows the remarks that have been added to the letter so far.

2.20.3.6 Tab “Internal Remarks”

You will find the following settings in the “Internal Remarks” tab:

- Enter Internal Remark
  This field offers the possibility to add an internal remark to the letter.
- *Internal Remarks*
  This field shows the internal remarks that have been added to the letter so far.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the letter so far.

2.21 Cases

Cases are created by storing a process at shelf level or by sending letters (see chapter 2.20 “Letters”). If a process is stored in the *Default Process for Incoming Cases* or in the *Default Process for Outgoing Cases* field in the shelf (see chapter 2.7 “Shelf”), a case is started. Accordingly, cases have the following areas, actions and settings.

2.21.1 Areas

The following areas can be found in an operation:

- *Case*
  This is all the information that is available for the properties and settings of the case.
- *Incoming Message*
  This is a message that has been taken into account in the case and has been received by means of a sent letter (see chapter 2.20 “Letters”).
- *Incoming Cover Letter*
  These are all incoming letters that were included in the case and received by means of the letter sent (see chapter 2.20 “Letters”).
- *Incoming Attachments*
  These are all incoming attachments that were considered in the case and received by means of the letter sent.
- *Comments Log*
  These are all comments (see chapter 2.24 “Comment”) that have been added to the corresponding case.
- *Outgoing Message*
  This is a message that was sent from within the case.
- *Outgoing Cover Letter*
  These are all outgoing letters that were sent from the case.
- *Outgoing Attachments*
  These are all outgoing attachments that were sent from the case.
- *Exported Comments Logs*
  These are the exported comment logs relating to the case.
- *Referenced Documents* (see chapter 2.11 “Documents”)
  These are all documents that are assigned to the case.
- *Referenced Document Sleeves* (see chapter 2.13 “Document Sleeve”)
  These are all documents sleeves that exist for the referenced documents.

- *Referenced Action Items* (see chapter 2.17 “Action Items”)
  These are all action items that are assigned to the case.
- *Referenced Open Points* (see chapter 2.15 “Open Points”)
  These are all open points that are assigned to the case.

2.21.2 Actions

The following actions can be found in a case:

- *Open Document Sleeve*
  Here you can open a referenced document sleeve (see chapter 2.13 “Document Sleeve”) of a referenced document of the case.
- *Add Remark*
  Here you can add remarks to the respective case.
- *Add Internal Remark*
  Here you can add internal remarks to the respective case.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create Letter* (see chapter 2.20 “Letters”)
  It is possible to create a letter here.
- *Properties*
  This action opens a window in which all properties of the case can be viewed and changed.

2.21.3 Properties

The following settings can be found in a case:

2.21.3.1 Tab “Case”

The following settings can be made within the “Case” tab:

- *Status*
  This is the status of the case.
- *Incoming Letter* (see chapter 2.20 “Letters”)
  This is the reference to the incoming letter.
- *Incoming Importance*
  This is a reference to the importance of the product.
- *Incoming Received on/at*
  This is the reference to the date of receipt.
- *Incoming Received from*
  This is the reference from whom the letter was received.
- *Incoming Purpose of Sending*
  This is the purpose of sending the receipt.
- *Incoming Reply Option*
  This is the response option that is possible for the input.
- *Incoming Reply Required*
  This is the information as to whether a reply to the incoming message is required.

- *Incoming Reply Required by*
  This is information on the deadline for responding to the receipt.
- *Incoming for Information Only*
  This is the information that the receipt was sent for information purposes only.
- *Incoming Close Correspondence*
  This is the information as to whether the inbox closes the correspondence.
- *Outgoing Letter* (see chapter 2.20 “Letters”)
  This is the outgoing letter that was sent from the case.
- *Outgoing Importance*
  This is the importance of the outgoing letter (see chapter 2.20 “Letters”).
- *Outgoing Sent on/at*
  This is the date when the outbox from the case was sent.
- *Outgoing Sent by*
  This is the processor who sent the outbox from the case.
- *Outgoing Purpose of Sending*
  This is the purpose of sending of the outbox.
- *Outgoing Reply Option*
  This is the reply option that relates to the output.
- *Outgoing Reply Required*
  This is the information as to whether a reply must be sent as part of the output.
- *Outgoing Reply Required by*
  This field only appears if the *Reply Required* field has been activated. This is the date by which the response must be sent.
- *Outgoing for Information Only*
  This field describes the information that the output was transmitted for information purposes only.
- *Outgoing Close Correspondence* (see chapter 2.25 “Correspondence”)
  This field describes the information that the outbox closes the correspondence.
- *Reply To*
  This field describes the letter (see chapter 2.20 “Letters”) to which a reply must be sent.
- *Forward of*
  This field describes the letter that was sent.
- *Subject*
  This field specifies the subject of the case.
- *Category*
  This field specifies the category of the case.
- *Letter Type*
  A letter type can be selected here. These types must first be worked out in the configuration.
- *Case Directory*
  A specific case directory in which the case is located must be selected. This is already preselected, but can be changed.

- *Case Folder*
  A specific case folder must be selected in which the case is located. This is already preselected, but can be changed.
- *Responsible*
  A person responsible for the case can be defined.
- *Lead Reviewer*
  A lead reviewer can be defined for the case.
- *Reviewers*
  Multiple reviewers can be defined for the case.
- *Final Reviewer*
  A final reviewer can be defined for the case.
- *Contract Manager*
  A contract manager can be stored for the case.
- *Approver*
  An approver can be stored for the case.
- *Incoming Message*
  This field shows the incoming message of the preceding letter (see chapter 2.20 “Letters”).
- *Outgoing Message*
  This field shows the outgoing message of the letter to be sent.

2.21.3.2 Tab “Incoming Cover Letters”

The following settings can be made within this tab:

- *Incoming Cover Letters*
  This list shows all incoming cover letters that were deposited in the course of the case.

2.21.3.3 Tab “Incoming Attachments”

The following settings can be made within this tab:

- *Incoming Attachments*
  This list shows all incoming attachments that were deposited in the course of the case.

2.21.3.4 Tab “Comments Log”

The following settings can be made within this tab:

- *Default Comment State*
  This field sets the selected comment status for all comments in the case.
- *Comments Log*
  This list shows all comments that were stored in the documents as part of the case.

2.21.3.5 Tab “Outgoing Cover Letters”

The following settings can be made within this tab:

- *Outgoing Cover Letters*
  This list shows all outgoing cover letters that were deposited in the course of the case.

2.21.3.6 Tab “Outgoing Attachments”

The following settings can be made within this tab:

- *Outgoing Attachments*
  This list shows all outgoing attachments that were deposited in the course of the case.

2.21.3.7 Tab “Remarks”

The following settings can be made within this tab:

- *Enter Remark*
  This field offers the possibility to add a remark to the document.
- *Remarks*
  This list shows all the remarks that were stored in the course of the case.

2.21.3.8 Tab “Internal Remarks”

The following settings can be made within this tab:

- *Enter Internal Remark*
  This field offers the possibility to add a remark to the document.
- *Internal Remarks*
  This list shows all internal remarks that were stored in the course of the case.
- *Internal Remarks Details*
  This list shows the internal remarks that have been stored in the course of the case.

2.21.1 Features

Additional new features that go beyond the basic architecture are described here.

2.21.1.1 Letters processed within Cases

If a letter is processed in a case, it can now also be partially replied to in the recipient shelf - provided the corresponding reply options are activated. The case remains open until all replies have been completed.

2.22 Meetings

Meetings can be created within an action item (see chapter 2.17 “Action Items”) in the action item list (see chapter 2.16 “Action Item List”), provided that the creation of meetings has been activated at the level of the action item list. These meetings can also be created within documents (see chapter 2.11 “Documents”).

2.22.1 Areas

The following areas arise within a meeting:

- *Action Items* (see chapter 2.17 “Action Items”)
  These are all action items that were generated during the meeting.
- *Meeting Sequences* (see chapter 2.23 “Meeting Sequences”)
  These are all meeting sequences that were created within a meeting.

- *Documents* (see chapter 2.11 “Documents”)
  These are all documents that represent objects that were created within the meeting.

2.22.2 Actions

The following actions occur within a meeting:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Create Action Item* (see chapter 2.17 “Action Items”)
  Allows you to create an action item within the meeting.
- *Create Meeting Sequence* (see chapter 2.23 “Meeting Sequences”)
  Allows you to create a meeting sequence within the meeting.
- *Properties*
  Allows you to open and thus change the properties of a meeting.

2.22.3 Properties

The following settings are made within a meeting:

2.22.3.1 Tab “Meeting”

The following settings can be made within this tab:

- *Action Item List* (see chapter 2.16 “Action Item List”)
  This is the list in which the meeting is located.
- *Meeting ID*
  This is the meeting identification number.
- *Meeting Name*
  This is the meeting name.

2.23 Meeting Sequences

Meeting sequences can be created within a meeting.

2.23.1 Areas

The following areas arise within a meeting:

- *Action Items* (see chapter 2.17 “Action Items”)
  These are all action items that were generated within the meeting sequence.
- *Documents* (see chapter 2.11 “Documents”)
  These are all documents that represent objects that were created within the meeting sequence.

2.23.2 Actions

The following actions occur within a meeting:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.

- *Create Action Item* (see chapter 2.17 “Action Items”)
  Enables the creation of an action item within the meeting sequence.
- *Properties*
  Allows you to open and thus change the properties of a meeting sequence.

2.23.3 Properties

The following settings are made within a meeting sequence:

2.23.3.1 Tab “Meeting Sequence”

The following settings can be made within this tab:

- *Action Item List* (see chapter 2.16 “Action Item List”)
  This is the list in which the meeting sequence is located.
- *Meeting*
  This field shows the meeting in which the meeting sequence is located.
- *Meeting Sequence ID*
  This is the meeting sequence identification number.
- *Date*
  This is the date of the meeting sequence.
- *Subject*
  This is the subject of the meeting sequence.

2.24 Comment

A comment can be achieved by leaving comments within a content object such as a PDF using the *Comment* function. If this is the case, these comments can be exported using the *Export Comments* function. The exported comments can be found in the corresponding list *Aggregated comment list*.

2.24.1 Properties

You can find the following settings in the “Comment” tab:

- *Comment ID*
  This is a generated identification number for the comment that was left on the respective object.
- *Source*
  This is the object to which the comment was added.
- *Comment State*
  This is the status of the comment, which is pre-filled but can be changed afterwards.
- *Commented by*
  Here you can see who has added the comment to the object.
- *Text*
  This is the text entered within the comment.
- *Internal Remarks*
  Internal remarks can be added to the comment.

- *Page*
  This field shows the number of pages of the object on which the comments have been left.
- *Type*
  This refers to the type of comment and the extent to which it was left.

2.25 Correspondence

An exchange of letters can be created by sending several letters (see chapter 2.20 "Letters") between two different shelves (see chapter 2.7 "Shelf"). Besides the letters, the corresponding cases (see chapter 2.21 2.20 "Cases") are also shown. If the Use correspondence for related letters field is activated in a shelf, a function called Update correspondence appears. This function enables the creation or, if already available, the updating of correspondence.

2.25.1 Areas

The following areas can be found within the correspondence:

- *Correspondence*
  Contains all the necessary properties of the correspondence, which can also be manipulated accordingly within this field.
- *Letters* (see chapter 2.20 "Letters")
  This list contains all letters that are responsible for the aggregation of the correspondence.
- *Cases* (see chapter 2.21 2.20 "Cases")
  This list contains all cases of a shelf that are responsible for the aggregation of the correspondence.
- *Remarks*
  This area contains all remarks made within the correspondence.

2.25.2 Actions

The following actions can be found within the correspondence:

- *Add Remark*
  This action allows you to create and add a remark to the correspondence.
- *Properties*
  This action enables a window to be opened, whereby the properties of the font change can be manipulated.

2.25.3 Properties

You will find the following tabs in the correspondence settings:

2.25.3.1 Tab "Correspondence"

The following settings can be made or viewed within this tab:

- *State*
  This is the status of the correspondence.
- *Subject*
  This is the subject of the correspondence.

- *Initial Letter* (see chapter 2.20 “Letters”)
  This is the first letter.
- *Last Sent Letter*
  This is the last letter sent.
- *Last Received Letter*
  This is the last letter received.
- *Last Letter*
  This is the last letter.
- *Closing Letter*
  This is the closing letter, which can be adjusted accordingly within the settings.

2.25.3.2 Tab “Letters”

The following settings can be made or viewed within this tab:

- *Letters* (see chapter 2.20 “Letters”)
  This is a list of all letters that were aggregated within this correspondence.

2.25.3.3 Tab “Cases”

The following settings can be made or viewed within this tab:

- *Cases* (see chapter 2.21 “Cases”)
  This is a list of all cases of a shelf that were aggregated within this correspondence.

2.25.3.4 Tab “Remark”

The following settings can be made or viewed within this tab:

- *Enter Remark*
  This field offers the possibility to add remarks to the correspondence.
- *Add Attachments*
  This field offers the possibility to add attachments to the correspondence.
- *Remarks*
  This field contains all remarks and attachments that have been added to the correspondence.

2.26 Reference Dates

A reference date can be created within the Reference data field in an area (see chapter 2.5 “Area”), project (see chapter 2.4 “Projects”), partner (see chapter 2.6 “Partner”) or a shelf (see chapter 2.7 “Shelf”). Corresponding reference data from the documents (see chapter 2.11 “Documents”), action items (see chapter 2.17 “Action Items”) and any open points (see chapter 2.15 “Open Points”) can be used.

2.26.1 Areas

Accordingly, the following ranges arise within a reference date:

- *Collaboration*
  This field describes the respective collaboration in which the reference date was created.

- *Dates*
  This field describes a date that was set within the reference date.
- *Documents* (see chapter 2.11 “Documents”)
  This field shows the documents that are assigned to the reference date.
- *Document Instances* (see chapter 2.12 “Document Instance”)
  This field shows the document instances that are assigned to the reference date.
- *Action Items* (see chapter 2.17 “Action Items”)
  This field shows the action items that are assigned to the reference date.
- *Open Points* (see chapter 2.15 “Open Points”)
  This field shows the open points that are assigned to the reference date.

2.26.2 Actions

You will find the following actions within a reference date:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Export Documents*
  Exports all documents that use the reference date to an Excel file.

2.26.3 Properties

Within the reference date, the following properties can be set in the “Reference date” tab:

- *Name*
  This is the name of the reference date.
- *Date*
  This is the due date or the date of the reference date, whereby this date is applied to all documents (see chapter 2.11 “Documents”), action items (see chapter 2.17 “Action Items”) and/or open points (see chapter 2.15 “Open Points”) in which this is linked.

2.27 E-Mail Folder

Within a partner (see chapter 2.6 “Partner”) or in a shelf (see chapter 2.7 “Shelf”) , any email folders can be created in the email folders list after activating the *Use E-Mail Folder* field.

2.27.1 Areas

The following areas arise within an e-mail folder:

- *E-Mails*
  This list describes all e-mails that were found by linking to Outlook.

2.27.2 Actions

The following actions occur within an e-mail folder:

- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Update E-Mails*
  Updates the registered e-mail and includes all changes.

- *Reset E-Mails*
  Resets the registered e-mail.
- *Synchronize*
  Synchronizes the e-mail folder.
- *Define Logo*
  Defines a logo for the e-mail folder.
- *Define Description*
  Defines a description for the e-mail folder.
- *Properties*
  Opens a window where any changes can be made to the e-mail folder settings.

2.27.3 Properties

The following settings are made within the e-mail folder:

2.27.3.1 Tab “E-Mail Folder”

The following properties of the e-mail folder can be viewed or manipulated within this tab:

- *Room*
  This field describes the storage location in which the e-mail folder is located. This can be a partner (see chapter 2.6 “Partner”) or a shelf (see chapter 2.7 “Shelf”).
- *Category*
  This field describes a category for the email folder or allows you to set a category for the email folder. However, this category must first be created in the configuration.
- *E-Mail Domains*
  This field enables the provision of any domains.
- *Regular Expression to Identify E-Mails via the Subject*
  This field allows you to provide a regular expression that helps to identify emails via the subject.
- *Original Location*
  This field allows you to link an original filing.

2.28 Registered E-Mail

A registered e-mail can be created if an inbox folder has been created in an area (see chapter 2.5 “Area”), partner (see chapter 2.6 “Partner”), project (see chapter 2.4 “Projects”) or in a shelf (see chapter 2.7 “Shelf”). Any settings can be made in this inbox folder that determine the extent to which registration should take place. If the registered e-mail has been created, the following areas, actions and settings are available.

2.28.1 Areas

The following areas can be accessed within a registered e-mail:

- *Registered E-Mail*
  This area contains all information relating to the properties of the registered emails.
- *Message*
  This area contains the message that was sent via the registered e-mail.

- *Attachments*
  This area contains all attachments that were sent via the registered e-mail.
- *Following E-Mails*
  This area contains all following e-mails relating to the registered e-mail.
- *Previous E-Mails*
  This area contains all previous e-mails relating to the registered e-mail.
- *Aggregated Action Items*
  This area contains an aggregated list of all action items relating to the registered email.
- *Aggregated Open Points*
  This area contains an aggregated list of open points relating to the registered e-mail.

2.28.2 Actions

The following actions can be achieved within a registered e-mail:

- *Add Remark*
  This action allows you to add remarks to the registered email.
- *Enable Text Wrapping*
  Enables text wrapping in the columns of the lists.
- *Open E-Mail*
  Opens the registered e-mail.
- *Update E-Mails*
  Updates the registered e-mail and includes all changes.
- *Reset E-Mails*
  Resets the registered e-mail.
- *Create Action Item*
  Creates a new action item in connection with the current registered e-mail.
- Create Open Point
  Creates a new open item in connection with the current registered e-mail.
- *Start Process*
  Opens a dialog in which various ad hoc processes or predefined processes can be started.
- *Properties*
  Opens a window in which the settings of the registered e-mail can be viewed or manipulated.

2.28.3 Properties

You can make the following settings for a registered e-mail:

2.28.3.1 Tab “Message”

This tab contains the PDF preview of the original email.

2.28.3.2 Tab “Registered E-Mail”

The following settings can be made within this tab:

- *Subject*
  This field contains the subject of the registered e-mail.
- *Importance*
  This field contains the importance of the registered e-mail.
- *Sent on/at*
  This field contains the date on which the registered e-mail was sent.
- *Sender*
  This field contains the sender of the registered e-mail.
- *Received on/at*
  This field contains the date of receipt of the registered e-mail.
- *Receiver*
  This field contains the recipient of the registered e-mail.
- *To: (E-Mail Addresses)*
  This field contains the e-mail of the "To" recipient, the registered e-mail.
- *Cc: (E-Mail- Addresses)*
  This field contains the e-mail of the "Cc" recipient, the registered e-mail.
- *Bcc: (E-Mail- Addresses)*
  This field contains the e-mail of the "Bcc" recipient, the registered e-mail.
- *Message*
  This field contains the message of the registered e-mail.
- *E-Mail Folder* (see chapter 2.27 "E-Mail Folder")
  This field contains the referenced e-mail folder of the registered e-mail.
- *Referenced E-Mail Folders*
  This field contains the referenced e-mail folder of the registered e-mail.
- *Assigned E-Mail*
  This field contains the assigned e-mail of the registered e-mail.
- *Message ID*
  This field contains the message ID of the registered e-mail.

2.28.3.3 Tab "Action Items"

The following settings can be made within this tab:

- *Action Items* (see chapter 2.17 "Action Items")
  Various associated action items can be added or created.

2.28.3.4 Tab "Open Points"

The following settings can be made within this tab:

- *Open Points* (see chapter 2.15 "Open Points")
  Various associated open points can be added or created.

2.28.3.5 Tab "Remarks"

The following settings can be made within this tab:

- *Enter Remark*
  This field offers the possibility to add a remark to the document.
- *Remarks*
  This field shows the remarks that have been added to the document so far.

2.28.3.6 Tab "Internal Remarks"

The following settings can be made within this tab:

- *Enter Internal Remark*
  This field offers the possibility to add an internal remark to the document.
- *Internal Remarks*
  This field shows the internal remarks that have been added to the document so far.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the document so far.

2.29 Purpose of Sending

Purposes of sending can be added within the configuration, in the field *Purpose of Sending*.

2.29.1 Properties

The following settings can be made in a shipping purpose:

- *Name*
  This field describes the name of the purpose of sending.
- *Description*
  This field is a description for the purpose of sending.
- *Send Information Only*
  This field offers the possibility to send information of the document without document items and comments.
- *Reply Required*
  This field offers the possibility to require answers regarding the purpose of sending.
- *Reply Options*
  This field offers the possibility to add corresponding response options for the purpose of sending. These response options consist of these properties:
  - *State*
    Here you can select a status for the answer option.
  - *Set State of Original*
    Here you can activate that the status can be applied to the original.
  - *Set Original to Final Form*
    Here you can activate that the status of the original should be set to "Completed".

2.30 Manuals

Manuals can have volumes (see chapter 2.31 "Volumes"), and these in turn can have chapters (see chapter 2.32 "Chapters") that can contain documents (see chapter 2.11 "Documents") and subchapters (see chapter 2.32 "Chapters").

2.30.1 Areas

You can find the following areas within a manual:

- *Volumes* (see chapter 2.31 "Volumes")
  This are all the volumes existing in the manual.

2.30.2 Actions

You can find the following actions within a manual:

- *Create New Volume*
  This is for creating a new volume inside the manual.

2.30.3 Properties

You can define the following settings in a manual:

2.30.3.1 Tab "Manual"

The following settings can be made within this tab:

- *Name*
  This is the name of the manual.
- *Volumes* (see chapter 2.31 "Volumes")
  This is the list of all volumes that are located in this manual.

2.31 Volumes

Volumes are containers for chapters (see chapter 2.32 "Chapters"). It can be sent out to partners by letter (see chapter 2.20 "Letters").

2.31.1 Areas

You can find the following areas within a volume:

- *Chapters* (see chapter 2.32 "Chapters")
  This list contains all chapters of the volume.
- *Sent Volumes*
  This area contains copies of the volumes at the point in time, when these were sent per letter.
- *Referencing Letters* (see chapter 2.20 "Letters")
  This area contains all letters that are related to the volume.

2.31.2 Actions

You can find the following actions within a volume:

- *Attach to Letter*
  This action allows you to add the volume to a letter.
- *Create New Chapter*
  This action creates a new chapter inside the volume.

2.31.3 Properties

You can define the following settings in a volume:

2.31.3.1 Tab “Volume”

The following settings can be made within this tab:

- *Name*
  This is the name of the volume.
- *Manual* (see chapter 2.30 “Manuals”)
  This shows the manual, where the volume is part of.
- *Chapters* (see chapter 2.32 “Chapters”)
  This are the chapters contained in the volume.

2.31.3.2 Tab “Referencing Letters”

The following settings can be made within this tab:

- *Referencing Letters* (see chapter 2.20 “Letters”)
  This field shows the referencing letters in a list.

2.32 Chapters

Chapters keep the actual documents of the manual (see chapter 2.30 “Manuals”), resp. volume (see chapter 2.31 “Volumes”). Chapters can have subchapters and these can also have subchapters and so on and so forth.

2.32.1 Areas

You can find the following areas within a chapter:

- *Documents* (see chapter 2.11 “Documents”)
  This are the documents assigned to the chapter.
- *Sub Chapters*
  This are all subchapters of the chapter.

2.32.2 Actions

You can find the following actions within a chapter:

- *Create New Chapter*
  This creates a new subchapter in the chapter.

2.32.3 Properties

You can define the following settings in a chapter:

2.32.3.1 Tab “Chapter”

The following settings can be made within this tab:

- *Name*
  This is the name of the chapter.
- *Contained in*
  This shows the parent of the chapter. This could be a volume (see chapter 2.31 “Volumes”) but also a chapter.
- *Documents* (see chapter 2.11 “Documents”)
  This are the documents which are part of the chapter.
- *Sub Chapters*
  This are the subchapters of the chapter.

2.33 Rights and Roles

The following chapter discusses the rights and distribution of roles within the correspondence manager.

2.33.1 Rights of the Roles

There are various roles with specific rights in correspondence manager. These rights can be adapted dynamically depending on the context. Therefore, a detailed explanation in this user documentation is not useful. The configurations of the roles can vary in different contexts, even if they are essentially the same role. The following general description of the respective roles serves as a guideline for the correspondence manager application.

The following roles are available in the correspondence management:

- *Full Control*
  This role grants unrestricted control over the entire system. Users with this role can perform all operations, including managing user rights, customizations and complete changes to the system configuration and data.
- *App Administrator*
  Users with this role have comprehensive administration rights for the application. They can manage users and their authorizations as well as configure and adapt the application.
- *App Manager*
  Users in this role have extensive modification rights in the respective instance. They can manipulate existing objects, relations and attributes, but cannot apply any higher restrictions to the structure.
- *Customizing User*
  This role allows the user to adjust the application. This includes the configuration of settings and the management of user-defined customizations.
- *App Power User*
  This user role offers extended usage rights. In contrast to regular users, app power users can make deeper and more comprehensive changes and adjustments.
- *App User*
  Users in this role have standard rights to use the application. They can use basic functions, but cannot perform administrative tasks or make in-depth changes.
- *Administrator*
  This role is similar to the App Administrator, but focuses on managing the system environment and infrastructure. Users can change settings and monitor system operations.

- *Change Access*
  Users with this role have the right to make changes to data and objects. This includes creating, editing and deleting data within the assigned structure.
- *Read Access*
  This role grants read-only rights. Users can view artifacts of the structure, but cannot make any changes. This is ideal for users who need to view but not edit information.
- *Restricted Access*
  This role is for retain the room hierarchy for other users, that do only have read access on the lowest level of a room hierarchy. These rights are also needed, if other users are added to these rooms.

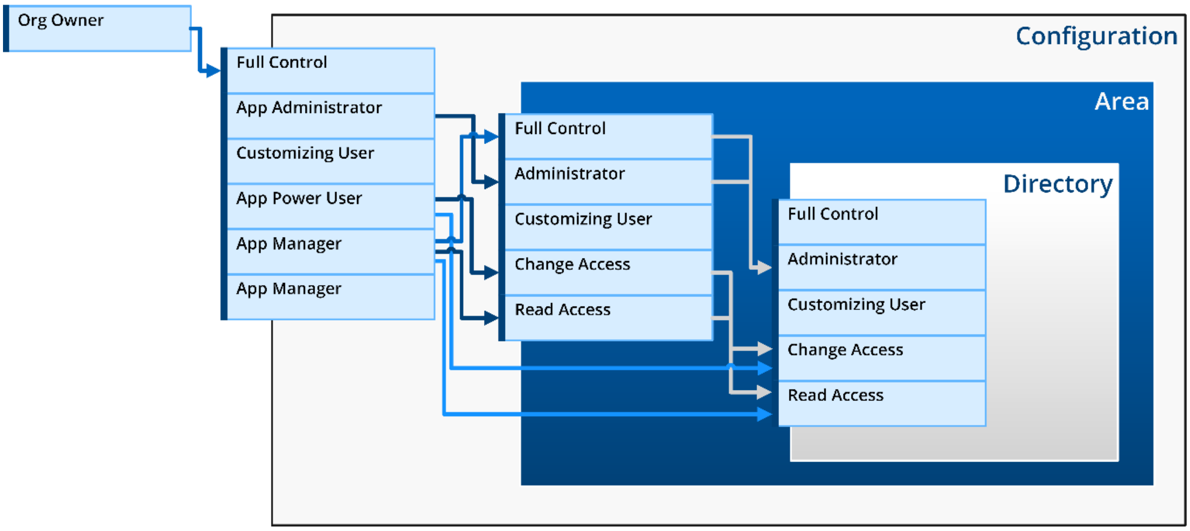
2.33.2 Right Inheritance

Rights can be set specifically so that only selected people or groups can see files and documents that are accessible to them. These rights are handled differently via the various "app rooms". The users in the rights are currently not displayed under the authorizations, which makes it difficult to understand the rights inheritance.

This rights inheritance for "App Administrator" and "App Power User" is explained in more detail in the following graphic:

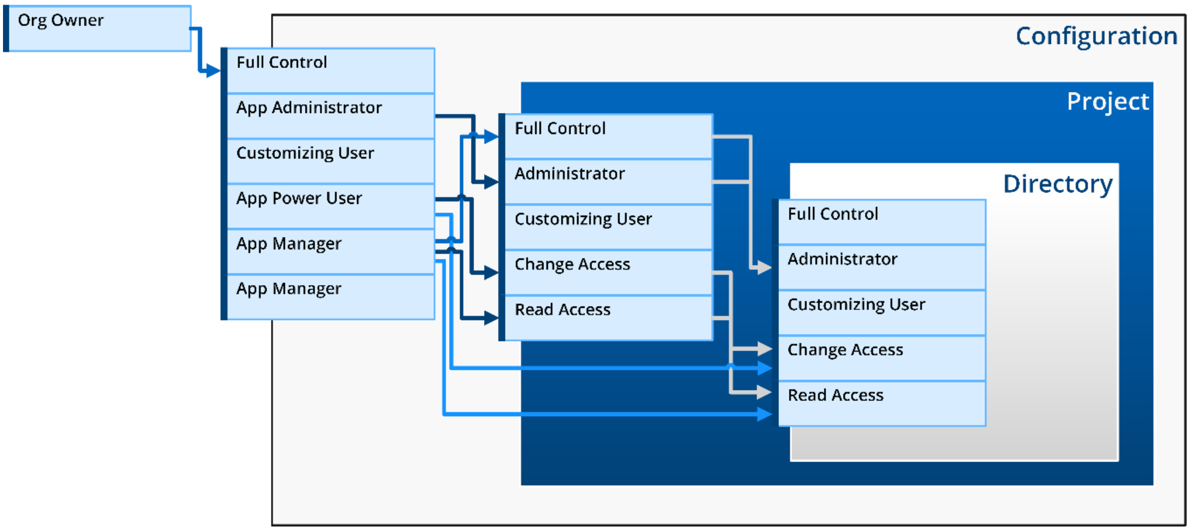
2.33.2.1 Area

Within an area, rights inheritance can be represented as follows.



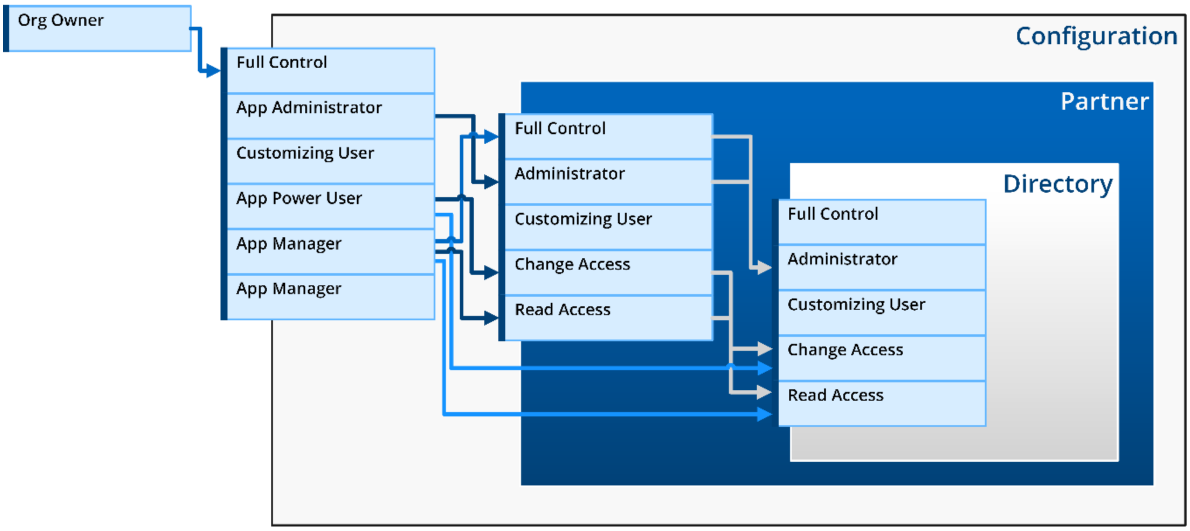
2.33.2.2 Project

Within a project, rights inheritance can be represented as follows.



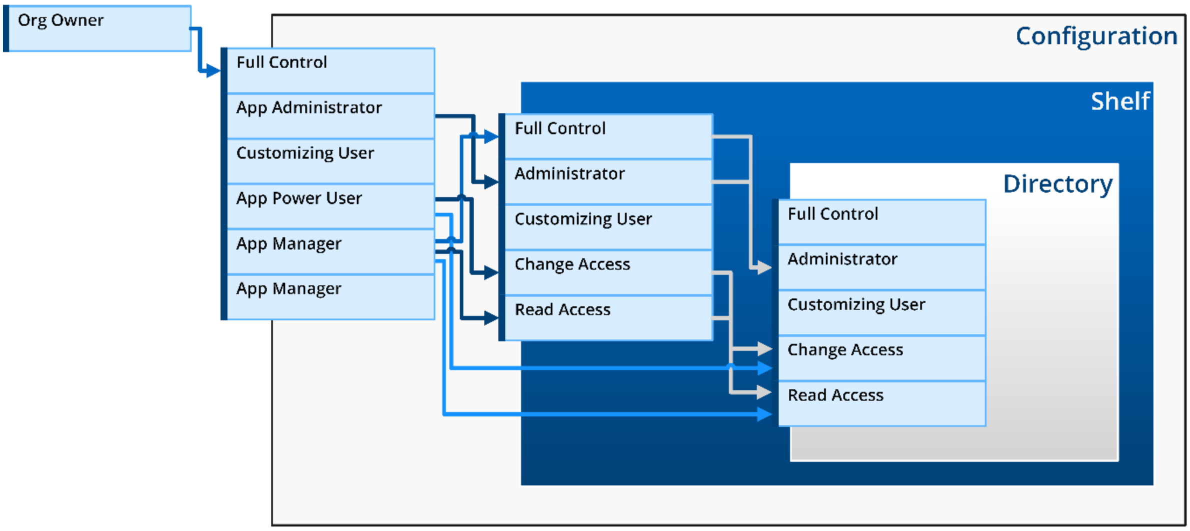
2.33.2.3 Partner

Within a partner, rights inheritance can be represented as follows.



2.33.2.4 Shelf

The inheritance of rights within a shelf can be represented as follows.



2.34 Notifications and Reminders

Notifications and reminders are, as the name say, some kind of interaction with the user, in order to Notify or Remind them on specific topics. This mechanic is used for e.g.: due date reminder, notification on a newly received letter etc. These notifications and reminders can be configured on various objects and therefore specify the objects which are going to be informed about.

2.34.1 Preconditions

In order to receive a notifications and reminders, it is necessary to be in the list of recipients for the specific object, which contains the desired notification/reminder (shelf, action item list, document list, open point list). Furthermore, you also have to enable the email notification for the desired notification in the notification settings.

This means, that the recipient of a notification has either to be

- the owner of the object (letter, case, action item, document, open point) which is going to be informed about,
- has full control in the contact room of the object and the *Standard User for Explicit Notifications* is enabled on the superordinated object (shelf, action item list, document list, open point list),
- or is in the list of *Additional Users for Explicit Notifications* of the superordinated object (shelf, action item list, document list, open point list).

2.34.2 Shelf

In a Shelf (see chapter 2.7 “Shelf”), we can enable the following notification and reminder options:

- Letter Received Notification
  This notification sends an email about a received letter in your shelf.
- Letter Reply Required Reminder
  This is a reminder email about a due date of a letter reply.
  This reminder is typically sent 2 weeks before the due date.
  If this 2-week earlier reminder is in the past (before the current date), a reminder email is sent once every week.
- Case Reply Required Reminder
  This is a reminder email about a due date of a case reply.
  This reminder is typically sent 2 weeks before the due date.
  If this 2-week earlier reminder is in the past (before the current date), a reminder email is sent once every week.
- Document Instance Due Date Reminder
  This is a reminder email about a due date of a document instance.
  This reminder is typically sent 2 weeks before the due date.
  If this 2-week earlier reminder is in the past (before the current date), a reminder email is sent once every week.
- Document Canceled Notification
  This notification sends an email about a cancelled document in your shelf.
- Document Restored notification
  This notification sends an email when a document is restored in your shelf.

2.34.3 Action Item List

In an Action Item List (see chapter 2.16 “Action Item List”), we can enable the following notification and reminder options:

- Action item Changed Owner Notification
  This notification sends an email when an action item’s owner changes.
- Action Item Due Date Reminder
  This is a reminder email about a due date of an action item.
  This reminder is typically sent 2 weeks before the due date.
  If this 2-week earlier reminder is in the past (before the current date), a reminder email is sent once every week.

2.34.4 Document List

In a Document List (see chapter 2.10 “Document List”), we can enable the following notification and reminder options:

- Document Changed Owner Notification
  This notification sends an email when a document’s owner changes.
- Document Due Date Reminder
  This is a reminder email about a due date of a document.
  This reminder is typically sent 2 weeks before the due date.
  If this 2-week earlier reminder is in the past (before the current date), a reminder email is sent once every week.

2.34.5 Open Point List

In an Open Point List (see chapter 2.14 “Open Points List”), we can enable the following notification and reminder options:

- Open Point Changed Owner Notification
  This notification sends an email when an open point’s owner changes.
- Open Point Due Date Reminder
  This is a reminder email about a due date of an open point.
  This reminder is typically sent 2 weeks before the due date.
  If this 2-week earlier reminder is in the past (before the current date), a reminder email is sent once every week.

2.35 Workflows

Users, organizations, organizational units and external organizations can be integrated into the processing of business objects via workflow by starting a process that can be processed via the worklist (these are usually approval and release processes).
Further information can be found in the white paper “Model-Based Customizing” and in the “Workflow” chapter in the “User Help Fabasoft Cloud”.

2.35.1 Activities

These activities are available in the correspondence management, in addition to the default processes of the Fabasoft Cloud:

2.35.1.1 Prepare Incoming Case

Prepares an incoming case as document controller.
This action has the following steps available:

- *Open*
  This step opens the object with its native tool.
- *Open Properties*
  This opens the properties of the case.
- *Classify Case*
  This is for classifying the case.
- *Apply Codes*
  This is not shown, if there are no code parts and no documents available.
- *Create Letter*
  This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  This is only shown, if there is no cover letter existing for the corresponding letter.
- *Finish*
  This performs a sanity check on the attached document items of the case.

2.35.1.2 Prepare Incoming Case by Responsible

Prepares an incoming case as responsible.

- *Open*
  This opens the object with its native tool.
- *Open Properties*
  This opens the properties of the case.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a new cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Assign Reviewers*
  This is for assigning reviewers to the incoming case. This is shown, if the case has useable attachments, where reviewers are assigned and the state is set to *"Needs Review*".
- *Finish*
  This performs a sanity check on the attachments of the case.

2.35.1.3 Prepare Incoming Case by Lead Reviewer

Prepares an incoming case as lead reviewer.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Create Letter*
  Opens the dialog for creating a letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens the dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Assign Reviewers*
  This is for assigning reviewers to the incoming case. This is shown, if the case has useable attachments, where reviewers are assigned and the state is set to *"Needs Review*".
- *Finish*
  This performs a sanity check on the attachments of the case.

2.35.1.4 Approve Incoming Case

Approves an incoming case as approver.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Approve Comments*
  Opens the comments in order to review and approve them. This is shown if any attached document has comments.
- *Approve*
  Approves the Case and finishes the activity. This option is available, if there are no more comments on attachments.
- *Deny Approval*
  Denies the approval of the case and finishes the activity.

2.35.1.5 Finalize Incoming Case

Finalizes an incoming case as document controller.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Create Letter*
  This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  This is only shown, if there is no cover letter existing for the corresponding letter.
- *Send Letter*
  This action is available, if a corresponding letter exists and is not already sent. It sends the letter to the recipient of the case. This action finishes the activity.
- *Finish*
  When the letter was sent, this option is available. This finishes the activity.

2.35.1.6 Prepare Outgoing Case

Prepares an outgoing case as document controller.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Classify Case*
  This is for classifying the Case.
- *Apply Codes*
  This is not shown, if there are no code parts and no documents available.
- *Create Letter*
  This is not shown, if there is already an existing letter for this case.

- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  This opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Finish*
  This performs a sanity check on the attachments of the case.

2.35.1.7 Prepare Outgoing Case by Responsible

Prepares an outgoing case as responsible.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Assign Reviewers*
  This is for assigning reviewers to the outgoing case. This is shown, if the case has useable attachments, where reviewers are assigned and the state is set to *"Needs Review"*.
- *Finish*
  This performs a sanity check on the attachments of the case.

2.35.1.8 Prepare Outgoing Case by Lead Reviewer

Prepares an outgoing case as lead reviewer.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.

- *Assign Reviewers*
  This is for assigning reviewers to the outgoing case. This is shown, if the case has useable attachments, where reviewers are assigned and the state is set to *"Needs Review*".
- *Finish*
  This finishes the activity.

2.35.1.9 Approve Outgoing Case

Approves an outgoing case as approver.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Approve*
  Sets the Case to approved. This finishes the activity.
- *Deny Approval*
  Sets the Case to denied. This finishes the activity.

2.35.1.10 Finalize Outgoing Case

Finalizes an outgoing case as document controller.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Send Letter*
  This action is available, if a corresponding letter exists and is not already sent. It sends the letter to the recipient of the case. This action finishes the activity.
- *Finish*
  When the letter was sent, this option is available. This finishes the activity.

2.35.1.11 Review Case (With Accept/Reject)

Reviews a case as prep team.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.

- Set Document Reply Options
  This opens a dialog where the reply option can be set. This is available, if there is no reply option provided from the incoming attachments or letter.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Accept*
  This finishes the activity.
- *Reject*
  This rejects the case. The option is available if there is no outgoing letter for the case.

2.35.1.12 Review Case (Without Accept/Reject)

Reviews a case as prep team (without reject).

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Set Document Reply Options*
  This opens a dialog where the reply option can be set. This is available, if there is no reply option provided from the incoming attachments or letter.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Finish*
  This finishes the activity.

2.35.1.13 Send Case (With Reject)

Sends a case as send team.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.

- *Review Comments*
  Opens the comments for reviewing. This is shown, if there are comments or annotations on a document.
- *Set Document Reply Options*
  This opens a dialog where the reply option can be set. This is available, if there is no reply option provided from the incoming attachments or letter.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Send Letter*
  This action is available, if a corresponding letter exists and is not already sent. It sends the letter to the recipient of the case. This action finishes the activity.
- *Finish*
  When the letter was sent, this option is available. This finishes the activity.
- *Reject*
  This rejects the case. The option is available if there is no outgoing letter for the case.

2.35.1.14 Send Case (Without Reject)

Sends a case as send team (without reject).

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Review Comments*
  Opens the comments for reviewing. This is shown, if there are comments or annotations on a document.
- *Set Document Reply Options*
  This opens a dialog where the reply option can be set. This is available, if there is no reply option provided from the incoming attachments or letter.
- *Create Letter*
  Opens a dialog for creating a new letter. This is not shown, if there is already an existing letter for this case.
- *Open Letter*
  This opens the corresponding letter.
- *Create Cover Letter*
  Opens a dialog for creating a cover letter. This is shown, if there is no cover letter existing for the corresponding letter.
- *Send Letter*
  Sends the created letter. This finishes the activity.

- *Finish*
  Sets the Case to done. After the letter is sent, this option gets available. This finishes the activity.

2.35.1.15 Assign Reviewers by Responsible

Reviews a document item as responsible.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Assign Reviewers*
  This is for assigning reviewers to the document. This is shown, if the case has useable attachments, where reviewers are assigned and the state is set to *"Needs Review*".
- *Finish*
  This finishes the activity.

2.35.1.16 Assign Reviewers by Lead Reviewer

Reviews a document item as lead reviewer.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Assign Reviewers*
  This is for assigning reviewers to the document. This is shown, if the case has useable attachments, where reviewers are assigned and the state is set to *"Needs Review*".
- *Finish*
  This finishes the activity.

2.35.1.17 Review Document Item

Reviews the document item as reviewer.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Comment*
  Opens the document item in a dialog, where comments can be created and added.
- *Review Comments*
  Opens the comments for reviewing.
- *Finish*
  The document is set to reviewed. This finishes the activity.

2.35.1.18 Adjust Comments

Adjusts comments of a document item as responsible/lead reviewer.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Adjust Comments*
  Opens a dialog for adjusting comments. This is shown, if the document item has a comment log with entries or annotations.
- *Finish*
  This finishes the activity.

2.35.1.19 Stamp Document Item

Applies stamps to a document item as document controller.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Stamp*
  Opens a PDF tool in order to add stamps to document items.
- *Finish*
  This finishes the activity.

2.35.1.20 Approve Document Item

Approves a document item comments as approver.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Approve Comments*
  Opens the dialog for the comments, in order to check them. This is available, if there are comments on the document.
- *Approve*
  Sets the document to approved. This is available, if there are no more comments on the document. This finishes the activity.
- *Deny Approval*
  Sets the document to denied. This finishes the activity.

2.35.1.21 Create New Revision

Creates a new document revision.

2.35.1.22 Submit Document

Submits the document to the requester.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Submit Document*
  Transfers the document items to the original document. This finishes the activity.

2.35.1.23 Review Document

Reviews a document.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Request Document Adjustment*
  Requests adjustments of the document by the supplier. This option is available, if the state of the document is "*Needs Review*".
- *Request Document Correction*
  Requests a new, corrected document from the supplier. This option is available, if the state of the document is "*Needs Review*".
- *Set as Reviewed*
  Sets the document to reviewed. This option is available, if the state of the document is "*Received*", "*Open*", "*Needs Review*".
- *Finish*
  This option is available, if the state of the document is not "*Received*", "*Open*", "*Needs Review*". This finishes the activity.

2.35.1.24 Review Document Formally

Reviews a document formally.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Review*
  Sets the state of the document to "*Reviewed*" and signs it.
- *Review with comments*
  Sets the state of the document to "*Reviewed - With Comments*" and signs it. Added remarks will be transferred to the supplier.
- *Decline*
  Sets the state of the document to "*Declined*" and signs it. This finishes the activity.

2.35.1.25 Review Document Technically

Review a document technically.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Review*
  Sets the state of the document to "*Reviewed*" and signs it.
- *Review with comments*
  Sets the state of the document to "*Reviewed - With Comments*" and signs it. Added remarks will be transferred to the supplier.
- *Decline*
  Sets the state of the document to "*Declined*" and signs it. This finishes the activity.

2.35.1.26 Check Incoming Document Formally

Checks an incoming document formally.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Accept for Review*
  Sets the state of the document to "*For Review*". This finishes the activity.
- *Request Document Adjustment*
  Requests adjustments of the document from the supplier of the document. This finishes the activity.

2.35.1.27 Check Outgoing Document Formally

Checks an outgoing document formally.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Outgoing Check Passed*
  Signs the document. This finishes the activity.
- *Outgoing Check Failed*
  Sets the state of the document to "*Outgoing Check Failed*" and signs the object. This finishes the activity.

2.35.1.28 Synchronize Document to Document Instance

Synchronizes the document with its metadata to the document instance.

2.35.1.29 Synchronize Document Instance to Document

Synchronizes the document instance with its metadata to the document.

2.35.1.30 Process Action Item

Processes an action item.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Request Closure*
  Sets the state of the action item to "*Closure Requested*" and finishes the activity.
- *Close*
  Sets the state of the action item to "*Closed*" and finishes the activity.

2.35.1.31 Process Open Point

Processes an Open Point

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Properties*
  This opens the properties dialog of the object.
- *Close*
  Sets the state of the open point to "*Closed*" and finishes the activity.

2.35.2 Revision Requested

Creates a new document revision and requests it from the document owner.

- *Open*
  This opens the object with its native tool and in its origin location.
- *Open Origin Document*
  This opens the main document of the document instance.
- *Open Properties*
  This opens the properties dialog of the object.
- *Accept*
  Creates a new revision, requests it and finishes the activity.
- *Reject*
  Opens the dialog for entering a remark and finishes the activity.

2.35.3 Automatic Revision Requested

Automatically creates a new revision of the document and requests it.

3 Application Area: Quality Management

The application area quality management of Fabasoft Approve offers you a pioneering solution for the innovative management of issues (see chapter 3.5 “Issues”). The application enables extremely straightforward, intuitive and collaborative handling of issues and their processing in an 8D-Process (see chapter 3.3 “8D Process”).

Subsequently, a basic process is presented that enables the efficient handling of issues (see chapter 3.5 “Issues”) within this process. The system is designed not only to make the management of defects transparent and accessible, but also to promote collaborative exchange and ensure seamless integration into the overall 8D-Process (see chapter 3.3 “8D Process”).

3.1 Quality Manager Dashboard

After creating a quality manager configuration (see chapter 3.2 “Quality Manager Configuration“), a dashboard is automatically created for you and placed on the home screen. This quality manager dashboard serves as your central access point to quality management.

Note: It is important to note that depending on your role and the previous settings made before you first accessed the quality management, certain objects and settings may vary. There may be differences in terms of user assistance. If there are any uncertainties or specific adjustments, you should contact the relevant administrators for detailed information.

3.1.1 Areas

The Quality Manager dashboard is divided into different areas to provide you with clear access and efficient use of the quality management. The following areas are typically available:

- *Upload Area*
  This element allows you to upload a file and register it as a new issue. This element is only displayed if the field Enable Issue Registration by Drag & Drop has been activated in the quality manager configuration.
- *Sites* (see chapter 3.4 “Sites”)
  Within the application, all *Sites* released for you are clearly displayed. You have the option of modifying or reading these *Sites* according to your individual settings and access rights. This interface allows you to customize the *Sites* according to your needs while ensuring easy navigation and editing.
- *Issues* (see chapter 3.5 “Issues”)
  The *Issues* tile consists of a list that makes various *Issues* accessible to you based on the rights granted. You can add additional entries to this list. These actions are described in more detail below.
- *Actions* (see chapter 3.24 “Actions”)
  The *Actions* tile also consists of a list that makes various actions available to you based on the rights you have been granted.
- *Search*
  The “Search” tile - just like the “Actions” tile - consists of a list. Based on the given rights, this list calculates various objects, which can be configured by you. There are various actions that must be carried out to enable this list configuration. These actions are described in more detail below.

3.1.2 Actions

Depending on the rights assigned, you can perform the following actions at dashboard level and the corresponding levels below:

- *Create Issue* (see chapter 3.5 “Issues”)
  This function allows you to create a new issue and automatically add it to the corresponding list. This action greatly simplifies the process of issue management by providing a seamless and efficient way to identify, record and add new issues to the relevant list.
- *Refresh*
  This action allows you to update the given view and load possible new conditions in this scope.
- *Search*
  This action allows you to start a search. The object class to be searched for can be specified in the search dialog under “Selection”. You can also select whether you only want to search for objects in your own organization or also outside it.
- *Switch to Configuration*
  By executing this action, you navigate to the quality manager configuration (see chapter 3.2 “Quality Manage”). As a quality management administrator, you can switch to the corresponding quality manager configuration to make configuration settings there.
- *Reset Search*
  You can use this action to reset the search you have performed. Please note that the objects that appeared during the search action will disappear again.
- *Save search query*
  If you have carried out this action, you can call up the search again and again. The objects you have searched for will also appear in the list and can be edited accordingly.
- *Settings*
  Defines general properties of the quality manager dashboard (e.g., the logo or the notification setting).
  Note: If the quality manager configuration or organization management is not activated, you have limited setting options on the "User settings" and "Organization settings" tabs.

3.2 Quality Manager Configuration

In the quality manager configuration, you can define general settings and authorize users to use the quality management.

The quality manager configuration is created automatically when the quality management is activated for your cloud organization. The owner of the cloud organization is initially stored in the quality manager configuration in the “quality manager administrator” role. As a quality management administrator, you can switch to the quality manager configuration as follows:

1. Navigate to your quality manager dashboard.
2. Click on the “Switch to Configuration” action to switch to the quality manager configuration.

3.2.1 Areas

The quality manager configuration is divided into the following areas:

- *Sites* (see chapter 3.4 “Sites”)
  This list shows the available Sites.
- *Measuring Units* (see chapter 3.10 “Measuring Units”)
  This list shows the available Measuring Units.
- *Failure Locations* (see chapter 3.6 “Failure Locations”)
  This list shows the available Failure Locations.
- *Failure Sub Locations* (see chapter 3.7 “Failure Sub Locations”)
  This list shows the available Failure Sub Locations.
- *Failure Type* (see chapter 3.8 “Failure Types”)
  This list shows the available Failure Types.
- *Failure* (see chapter 3.9 “Failure”)
  This list shows the available Failures.
- *Material Classes* (see chapter 3.11 “Material Classes”)
  This list shows the available Material Classes.
- *Materials* (see chapter 3.12 “Materials”)
  This list shows the available Materials.
- *Customer* (see chapter 3.13 “Customers”)
  This list shows the available Customers.
- *Supplier* (see chapter 3.14 “Supplier”)
  This list shows the available Suppliers.
- *Lead Time Definitions* (see chapter 3.15 “Lead Time Definitions”)
  This list shows the available Lead Time Definitions.
- *Equipment Types* (see chapter 3.16 “Equipment Types”)
  This list shows the available Equipment Types.
- *Async Data Objects*
  Contains basic objects that save input data from a web service and process it in the background. If such processing is running, entries are visible in this area.
- *Insight Apps*
  Insight Apps provide aggregated access to the information in your cloud organization, tailored to your needs. You can use Insight Apps to display and highlight important information without users having to search for it explicitly.
- *Forms and Categories*
  Shows the forms and categories provided via the configuration. With the help of user-defined forms, for example, contracts can be expanded to include fields for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.
  Note: Further information can be found in the white paper “Model-Based Customizing”.
- *Processes*
  Shows the processes provided via the configuration. Users, organizations, organizational units and external organizations can be integrated into the processing of business objects via workflow by starting a process that can be processed via the worklist (these are usually approval and release processes).
  Further information can be found in the white paper “Model-Based Customizing“ and in the “Workflow” chapter in the “User Help Fabasoft Cloud”.

- *Templates*
  Shows the templates provided via the configuration. The templates are displayed in the Create dialog (e.g., using the “New” context menu command). You can define documents and document templates both in the quality manager configuration and in site. Templates defined in the quality manager configuration are offered for selection in all contract lists.
  Note: A template can only be used once it has been released via the “Release for Usage” context menu command. Changes must be released using the “Re-release” context menu command. Sharing can also be deactivated.
- *Text Modules*
  Shows the text modules provided via the configuration that can be inserted into Word documents. Text modules can be inserted in documents and also in document templates. You can define text modules both in the quality manager configuration and in a site. Text modules defined in the quality manager configuration are available in all sites.
- *Reports and OData Services*
  Contains templates for reports and OData services. Corresponding BIRT reports, Microsoft Excel reports and OData services can be generated within this list. These reports essentially offer the possibility of data visualization and analysis. They can also be integrated into any web applications (BIRT).
- *Thesauri*
  Shows the Thesauri provided in the configuration.
- *Presettings*
  Contains default settings such as self-generated search patterns or time spans.
- *Failed Background Tasks*
  This area shows failed background tasks. You can perform the following manual actions: “Define Next Execution”, “Send Link” and “Delete”.
  Note: This area is only displayed if there is at least one failed background task.

3.2.2 Actions

The following actions can be carried out within the configuration:

- *Import Translation*
  Imports a CSV of translations for various languages.
- *Export Translation*
  Exports a CSV of translations for various languages you can select.
- *Show New Events*
  This action opens the news of the quality manager configuration.
- *Settings*
  This action opens the quality manager configuration settings.

3.2.3 Settings

The following settings can be made within the quality manager configuration:

3.2.3.1 Tab “General Settings”

- *Name*
  Defines the name of the configuration.

- *Subject*
  Defines the description of the configuration.
- *Holiday Table*
  Defines the public holiday table to be used in the context of the configuration (otherwise the Standard public holiday table is used).
- *Restrict Shortcuts Within Teamroom*
  Defines what type of links may be stored in the configuration. You can restrict the permitted links to objects that are assigned to the organization or to objects that are assigned to the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows you to restrict the team members who are allowed to open or download content on the end device.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which authorizations a team member must have so that the team member can open or download content on the end device.
- *All Team Members May Add Members*
  Defines whether all team members can add users to the team or only team members with "Full Control". Members with change access may grant or revoke change access or read access to other members. Members with read access may grant or revoke read access to other members.
- *Restrict Team Members*
  Defines the organizations, organizational units, teams and external organizations whose members may be added to the Teamroom. If the list does not contain any entries, members can be added without restriction.
- *Main Administrator*
  Defines the user who receives the automatically generated e-mail messages relating to the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as a contact in the event of missing authorizations.
- *Support Coordinator*
  The support coordinator team has access to all support requests in the corresponding context and can perform the same actions as the submitters of the support requests.
- *Support Team*
  The support team takes over the organization-internal administration of support requests in the appropriate context.
- *Enable Advanced Mode*
  Activates a mode that allows you to work with multiple trays and manage templates and presets, among other things.
- *Activate Trace Output*
  Enables the output of information about the progress of a code execution. For example, if you are a form designer using expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can have trace output written to the web browser console (`cooobj.Trace("string");` resp. `cooobj.Trace("string", value);`).

3.2.3.2 Tab “Details”

- *Default Dashboard Name*
  This setting determines the name of the quality manager dashboard.
- *Default Dashboard Class*
  The dashboard class that is used by default for the dashboard is displayed here.
- *Default Dashboard Form*
  This setting enables the storage of a form specified in the configuration, which is derived from the dashboard class.
- *Enable Issue Registration by Drag & Drop*
  If this setting is activated, an upload area is displayed in the dashboard that allows authorized users to upload a file and register it as a new issue.
- *Insight App for Issue Registration*
  An Insight app can be selected in this field, which is called instead of the document preview when a new issue is registered.
- *Enable Split View for Risk Evaluation*
  If this setting is activated, the risk evaluation of issues takes place in a split view, which simultaneously displays the attachments of the issue.
- *Insight App for Chat with Document in Risk Evaluation*
  An Insight app can be selected in this field that allows you to chat with the selected document from the attachments of the issue during the risk evaluation.
- *Manage Master Data at Site Level*
  This option determines whether the configuration of the individual aspects takes place at configuration level or plant level. This shifts the configurations measuring units (see chapter 3.10 “Measuring Units”), Material Classes (see chapter 3.11 “Material Classes”), Materials (see chapter 3.12 “Materials”), Customers (see chapter 3.13 “Customers”) and Suppliers (see chapter 3.14 “Supplier”) inside the sites.
- *Corporate Language*
  This field is for setting a corporate language.
- *Issue Types*
  This field is for creating and adding issue types (see chapter 3.17 “Issue Types”).
- *Default Issue Type for New Issues*
  A issue type can be stored in this field, which is preselected for all newly created issues.
- *Default Issue Description*
  This text field provides a basic description of the issue (see chapter 3.5 “Issues”), if no further information is provided on the issue in question.
- *Application Areas*
  Application areas can be defined here, which can be used for further classification of issues.
- *Impacts*
  Impacts can be defined here, which can be used for further classification of issues.
- *Issue 8D Process*
  This setting determines the default process setting for an issue. A standard process for an 8D process can be selected here.
- *Type for Measuring Devices* (see chapter3.16 “Equipment Types”)
  This type determines the setting of the measuring equipment.

- *Type for Operating Equipment* (see chapter 3.16 “Equipment Types”)
  This type determines the setting of the operating equipment.
- *Correction Process* (see chapter 3.24.1 “Correction”)
  This setting determines the default process setting for a correction process. A standard process for a correction process to be used can be stored here.
- *Corrective Action Process* (see chapter 3.24.2 “Corrective Action”)
  This setting determines the default process setting for a correction action process. A standard process for a correction action process to be used can be stored here.
- *Preventive Action Process* (see chapter 3.24.3 “Preventive Action”)
  This setting determines the default process setting for a preventive action process. A standard process for a preventive action process to be used can be stored here.
- *Audit Action Process*
  This setting determines the default process setting for an audit action. A standard process for an audit action process to be used can be stored here.
- *Change Request Process*
  This setting determines the default process setting for a change request. A standard process for a change request process to be used can be stored here.
- *Change Action Process*
  This setting determines the default process setting for a change action. A standard process for a change action process to be used can be stored here.
- *FMEA Process*
  This setting determines the default process setting for a FMEA process. A standard process for FMEA process to be used can be stored here.
- *FMEA Preventive Action Process*
  This setting determines the default process setting for a FMEA preventive action process. A standard process for FMEA preventive action process to be used can be stored here.
- *FMEA Detection Action Process*
  This setting determines the default process setting for a FMEA detection action process. A standard process for FMEA detection action process process to be used can be stored here.
- *Change Types*
  This setting is for creating and storing different change types. These are used for audits (see chapter 3.30 “Audits”).
- *Evaluation Catalogs*
  This setting is for creating and storing different evaluation catalogs. These are used for FMEAs (see chapter 3.36 “FMEAs”) and for audits (see chapter 3.30 “Audits”).
- *FMEA Default Evaluation Catalogs*
  In this field, a default evaluation catalog for severity, occurrence and detection can be defined. These evaluation catalogs have to be created first in the *Evaluation Catalogs* field.
- *Audit Kinds*
  This setting is for creating and storing different audit kinds. These are used for audits (see chapter 3.30 “Audits”).
- *Audit Types*
  This setting is for creating and storing different audit types. These are used for audits (see chapter 3.30 “Audits”).

- *Standards*
  This setting is for creating and storing different standards. These are used for audits (see chapter 3.30 “Audits”).

3.2.3.3 Tab “Expressions”

- *Expression for Commit of Issues*
  Here you can provide a specific expression that is used in the prepare commit of an issues.
- *Expression for Commit of Actions*
  Here you can provide a specific expression that is used in the prepare commit of an action.
- *Expression for Determining Related Issues*
  Here you can provide a specific expression that is used to determine related issues.
- *Expression for Determining 8D Due Dates*
  Here you can provide a specific expression that is used to determine the 8D due dates.
- *Expression for Determining 8D Team*
  Here you can provide a specific expression that is used to determine the 8D team.
- *Expression for Determining Suggested Corrections*
  Here you can provide a specific expression that is used to determine proposals for corrections.
- *Expression for Determining Suggested Corrective Actions*
  Here you can provide a specific expression that is used to determine proposals for corrective actions.
- *Expression for Determining Suggested Preventive Actions*
  Here you can provide a specific expression that is used to determine proposals for preventive actions.
- *Initialization Expression for Created Actions*
  Here you can provide a specific expression that is used to initialize created actions.
- *Expression for Processing Extracted QR Codes*
  Here you can provide a specific expression that is used for processing extracted QR codes.

3.2.3.4 Tab “Inspection Planning”

- *Process After Finishing Last Issue of Test Step*
  Starts the specified process after the last defect within a test step has been completed.
- Insight App for Chat with Test Step Instruction Documents
  Here you can select an insight app which should be used for chatting with documents of a test step.

3.3 8D Process

The 8D process represents the further handling for the processing of an issue (see chapter 3.5 “Issues”). This is based on several steps that must be carried out depending on the dimensions of the damage. “8D” stands for the eight mandatory disciplines (process steps) that are required when dealing with an issue in order to overcome the underlying problem.

- General actions within the steps:
  Within the individual process steps, the following actions are repeated for each individual step. These are summarized as follows:

- *Open*
  The issue (see chapter 3.5 “Issues”) in which the current process is being executed can be opened.
- *Open Properties*
  The properties of the issue in which the current process is being executed can be opened.
- *Finished*
  This field completes the respective process step.
- Perform Risk Evaluation
  The following options are available within this process step:
  - *Perform Risk Evaluation*
    This option opens the issue settings and the 8D team settings via a dialog. These can be manipulated in this process.
  - *Define Corrections* (see chapter 3.24.1 “Correction”)
    This option opens the list of issue specific corrections via dialog, whereby further actions can be added in the process.

The following steps describe the basic processing of an 8D based issue in more detail:

- Form Team.
  The following options are available within this process step:
  - *Schedule Deadlines*
    This option opens the schedule settings of the issue (see chapter 3.5 “Issues”) via dialog. The respective due dates of the dimensions must be set here. This can also be done by selecting a lead time definition.
  - *Form Team*
    This action opens the team setting of the issue (see chapter 3.5 “Issues”) via dialog. The respective teams of the dimensions must be set here if they are not selected.
- Describe Problem.
  The following options are available within this process step:
  - *Describe Problem*
    Triggering this action opens a dialog box that is required for the problem description. This has several fields in which the problem can be described in more detail using location and type information.
- Define Corrections.
  The following options are available within this process step:
  - *Define Corrections* (see chapter 3.24.1 “Correction”)
    This option opens the list of issue specific corrections via dialog, whereby further actions can be added in the process.
- Perform Cause Identification.
  The following options are available within this process step:
  - *Perform Cause Identification*
    A dialog box is displayed in which the corresponding cause (see chapter 3.25 “Cause”) can be further specified.
- Define Corrective Actions.
  The following options are available within this process step:

- *Define Corrective Actions* (see chapter 3.24.2 “Corrective Action”)
  Triggering this action opens a dialog box in which any information on the issue specific corrective actions can be stored. Changes can also be made to the linked cause (see chapter 3.25 “Cause”).

- Implement Corrective Actions.
  The following options are available within this process step:
  - *Implement Corrective Actions* (see chapter 3.24.2 “Corrective Action”)
    The same dialog box that is displayed in the previous process step is called up to confirm the respective settings.
- Define Preventive Actions.
  The following options are available within this process step:
  - *Define Preventive Actions* (see chapter 3.24.3 “Preventive Action”)
    After pressing this action, a dialog box opens where preventive actions can be set according to the issue (see chapter 3.5 “Issues”).
- Further steps until process completion
  First, a background task starts that checks whether the issue (see chapter 3.5 “Issues”) in which the process is being executed contains open actions (see chapter 3.24 “Actions”).

If this was not the case, the completion status for the issue can be set and the process for the issue can be completed accordingly.

3.4 Sites

Sites contain issues (see chapter 3.5 “Issues”) and define various configuration settings. Depending on the site structure, you can define specific properties.

3.4.1 Areas

Sites are divided into the following areas:

- *Issues* (see chapter 3.5 “Issues”)
  This list contains all issues assigned to the site.
- *Actions* (see chapter 3.24 “Actions”)
  This calculated search list contains all actions that are assigned to the site and have been restricted accordingly by your further specifications.
- *Projects* (see chapter 3.28 “Projects”)
  This list contains all projects assigned to the site.
- *Units* (see chapter 3.18 “Unit”)
  This list contains all units assigned to the site.
- *Incoming Goods Objects* (see chapter 3.20 “Incoming Goods Objects”)
  This list contains all incoming goods assigned to the site.
- *Purchase Orders* (see chapter 3.21 “Purchase Orders”)
  This list contains all purchase orders assigned to the site.
- *Purchase Order Positions* (see chapter 3.22 “Purchase Order Positions”)
  This list contains all purchase order positions assigned to the site.
- *Purchaser Groups* (see chapter 3.23 “Purchaser Groups”)
  This list contains all purchaser groups assigned to the site.

- *Inspection Master Plans* (see chapter 3.29.1 “Inspection Master Plans”)
  This list contains all inspection master plans assigned to the site.
- *Inspection Phases* (see chapter 3.29.3 “Inspection Phases”)
  This list contains all inspection phases assigned to the site.
- *Test Step Templates* (see chapter 3.29.4 “Test Step”)
  This list contains all test step templates assigned to the site.
- *Inspection Plans* (see chapter 3.29.2 “Inspection Plans”)
  This list contains all inspection plans assigned to the site.
- *Measuring Units* (see chapter 3.10 “Measuring Units”)
  This list contains all measuring Units assigned to the site.
- *Material Classes* (see chapter 3.11 “Material Classes”)
  This list contains all material classes assigned to the site.
- *Materials* (see chapter 3.12 “Materials”)
  This list contains all materials assigned to the site.
- *Customers* (see chapter 3.13 “Customers”)
  This list contains all customers assigned to the site.
- *Suppliers* (see chapter 3.14 “Suppliers”)
  This list contains all suppliers assigned to the site.
- *Equipment Classes* (see chapter 3.16 “Equipment Types”)
  This list contains all equipment classes assigned to the site.
- *Change Requests* (see chapter 3.35 “Change Requests”)
  This list contains all change requests assigned to the site.
- *Audits* (see chapter 3.30 “Audits”)
  This list contains all audits assigned to the site.
- *Findings* (see chapter 3.34 “Findings”)
  This list contains all findings assigned to the site.
- *FMEAs* (see chapter 3.36 “FMEAs”)
  This list contains all FMEAs assigned to the site.

3.4.2 Actions

The following actions are available for sites:

- *Create Issue* (see chapter 3.5 “Issues”)
  This action creates a new issue.
- *Import FMEA from XML* (see chapter 3.36 “FMEAs”)
  This action allows you to import an FMEA from an XML file based on the MSRFMEA schema. The action is only available if the FMEA functionality has been enabled in the site settings.
- *Show New Events*
  This action shows changes and events for the current object.
- *Manage Follow-Ups*
  This action defines the Follow-Ups. In this way, you can set that a process is started or you receive a notification for the affected objects after a specified period of time has elapsed.
- *Templates and Presettings*
  This action opens the templates and presettings of the site.

- *Settings*
  This action opens the site settings.

3.4.3 Settings

You can define the following settings at the site:

3.4.3.1 Tab “Site”

The following settings are available in the “Site” tab:

- *Name*
  Defines the name of the site.
- *ID*
  Defines the id of the site.
- *Default Issue Description*
  This text field provides a basic description of the issue (see chapter 3.5 “Issues”), if no further information is provided on the issue in question.
- *Default Application Area*
  This text field provides a default application area, which have to be created in the configuration, for newly created issues.
- *Default Lead Time for Issues* (see chapter 3.5 “Issues”)
  Allows you to define a specific default lead time for an issue.
- *Skip Risk Evaluation for Issues Created by Coordinators*
  This checkbox skips the risk evaluation of issues which are created by the issue coordinator.
- *Enabled Properties*
  Enables the activation of various properties on the site. Corresponding lists are displayed on the site.

3.4.3.2 Tab “Number Ranges”

The following settings are available in the “Number Ranges” tab:

- *Number Ranges*
  Allows you to specify a number range that can be stored for use in the issues (see chapter 3.5 “Issues”).
- *Issue Number Ranges*
  Deposit of the number range, for use in the issues at the site concerned.

3.4.3.3 Tab “8D Team”

The following settings are available in the “8D Team” tab:

- *Default Issue Coordinators*
  Enables the deposit of a coordinator for the issues (see chapter 3.5 “Issues”) at the corresponding site.
- *Default D1 to D8-Team*
  Enables the deposit of D-teams for the processing and coordination of issues at the site.

3.4.3.4 Tab “Templates & Processes”

The following settings are available in the "Templates & Processes" tab:

- *Templates*
  Templates for the corresponding object classes, contexts and languages can be stored here. These can be used within the site.
- *Issue 8D Process* (see chapter 3.5 “Issues”)
  Here you can store a standard 8D process (see chapter 3.3 “8D Process”) for issues at the specific site.
- *Correction Process* (see chapter 3.24.1 “Correction”)
  Here you can define a standard correction process for issues at the specific site.
- *Corrective Action Process* (see chapter 3.24.2 “Corrective Action”)
  Here you can define a standard corrective action process for issues at the specific site.
- *Preventive Action Process* (see chapter 3.24.3 “Preventive Action”)
  Here you can define a standard preventive action process for issues at the specific site.
- *Process After Finishing Last Issue of Test Step* (see chapter 3.29.4 “Test Step”)
  Here you can define a process at the specific site, which is executed after the last issue has been completed.

3.4.3.5 Tab “FMEA”

The following settings area available in the “FMEA” tab:

- *FMEA Default Evaluation Catalogs*
  In this field, a default evaluation catalog for severity, occurrence and detection can be defined. These evaluation catalogs have to be created first in the configuration (see chapter 3.2 “Quality Manager Configuration”). If no default evaluation catalog is defined, the corresponding default evaluation catalog is retrieved from the configuration.
- *FMEA Process*
  Here you can define a process, which is used for an FMEA.
- *FMEA Preventive Action Process*
  Here you can define a process, which is applicated on FMEA preventive actions.
- *FMEA Detection Action Process*
  Here you can define a process, which is applicated on FMEA detection actions.

3.4.4 Create Site

To create a new site, you can proceed as follows:

1. Navigate into the quality manager configuration (see chapter 3.2 “Quality Manager Configuration”).
2. Click on “New” within the “Sites”-List.
3. If templates already exist for this object class, a selection dialog is displayed. Select the desired entry from the list.
4. Enter a name for the new site in the field *Name*.
5. If necessary, define a default lead time for issues (see chapter 3.5 “Issues”). Activate and fill out the corresponding properties that are necessary for the configuration of the site.

6. Switch to the Tab “Number Ranges”.
7. Add corresponding number ranges if necessary.
8. Select one of these number ranges for further processing.
9. Switch to the Tab “8D Team”.
10. Store the corresponding 8D teams.
11. Switch to the Tab “Templates & Processes”.
12. Store necessary templates and processes.
13. Click on “Next”.

3.4.5 Create Project

To create a new project in a site, you can proceed as follows:

1. Navigate to the “Projects” (see chapter 3.28 “Projects”) list in a site.
2. Click on the Action “New”.
3. Enter an ID for the project in the field *ID*.
4. In the field *Multilingual Name*, enter names for the corresponding language that should then be stored in the project.
5. If necessary, enter a customer, which you can select in the *Customer* field. This customer (see chapter 3.13 “Customers”) must be created first of all.
6. If necessary, enter an end customer, which you can select in the *End Customer* field. This end customer must be created first, just like the customer, if none can be selected.
7. Click on “Next”.

3.4.6 Create Incoming Goods Object

To create a new incoming goods object in a site, you can proceed as follows:

1. Navigate to the list of “Incoming Goods Objects” (see chapter 3.20 “Incoming Goods Objects”) in the relevant site.
2. Click on "New" in the list of incoming goods objects in the site.
3. Assign an incoming goods object number in the “Number” field.
4. Select a supplier from the list of suppliers available there. If no supplier (see chapter 3.14 “Suppliers”) exists, this must be created first of all.
5. If necessary, enter a posting date for the incoming goods object.
6. Click on “Next”.

3.4.7 Create Purchase Order

To create a new purchase order in a site, you can proceed as follows:

1. Navigate to the list of “Purchase Orders” (see chapter 3.21 “Purchase Orders”) in the relevant site.
2. Click on “New” in the list of purchase orders in the site.
3. Enter a purchase order number in the “Purchase Order Number” field.
4. Enter an order date in the “Order Date” field.

5. Select a supplier from the list of suppliers found there. If no supplier (see chapter 3.14 “Suppliers”) is available, this must be created first of all.
6. Select a purchasing group from the list of purchasers found there. If no purchaser group (see chapter 3.23 “Purchaser Groups”) exists, this must be created first of all.
7. Enter a total value in the corresponding currency in the “Total Value” field.
8. Select a header text for the order.
9. Select a state for the order.
10. Click on “Next”.

3.4.8 Create Purchaser Group

To create a new purchasing group in a site, you can proceed as follows:

1. Navigate to the list of “Purchasing groups" (see chapter 3.23 “Purchaser Groups”) in the relevant site.
2. Click on “New” in the list of purchasing groups in the site.
3. Assign a purchasing group ID in the “ID” field.
4. Select a state for the purchasing group.
5. Click on “Next”.

3.4.9 Create Issue

To create a new issue (see chapter 3.5 “Issues”) in a site, you can proceed as follows:

1. Click on the “Create Issue” action in the site
2. Select a site in the *Site* field. This is the referenced site for the issue. The site in which you are located is already pre-filled.
3. Write a short description in the *Short Description* field, briefly explaining the issue.
4. Select an issue source in the *Issue Source* field.
5. Select a supplier (see chapter 3.14 “Suppliers”), if necessary. This must be created first if none can be selected.
6. Select a date in the *Occurred on* field.
7. Select a severity in the *Severity* field.
8. Select a PDCA state in the *PDCA state* field, if necessary.
9. Select a failure location (see chapter 3.6 “Failure Locations”) in the *Failure Location* field. This must be created first if none can be selected.
10. Select a failure sub location (see chapter 3.7 “Failure Sub Locations”) in the *Failure Sub Location* field. This must also be created first if none can be selected.
    Note: If a *Failure Location* does not have a *Failure Sub Location* defined, this does not need to be filled in.
11. Select a failure type (see chapter 3.8 “Failure Types”) if this is necessary. This must be created first if none can be selected.
12. Select a failure (see chapter 3.9 “Failure”) if this is necessary. This must be created first if none can be selected.
13. Select units (see chapter 3.18 “Unit”) if this is necessary. These must be created first.

14. Select a BOM item (see chapter 3.19 “BOM”) if this is necessary. This must be created first.
15. Add related issues if necessary.
16. Switch to the Tab “8D Team”.
17. Select various coordinators for the issue.
18. Select various members for the individual D-Teams, if necessary.
19. Switch to the Tab “8D Schedule”.
20. Select a lead time definition (see chapter 3.15 “Lead Time Definitions“) if necessary.
21. Select the corresponding D due dates for the individual dimensions. These can be set in the fields *D1 Due on* to *D8 Due on*.
22. Switch to the Tab “D2 – Describe Problem”.
23. Describe a problem summary, if necessary.
24. Select a failure location. This is already pre-initialized if it was selected under the “Issue” tab.
25. Select a failure sub location, if necessary. This is already pre-initialized if it was selected under the “Issue” tab.
    Note: If a *Failure Location* does not have a *Failure Sub Location* defined, this does not need to be filled in.
26. Select a failure type, if necessary. This is already pre-initialized if it has been selected under the "Issue" tab.
27. Select a failure, if necessary. This is already pre-initialized if it was selected under the "Issue" tab.
28. Add attachments to the problem summary under the Attachments for problem summary field, if necessary.
29. Switch to the Tab “D3 – Define Corrections/Containment Actions” (see chapter 3.24.1 “Correction”).
30. Add an entry if this is necessary.
31. Switch to the Tab “D4 – Cause Identification”.
32. Describe a summary for root cause identification, if necessary.
33. Add a root cause identification if necessary.
34. Add a Direct Cause (see chapter 3.25 “Cause”), if necessary. This must be created first if none can be selected.
35. Add a main cause, if necessary. This must also be created first if none can be selected.
36. Switch to the Tab “D5 & D6 – Define/Implement Corrective Actions”.
37. Add a *Corrective Action*, if necessary. This must be created first if none can be selected.
38. Include a summary of the corrective action determination, if necessary.
39. Add a summary of the anchoring of the corrective actions, if necessary.
40. Switch to the Tab “D7 – Define Preventive Actions”.
41. Add a preventive action if necessary. This must be created first if none can be selected.
42. Add a summary of the preventive actions, if necessary.
43. Switch to the Tab “D8 – Complete 8D Process”.
44. Fill in the text fields displayed there, if necessary.
45. Click on “Save”.

3.4.10 Create Inspection Master Plan

To create a new master test plan, you can proceed as follows:

1. Navigate to the Inspection Master Plans (see chapter 3.29.1 “Inspection Master Plans”) list in the relevant site.
2. Click on “New” in the inspection master plans list in the site.
3. Write an appropriate name in the corresponding languages in the *Multilingual Name* field.
4. The "Active" field of the inspection master plan is ticked by default, but you can deactivate this.
5. Click on “Next”.

3.4.11 Create Inspection Phase

To create a new test phase, you can proceed as follows:

1. Navigate to the Inspection phases (see chapter 3.29.3 “Inspection Phases”) list in the relevant site.
2. Click on "New" in the inspection phases list in the site.
3. Define an appropriate ID for the inspection phase. This is used for identification.
4. Write an appropriate name in the corresponding languages in the *Multilingual Name* field.
5. The "Active" field of the inspection plan is ticked by default, but you can deactivate this.
6. Click on “Next”.

3.4.12 Create Test Step

To create a new test step, you can proceed as follows:

1. Navigate to the test steps (see chapter 3.29.4 “Test Step“) list in the relevant site.
2. Click on “New” in the test steps list in the factory.
3. Write an appropriate name in the corresponding languages in the *Multilingual Name* field.
4. Describe an adequate test instruction in the appropriate languages in the *Instruction Text* field.
5. Add a measurement device class, if necessary. This must be created first if none can be selected.
6. Add a measurement device, if necessary. This must be created first if none can be selected.
7. Add an operating equipment device class, if necessary. This must be created first if none can be selected.
8. Add an operating equipment, if necessary. This must be created first if none can be selected.
9. Add attachments if necessary.
10. Add instruction documents if necessary.
11. The test step is “Active” by default, but you can deactivate this.
12. Click on “Next”.

3.4.13 Create Equipment Class

To create a new equipment class (see chapter 3.26 "Equipment Classes"), you can proceed as follows:

1. Navigate to the equipment classes list in the relevant site.
2. Click on "New" in the Equipment classes list in the site.
3. Define an appropriate ID for the inspection phase (see chapter 3.29.3 "Inspection Phases"). This is used for identification.
4. Write an appropriate name in the corresponding languages in the *Multilingual Name* field.
5. Click on "Next".

3.4.14 Create FMEA

To be able to create a new FMEA, the FMEA functionality must have been enabled in the site settings.

To create a new FMEA, you can proceed as follows:

1. Navigate to the FMEAs list in the relevant site.
2. Click on "New" in the FMEAs list in the site.
3. Select the type of FMEA you would like to create, either "Design FMEA" or "Process FMEA".
4. Fill out the *Multilingual Name* and *Responsible* fields and select the desired evaluation catalogs.
5. Click on "Next".

3.5 Issues

Issues contain units (see chapter 3.18 "Unit") and define various configuration settings. There is also a calendar in which various important due dates are displayed. 8D reports are an important component in the context of issues.

3.5.1 Areas

Issues are divided into the following areas:

- *Calendar*
  Indicates deadlines and dates for the issue.
- *Issue*
  This field shows the basic data relating to the issue.
- *Units*
  Describes a list of units that are assigned to the issue.
- *Description*
  This is the description of the issue.
- *D3 – Define Corrections/Containment Actions* (see chapter 3.24.1 "Correction")
  Describes a list of corrections assigned to the issue.
- *D4 – Cause Identification*
  Describes various properties that are necessary for identifying the cause of an issue.

- *D5 & D6 – Define/Implement Corrective Actions* (see chapter 3.24.2 “Corrective Action”)
  Describes various properties that are necessary for the corrective actions of an issue.
- *D7 – Define Preventive Actions* (see chapter 3.24.3 “Preventive Action”)
  Describes various properties that are necessary for the prevention actions of an issue.
- *8D Reports*
  Describes a list of 8D reports that are assigned to the issue.
- *Attachments*
  Describes a list of objects, such as PDFs or WIN Word documents, that are assigned to the issue.
- *Related Issues*
  Describes a list of issues related to the current issue.
- *Referenced by*
  Describes a list of issues that reference the current issue.

3.5.2 Actions

The following actions can be found within an issue:

- *Generate 8D Report*
  Generates an 8D report based on the data in an issue and adds it to the 8D reports list.
- *8D Team*
  Allows you to edit the members of the 8D team for the issue.
- *Add Remark*
  Enables the formulation of notes to be added to an issue.
- *Properties*
  This action calls up the properties of an issue, which can be manipulated within the dialog that appears.

3.5.3 Properties

You can define the following properties in an issue:

3.5.3.1 Tab “Issue”

Within the "Issues" tab, there are the following settings:

- *Site*
  This field contains the site (see chapter 3.4 “Sites”) where this issue occurred.
- *State*
  This field contains the current processing status of the issue.
- *ID*
  This field contains the unique ID of the issue.
- *Short Description*
  Defines the short description of the issue.
- *Issue Source*
  Specifies the source of the issue.
- *Supplier* (see chapter 3.14 “Suppliers”)
  Specifies the supplier in case of issues.

- *NCR ID*
  Defines the NCR ID of the issue.
- *Occurred on*
  Specifies the date on which the issue occurred.
- *Application Area*
  Specifies the application area of the issue.
- *Severity*
  Determines the severity of the issues.
- *Impact*
  Specifies the impact of the issue.
- *PDCA-State*
  Defines the PDCA status of the issue.
- *Failure Location* (see chapter 3.6 "Failure Locations")
  Determines the failure location of the issue.
- *Failure Sub Location* (see chapter 3.7 "Failure Sub Locations")
  Defines a specific failure sub location at the issue, whereby this failure sub location is always subordinate to the failure location.
- *Failure Type* (see chapter 3.8 "Failure Types")
  Defines a specific failure type on the issue, which is relevant for the failure selection.
- *Failure* (see chapter 3.9 "Failure")
  Defines the failure that is responsible for the issue.
- *Customer* (see chapter 3.13 "Customers")
  Defines the corresponding customer for the issue.
- *Sales Order Number*
  Defines the corresponding sales order number for the issue.
- *Project* (see chapter 3.28 "Projects")
  Defines the corresponding project for the issue.
- *Units* (see chapter 3.18 "Unit")
  Defines several units for the issue.
- *BOM Item* (see chapter 3.19 "BOM")
  BOM items can be added to the issue here. These describe more detailed information on the issue.
- *Material* (see chapter 3.12 "Materials")
  Defines a material on which the issue has arisen. If a BOM item is selected and it contains a material, this is automatically adopted as the material for the issue.
- *Incoming Goods Object* (see chapter 3.20 "Incoming Goods Objects")
  This field contains the associated incoming goods object.
- *Purchase Order* (see chapter3.21 "Purchase Orders")
  Defines a purchase order to be assigned to the issue.
- *Purchase Order Position* (see chapter 3.22 "Purchase Order Positions")
  Defines a purchase order position that is available in the selected order.
- *Reference Quantity*
  Defines the reference quantity.

- *Complaint Quantity*
  Defines the complaint quantity.
- *Description*
  Defines a description for the issue.
- *Initial State*
  Defines an initial state for the issue.
- *Target State*
  Defines a target state for the issue.
- *Attachments*
  In this field, you can add attachments to the issue.
- *Related Issues*
  In this field, you can add related issues to the issue. These are used for recognizability.

3.5.3.2 Tab "8D Team"

The following settings are available in the "8D Team" tab:

- *Coordinators*
  The coordinators of the issue are consulted for basic issue handling.
- *D1 – D8 Team*
  These are the respective teams that are responsible for the issue and its different areas of treatment and continue to work on the issue in terms of the team task.

3.5.3.3 Tab "8D Schedule"

The following settings are available in the "8D appointments" tab:

- *Lead Time Definition* (see chapter 3.15 "Lead Time Definitions")
  This allows you to provide an already specified lead time definition for the issue.
- *D1 Due on – D8 Due on*
  This is used to specify the due dates of the respective dimensions. These are used for further processing.

3.5.3.4 Tab "D2 – Describe Problem"

The following settings are available in the "D2 - Describe problem" tab:

- *Problem Summary*
  In terms of summarizing the problem, the respective issue-related processors have the opportunity to describe the problem in more detail.
- *Failure Location* (see chapter 3.6 "Failure Locations")
  If no failure location has been selected under the "Issues" tab, you can select a failure location here. If one has already been selected, it will be displayed here.
- *Failure Sub Location* (see chapter 3.7 "Failure Sub Locations")
  If no failure sub location has been selected under the "Issues" tab, you can select a failure sub location here. If one has already been selected, it will be displayed here.
- *Failure Type* (see chapter 3.8 "Failure Types")
  If no failure type has been selected under the "Issues" tab, you can select a failure type here. If one has already been selected, it will be displayed here.

- *Failure* (see chapter 3.9 “Failure”)
  If no failure has been selected under the “Issues” tab, you can select a failure here. If one has already been selected, it will be displayed here.
- *Problem Summary Attachments*
  This field offers the option of adding various attachments to the issue that could be useful for further processing of the issue.

3.5.3.5 Tab “D3 – Define Corrections/Containment Actions”

Note: The terms “correction” and “containment action” are used synonymously in Fabasoft Approve QMS and describe an action to contain as well as directly correct a detected nonconformity.

The following settings are available in the “D3 - Define Corrections/Containment Actions” tab:

- Corrections (see chapter 3.24.1 “Correction”)
  Corrections relating to the issues can be added within this tab.
- Corrections Summary
  In the sense of the summary of the corrections, the respective processor related to the issues can describe the corrections in more detail here.

3.5.3.6 Tab “D4 – Cause Identification”

The following settings are available in the “D4 - Cause detection” tab:

- *Cause Identification Summary*
  In the sense of the summary of the causes, the respective processor related to the issues can describe the causes (see chapter 3.25 “Cause”) in more detail here.
- *Cause Identification – 5-Why*
  In this field, you can add corresponding 5-Whys to the issue. These are subsequently also used to identify the cause.
- *Direct Cause* (see chapter 3.25 “Cause”)
  In this field you can add a direct cause to the issue, if one is known.
- *Root Cause*
  In this field you can add a root cause to the issue, if one is known.

3.5.3.7 Tab “D5 & D6 – Define/Implement Corrective Actions”

The following settings are available in the “D5 & D6 – Define/Implement corrective actions” tab:

- *Corrective Actions* (see chapter 3.24.2 “Corrective Action”)
  In this field you can add appropriate corrective actions to the issue.
- *Define Corrective Actions Summary*
  Within this field you can summarize why a selected corrective action was felt to be correct.
- *Implement Corrective Actions Summary*
  Within this field, you can mention relevant points regarding the anchoring of corrective actions.

3.5.3.8 Tab “D7 – Define Preventive Actions”

The following settings are available in the “D7 - Define preventive actions” tab:

- *Preventive Actions* (see chapter 3.24.3 "Preventive Action")
  This field is used to add preventive actions associated with the issue.
- *Define Preventive Actions Summary*
  Within this field you can summarize the used corrective actions used for the issue.

3.5.3.9 Tab "D8 – Complete 8D Process"

The following settings are available in the "D8 - Completion 8D process" tab:

- *What happened?*
- *How did this happen?*
- *Why did this happen (and why was it not detected)?*
- *What was done?*
- *What are the Lessons Learned?*

These fields are used to answer and guide the correct interpretation of an issue that has occurred. These fields should also be used to close an issue.

3.6 Failure Locations

Failure locations are assigned to an issue (see chapter 3.5 "Issues"). This can be traced and organized using this failure location.

3.6.1 Actions

The following actions are available for failure sub locations:

- *Import Failure Location*
  This function is used to import multiple failure locations. These failure locations are imported via a CSV.

3.6.2 Properties

You can define the following properties for a failure location:

- *ID*
  Defines the ID for the respective failure location. This ID is used to identify the respective failure location.
- *Multilingual Name*
  The multilingual name is used to name the failure location, whereby this name can be defined in a wide variety of languages.
- *Definition*
  The definition is used to describe the failure location, whereby this definition can be defined in a wide variety of languages.
- *Active*
  This option is used to differentiate between failure locations that are active and those that can no longer be used.

3.7 Failure Sub Locations

Failure sub locations are assigned to an issue (see chapter 3.5 “Issues”). This can be traced and organized using this failure sub location.

3.7.1 Actions

The following actions are available for failure sub locations:

- *Import Failure Sub Location*
  This function is used to import multiple failure sub locations. These failure sub locations are imported via a CSV.

3.7.2 Properties

You can define the following properties for a failure sub location:

- *ID*
  Defines the ID for the respective failure location. This ID is used to identify the respective failure sub location.
- *Multilingual Name*
  The multilingual name is used to name the failure sub location, whereby this name can be defined in a wide variety of languages.
- *Definition*
  The definition is used to describe the failure sub location, whereby this definition can be defined in a wide variety of languages.
- *Active*
  This option is used to differentiate between failure sub locations that are active and those that can no longer be used.

3.8 Failure Types

Failure types are assigned to an issue (see chapter 3.5 “Issues”). This can be traced and organized using this failure type.

3.8.1 Actions

The following actions are available for failure types:

- *Import Failure Type*
  This function is used to import multiple failure types. These failure types are imported via a CSV.

3.8.2 Properties

You can define the following properties for a failure type:

- *ID*
  Defines the ID for the respective failure type. This ID is used to identify the respective failure type.

- *Multilingual Name*
  The multilingual name is used to designate the failure type, whereby this name can be defined in a wide variety of languages.
- *Definition*
  The definition is used to describe the failure type, whereby this definition can be defined in a wide variety of languages.
- *Active*
  This option is used to differentiate between failure types that are active and those that can no longer be used.

3.9 Failure

Failures are assigned to an issue (see chapter 3.5 "Issues"). This can be traced and organized using this failure.

3.9.1 Actions

The following actions are available in the event of failures:

- *Import Failure*
  This function is used to import multiple failures. These failures are imported via a CSV.

3.9.2 Properties

In the event of a failure, you can set the following properties:

- *ID*
  Defines the ID for the respective failure. This ID is used to identify the respective failure.
- *Multilingual Name*
  The multilingual name is used to name the failure, whereby this name can be defined in a wide variety of languages.
- *Definition*
  The definition is used to describe the failure, whereby this definition can be defined in a wide variety of languages.
- *Active*
  This option is used to differentiate between failures that are active and those that can no longer be used.

3.10 Measuring Units

Measuring units can be created and used for different areas. Measuring units are quantities that are used as comparative quantities for quantitative determination.

3.10.1 Actions

The following actions are available for measuring units:

- *Import Measuring Units*
  This function is used to import several measuring units. These measuring units are imported via a CSV.

3.10.2 Properties

You can define the following properties for measuring units:

- *ID*
  Defines the ID for the respective measuring unit. This ID is used to identify the respective measuring unit.
- *ISO-Code*
  Defines the ISO code for the respective measuring unit. This ISO code is used to identify the respective measuring units.
- *Technical Name*
  The multilingual name is used for the technical designation of the measuring unit, whereby this name can be defined in a wide variety of languages.
- *Commercial Name*
  The multilingual name is used for the commercial designation of the measuring unit, whereby this name can be defined in a wide variety of languages.
- *Measuring Unit Text*
  The definition serves to describe the measuring unit, whereby this definition can be defined in a wide variety of languages.
- *State*
  This option is used to differentiate between measurement units that are active and those that can no longer be used.

3.11 Material Classes

The material classes can be assigned to the respective issues (see chapter 3.5 “Issues”). The material class is used to organize any materials.

3.11.1 Actions

The following actions are available for material classes:

- *Import Material Classes*
  This function is used to import several material classes. These material classes are imported via a CSV.

3.11.2 Properties

You can define the following properties for a material class:

- *Short Name*
  This is a field that is available for the specification of any material classes.
- *State*
  This option is used to differentiate between material classes that are active and those that can no longer be used.

3.12 Materials

The materials can be assigned to the respective issues (see chapter 3.5 “Issues”).

3.12.1 Actions

The following actions are available for materials:

- *Import Materials*
  This function is used to import multiple materials. These materials are imported via a CSV.

3.12.2 Properties

You can define the following properties for a material:

- *Number*
  This is the concrete identification option for a material in a specific material class.
- *Material Class*
  This is the material class that is used to group the materials.
- *Multilingual Name*
  The multilingual name is used to name the material, whereby this name can be defined in a wide variety of languages.
- *Measuring Unit*
  This field offers the option of linking a unit of measurement that describes the material in more detail.
- *Gross Weight*
  This field offers the possibility to enter the gross weight of the material.
- *Net Weight*
  This field offers the possibility to specify the net weight of the material.
- *Weight Unit*
  This field allows you to specify the weight unit for the specific material.
- *State*
  This option is used to differentiate between materials that are active and those that can no longer be used.

3.13 Customers

The customers can be assigned to the respective issues (see chapter 3.5 “Issues”). This serves as a specification of the extent to which the issue has arisen.

3.13.1 Areas

The following areas are available for customers:

- *Customer*
  This shows some information about the customer, which are also found under properties.
- *Issues* (see chapter 3.5 “Issues”)
  This shows all related issues of the customer.
- *Audits* (see chapter 3.30 “Audits”)
  This shows all related audits of the customer.

3.13.2 Actions

The following actions are available for customers:

- *Import Customers*
  This function is used to import multiple customers. These customers are imported via a CSV.

3.13.3 Properties

You can define the following properties for a customer:

- *ID*
  Defines the ID for the respective customer. This ID is used to identify the respective customer.
- *Company Name*
  This defines the company name of the respective customer. This also serves to identify the customer.
- *State*
  This option is used to differentiate between customers who are active and those who can no longer be used.

3.14 Suppliers

The suppliers can be assigned to the respective issues (see chapter 3.5 "Issues"). This serves as a specification of the extent to which the issue has arisen.

3.14.1 Actions

The following actions are available for suppliers:

- *Import Suppliers*
  This function is used to import multiple suppliers. These suppliers are imported via a CSV.

3.14.2 Properties

You can define the following properties for a supplier:

- *ID*
  Defines the ID for the respective supplier. This ID is used to identify the respective supplier.
- *Company Name*
  This defines the company name of the respective supplier. This also serves to identify the supplier.
- *State*
  This option is used to differentiate between suppliers that are active and those that can no longer be used.

3.15 Lead Time Definitions

The lead time definitions can be assigned to the respective issues (see chapter 3.5 "Issues"). This serves as a specification of the lead time in which the issue should be located.

3.15.1 Properties

You can specify the following properties in a lead time definition:

- *Multilingual Name*
  The multilingual name is used to designate the lead time, whereby this name can be defined in a wide variety of languages.
- *D1 Due on (Days) – D8 Due on (Days)*
  This is used to specify the due dates of the respective dimensions. These are used for further processing.

3.16 Equipment Types

The equipment types can be assigned to the respective issues (see chapter 3.5 “Issues”). This serves as a specification of the extent to which the issue has arisen.

3.16.1 Properties

You can define the following properties for an equipment type:

- *ID*
  Defines the ID for the respective equipment type. This ID is used to identify the respective equipment type.
- *Multilingual Name*
  The multilingual name is used to name the equipment type, whereby this name can be defined in a wide variety of languages.
- *Active*
  This option is used to differentiate between equipment types that are active and those that can no longer be used.

3.17 Issue Types

The issue types can be assigned to the respective issues (see chapter 3.5 “Issues”). This serves as a clarification, which party has to act on the specific issue and what severity must be used for such issue.

3.17.1 Properties

You can define the following properties for an issue type:

- *Issue Source*
  Defines the source of the issue. If an issue type with this field set gets applied to an issue, the respective field on the issue will be read only and the value of the issue type will be set.
- *Severity*
  This field is for defining a severity, in context of the 8D process. If an issue type with this field set gets applied to an issue, the respective field on the issue will be read only and the value of the issue type will be set.

3.18 Unit

The units can be assigned to the respective issues (see chapter 3.5 “Issues”). These serve as a specification of the extent to which the issue has arisen.

3.18.1 Areas

Units are divided into the following areas:

- *Unit*
  This is the main section of the unit properties.
- *BOM* (see chapter 3.19 "BOM")
  This list is used to add parts list items to the respective unit. These can be managed accordingly within a unit.
- *Attachments*
  This list is used to add corresponding unit-specific documents to the unit.
- *Inspection Plans* (see chapter 3.29 "Inspection Plans")
  If an inspection master plan is available, this list makes it possible to create corresponding inspection plans within a unit.
- *Issues* (see chapter 3.5 "Issues")
  Within a unit, this list offers the possibility to add issues and also set them in dependency.

3.18.2 Actions

The following actions are available for units:

- *Create Issue*
  Opens the dialog for creating a new issue with data of the corresponding unit prefilled.
- *Check*
  This action is available, if the corresponding unit has useable inspection plans stored in the list of *Inspection Plans*. This opens the inspection plans test steps in a dialog for checking.
- *Create Inspection Plan*
  This action lets you create inspection plans, which were created and released for usage on the site (see chapter 3.4 "Sites").
- *Answer Form* (**AI**)
  This action gets available, when the unit contains attachments and is configured with a specific category that has the "Unit Metadata" option enabled. It analyzes the attachments and answers the form, which is provided through the category, with the answers generated by the ai. Afterwards the filled-out form is shown, so you can check the results of the ai for possibility and improve them if desired.

3.18.3 Properties

You can define the following properties in a unit:

- *ID*
  Defines the ID for the respective unit. This ID is used to identify the respective unit.
- *Project*
  This is the project, which is related to the unit.
- *Multilingual Name*
  The multilingual name is used to name the unit, whereby this name can be defined in a wide variety of languages.

- *Active*
  This option is used to differentiate between units that are active and those that can no longer be used.

3.19 BOM

The parts lists are located within a unit (see chapter 3.18 “Unit”), which in turn exists in a project. This BOM has several items.

3.19.1 Areas

BOM items are divided into the following areas:

- *Subordinated Items*
  This list is used to assign further BOM items that relate to the BOM item.
- *Issues* (see chapter 3.5 “Issues”)
  This list refers to the issues that belong to the corresponding BOM item.

3.19.2 Properties

You can define the following properties within a BOM item:

- *ID*
  Defines the ID for the respective BOM item. This ID is used to identify the respective BOM item.
- *Belongs to*
  This setting determines the relationship or unit to which the respective BOM item belongs.
- *Multilingual Name*
  The multilingual name is used to name the BOM item, whereby this name can be defined in a wide variety of languages.
- *Material* (see chapter 3.12 “Materials”)
  A material can be linked to the respective BOM here.
- *Required Quantity*
  The required quantity describes, within the BOM, how high the material quantity of the corresponding material is.

3.20 Incoming Goods Objects

The incoming goods object essentially refers to the physical or digital recording of goods that arrive in a warehouse or in a company. It can be an element in logistics processes that ensures that incoming goods are properly recorded, checked and added to the inventory.

3.20.1 Properties

You can define the following properties within an incoming goods object:

- *Number*
  Defines the number for the respective incoming goods object. This ID is used to identify the respective incoming goods object.

- *Supplier* (see chapter 3.14 “Suppliers”)
  Defines the supplier of the incoming goods object.
- *State*
  Displays the status of the incoming goods object.
- *Posting Date*
  This field contains the posting date of the incoming goods object.

3.21 Purchase Orders

A purchase order is generally a central component of the procurement process. It also plays an important role in warehouse management, production and general business processing.

3.21.1 Areas

Purchase orders are divided into the following areas:

- *Purchase Order Positions*
  This list is used to assign further purchase order positions that relate to the purchase order.
- *Issues* (see chapter 3.5 “Issues”)
  This list refers to the issues that belong to the corresponding purchase order.

3.21.2 Properties

You can define the following properties within a purchase order:

- *Purchase Order Number*
  Defines the order number for the respective purchase order. This order number is used to identify the respective purchase order.
- *Order Date*
  This field contains the date of the purchase order.
- *Supplier* (see chapter 3.14 “Suppliers”)
  This field contains the supplier of the purchase order.
- *Purchaser Group* (see chapter 3.23 “Purchaser Groups”)
  This field contains the purchaser group of the purchase order.
- *Total Value*
  The total value field contains a value that reflects the total costs of subordinate purchase order positions.
- *Header Text*
  The header text field contains a short summary of the purchase order.
- *State*
  This option is used to differentiate between purchase orders that are active and those that can no longer be used.

3.22 Purchase Order Positions

A purchase order position within a purchase order is a specific entry that covers a particular good or service requested by a supplier. This purchase order position contains detailed information such as the item description, quantity, unit price, etc. An issue can also occur in connection with a purchase order position if the delivered product or service does not meet the agreed specifications.

3.22.1 Areas

Purchase order positions are divided into the following areas:

- *Purchase Order Position*
  This list shows some properties of the purchase order position. These can also be edited.
- *Issues* (see chapter 3.5 “Issues”)
  This list refers to the issues that belong to the corresponding purchase order position.

3.22.2 Properties

You can define the following properties within a purchase order position:

- *Position Number*
  Defines the ID for the respective purchase order position. This ID is used to identify the respective purchase order position.
- *Purchase order*
  This field shows the associated purchase order.
- *Supplier* (see chapter 3.14 “Suppliers”)
  This field shows the associated supplier.
- *Short Description*
  A short description can be entered in this field.
- *Arrival Date*
  In this field, you can define the arrival date of the purchase order position.
- *Order Quantity*
  The purchase order quantity describes the quantity of material ordered.
- *Order Quantity Measuring Unit* (see chapter 3.12 “Materials “)
  The purchase order measuring unit describes the measuring units of the material ordered.
- *Quantity in Price Unit*
  The quantity in price measuring unit describes the quantity of material ordered in a price measuring unit.
- *Price Unit Measuring Unit* (see chapter 3.12 “Materials”)
  The price measuring unit describes the measuring unit of the material ordered, only in a different unit. This is used to calculate the purchase order position value.
- *Price*
  The price describes the price of the purchase order position.
- *Price Unit*
  The price unit is the unit of the price. This must be specified as a number.
- *Position Value*
  The position value describes the value of this purchase order position.
- *Material* (see chapter 3.12 “Materials“)
  This field contains the material to which this purchase order position refers.

- *Material Order Text*
  The material order text contains additional information regarding the material of the purchase order.
- *Net Weight*
  The net weight describes the weight of the delivery without packaging.
- *Weight Unit* (see chapter 3.12 "Materials")
  The weight unit for the net weight can be entered here.
- *Additional Note*
  The additional note contains additional notes that do not match either the material order text or the delivery text.
- *Delivery Text*
  The delivery text is a short text containing additional information about the delivery.
- *State*
  This option is used to differentiate between purchase order positions that are active and those that can no longer be used.

3.23 Purchaser Groups

The purchasing groups can be assigned to the respective purchase orders (see chapter 3.21 "Purchase Orders"). This serves as a specification of which purchasing group has placed the purchase order.

3.23.1 Areas

Purchaser Groups are divided into the following areas:

- *Purchaser Group*
  This is the metadata of the purchasing group.
- *Purchase Orders*
  These are the orders that generally belong to the purchaser group.

3.23.2 Properties

You can define the following properties for a purchaser group:

- *ID*
  Defines the ID for the respective purchasing group. This ID is used to identify the purchasing group.
- *State*
  This option is used to differentiate between purchasing groups that are active and those that can no longer be used.

3.24 Actions

Actions are divided into corrections (see chapter 3.24.1 "Correction"), corrective actions (see chapter 3.24.2 "Corrective Action"), preventive actions (see chapter 3.24.3 "Preventive Action"), preventive actions (FMEA) (see chapter 3.24.4 "Preventive Action (FMEA)"), detection actions (FMEA) (see chapter 3.24.5 "Detection Action (FEMA)"), audit actions (see chapter 3.24.6 "Audit Action") and change actions (see chapter 3.24.7 "Change Actions"). These objects must always be created using an underlying template. Corresponding instances are required for this in the template list at configuration level (see chapter 3.2 “Quality Manage”).

Once this has been done, corresponding templates must be stored on the site (see chapter 3.4 “Sites”). This requires a language, context, the corresponding object class and the template. Each individual action is described in more detail below.

3.24.1 Correction

The immediate action is the first action to be taken in the 8D process (see chapter 3.3 “8D Process”). In the case of a 3D process, this must be specified.

3.24.1.1 Properties

- *Issue* (see chapter 3.5 “Issues”)
  This field refers to the referenced issue within which this action was created.
- *State*
  The status describes the life cycle stage in which the corresponding correction is located.
- *Responsible*
  The person responsible for the specific action is entered in this field.
- *Due on*
  The due date for the correction can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the correction.
- *Number*
  This is an automatically generated number for the correction. This is for the unique identification of the correction.
- *Description*
  This is the description of the correction.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.
- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.
- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.

- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.2 Corrective Action

The corrective action is the second relevant action to be set in the 8D process. In the case of a D5 & D6 process, this must be specified.

3.24.2.1 Properties

- *D4 Cause* (see chapter 3.25 “Cause ”)
  This is a cause that must be specified in the course of D4 cause identification. This must be referenced here.
- *Cause*
  In the course of the D4 cause, a cause is selected which is subsequently linked here.
- *Issue* (see chapter 3.5 “Issues”)
  This is a referenced field for the basic issue object.
- *State*
  The status describes the life cycle stage in which the corresponding corrective action currently is.
- *Responsible*
  The person responsible for the specific action is entered in this field.
- *Due on*
  The due date for the corrective actions can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the corrective action.
- *Number*
  This is an automatically generated number for the corrective actions. This is for the unique identification of the corrective action.
- *Description*
  This is the description of the corrective action.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.
- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.

- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.
- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.3 Preventive Action

The preventive action is used in the 8D process (see chapter 3.3 "8D Process"). In the case of a D7 process, this must be specified.

3.24.3.1 Properties

- *D4 Cause* (see chapter 3.25 "Cause")
  This is a cause that must be specified in the course of D4 cause identification. This must be referenced here.
- *Cause*
  In the course of the D4 cause, a cause is selected which is subsequently linked here.
- *Issue* (see chapter 3.5 "Issues")
  This is a referenced field for the basic issue object.
- *State*
  The status describes the life cycle stage in which the corresponding preventive action currently is.
- *Responsible*
  The person responsible for the specific action is entered in this field.
- *Due on*
  The due date for the preventive action can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the preventive action.
- *Number*
  This is an automatically generated number for the preventive action. This is for the unique identification of the preventive action.
- *Description*
  This is a description of the preventive action.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.

- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.
- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.
- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.4 Preventive Action (FMEA)

This is a preventive action which is used in the FMEA (see chapter 3.36 "FMEAs").

3.24.4.1 Properties

- *State*
  The status describes the life cycle stage in which the corresponding preventive action currently is.
- *Responsible*
  The person responsible for the specific action is entered in this field.
- *Due on*
  The due date for the preventive action can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the preventive action.
- *Description*
  This is a description of the preventive action.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.
- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.
- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.
- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.5 Detection Action (FEMA)

This is a detection action which is used in the FMEA (see chapter 3.36 "FMEAs").

3.24.5.1 Properties

- *State*
  The status describes the life cycle stage in which the corresponding preventive action currently is.
- *Responsible*
  The person responsible for the specific action is entered in this field.
- *Due on*
  The due date for the preventive action can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the preventive action.
- *Description*
  This is a description of the preventive action.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.
- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.
- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.
- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.6 Audit Action

Audit actions are used in Audits (see chapter 3.30 "Audits") and can be created in the context of an audit, checklist (see chapter 3.31 "Checklists"), checklist entry (see chapter 3.32 "Checklist Entries") or findings (see chapter 3.34 "Findings").

3.24.6.1 Properties

- *Belongs to*
  This is the superordinated object, where the audit action was created in.

- *Audit* (see chapter 3.30 “Audits“)
  This is the audit which the audit action belongs to.
- *State*
  The status describes the life cycle stage in which the corresponding preventive action currently is.
- *Responsible*
  The person responsible for the specific action is entered in this field.
- *Due on*
  The due date for the preventive action can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the preventive action.
- *Description*
  This is a description of the preventive action.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.
- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.
- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.
- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.7 Change Actions

This is an action which is used for requesting changes.

3.24.7.1 Properties

- *Change Request* (see chapter 3.35 “Change Requests”)
  This field shows the related change request which the change action was created for.
- *State*
  The status describes the life cycle stage in which the corresponding preventive action currently is.
- *Responsible*
  The person responsible for the specific action is entered in this field.

- *Due on*
  The due date for the preventive action can be set here.
- *With Feedback?*
  This field can be used to decide whether feedback should be sent to the person responsible.
- *Feedback to*
  If the field *With Feedback?* has been selected, this field must be filled in accordingly.
- *Short Description*
  This is a brief description of the preventive action.
- *Number*
  This is an automatically generated number for the preventive action. This is for the unique identification of the preventive action.
- *Description*
  This is a description of the preventive action.
- *Effectiveness Review?*
  This field is used to decide whether an effectiveness review should be carried out.
- *Effectiveness Review After*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a period to be set to which the effectiveness review should relate.
- *Effectiveness Review by*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is a user to be set to whom the effectiveness review should refer.
- *Effectiveness Remark*
  This field is displayed after the *Effectiveness Review?* field has been checked. This is field for entering remarks about the effectiveness of the action.
- *Evidence of Effectiveness*
  This field is displayed after the *Effectiveness Review?* field has been checked. Attachments can be added as evidence for the effectiveness.

3.24.8 Process for Actions

The basic process for actions represents the further handling for the processing of a measure.

- General actions within the steps:
  Within the individual process steps, the following actions are repeated for each individual step. These are summarized as follows:
  - *Open*
    The action in which the current process is being executed can be opened.
  - *Open Properties*
    The properties of the action in which the current process is being executed can be opened.
  - *Finish*
    This field completes the respective process step.
- Finish Action
  The following options are available within this process step:

- *Open Issue* (see chapter 3.5 “Issues”)
  The issue related to the action or the issue affected by the action is opened.

- Action Finished
  The following options are available within this process step:
  - *Open Issue*
    The issue related to the action or the issue affected by the action is opened.
  - *Take Note*
    This field completes the “Action Finished” process step and at the same time opens a dialog box where the settings of the action can be checked and manipulated accordingly.
- Further steps until process completion
  First, a background task starts, which is then replaced by an effectiveness review and the corresponding upload. Once this has been completed, the task is considered finished.

3.25 Cause

The causes can be created within an issue (see chapter 3.5 “Issues”) and are assigned to it accordingly. The cause can be restricted at issue level, whereby a direct cause and a root cause can be referenced.

3.25.1 Areas

The causes are divided into the following areas:

- *Remarks*
  This is a collection of remarks regarding to the cause.
- *Corrective Actions* (see chapter 3.24.2 “Corrective Action”)
  This list provides an overview of the associated corrective action, whereby corresponding corrective actions must be stored for the respective cause.
- *Preventive Actions* (see chapter 3.24.3 “Preventive Action”)
  This list provides an overview of the associated preventive action, whereby appropriate preventive actions must be stored for each cause.
- *Attachments*
  This list contains all attachments of the cause.

3.25.2 Actions

Causes can have the following actions:

- Add Remark
  This opens a dialog, where a remark can be created.

3.25.3 Properties

You can define the following properties in a cause:

- *Sequence Number*
  The sequence number describes the cause.
- *Failure*
  The error shows the exact failure to which this cause belongs.

- *Issue* (see chapter 3.5 “Issues”)
  This field holds the connection to the issue or describes the issue in which the cause is located.
- *Issue Description*
  This field describes the issue in more detail (see chapter 3.5 “Issues”) or refers to the issue description in the issue.
- *Short Description*
  This field contains a brief description of the cause.
- *Why*
  This field serves as support for the cause description. The extent to which the cause occurred should be specified.
- *Therefore*
  This field also serves to support the description of the cause. It should specify what the cause is, or it is the direct formulation of causality.
- *Attachments*
  This list contains all attachments of the cause.
- *Cause Area*
  The cause area is used to link to a failure location (see chapter 3.6 “Failure Locations”). However, this failure location can only be referenced if there is an active failure sub location.
- *Cause Sub Area*
  The error sub-location mentioned above (see chapter 3.7 “Failure Sub Locations”) can be referenced here if it is active.
- *Cause Type*
  This field is used to reference a failure type (see chapter 3.8 “Failure Types”).
- *Cause*
  The cause serves as a reference to a failure that has been restricted by selecting a failure type.
- *Component Affected*
  This selection field enables the reference to a component. This component is expressed by the following four fields.
- *Affected Component* (see chapter 3.6 “Failure Locations”)
  This field enables the reference to a failure location, whereby the affected component is present at this failure location.
- *Affected Sub Component* (see chapter 3.7 “Failure Sub Locations”)
  This field enables the reference to a failure sub location, whereby the affected sub-component is present at this failure sub location.
- *Component Failure Type* (see chapter 3.8 “Failure Types”)
  This field enables the reference to a failure type, describing on an abstract level how the component was damaged.
- *Component Failure* (see chapter 3.9 “Failure”)
  This field enables the reference to an failure, whereby this is restricted by the selected failure type (see chapter 3.8 “Failure Types”).
- *Remarks*
  This field can be used as a comment field. Any remarks on the cause can be added here.

- *Corrective Actions* (see chapter 3.24.2 "Corrective Action")
  This list provides an overview of the associated corrective actions, whereby corresponding corrective actions must be stored for the respective cause.
- *Preventive Actions* (see chapter 3.24.3 "Preventive Action")
  This list provides an overview of the associated preventive actions, whereby appropriate preventive actions must be stored for each cause.

3.26 Equipment Classes

The equipment classes can be accessed via the settings on the configuration or on the respective site (see chapter 3.4 "Sites").

At least one equipment type (see chapter 3.16 "Equipment Types") must be created in the configuration list. This can be stored under Type for measuring equipment and Type for operating equipment in the configuration settings.

Within the site (see chapter 3.4 "Sites") concerned, the corresponding properties, in this case equipment classes, must be activated.

If this has been done, an equipment class can be created in the course of the site.

3.26.1 Properties

- *ID*
  Defines the ID for the respective equipment class. This ID is used to identify the respective equipment class.
- *Multilingual Name*
  The multilingual name is used to name the equipment class, whereby this name can be defined in a wide variety of languages

3.27 Equipment

Equipment can be produced within an equipment class (see chapter 3.26 "Equipment Classes").

3.27.1 Areas

Equipment is divided into the following areas:

- *Attachments*
  This list is used to add various equipment-related documents.

3.27.2 Properties

- *ID*
  Defines the ID for the respective equipment. This ID is used to identify the respective equipment.
- *Type*
  The type specifies the basic type of the equipment, whereby these types were set up in the configuration.

- *Multilingual Name*
  The multilingual name is used to name the equipment, whereby this name can be defined in a wide variety of languages.
- *Equipment Class* (see chapter 3.26 “Equipment Classes”)
  This is the direct link to the equipment class above.
- *Active*
  This option is used to differentiate between equipment that is active and equipment that can no longer be used.

3.28 Projects

A project can be produced within a site (see chapter 3.4 “Sites”). This project serves as a reference object.

3.28.1 Areas

A project is divided into the following areas:

- *Project*
  This is a brief overview of the project metadata.
- *Units* (see chapter 3.18 “Unit”)
  This is a list that refers to the units within a project. Units can be created within the project.
- *Attachments*
  This list is used to add various project-related documents.
- *Issues* (see chapter 3.5 “Issues”)
  This list contains all issues related to the specific project.

3.28.2 Properties

You can define the following properties in a project:

- *ID*
  Defines the ID for the respective project. This ID is used to identify the respective project.
- *Multilingual Name*
  The multilingual name is used to name the project, whereby this name can be defined in a wide variety of languages.
- *Customer* (see chapter 3.13 “Customers”)
  This is the linking of the customer of a project. A customer is created in the customer list at configuration level.
- *End User*
  This is the linking of the end user of a project. An end user is created in the customer list at configuration level.
- *Sales Order Number*
  Defines the sales order number.
- *State*
  This is the state of the project.

3.29 Inspection Plans

The following chapter describes the subdivision of the test plans in more detail.

3.29.1 Inspection Master Plans

An inspection master plan can be produced within a site (see chapter 3.4 “Sites”) and serves as a superordinate inspection plan (see chapter 3.29.2 “Inspection Plans”) for all underlying inspection plans, inspection phases (see chapter 3.29.3 “Inspection Phases”) and test steps (see chapter 3.29.4 “Test Step”).

3.29.1.1 Areas

An inspection master plan is divided into the following areas:

- *Inspection Plans*
  These are the underlying inspection plans.
- *Released Revisions*
  These are the released revisions of the inspection plans.

3.29.1.2 Properties

You can define the following properties in an inspection master plan:

- *Multilingual Name*
  You can define the following properties in an inspection master plan:
- *Active*
  This option is used to differentiate between master inspection plans that are active and those that can no longer be used.
- *Site* (see chapter 3.4 “Sites”)
  This is the representation of the site referred to.

3.29.2 Inspection Plans

An inspection plan can be produced within an inspection master plan and is used to structure the inspections.

3.29.2.1 Actions

The following actions are available within an inspection plan:

- *Create Test Step* (see chapter 3.29.4 “Test Step”)
  Creates a test step within the referenced inspection plan, which also refers to the inspection plan as a result.
- *Create Revision*
  Creates a revision of the inspection plan. This revision is added at inspection master plan level. This option is only available, when editing inspection plans on the site (see chapter 3.4 “Sites”).
- *Set Inactive*
  Sets the relevant inspection plan to “inactive”.

- *Ready for Checking*
  Sets the relevant inspection plan to “ready”.
- *Check*
  This action is available, when the inspection plan is set to *ready*.

3.29.2.2 Properties

You can define the following properties in an inspection plan:

- *Inspection Phase* (see chapter 3.29.3 “Inspection Phases”)
  This is the link to the inspection phase to be obtained.
- *State*
  This is the status currently occupied by the inspection plan.
- *Released Revision*
  This is a released revision of the inspection plan.
- *Sequence Number*
  This is the current sequence number.
- *Sorting Number*
  This is the sorting number of the inspection plan.
- *Multilingual Name*
  The multilingual name is used to name the inspection plan, whereby this name can be defined in a wide variety of languages.
- *Description*
  The description serves to formulate the inspection plan in more detail or to describe the extent to which it can be used.
- *ITPs*
  The ITPs are the display of the inspection master plans (see chapter 3.29.1 “Inspection Master Plans”).
- *Template Created by*
  This field stores the information by whom the inspection plan was created.
- *Template Created on/at*
  This field stores the information when the inspection plan was created.

3.29.3 Inspection Phases

An inspection phase can be created within a site (see chapter 3.4 “Sites”). This is used to further subdivide the inspection phases and test steps (see chapter 3.29.4 “Test Step”).

3.29.3.1 Actions

The following actions are available for inspection phases:

- *New*
  This creates a new inspection plan (see chapter 3.29.2 “Inspection Plans”) in the current inspection phase.

3.29.3.2 Properties

You can define the following properties in an inspection phase:

- *ID*
  Defines the ID for the respective inspection phase. This ID is used to identify the respective inspection phase.
- *Multilingual Name*
  The multilingual name is used to name the inspection phase, whereby this name can be defined in a wide variety of languages.
- *Active*
  This option is used to differentiate between inspection phases that are active and those that can no longer be used.
- *Site*
  This is the superordinate work of the test phase.

3.29.4 Test Step

A test step can be created within an inspection phase (see chapter 3.29.3 "Inspection Phases"), or an inspection plan (see chapter 3.29.2 "Inspection Plans"). This serves to further subdivide the inspection plan.

3.29.4.1 Areas

The following areas exist within a test step:

- *Test Step*
  This is the metadata section of the test steps.
- *Attachments*
  This list is used to attach objects to the test step that affect it.

3.29.4.2 Actions

The following actions are available for test steps:

- *Check*
  This opens a dialog with the test step for checking.
  - *Chat* (**AI**)
    This option inside the dialog allows you to "chat" with the provided documents of the test step. You can ask questions and the ai will answer them based on the data inside these documents.
- *Create Issue*
  This opens a dialog for creating an issue with data of the test step prefilled.

3.29.4.3 Properties

You can define the following properties in a test step:

- *ID*
  This ID is used to identify the respective test step.
- *Multilingual Name*
  The multilingual name is used to name the test step, whereby this name can be defined in a wide variety of languages.

- *Instruction Text*
  This is a test instruction that must be carried out in accordance with the test step.
- *Measuring Device Class* (see chapter 3.26 “Equipment Classes”)
  This is the link to a measuring equipment class that is associated with the test step.
- *Measuring Device* (see chapter 3.27 “Equipment”)
  This is a measuring device that is connected to the test step and is restricted accordingly by the measuring device class already selected.
- *Operating Equipment Class* (see chapter 3.26 “Equipment Classes”)
  This is the link to an operating equipment class that is associated with the test step.
- *Operating Equipment* (see chapter 3.27 “Equipment”)
  This is an operating equipment that is associated with the test step and is restricted accordingly by the operating equipment class already selected.
- *Author*
  This is the initial author of the test step.
- *Attachments*
  This list is used to attach objects to the test step that affect it.
- *Instruction Documents*
  These are test step-related instruction documents. These are used for further processing of the test step.
- *Active*
  This option is used to differentiate between test steps that are active and those that can no longer be used.

3.30 Audits

- Audits are used for reviewing a system. They contain checklists (see chapter 3.31 “Checklists”), checklist entries (see chapter 3.32 “Checklist Entries”), audit actions (see chapter 3.24.6 “Audit Action”), findings (see chapter 3.34 “Findings”) and change requests (see chapter 3.35 “Change Requests”).

3.30.1 Areas

Audits are divided into the following areas:

- *Calendar*
  This calendar shows all events and tasks related to the audit.
- *Audit*
  This area shows some information about the audit, which can be seen in more detail under properties.
- *Description*
  This area shows the description of the audit.
- *Checklists*
  This area contains the checklists related to the audit.
- *All Checklist Entries*
  This area contains all checklist entries from all related checklists.
- *Findings*
  This area contains the findings related to this audit.

- *Audit Actions*
  This area contains the related audit actions.
- *Reports*
  This area contains the related reports.
- *Attachments*
  This area contains the related attachments.
- *Subordinated Audits*
  This area contains all subordinated audits of the current audit.

3.30.2 Actions

The following actions are available within an audit:

- *Create Finding*
  This action creates a new finding for the current audit.
- *Create Audit Action*
  This action creates a new audit action.
- *Generate Report*
  This action creates a new report.
- *Perform Completeness Check*
  This action opens a new dialog, in which all relevant checks of the checklist entries can be checked.
- *Add Remark*
  This creates a new remark for the related object.
- *Properties*
  This opens the properties of the object.

3.30.3 Settings

You can define the following settings within an audit:

- *Year*
  This is the year of the audit.
- *Number*
  This is a generated number, which also functions as identifier for the audit.
- *State*
  This field contains the current state of the audit.
- *Multilingual Name*
  The multilingual name stores the name of the audit. This name can be set for different languages.
- *Audit Kind*
  The audit kind is for specifying kind of the related audit. Audit kinds have to be defined in the configuration (see chapter 3.2 “Quality Manager Configuration“) in order to be available to select.
- *Audit Type*
  The audit type is for further specifying the type of the related audit. Audit types have to be

defined in the configuration (see chapter 3.2 “Quality Manager Configuration“) in order to be available to select.

- *Standard*
  In this field, you can select a standard, which this audit is following. Standards have to be defined in the configuration (see chapter 3.2 “Quality Manager Configuration“) in order to be available to select.
- *Responsible*
  Here you can select a responsible for the audit.
- *Begin*
  This is the start date of the audit.
- *End*
  This is the end date of the audit.
- *Description*
  This field contains the description. This description can be written in different languages.
  - *Language*
    This is the language of the description.
  - *Language-Specific String List*
    This is the actual description, written in the selected language.
- *Customer* (see chapter 3.13 “Customers”)
  The customer of the audit can be set here.
- *Supplier* (see chapter 3.14 “Suppliers”)
  The supplier of the audit can be set here.
- *Unit* (see chapter 3.18 “Unit”)
  The unit of the audit can be set here.
- *Material* (see chapter 3.12 “Materials”)
  The material of the audit can be set here.

3.31 Checklists

- Checklists are part of audits (see chapter 3.30 “Audits”), and contain various checklist entries (see chapter 3.32 “Checklist Entries”), audit actions (see chapter 3.24.6 “Audit Action”) and findings (see chapter 3.34 “Findings”).

3.31.1 Areas

Checklists are divided into the following areas:

- *Checklist*
  This area shows some information about the audit, which can be seen in more detail under properties.
- *Description*
  This shows the description of the checklist.
- *Remarks*
  This area shows a collection of all remarks for the checklist.
- *Checklist Entries* (see chapter 3.32 “Checklist Entries”)
  This area shows the checklist entries created for this specific checklist.

- *Findings* (see chapter 3.34 “Findings”)
  This area shows all findings related to the checklist.
- *Audit Actions* (see chapter 3.24.6 “Audit Action”)
  This area shows all audit actions related to the checklist.
- *Reports*
  This area shows all reports generated for the checklist.
- *Attachments*
  This area contains all attachments of the checklist.

3.31.2 Actions

The following actions are available within a checklist:

- *Generate Report*
  This starts the generation of a report for the checklist.
- *Add Remark*
  This opens a dialog for creating a remark.

3.31.3 Properties

You can define the following settings within a checklist:

- *Multilingual Name*
  This field contains the name of the checklist.
- *Belongs to*
  This field contains the audit, which the specific checklist is part of.
- *Number*
  This field contains the generated number of the checklist. It can also be used for identifying.
- *State*
  This is the state of the checklist.
- *Evaluation Catalog*
  This is evaluation catalog which is used for the checklist and the checklist entries
- *Responsible*
  This is the responsible of the checklist.
- *Respondents*
  Here you can add respondents to the checklist.
- *Respondents with Access*
  This field contains the respondents with access to the checklist.
- *Begin on*
  This is the start date of the checklist.
- *End on*
  This is the end date of the checklist.
- *Description*
  This field contains the description. This description can be written in different languages.
  - *Language*
    This is the language of the description.

- *Language-Specific String List*
  This is the actual description, written in the selected language.

3.32 Checklist Entries

- Checklist entries are part of checklists (see chapter 3.31 "Checklists") and contain audit actions (see chapter 3.24.6 "Audit Action") as well as findings (see chapter 3.34 "Findings")

3.32.1 Areas

Checklist entries are divided into the following areas:

- *Checklist Entry*
  This contains some information about the checklist entry, which can also be seen under properties.
- *Description*
  This is the description of the checklist entry.
- *Findings*
  This list contains all findings belonging to the checklist entry.
- *Audit Actions*
  This list contains all audit actions related to the checklist entry.
- *Attachments*
  This field contains all attachments of the checklist entry.

3.32.2 Actions

The following actions are available within a checklist entry:

- *Add Remark*
  This action opens a dialog for creating a remark.

3.32.3 Properties

You can define the following settings within a checklist entry:

- *Checklist* (see chapter 3.31 „Checklists")
  This is checklist which the specific checklist entry is part of.
- *Number*
  This is a generated number for the checklist entry which can also be used for identifying.
- *Chapter of Standard*
  This is the Standard which the checklist entry is following.
- *Multilingual Name*
  This is the name of the checklist entry. When creating a checklist entry as a template, it can be provided in several different languages. For normal usage this has only one.
- *Description*
  This field contains the description. This description can be written in different languages.
  - *Language*
    This is the language of the description.

  - *Language-Specific String List*
    This is the actual description, written in the selected language.
- *Evaluation*
  Here the evaluation of the checklist entry can be set. The available options come from the evaluation catalog of the checklist.

3.32.3.1 Tab "Affected Processes"

In this tab, you can set the following settings:

- *Checklist* (see chapter 3.31 „Checklists“)
  This is checklist which the specific checklist entry is part of.

3.33 Audit Actions

Audit actions are part of a checklist entry (see chapter 3.32 "Checklist Entries") and can contain change requests (see chapter 3.35 "Change Requests").

3.33.1 Areas

Audit actions are divided into the following areas:

- *Action*
  This contains some information about the audit action, which can also be seen under properties.
- *Description*
  This is the description of the audit action.
- *Attachments*
  This field contains all attachments of the audit action.
- *Change Request*
  This is a list of change requests related to the audit action.

3.33.2 Actions

The following actions are available within an audit action:

- *New*
  This action creates a new audit action.
- *Cancel*
  This action cancels the audit action.
- *Reopen*
  This action is for reopening a canceled audit action.
- *Add Remark*
  This opens a dialog for creating a new remark.

3.33.3 Properties

You can define the following settings within an audit action:

- *Belongs to*
  This is the related checklist entry of the audit action.

- *Audit*
  This is the related audit of the audit action.
- *Checklist*
  This is the related checklist of the audit action.
- *State*
  This is the state of the audit action.
- *Responsible*
  In this field the responsible for the audit action can be set.
- *Due on*
  This is the due date of the audit action.
- *With Feedback?*
  Hereby the feedback for the audit action can be enabled.
- *Feedback to*
  When *With Feedback?* is checked, this field is shown. Here a user can be set, who should receive the feedback.
- *Short Description*
  This is the short description of the audit action.
- *Number*
  This is the generated number of the audit action, which can also be used for identifying.
- *Description*
  This is the description of the audit action.
- *Effectiveness Review?*
  Hereby the effectiveness review can be audit action.
- *Effectiveness Review After*
  Here you can specify a time after which the effectiveness review should be carried out.
- *Effectiveness Review by*
  Here the user who should carry out the effectiveness review can be set.

3.34 Findings

- Findings can be part of a checklist (see chapter 3.31 “Checklists”) or a checklist entry (see chapter 3.32 “Checklist Entries”) and contain audit actions (see chapter 3.24.6 “Audit Action”).

3.34.1 Areas

Findings are divided into the following areas:

- *Finding*
  This is a small collection of important data about the finding, which can also be seen under *Properties*.
- *Description*
  This field shows the description of the finding, which can also be seen under *Properties*.
- *Audit Actions*
  This field stores audit actions related to the specific finding.

- *Attachments*
  This field stores attachments related to the finding.

3.34.2 Actions

The following actions are available within a finding:

- *New Audit Action*
  This action lets you create a new audit action with data of the finding prefilled.
- *Add Remark*
  This action allows you to add a remark to the finding.

3.34.3 Settings

You can define the following settings within a finding:

- *Belongs to*
  This field contains the related object, which the finding belongs to.
- *Number*
  This is a generated number of the finding, which can also be used for identifying.
- *Audit*
  This is the audit related to the finding.
- *Checklist*
  This is the checklist related to the finding.
- *State*
  This is the current state of the finding.
- *Type*
  Here you can select the type of the finding.
- *Short Description*
  This is the short description of the finding
- *Responsible*
  Here you can specify a responsible for the finding.
- *Description*
  This field is the description of the finding.

3.35 Change Requests

- Change requests are part of an audit action (see chapter 3.24.6 “Audit Action”) and contain change actions (see chapter 3.24.7 “Change Actions”).

3.35.1 Areas

Change requests are divided into the following areas:

- *Affected Objects*
  Here you can add objects which are related to the change request.
- *Change Actions*
  Here you can create change actions for the change request.

- *Attachments*
  This list contains all attachments of the change request.

3.35.2 Actions

The following actions are available within a change request:

- *Add Remark*
  This action opens a dialog for creating a new remark.

3.35.3 Properties

You can define the following settings within a change request:

- *Year*
  This is the year, which the change request was created.
- *Number*
  This is the generated number for the change request, which can also be used for identifying.
- *Belongs to*
  This is the related object, which the change request belongs to.
- *State*
  This is the current state of the change request.
- *Priority*
  Here you can set a priority for the change request.
- *Short Description*
  This is the short description of the change request.
- *Responsible*
  This is the responsible for the change request
- *Due on*
  This is the due date of the change request.
- *Description*
  This is the description of the change request.
- *Reason for Change*
  This field is for entering a reason for changing the affected objects.

3.36 FMEAs

Failure Mode and Effects Analysis (FMEA) is a systematic method for identifying and evaluating potential failures in products, processes, or systems during the planning and development stages. Its objective is to detect risks early, analyze their causes and effects, and define suitable actions to prevent failures or reduce their impact.

3.36.1 Areas

An FMEA is divided into the following areas:

- *Calendar*
  This is a calendar (see chapter 2.18 “Calendar”) that contains all the events in the FMEA.

- *Structure Elements*
  This field shows all structure elements of the FMEA.
- *Characteristics*
  This field shows all characteristics of the FMEA.
- *Functions*
  This field shows all functions of the FMEA.
- *Failure Modes*
  This field shows a diagram of all failure modes of the FMEA.
- *Evaluations*
  This field shows a diagram of all evaluations for the focus element of the FMEA.
- *Actions*
  This field shows a diagram of all actions of the FMEA.
- *Risk Matrix: S x O*
  This field shows a table of all failure modes of the FMEA. This table displays the risk matrix with the occurrence from 1 to 10 as rows and the severity from 1 to 10 as columns.
- *Risk Matrix: S x D*
  This field shows a table of all failure modes of the FMEA. This table displays the risk matrix with the detection from 1 to 10 as rows and the severity from 1 to 10 as columns.
- *Risk Matrix: D x O*
  This field shows a table of all failure modes of the FMEA. This table displays the risk matrix with the occurrence from 1 to 10 as rows and the detection from 1 to 10 as columns.
- *Control Plans*
  This field shows all control plans related to the FMEA.
- *Attachments*
  This field contains the attachments of the FMEA.

3.36.2 Actions

The following actions are available within a FMEA:

- *Create Structure Element*
  This function allows you to create a new structure element.
- *Create Function*
  This function allows you to create a new function for a structure element.
- *Create Failure Mode*
  This function allows you to create a new failure mode for a function.
- *Export as XML*
  This function allows you to export the FMEA as an XML file. The XML is based on the MSRFMEA schema.
- *Structure*
  This option opens a structure view, where the underlying structured elements and functions are shown.

3.36.3 Settings

You can define the following settings at the FMEA:

- *State*
  This field contains the state of the FMEA.
- *Site* (see chapter 3.4 “Sites”)
  This field contains the site, where the FMEA is created/used in.
- *Multilingual Name*
  The multilingual name is used to name the FMEA, whereby this name can be defined in a wide variety of languages.
- *Customer* (see chapter 3.13 “Customers”)
  This field contains the customer, which this FMEA is related to.
- *Model Year/Program*
  This field contains the model year or the program of the FMEA to test.
- *Focus Element*
  This field allows you to define the focus element for the FMEA.
- *Evaluation Catalog for Severity*
  This field stores the evaluation catalog for the severity. The evaluation catalog has to be created in the configuration beforehand.
- *Evaluation Catalog for Occurrence*
  This field stores the evaluation catalog for the occurrence. The evaluation catalog has to be created in the configuration beforehand.
- *Evaluation Catalog for Detection*
  This field stores the evaluation catalog for the detection. The evaluation catalog has to be created in the configuration beforehand.

3.37 Structure Elements

Structure elements are used to define the structure of a product/ system (in case of a Design FMEA) or process (in case of a Process FMEA). They can be used as a reference to real world devices or components, or can represent immaterial components of a system.

3.37.1 Areas

Structure elements are divided into the following areas:

- *Subordinated Structure Elements* (see chapter 3.37 “Structure Elements”)
  This field contains the underlying elements that specify the current structured element in more detail.
- *Functions* (see chapter 3.38 “Functions”)
  This field contains the functions, which the current structured element has.
- *Attachments*
  This field contains the attachments of the structured element.

3.37.2 Actions

The following actions are available within a structured element:

- *Create Form*
  Creates a new report of the structure element in the style of the AIAG/VDA 2019 form. The resulting form is saved under the attachments of the structure element.

3.37.3 Properties

You can define the following properties in a structured element:

- *Parent Element*
  This field shows the superordinate element of this structured element.
- *Multilingual Name*
  The multilingual name is used to name the structured element, whereby this name can be defined in a wide variety of languages.
- *Failure Location* (see chapter 3.6 “Failure Locations”)
  This field is used for defining the failure location of the structured element.
- *Failure Sub Location* (see chapter 3.7 “Failure Sub Locations”)
  This field is used for defining the failure sub location of the structured element.

3.38 Functions

Functions represent the functionality of a structured element (see chapter 3.37 “Structure Elements”).

3.38.1 Areas

Functions are divided into the following areas:

- *Failure Modes* (see chapter 3.39 “Failure Modes”)
  This field stores all underlying failure modes of the function
- *Superordinated Functions*
  This field stores the superordinate functions of the current function.
- *Subordinated Functions*
  This field stores the subordinated functions of the current function.

3.38.2 Properties

You can define the following properties in a function:

- *Structure Element*
  This is the structure element the function belongs to.
- *Multilingual Name*
  This is the name of the function. It can be defined in many different languages.
- *Description*
  This is the description of the function.

3.39 Failure Modes

Failure Modes describe the possible failures of a structure element (see chapter 3.37 “Structure Elements”).

3.39.1 Areas

Failure modes are divided into the following areas:

- *Effects*
  This field allows you to reference the effects of the failure mode.
- *Causes*
  The field allows you to reference the causes of the failure mode.
- *Related Issues* (see chapter 3.5 “Issues”)
  This field contains issues which have any attribute of the current failure mode in common.
- *Assigned Issues* (see chapter 3.5 “Issues”)
  Issues that are assigned to the failure mode.

3.39.2 Properties

You can define the following properties in a failure mode:

- *Structure Element* (see chapter 3.37 “Structure Elements”)
  This is the corresponding structure element of the failure mode
- *Function* (see chapter 3.38 “Functions”)
  This is the function this failure mode is related to.
- *Multilingual Name*
  This is the name of the failure mode. The name can be defined in different languages.
- *Failure Type* (see chapter 3.8 “Failure Types”)
  This is the corresponding failure type of the failure mode. These have to be defined on the configuration (see chapter 3.2 “Quality Manager Configuration“), in order to be available.
- *Failure* (see chapter 3.9 “Failure”)
  This is the corresponding failure of the failure mode. Only failures of the corresponding failure type are available for selection. These have to be defined on the configuration (see chapter 3.2 “Quality Manager Configuration“), in order to be available.

3.40 Risk Evaluations

Risk evaluations are used to assign risk evaluations for the causes of a failure mode.

3.40.1 Areas

Risk evaluations are divided into the following areas:

- *Risk Evaluation*
  This shows some detail information about the risk evaluation, which can also be seen under properties.
- *Preventive Actions* (see chapter 3.24.4 “Preventive Action (FMEA)”)
  This are the preventive actions of the risk evaluation.
- *Detection Actions* (see chapter 3.24.5 “Detection Action (FEMA)”)
  This are the detection actions of the risk evaluation.

3.40.2 Actions

The following actions are available within a risk evaluation:

- *Save Evaluation Status*
  Saves the current risk evaluation and the current status of actions. This action must be

carried out after the initial status has been determined and evaluated, as well as after each relevant re-evaluation.

3.40.3 Properties

You can define the following properties in a risk evaluation:

- *Occurrence*
  Here you can select an occurrence for the risk evaluation. The values are provided by the evaluation catalog which is set for the.
- *Detection*
  Here you can select a detection for the risk evaluation. The values are provided by the evaluation catalog which is set for the.
- *RPN*
  This is the RPN of the risk evaluation, calculated with the values of the severity, occurrence and detection.
- *Action Priority*
  This field shows the action priority, which is automatically determined.
- *Preventive Actions* (see chapter 3.24.4 "Preventive Action (FMEA)")
  This are the preventive actions of the risk evaluation.
- *Detection Actions* (see chapter 3.24.5 "Detection Action (FEMA)")
  This are the detection actions of the risk evaluation.

3.41 Quality Manager Webservice Interface

Fabasoft Approve QMS offers you the following interfaces, which you can use with any objects and content:

3.41.1 Set Up

The WSDL can be accessed at the following URL:

- *https://<host>/<vdir>/fscdav/wsdl?WEBSVC=SOLAPPROVEQUALITY_111_100_WebService*
  - "<host>" must be replaced by "https://de.cloud.fabasoft.com" for the location Germany, by "https://at.cloud.fabasoft.com" for Austria and by "https://ch.cloud.fabasoft.com" for Switzerland
  - "<vdir>" has to be replaced by "folio"
    - Call for German location:
      https://de.cloud.fabasoft.com/folio/fscdav/wsdl?WEBSVC=SOLAPPROVEQUALITY_111_100_WebService

The web service also supports the JSON format:

- *https://<host>/<vdir>/wsjson/SOLAPPROVEQUALITY_111_100_WebService/<operation>*

3.41.2 Authentication

For authentication, you must use your e-mail address as the user name and generate a password for applications for "Quality Manager". To generate a password for applications, proceed as follows:

https://help.cloud.fabasoft.com/index.php?topic=doc/Benutzerhilfe-Fabasoft-Cloud-ger/kontoeinstellungen.htm#zugriff-fuer-anwendungen

3.41.3 WSImportIssues

This webservice is used to import issues (see chapter 3.5 "Issues") with all metadata contained in a JSON file into a specific site (see section 3.4 "Sites").

The same values are used for the keys as for WSImportIssuesCSV (see 3.41.4 “WSImportIssuesCSV”) in the *Field* column.

The following is an example JSON that can be used for importing defects.

Example

IssueImport.json

```
{
  "issues": [{
    "objexternalkey": "ISSUE_EXTERNAL_KEY_001",
    "issueshortdescription": "Issue Short Description",
    "issuedescription": ["This is the sample description", "with multiple
lines."],
    "issuefailuretype": "FT01 - Failure Type 1",
    "issuefailure": "F01 - Failure 1",
    "issuefailurelocation": "FL01 - Failure Location 1",
    "issuefailuresublocation": "FSL01 - Failure Sub Location 1",
    "issuesupplier": "12345 - Supplier 1",
    "issuematerial": "67890 - Material 1",
    "issuereferencequantity": "1.0",
    "issuecomplaintquantity": "1.0",
    "attachments": [{
      "filename": "Attachment 1.txt",
      "content": "<i>Base64-encoded file content</i>"
    }]
  }]
}
```

3.41.4 WSImportIssuesCSV

This webservice is used to import issues (see chapter 3.5 "Issues") with all metadata contained in a CSV file into a specific site (see section 3.4 "Sites").

A list of the columns that are processed now follows. However, these are only taken into account if they are written correctly, as in the following table under the *CSV Column* in English. A user-defined name for these columns can be created on a site (see chapter 3.4 “Sites”) in the *Data Import Customizations* field. This must then be used.

CSV Column	Field	Example Value
Notification	`COOSYSTEM@1.1:objexternalkey`	ISSUE_100145626

Type	SOLAPPROVEQUALITY@111.100: issuetype	Severe Supplier Issue
Category	COOTC@1.1001: objcategory	Supplier Issue
Short Description	SOLAPPROVEQUALITY@111.100: issueshortdescription	Missing supplier documentation
Description	SOLAPPROVEQUALITY@111.100: issuedescription	The supplier has not provided the required documentation for the material used
NCR ID	SOLAPPROVEQUALITY@111.100: issuencrid	NCR0032
Created by	SOLAPPROVEQUALITY@111.100: issueexternalcreatorname	John Doe
Created on	COOSYSTEM@1.1: objcreatedat	15.04.2024
Material	SOLAPPROVEQUALITY@111.100: issuematerial.materialnumber	M34810
Material Description	SOLAPPROVEQUALITY@111.100: issuematerial.mlname	Turbine Housing
Unit of Measure	SOLAPPROVEQUALITY@111.100: issuematerial.materialmeasuringunit	EA
Reference Quantity	SOLAPPROVEQUALITY@111.100: issuereferencequantity	100.00
Complaint Quantity	SOLAPPROVEQUALITY@111.100: issuecomplaintquantity	100.00
Supplier	SOLAPPROVEQUALITY@111.100: issuesupplier.supid	S341
Supplier Name	SOLAPPROVEQUALITY@111.100: issuesupplier.supname	Housing Supplier GmbH
Purchase Order	SOLAPPROVEQUALITY@111.100: issuepurchaseorder.ponumber	O5487
Purchase Order Position	SOLAPPROVEQUALITY@111.100: issuepurchaseorderposition.popnumber	10
Purchaser Group	SOLAPPROVEQUALITY@111.100: issuepurchaseorder.popurchasergroup.pgid	Purchase Department Turbines

Source	`SOLAPPROVEQUALITY@111.100: issuesourcetype`	Supplier
Failure Location	`SOLAPPROVEQUALITY@111.100: issuefailurelocation.flid`	FL50
Failure Location Name	`SOLAPPROVEQUALITY@111.100: issuefailurelocation.mlname`	Assembly
Failure Sub Location	`SOLAPPROVEQUALITY@111.100: issuefailuresublocation.fslid`	FSL3
Failure Sub Location Name	`SOLAPPROVEQUALITY@111.100: issuefailuresublocation.mlname`	Final Assembly Line Check
Failure Type	`SOLAPPROVEQUALITY@111.100: issuefailuretype.ftid`	FT104
Failure Type Name	`SOLAPPROVEQUALITY@111.100: issuefailuretype.mlname`	Documentation
Failure	`SOLAPPROVEQUALITY@111.100: issuefailure.failureid`	F2
Failure Name	`SOLAPPROVEQUALITY@111.100: issuefailure.mlname`	Supplier Documentation
Customer	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.prjcustomer.custid`	C360472
Customer Name	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.prjcustomer.custname`	Super Customer Ltd
End User	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.prjenduser.custid`	1674
End User Name	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.prjcustomer.custname`	Best End User co.
Project	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.prjid`	P02
Project Name	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.mlname`	Next Gen Pump
Sales Order Number	`SOLAPPROVEQUALITY@111.100: issueunits.unitproject.prjsalesordernumber`	PSON0381
Unit	`SOLAPPROVEQUALITY@111.100: issueunits.unitid`	U001
Unit Name	`SOLAPPROVEQUALITY@111.100: issueunits.mlname`	Unit #1

3.41.5 WSImportActionsCSV

This webservice is used to import actions (see chapter 3.24 "Actions") with all metadata contained in a CSV file into a specific site (see section 3.4 "Sites").

A list of the columns that are processed now follows. However, these are only taken into account if they are written correctly, as in the following table under the *CSV Column* in English. A user-defined name for these columns can be created on a site (see chapter 3.4 “Sites”) in the *Data Import Customizations* field. This must then be used.

CSV Column	Field	Example Value
Action	`COOSYSTEM@1.1: objexternalkey`	CORR_1
Action Class	`COOSYSTEM@1.1: objclass`	Correction
Category	`COOTC@1.1001: objcategory`	Internal Correction Action
Responsible	`SOLAPPROVEQUALITY@111.100: actresponsible`	test.person@fabasoft.com
Short Description	`SOLAPPROVEQUALITY@111.100: actname`	Correct Documentation
Description	`SOLAPPROVEQUALITY@111.100: actdescription`	Correct the documentation with the newly provided information of the supplier
Created by	`SOLAPPROVEQUALITY@111.100: actexternalcreatorname`	John Doe
Created on	`COOSYSTEM@1.1: objcreatedat`	28.04.2024
Issue	`SOLAPPROVEQUALITY@111.100: actissue.issueid`	ID100145626

Cause	`SOLAPPROVEQUALITY@111.100: corractcause`
	oder
	`SOLAPPROVEQUALITY@111.100: pervactcause`
		CAUSE_0082

Due on	`SOLAPPROVEQUALITY@111.100: actdueon`	27.05.2024
Completed by	`SOLAPPROVEQUALITY@111.100: actcompletedby`	John Doe
Completed on	`SOLAPPROVEQUALITY@111.100: actcompletedon`	25.05.2024

3.41.6 WSImportCausesCSV

This webservice is used to import causes (see chapter 3.25 "Cause") with all metadata contained in a CSV file into a specific site (see section 3.4 "Sites").

A list of the columns that are processed now follows. However, these are only taken into account if they are written correctly, as in the following table under the *CSV Column* in English. A user-defined name for these columns can be created on a site (see chapter 3.4 “Sites”) in the *Data Import Customizations* field. This must then be used.

CSV Column	Field	Example Value
ID	`COOSYSTEM@1.1: objexternalkey`	CAUSE_0082
Category	`COOTC@1.1001: objcategory`	Internal Cause
Issue	`SOLAPPROVEQUALITY@111.100: csissue`	ISSUE_100145626
Short Description	`SOLAPPROVEQUALITY@111.100: csshortdescription`	Wrong Contact Person
Why	`SOLAPPROVEQUALITY@111.100: cswhy`	New workers were not trained well enough.
Therefore	`SOLAPPROVEQUALITY@111.100: cstherefore`	New workers selected the wrong contact person.
Cause Area	`COOSYSTEM@1.1: cscausearea`	CA0010
Cause Area Name	`SOLAPPROVEQUALITY@111.100: cscausearea.mlname`	Product Development
Cause Sub Area	`SOLAPPROVEQUALITY@111.100: cscausesubarea`	CSA0029
Cause Sub Area Name	`SOLAPPROVEQUALITY@111.100: cscausesubarea.mlname`	Documentation
Cause Type	`SOLAPPROVEQUALITY@111.100: cscausetype`	CT0001
Cause Type Name	`SOLAPPROVEQUALITY@111.100: cscausetype.mlname`	Worker unsuitable
Cause	`SOLAPPROVEQUALITY@111.100: cscause`	C0053
Cause Name	`SOLAPPROVEQUALITY@111.100: cscause.mlname`	Not trained enough
Component Affected	`SOLAPPROVEQUALITY@111.100: csaffectedcomponent`	TRUE
Affected Component	`SOLAPPROVEQUALITY@111.100: cscausingcomponent`	AC0207

Affected Component Name	SOLAPPROVEQUALITY@111.100: cscausingcomponent.mlname	Documentation
Affected Sub Component	SOLAPPROVEQUALITY@111.100: cscausingsubcomponent	ASC0011
Affected Sub Component Name	SOLAPPROVEQUALITY@111.100: cscausingsubcomponent.mlname	Used Component Documentation
Component Failure Type	SOLAPPROVEQUALITY@111.100: cscausingfailuretype	
Component Failure Type Name	SOLAPPROVEQUALITY@111.100: cscausingfailuretype.mlname	
Component Failure	SOLAPPROVEQUALITY@111.100: cscausingfailure	
Component Failure Name	SOLAPPROVEQUALITY@111.100: cscausingfailure.mlname	
Remarks	SOLAPPROVEQUALITY@111.100: csremarks	
Created by	SOLAPPROVEQUALITY@111.100: csexternalcreatorname	John Doe
Created on	COOSYSTEM@1.1: objcreatedat	27.04.2024
Direct Cause	SOLAPPROVEQUALITY@111.100: issue.issued4directcause	FALSE
Root Cause	SOLAPPROVEQUALITY@111.100: issue.issued4rootcause	TRUE

3.41.7 WSImportFindingsCSV

This webservice is used to import findings (see chapter 3.34 "Findings") with all metadata contained in a CSV file into a specific site (see section 3.4 "Sites").

A list of the columns that are processed now follows. However, these are only taken into account if they are written correctly, as in the following table under the *CSV Column* in English. A user-defined name for these columns can be created on a site (see chapter 3.4 “Sites”) in the *Data Import Customizations* field. This must then be used.

CSV Column	Field	Example Value
ID	COOSYSTEM@1.1: objexternalkey	FND_17452
Category	COOTC@1.1001: objcategory	Finding
Container	SOLAPPROVEQUALITY@111.100: fndparent	AC2496

Short Description	SOLAPPROVEQUALITY@111.100: fndshortdescription	Documentation does not fulfill the standard
Description	SOLAPPROVEQUALITY@111.100: fnddescription	The documentation does not meet the standard DIN EN ISO 20607
State	SOLAPPROVEQUALITY@111.100: fndstate	New
Type	SOLAPPROVEQUALITY@111.100: fndtype	Non-Conformance
Responsible	SOLAPPROVEQUALITY@111.100: fndresponsible	test.person@fabasoft.com
Created by	SOLAPPROVEQUALITY@111.100: fndexternalcreatorname	John Doe
Created on	COOSYSTEM@1.1: objcreatedat	28.04.2024

4 Application Area: Technical Records Management

The application area technical records management of Fabasoft Approve offers you a pioneering solution for the innovative management of technical records. The application enables extremely uncomplicated, intuitive and collaborative handling of technical records.

- Reduce risks through transparent processes
  Approve handles all communication relating to multi-year projects, as well as the coordination, management and checking of data in one platform, so that it is always clear who has what information and when. When managing the complete scope of documentation (e.g., CDRL) with Approve, the individual business letters or the complete correspondence can be referenced and linked to the corresponding documentation. This gives you a good overview.
- Automate manual and time-consuming tasks
  Approve classifies metadata from business letters and the associated documents, categorizes them and stores them in a structured manner. This allows different project teams to view or edit this information according to their access authorization. Comprehensive automated checking, release and approval processes for contractually required documents ensure efficient project management. This allows you to save resources accordingly.
- Maintain an overview of contractual obligations
  Contract-relevant "business letters" generated directly in Approve are automatically assigned a sequential number. These can be provided with metadata such as processing deadline, project indicator or to-dos, as well as assigned to the person responsible. A clearly laid out project calendar and automatically sent deadline reminders to all parties involved ensure that all tasks are completed on time.

4.1 Application Area

Within the comprehensive technical record management system, it is possible to efficiently manage records (see chapter 4.8 “Records”) and cases (see chapter 4.9 “Case”) in various application areas. This flexibility is made possible by the configuration level, at which various parameters can be defined in the configuration lists (see chapter 4.4 “Configuration Lists”). These lists are used to select assignments (see chapter 4.10 “Assignments”), which largely determine the extent to which the records or cases can be managed within the system.

These central assignments not only affect the structuring and organization of the records, but also influence the handling and management of the corresponding cases. Careful configuration at this level therefore enables the system to be individually adapted to the specific requirements and processes of an organization or business unit.

When creating a new record or a new case, after selecting the corresponding subject (see chapter 4.6 “Subjects”) n the case of the case or the corresponding record register (see chapter 4.5 “Record Registers”) in the case of the record, it is possible to select specific linked assignments. This step makes it possible to provide the newly created record or case with relevant and specific information that is directly related to the selected subject or record register.

These linked assignments (see chapter 4.10 “Assignments”) not only serve to contextually enrich the record (see chapter 4.8 “Records”) or the case (see chapter 4.9 “Case”) , but also enable precise linking with other relevant data records, resources or contextual information. This ensures the comprehensive and structured recording of information, which in turn supports efficient administration and tracking within the file management system.

The records are provided in the corresponding assignment lists in accordance with the configuration in the associated assignment instance. This means that the previously defined configuration settings, including the linked assignments and other relevant parameters, form the basis for the compilation and presentation of the records in the respective assignment instance. This systematic provision ensures that the records are easily accessible and organized according to the defined criteria and links.

The allocation instance acts as an interface that makes it possible to access the accumulated records accordingly, to have an overview of them and, if necessary, to carry out further actions. This structured approach within the assignment lists ensures efficient management and organization of records within the record management system, enabling users to access the information they need quickly and in a targeted manner.

Once the records have been created, they can be efficiently managed and documented. Management includes various processes, such as assigning responsibilities, defining access rights, tracking processing statuses and integrating other relevant metadata. Structured management ensures that the records are organized in accordance with the defined business processes and requirements.

Documentation includes the systematic recording of activities, changes and relevant information in connection with the records. This can include, for example, comments, processing histories or links to other cases. Comprehensive documentation not only makes it easier to track and review activities, but also supports transparency and compliance in the handling of records.

4.2 Records Manager Dashboard

After successfully adding to a Technical File Manager configuration, a dashboard is automatically created for you and placed on the “Home” page. This Technical File Manager dashboard serves as your central access point to the technical records management.

Note: It is important to note that depending on your role and the previous settings made before your first access to the technical records management, certain objects and settings may vary. There may be differences in terms of user help. If there are any uncertainties or specific adjustments, you should contact the relevant administrators for precise information.

4.2.1 Areas

The file manager dashboard is divided into the following areas:

- *Import Records* (see chapter 4.8 “Records”)
  Records can be imported here via the dashboard.
- *My Calendar* (see chapter 4.15 “Calendar”)
  This is an instance of a calendar in which the personal events (see chapter 4.16 “Events“), and tasks (see chapter 4.17 “Tasks”) are displayed.
- *My Suppliers* (see chapter 4.10.1.1 “Supplier”)
  These are suppliers that are instantiated and administered by you or are assigned to you.
- *My Customers* (see chapter 4.10.1.2 “Customer”)
  These are customers that are instantiated and administered by you or are assigned to you.
- *My Clients* (see chapter 4.10.1.3 “Client”)
  These are clients that are instantiated and administered by you or are assigned to you.
- *My Corporations* (see chapter 4.10.1.4 “Corporations”)
  These are corporations that are instantiated and administered by you or are assigned to you.
- *My Committees* (see chapter 4.10.1.5 ”Committees”)
  These are committees that are instantiated and administered by you or are assigned to you.
- *My Unions* (see chapter 4.10.1.6 “Unions”)
  These are unions that are instantiated and administered by you or are assigned to you.
- *My Companies* (see chapter 4.10.1.7 “Companies”)
  These are companies that are instantiated and administered by you or are assigned to you.
- *My Scopes* (see chapter 4.10.1.8 “Scopes”)
  These are scopes that are instantiated and administered by you or are assigned to you.
- *My Industries* (see chapter 4.10.1.9 “Industries”)
  These are industries that is instantiated and administered by you or is assigned to you.
- *My Areas* (see chapter 4.10.1.10 “Areas”)
  These are areas that are instantiated and administered by you or are assigned to you.
- *My Brands* (see chapter 4.10.1.11 “Brands”)
  These are brands that are instantiated and administered by you or are assigned to you.
- *My Products* (see chapter 4.10.1.12 “Products”)
  These are products that are instantiated and administered by you or are assigned to you.

- *My Projects* (see chapter 4.10.1.13 “Projects”)
  These are projects that are instantiated and administered by you or are assigned to you.
- *My Licenses* (see chapter 4.10.1.14 “Licenses”)
  These are licenses that are instantiated and administered by you or are assigned to you.
- *My Business Units* (see chapter 4.10.1.15 “Business Units”)
  These are business units that are instantiated and administered by you or are assigned to you.
- *My Cost Types* (see chapter 4.10.1.16 “Cost Types”)
  These are cost types that are instantiated and administered by you or are assigned to you.
- *My Cost Centers* (see chapter 4.10.1.17 “Cost Centers”)
  These are cost centers that are instantiated and administered by you or are assigned to you.
- *My Profit Centers* (see chapter 4.10.1.18 “Profit Centers”)
  These are profit centers that are instantiated and administered by you or are assigned to you.
- *Architectural Objects* (see chapter 4.10.1.19 “Architectural Objects”)
  These are all locations that you have access to.
- *My Records* (see chapter 4.8 “Records”)
  These are records that are instantiated and administered by you or are assigned to you.
- *Recently Used Records*
  These are all the records that were last used by you.
- *My Record Register* (see chapter 4.5 “Record Registers”)
  These are record registers that are instantiated and administered by you or are assigned to you.
- *My Cases* (see chapter 4.9 “Case”)
  These are cases that are instantiated and administered by you or are assigned to you.
- *Recently Used Cases*
  These are all the cases that were last used by you.
- *My Subjects* (see chapter 4.6 “Subjects”)
  These are subjects that are instantiated and administered by you or are assigned to you.
- *My Requests* (see chapter 4.11 “Requests”)
  These are requests that are instantiated and administered by you or are assigned to you.
- *Recently Used Requests*
  These are all requests that you have used recently.
- Published Documents
  These are all published documents that are displayed to you.
- *My Confidential Rooms*
  These are confidential rooms that are instantiated and administered by you or are assigned to you.
- *My External Rooms*
  These are external rooms that are instantiated and administered by you or are assigned to you.
- *My Search Folders*
  These are search folders that are instantiated and administered by you or are assigned to you.

- *Tutorials*
  These are all tutorial-specific videos or documents that are located in the configured Teamroom.

4.2.2 Actions

- *Upload*
  You can upload files here.
- *Create Record* (see chapter "Records")
  Within this action, it is possible to create one of several records, whereby a distinction is made between a rental agreement record, construction record, maintenance/repair record, project record, project-independent document record, subrental record or economic unit record.
- *Create Case* (see chapter 4.9 "Case")
  Here you can create a case and add it to the list of cases.
- *Create Request* (see chapter 4.11 "Requests")
  Here you can create a request, which will be placed in the list of requests.
- *Refresh*
  This action updates the dashboard and the lists on the dashboard.

4.3 Records Manager Configuration

In the technical records manager configuration, you can define general settings and authorize users to use the records manager.

The records manager configuration is created automatically when the records manager is activated for your cloud organization. The owner of the cloud organization is initially stored in the records manager configuration in the "Records manager administrator" role.

As a records manager administrator, you can switch to the records manager configuration as follows:

1. Navigate to your records manager dashboard (see chapter 4.2 "Records Manager Dashboard").
2. Click on the "Switch to Configuration" action to switch to the records manager configuration.

4.3.1 Areas

The records manager configuration is divided into different areas to provide you with clear access and efficient use of the technical records management. The following areas are typically available:

- *Configuration Lists* (see chapter 4.4 "Configuration Lists")
  This is a list, whereby all configuration lists are collected here.
- *Record Registers* (see chapter 4.5 "Record Registers")
  This is a list, whereby all record registers are collected here.
- *Subjects* (see chapter 4.6 "Subjects")
  This is a list, whereby all subjects are collected here.

- *Configuration Data* (see chapter 4.7 "Configuration Data")
  This is a list, whereby all configuration-specific documents are collected here.
- *Async Data Objects*
  Contains basic objects that save input data from a web service and process it in the background. If such processing is running, entries are visible in this area.
- *Insight Apps*
  Insight Apps provide aggregated access to the information in your cloud organization, tailored to your needs. You can use Insight Apps to display and highlight important information without users having to search for it explicitly.
- *Forms and Categories*
  Shows the forms and categories provided via the configuration. With the help of user-defined forms, for example, contracts can be expanded to include fields for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.
  Note: Further information can be found in the white paper "Model-Based Customizing":
- *Processes*
  Shows the processes provided via the configuration. Users, organizations, organizational units and external organizations can be integrated into the processing of business objects via workflow by starting a process that can be processed via the worklist (these are usually approval and release processes).
  Further information can be found in the white paper "Model-Based Customizing" and in the "Workflow" chapter in the "User Help Fabasoft Cloud".
- *Templates*
  Shows the templates provided via the configuration. The templates are displayed in the Create dialog (e.g., using the "New" context menu command). You can define document templates and many other templates both in the records manager configuration and in assignment lists. Templates defined in the records manager configuration are offered for selection in all assignment lists.
  Note: A template can only be used once it has been released via the "Release for Usage" context menu command. Changes must be released using the "Re-release" context menu command. Sharing can also be deactivated.
- *Text Modules*
  Shows the text modules provided via the configuration that can be inserted into Word documents. Text modules can be inserted in documents and also in document templates. You can define text modules both in the records manager configuration and in assignment lists. Text modules defined in the records manager configuration are available in all assignment lists.
- *Reports and OData Services*
  Contains templates for reports and OData services. Corresponding BIRT reports, Microsoft Excel reports and OData services can be generated within this list. These reports essentially offer the possibility of data visualization and analysis. They can also be integrated into any web applications (BIRT).
- *Thesauri*
  Shows the Thesauri provided in the configuration.
- *Presettings*
  Contains default settings such as self-generated search patterns or time spans.

- *Failed Background Tasks*
  This area shows failed background tasks. You can perform the following manual actions: "Define Next Execution", "Send Link" and "Delete".
  Note: This area is only displayed if there is at least one failed background task.

4.3.2 Actions

Depending on the rights assigned, you can perform the following actions at configuration level and the corresponding levels below:

- *Create Configuration List* (see chapter 4.4 "Configuration Lists")
  Creates a configuration list and places it in the list of configuration lists.
- *Create Record Register* (see chapter 4.5 "Record Registers")
  Creates a record register and places it in the list of record registers.
- *Create Subject* (see chapter 4.6 "Subjects")
  Creates a subject and places it in the list of subjects.
- *Import Translations*
  Imports a CSV of translations for various languages.
- *Export Translations*
  Exports a CSV of translations for various languages you can select.

4.3.3 Settings

In the technical records manager configuration, you can define the following application-specific settings, which are described in more detail below.

4.3.3.1 Tab "General Settings"

- *Name*
  Defines the name of the configuration.
- *Subject*
  Defines the description of the configuration.
- *Holiday Table*
  Defines the public holiday table to be used in the context of the configuration (otherwise the Standard public holiday table is used).
- *Access Protection*
  Defines the access settings. By default, only the specified team can access objects.
- *Restrict Shortcuts Within Teamroom*
  Defines what type of links may be stored in the configuration. You can restrict the permitted links to objects that are assigned to the organization or to objects that are assigned to the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows you to restrict the team members who are allowed to open or download content on the end device.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which authorizations a team member must have so that the team member can open or download content on the end device.

- *All Team Members May Add Members*
  Determines whether all team members are allowed to add users to the team or only team members with "All rights". Members with change rights may grant or revoke change rights or read rights to other members. Members with read rights may grant or withdraw read rights from other members.
- *Restrict Team Members*
  Defines the organizations, organizational units, teams and external organizations whose members may be added to the configuration. If the list does not contain any entries, members can be added without restriction.
- *Main Administrator*
  Defines the user who receives the automatically generated e-mail messages relating to the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as a contact in the event of missing authorizations.
- *Support Coordinator*
  The support coordinator team has access to all support requests in the corresponding context and can perform the same actions as the submitters of the support requests.
- *Support Team*
  The support team takes over the organization-internal administration of support requests in the appropriate context.
- *Enable Advanced Mode*
  Activates a mode that allows you to work with multiple trays and manage templates and presets, among other things.
- *Activate Trace Output*
  Enables the output of information about the progress of a code execution. For example, if you are a form designer using expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can have trace output written to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

4.3.3.2 Tab “Details”

You can specify the following settings in the “Details” tab:

- *Default Dashboard Name*
  This setting determines the name of the records manager dashboard.
- *Default Dashboard Class*
  This is a standard class for the dashboard.
- *Default Dashboard Form*
  This setting enables the storage of a form specified in the configuration, which is derived from the dashboard class.
- *Show Calendar in Dashboard* (see chapter 4.15 “Calendar”)
  This is a field that enables the calendar to be displayed in the dashboard.
- *Use Search-feeded Lists*
  This is a field that uses search-based lists for My Records, My Cases, My Requests, Archived Records, Archived Cases, Archived Requests, Records, Current Records, Current Cases.

- *Default Category for New Record Registers* (see chapter 4.5 “Record Registers”)
  Here you can set a default category, which must be specified in the configuration. This is used when a file directory is created.
- *Record Types* (see chapter 4.12 “Record Type”)
  You can create record types here.
- *Default Record Type for New Records*
  Here you can set a default category, which must be specified in the configuration. This is used for records.
- *Default Category for New Subjects* (see chapter 4.6 “Subjects”)
  Here you can set a default category, which must be specified in the configuration. This is used subjects.
- *Case Types* (see chapter 4.13 “Case Type”)
  You can create case types here.
- *Default Case Type for New Cases*
  Here you can set a default category, which must be specified in the configuration. This is used for cases.
- *Request Types* (see chapter 4.14 “Request Type”)
  You can create request types here.
- *Document Categories*
  You can create document categories here.
- *Document Categories for Published Documents*
  This includes categories for published documents.
- *Text Module Categories*
  You can create text module categories here.
- *Special Intervals*
  Here you can create categories for specific intervals.
- *Special Record Terms*
  Here you can store record terms directly in the configuration.
- *Special Termination Terms*
  Here you can store termination terms directly in the configuration.
- *Approval Levels*
  Approval levels can be stored directly in the configuration.
- *Limits*
  Corresponding limits can be set here, whereby corresponding levels of the limits can only be reached via the approval levels. Accordingly, there must be at least one entry in the approval levels.
- *Default Category for New Suppliers*
  A default category for new suppliers can be set here.
- *Default Category for New Customers*
  A default category for new customers can be set here.
- *Default Category for New Clients*
  A default category for new clients can be set here.
- *Default Category for New Corporations*
  A default category for new corporations can be set here.

- *Default Category for New Committees*
  A default category for new committees can be set here.
- *Default Category for New Unions*
  A default category for new unions can be set here.
- *Default Category for New Companies*
  A default category for new companies can be set here.
- *Default Category for New Scopes*
  A default category for new scopes can be set here.
- *Default Category for New Industries*
  A default category for new industries can be set here.
- *Default Category for New Areas*
  A default category for new areas can be set here.
- *Default Category for New Brands*
  A default category for new brands can be set here.
- *Default Category for New Products*
  A default category for new products can be set here.
- *Default Category for New Projects*
  A default category for new projects can be set here.
- *Default Category for New Licenses*
  A default category for new licenses can be set here.
- *Default Category for New Business Units*
  A default category for new business units can be set here.
- *Default Category for New Cost Types*
  A default category for new cost types can be set here.
- *Default Category for New Cost Center*
  A default category for new cost centers can be set here.
- *Default Category for New Profit Centers*
  A default category for new profit centers can be set here.
- *Default Category for New Architectural Objects*
  This is a default category that can be set for new architectural objects.
- *Default Category for New Confidential Rooms*
  This is a default category that can be set for new confidential rooms.
- *Default Category for New External Rooms*
  This is a default category that can be set for new external rooms.
- *Use External Room Assignments* (see chapter 4.10 “Assignments”)
  Here you can decide whether assignments should be used for external rooms.
- *Thesaurus for Structuring Record Templates*
  A thesaurus for the structure of the record templates can be set here.
- *Thesaurus for Structuring Case Templates*
  A thesaurus for the structure of the case templates can be set here.
- *Thesaurus for Structuring Request Templates*
  A thesaurus for the structure of the request templates can be set here.
- *Enable File Use Cases*
  The file use cases can be activated here.

- *Enable Search Apps*
  The search applications can be activated here.
- *Insert Records Manager Identification Into E-Mail Subject*
  This identification can be used for the automatic assignment of e-mails to records, cases (see chapter 4.9 “Case”) and requests (see chapter 4.11 “Requests”).
- *Keywords for Filenames to Identify Attachments of Records* (see chapter 4.8 “Records”)
  This field is used to store keywords for file names that identify the attachments of records.
- *Keywords for Filenames to Identify Attachments of Cases* (see chapter 4.9 “Case”)
  This field is used to store keywords for file names that identify the attachments of cases.
- *Keywords for Filenames to Identify Attachments of Requests* (see chapter 4.11 “Requests”)
  This field is used to store keywords for file names that identify the attachments of requests.
- *SAP System Name*
  This field represents the name of a connected SAP system.
- *SAP Client Name*
  This field represents the name of an existing SAP client.

4.3.3.3 Tab “Expressions”

Within the “Expressions” tab, you can enable the following settings:

- *Handle Creation of Record* (see chapter 4.8 “Records”)
  Here you can provide a specific expression that can influence the record accordingly when a record is created. This record is manipulated accordingly in terms of the expression.
- *Handle Commit of Record*
  Here you can execute a specific expression in the case of record creation. Even before the record is stored in the corresponding list, this expression is executed and can manipulate the record or its environment components accordingly.
- *Handle Creation of Case* (see chapter 4.9 “Case”)
  Here you can provide a specific expression that can influence the case accordingly when a case is generated. This case is manipulated accordingly in terms of the expression.
- *Handle Commit of Case*
  Here you can execute a specific expression in the case of case production. Even before the business case is stored in the corresponding list, this expression is executed and can manipulate the case or its environment components accordingly.
- *Handle Creation of Request* (see chapter 4.11 “Requests”)
  Here you can provide a specific expression that can influence the request accordingly when a request is generated. This request is manipulated accordingly in terms of the expression.
- *Handle Commit of Request*
  Here you can execute a specific expression in the case of request production. Even before the request is stored in the corresponding list, this expression is executed and can manipulate the request or its environment components accordingly.
- *Handle Creation of Assignment* (see chapter 4.10 “Assignments”)
  Here you can provide a specific expression that can influence the assignment accordingly in the event of an assignment generation. This assignment is manipulated accordingly in terms of the expression.
- *Handle Commit of Assignment*
  Here you can execute a specific expression in the event of assignment production. Even

before the assignment is stored in the corresponding list, this expression is executed and can manipulate the assignment or its environment components accordingly.

4.4 Configuration Lists

Configuration lists (see chapter 4.4 “Configuration Lists”) contain many dynamic object structures, which you can provide in the configuration list settings according to the possible objects. You can also make corresponding configuration settings at configuration list level.

4.4.1 Areas

These areas are linked to the settings of the assignments (see chapter 4.10 “Assignments”). The following maximum areas can be present:

- *Suppliers* (see chapter 4.10.1.1 “Supplier”)
  These are suppliers that were created within the configuration list (see chapter 4.4 “Configuration Lists”).
- *Customers* (see chapter 4.10.1.2 “Customer”)
  These are customers that were created within the configuration list.
- *Clients* (see chapter 4.10.1.3 “Client”)
  These are clients that were created within the configuration list.
- *Corporations* (see chapter 4.10.1.4 “Corporations”)
  These are corporations that were created within the configuration list.
- *Committees* (see chapter 4.10.1.5 ”Committees”)
  These are committees that were created within the configuration list.
- *Unions* (see chapter 4.10.1.6 “Unions”)
  These are unions that were created within the configuration list.
- *Companies* (see chapter 4.10.1.7 “Companies”)
  These are companies that were created within the configuration list.
- *Scopes* (see chapter 4.10.1.8 “Scopes”)
  These are scopes that were created within the configuration list.
- *Industries* (see chapter 4.10.1.9 “Industries”)
  These are industries that were created within the configuration list.
- *Areas* (see chapter 4.10.1.10 “Areas”)
  These are areas that were created within the configuration list.
- *Brands* (see chapter 4.10.1.11 “Brands”)
  These are brands that were created within the configuration list.
- *Products* (see chapter 4.10.1.12 “Products”)
  These are products that were created within the configuration list.
- *Projects* (see chapter 4.10.1.13 “Projects”)
  These are projects that were created within the configuration list.
- *Licenses* (see chapter 4.10.1.14 “Licenses”)
  These are licenses that were created within the configuration list.
- *Business Units* (see chapter 4.10.1.15 “Business Units”)
  These are business units that were created within the configuration list.

- *Cost Types* (see chapter 4.10.1.16 “Cost Types”)
  These are cost types that were created within the configuration list.
- *Cost Centers* (see chapter 4.10.1.17 “Cost Centers”)
  These are cost centers that were created within the configuration list.
- *Profit Centers* (see chapter 4.10.1.18 “Profit Centers”)
  These are profit centers that were created within the configuration list.
- *Architectural Objects* (see chapter 4.10.1.19 “Architectural Objects”)
  These are architectural objects that were created within the configuration list.
- *Documents*
  These are documents that were created within the configuration list.
- *Uploads*
  These are configuration list-specific uploaded objects.

4.4.2 Actions

Depending on the scope and specification at configuration list setting level, different action options are also available within the given lists, as with the areas. The following actions can be displayed as a maximum:

- *Synchronize*
  Synchronizes the content of the configuration list.
- *Define Logo*
  Defines a logo for the configuration list.
- *Create Supplier* (see chapter 4.10.1.1 “Supplier”)
  Creates a new supplier within the configuration list and stores it in the list of suppliers.
- *Create Customer* (see chapter 4.10.1.2 “Customer”)
  Creates a new customer within the configuration list and stores it in the list of customers.
- *Create Client* (see chapter 4.10.1.3 “Client”)
  Creates a new client within the configuration list and stores it in the list of clients.
- *Create Corporation* (see chapter 4.10.1.4 “Corporations”)
  Creates a new corporation within the configuration list and stores it in the list of corporations.
- *Create Committee* (see chapter 4.10.1.5 ”Committees”)
  Creates a new committee within the configuration list and stores it in the list of committees.
- *Create Union* (see chapter 4.10.1.6 “Unions”)
  Creates a new union within the configuration list and stores it in the list of unions.
- *Create Company* (see chapter 4.10.1.7 “Companies”)
  Creates a new company within the configuration list and stores it in the list of companies.
- *Create Scope* (see chapter 4.10.1.8 “Scopes”)
  Creates a new scope within the configuration list and stores it in the list of scopes.
- *Create Industry* (see chapter 4.10.1.9 “Industries”)
  Creates a new industry+ within the configuration list and stores it in the list of industries.
- *Create Area* (see chapter 4.10.1.10 “Areas”)
  Creates a new area within the configuration list and stores it in the list of areas.
- *Create Brand* (see chapter 4.10.1.11 “Brands”)
  Creates a new brand within the configuration list and stores it in the list of brands.

- *Create Product* (see chapter 4.10.1.12 “Products”)
  Creates a new product within the configuration list and stores it in the list of products.
- *Create Project* (see chapter 4.10.1.13 “Projects”)
  Creates a new project within the configuration list and stores it in the list of projects.
- *Create License* (see chapter 4.10.1.14 “Licenses”)
  Creates a new license within the configuration list and stores it in the list of licenses.
- *Create Business Unit* (see chapter 4.10.1.15 “Business Units”)
  Creates a new business unit within the configuration list and stores it in the list of business units.
- *Create Cost Type* (see chapter 4.10.1.16 “Cost Types”)
  Creates a new cost type within the configuration list and stores it in the list of cost types.
- *Create Cost Center* (see chapter 4.10.1.17 “Cost Centers”)
  Creates a new cost center within the configuration list and stores it in the list of cost centers.
- *Create Profit Center* (see chapter 4.10.1.18 “Profit Centers”)
  Creates a new profit center within the configuration list and stores it in the list of profit centers.
- *Create Architectural Object* (see chapter 4.10.1.19 “Architectural Objects”)
  Creates a new architectural object within the configuration list and stores it in the list of architectural objects.
- *Create Folder*
  Creates a new document within the configuration list and stores it in the list of documents.
- *Upload*
  Loads a new object into the structure of the configuration list and places this object in the list in which the “Upload” action was performed.

4.4.3 Properties

You can define the following settings in a configuration list:

4.4.3.1 Tab “Configuration List”

- *Name*
  This is the name of the configuration list.
- *Subject*
  In addition to the name, a subject can also be set for the configuration list.
- *Superordinate List*
  Here you can reference a superordinated file manager list, which is also in the list of configuration lists.

4.4.3.2 Tab “Assignments”

- *Manage Suppliers* (see chapter 4.10.1.1 “Supplier”)
  This field allows you to activate the default category for new suppliers.
- *Default Category for New Suppliers*
  This field allows you to store a default category for new suppliers.

- *Manage Customers* (see chapter 4.10.1.2 “Customer”)
  This field allows you to activate the default category for new customers.
- *Default Category for New Customers*
  This field allows you to store a default category for new customers.
- *Manage Clients* (see chapter 4.10.1.3 “Client”)
  This field allows you to activate the default category for new clients.
- *Default Category for New Clients*
  This field allows you to store a default category for new clients.
- *Manage Corporations* (see chapter 4.10.1.4 “Corporations”)
  This field allows you to activate the default category for new corporations.
- *Default Category for New Corporations*
  This field allows you to store a default category for new corporations.
- *Manage Committees* (see chapter 4.10.1.5 ”Committees”)
  This field allows you to activate the default category for new committees.
- *Default Category for New Committees*
  This field allows you to store a default category for new committees.
- *Manage Unions* (see chapter 4.10.1.6 “Unions”)
  This field allows you to activate the default category for new unions.
- *Default Category for New Unions*
  This field allows you to store a default category for new unions.
- *Manage Companies* (see chapter 4.10.1.7 “Companies”)
  This field allows you to activate the default category for new companies.
- *Default Category for New Companies*
  This field allows you to store a default category for new companies.
- *Manage Scopes* (see chapter 4.10.1.8 “Scopes”)
  This field allows you to activate the default category for new scopes.
- *Default Category for New Scopes*
  This field allows you to store a default category for new scopes.
- *Manage* Industries (see chapter 4.10.1.9 “Industries”)
  This field allows you to activate the default category for new industries.
- *Default Category for New Industries*
  This field allows you to store a default category for new industries.
- *Manage Areas* (see chapter 4.10.1.10 “Areas”)
  This field allows you to activate the default category for new areas.
- *Default Category for New Areas*
  This field allows you to store a default category for new areas.
- *Manage Brands* (see (see chapter 4.10.1.11 “Brands”)
  This field allows you to activate the default category for new brands.
- *Default Category for New Brands*
  This field allows you to store a default category for new brands.
- *Manage Products* (see chapter 4.10.1.12 “Products”)
  This field allows you to activate the default category for new products.
- *Default Category for New Products*
  This field allows you to store a default category for new products.

- *Manage Projects* (see chapter 4.10.1.13 “Projects”)
  This field allows you to activate the default category for new projects.
- *Default Category for New Projects*
  This field allows you to store a default category for new projects.
- *Manage Licenses* (see chapter 4.10.1.14 “Licenses”)
  This field allows you to activate the default category for new licenses.
- *Default Category for New Licenses*
  This field allows you to store a default category for new licenses.
- *Manage Business Units* (see chapter 4.10.1.15 “Business Units”)
  This field allows you to activate the default category for new business units.
- *Default Category for New Business Units*
  This field allows you to store a default category for new business units.
- *Manage Cost Types* (see chapter 4.10.1.16 “Cost Types”)
  This field allows you to activate the default category for new cost types.
- *Default Category for New Cost Types*
  This field allows you to store a default category for new cost types.
- *Manage Cost Centers* (see chapter 4.10.1.17 “Cost Centers”)
  This field allows you to activate the default category for new cost centers.
- *Default Category for New Cost Centers*
  This field allows you to store a default category for new cost centers.
- *Manage Profit Centers* (see chapter 4.10.1.18 “Profit Centers”)
  This field allows you to activate the default category for new profit centers.
- *Default Category for New Profit Centers*
  This field allows you to store a default category for new profit centers.
- *Manage Architectural Objects* (see chapter 4.10.1.19 “Architectural Objects”)
  This field allows you to activate the default category for new architectural objects.
- *Default Category for New Architectural Objects*
  This field allows you to store a default category for new architectural objects.

4.4.3.3 Tab “Roles”

The following roles can be stored within a configuration list:

- *Primary Contact*
  A primary contact person can be defined for the specified configuration list. This person can be consulted in any case and has access to all objects accordingly.
- *Full Control*
  Several users can be stored here, who should have all rights in accordance with the corresponding configuration list.
- *Change Access*
  Several users can be defined who are authorized to make changes according to the corresponding configuration list.
- *Read Access*
  Here, several users can be stored who, in accordance with the corresponding configuration list, should be authorized to view the corresponding objects and conditions, but not to change or manipulate them.

- *Restricted Access*
  Several users can be stored here who should only have restricted access in terms of the corresponding configuration list.

4.4.3.4 Tab "Remarks"

The following setting options are available within this tab:

- *Enter Remark*
  This field offers the possibility to leave any remarks on the respective assignment.
- *Add Attachments*
  This field offers the option of adding files to the references.
- *Remarks*
  This field shows the remarks that have been added to the open point so far.
- *References*
  This is a list of added attachments, which consists of content objects.

4.5 Record Registers

Record registers contain many dynamic object structures, which you can provide in the settings of the record register according to the possible objects. You can also make the corresponding configuration settings at record register level.

4.5.1 Areas

These areas are linked to the settings of the assignments. The following maximum areas can be available:

- *Current Records/Records* (see chapter 4.8 "Records")
  These are records that were created within the record register.
- *Current Requests/Requests* (see chapter 4.11 "Requests")
  These are requests that were created within the record register.
- *Calendar* (see chapter 4.15 "Calendar")
  This is a calendar that contains all events (see chapter 4.16 "Events") that are relevant for the record register.
- *Supplier* (see chapter 4.10.1.1 "Supplier")
  These are suppliers that were created within the record register.
- *Customer* (see chapter 4.10.1.2 "Customer")
  These are customers that were created within the record register.
- *Client* (see chapter 4.10.1.3 "Client")
  These are clients that were created within the record register.
- *Corporations* (see chapter 4.10.1.4 "Corporations")
  These are corporations that were created within the record register.
- *Committees* (see chapter 4.10.1.5 "Committees")
  These are committees that were created within the record register.
- *Unions* (see chapter 4.10.1.6 "Unions")
  These are unions that were created within the record register.

- *Companies* (see chapter 4.10.1.7 “Companies”)
  These are companies that were created within the record register.
- *Scopes* (see chapter 4.10.1.8 “Scopes”)
  These are scopes that were created within the record register.
- *Industries* (see chapter 4.10.1.9 “Industries”)
  These are industries that were created within the record register.
- *Areas* (see chapter 4.10.1.10 “Areas”)
  These are areas that were created within the record register.
- *Brands* (see chapter 4.10.1.11 “Brands”)
  These are brands that were created within the record register.
- *Products* (see chapter 4.10.1.12 “Products”)
  These are products that were created within the record register.
- *Projects* (see chapter 4.10.1.13 “Projects”)
  These are projects that were created within the record register.
- *Licenses* (see chapter 4.10.1.14 “Licenses”)
  These are licenses that were created within the record register.
- *Business Units* (see chapter 4.10.1.15 “Business Units”)
  These are business units that were created within the record register.
- *Cost Types* (see chapter 4.10.1.16 “Cost Types”)
  These are cost types that were created within the record register.
- *Cost Centers* (see chapter 4.10.1.17 “Cost Centers”)
  These are cost centers that were created within the record register.
- *Profit Centers* (see chapter 4.10.1.18 “Profit Centers”)
  These are profit centers that were created within the record register.
- *Architectural Objects* (see chapter 4.10.1.19 “Architectural Objects”)
  These are architectural objects that were created within the record register.
- *Documents*
  These are documents that were created within the record register.
- *Uploads*
  These are record register-specific uploaded objects.

4.5.2 Actions

You can perform the following actions in a record register:

- *Create Supplier* (see chapter 4.10.1.1 “Supplier“)
  Creates a new supplier within the record register and stores it in the list of suppliers.
- *Create Customer* (see chapter 4.10.1.2 “Customer“)
  Creates a new customer within the record register and stores it in the list of customers.
- *Create Client* (see chapter 4.10.1.3 “Client”)
  Creates a new client within the record register and stores it in the list of clients.
- *Create Corporation* (see chapter 4.10.1.4 “Corporations”)
  Creates a new corporation within the record register and stores it in the list of corporations.
- *Create Committee* (see chapter 4.10.1.5 ”Committees”)
  Creates a new committee within the record register and stores it in the list of committees.

- *Create Union* (see chapter 4.10.1.6 “Unions”)
  Creates a new union within the record register and stores it in the list of unions.
- *Create Company* (see chapter 4.10.1.7 “Companies”)
  Creates a new company within the record register and stores it in the list of companies.
- *Create Scope* (see chapter 4.10.1.8 “Scopes”)
  Creates a new scope within the record register and stores it in the list of scopes.
- *Create Industry* (see chapter 4.10.1.9 “Industries”)
  Creates a new industry within the record register and stores it in the list of industries.
- *Create Area* (see chapter 4.10.1.10 “Areas”)
  Creates a new area within the record register and stores it in the list of areas.
- *Create Brand* (see chapter 4.10.1.11 “Brands”)
  Creates a new brand within the record register and stores it in the list of brands.
- *Create Product* (see chapter 4.10.1.12 “Products”)
  Creates a new product within the record register and stores it in the list of products.
- *Create Project* (see chapter 4.10.1.13 “Projects”)
  Creates a new project within the record register and stores it in the list of projects.
- *Create License* (see chapter 4.10.1.14 “Licenses”)
  Creates a new license within the record register and stores it in the list of licenses.
- *Create Business Unit* (see chapter 4.10.1.15 “Business Units”)
  Creates a new business unit within the record register and stores it in the list of business units.
- *Create Cost Type* (see chapter 4.10.1.16 “Cost Types”)
  Creates a new cost type within the record register and stores it in the list of cost types.
- *Create Cost Center* (see chapter 4.10.1.17 “Cost Centers”)
  Creates a new cost center within the record register and stores it in the list of cost centers.
- *Create Profit Center* (see chapter 4.10.1.18 “Profit Centers”)
  Creates a new profit center within the record register and stores it in the list of profit centers.
- *Create Architectural Object* (see chapter 4.10.1.19 “Architectural Objects”)
  Creates a new supplier within the record register and stores it in the list of architectural objects.
- *Create Folder*
  Creates a new document within the record register and stores it in the list of documents.
- *Upload*
  Loads a new object into the structure of the record register and places this object in the list in which the “Upload” action was performed.
- *Create Record* (see chapter 4.8 “Records”)
  Creates a new record within the record register and places it in the list of records.
- *Create Event* (see chapter 4.16 “Events”)
  Creates a new event within the calendar (see chapter 4.15 “Calendar”) of the record register.
- *Create Task* (see chapter 4.17 “Tasks”)
  Creates a new task within the calendar in the record register.

4.5.3 Properties

You can define the following settings in a record register:

4.5.3.1 Tab “Record Register”

The following setting options are available within this tab:

- *Name*
  This is the name of the record register.
- *ID*
  This is the ID of the record register.
- *Subject*
  This is the subject of the record register, which can be provided as an alternative to the name.
- *Superordinate List*
  This is a record manager list that can be made available as a superordinate element.
- *Allow Requests* (see chapter 4.11 “Requests”)
  This is the option to enable requests at record register level and below.
- *Assignments* (see chapter 4.10 “Assignments”)
  These are assignments that can be made available to the record register.
- *Default Interval for End of Evidence Period Reminder E-Mail*
  This is a time interval that can be used as a standard for a reminder e-mail.
- *Default Interval for End of Check Period Reminder E-Mail*
  This is a time interval that can be used as a standard for a reminder e-mail.
- *Default Interval for Additional Reminders*
  This is a time interval that can be used as a standard for a reminder e-mail.
- *Always Use Default Interval for Additional Reminders*
  Here you can specify whether the *Default Interval for Additional Reminders* should always be used for additional reminders.
- *Reminder E-Mails to Internal Editors*
  This is the activation of the reminder e-mails to an internal processor.
- *Reminder E-Mails to Internal Purchasers*
  This is the activation of the reminder e-mails to an internal purchaser.
- *Reminder E-Mails to Internal Responsibles*
  This is the activation of the reminder e-mails to an internal responsible person.
- *Reminder E-Mails to Users with Full Control*
  This is the activation of reminder e-mails to users with full control.
- *Reminder E-Mails to Users with Change Access*
  This is the activation of reminder e-mails to users with change access.
- *Reminder E-Mails to Users with Read Access*
  This is the activation of reminder e-mails to users with read access.
- *Reminder E-Mails to Users with Restricted Access*
  This is the activation of reminder e-mails to users with restricted access.
- *Dedicated Contacts for Reminder E-Mails*
  Here you can set dedicated contacts for corresponding reminder e-mails.

- *Reminder Custom Text*
  Here you can specify a default additional text for reminder e-mails, which should be used in the scope of the record register.
- *Reminder Process*
  Here you can specify a default process for reminders to be used in the scope of the record register.
- *Retention Period*
  This is a default retention period that applies within the record register.
- *Process for End of Retention Period*
  This is a default process that is to be executed within the record register after the end of the retention period.

4.5.3.2 Tab “Details”

The following options are available within this tab:

- *Restrict Record Types* (see chapter 4.12 “Record Type”)
  You can restrict the record types that are available within the record register.
- *Prevent Creation of Record Types as Terms*
  Preventing the creation of terms for record types can be activated here.
- *Record Types*
  This field can be expanded if the *Restrict Record Types* field has been checked. Corresponding available records can be listed here.
- *Default Record Type for New Records*
  A standard record type can be set for new records within the record register.
- *Restrict Document Categories*
  This is a field that activates the restriction of document categories.
- *Default Document Category for Documents*
  If the *Restrict Document Categories* field has been selected, this field is visible. This field displays a list that reflects the available document categories or allows the available document categories to be referenced.
- *Allow Creation of Records With Read/Restricted Access*
  By ticking this field, users with only read or restricted rights can also create records.
- *Special Intervals*
  This field allows you to provide special time intervals within the record register.
- *Default Record State*
  A default record state can be set here, which is initially applied to all records unless another state has been selected.
- *Default Evidence Period for New Records*
  A default evidence period can be provided for records within the record register.
- *Default Check Period for New Records*
  A default check period for new records can be set within the record register.
- *Default Category for New Confidential Rooms*
  A default category can be set for new confidential rooms within the record register.
- *Default Category for New External Rooms*
  A default category can be set for new external rooms within the record register.

- *Standard Addressees*
  The available standard addressees can be selected. A maximum of all assignments is available.
- *Multiple Addressees*
  Here you can select whether multiple addressees are required. If this is the case, the content of the Required properties field changes in Records.
- *Multiple Internal Editors*
  You can select whether several editors are required.
- *Multiple Internal Purchasers*
  You can choose whether several purchasers are required.
- *Multiple Internal Responsible*
  You can choose whether several internal responisbles are required.
- *Hidden Elements in Records*
  Here you can select whether and if so, which elements should be hidden in records.
- *Required Properties in Records*
  Here you can select whether and if so, which properties are required in the records.
- *New Private PDF Annotations Accessible for Users With Change Access*
  You can choose whether private PDF comments are accessible to users with editing rights.
- *Disable Automatic Property Synchronization*
  Here you can choose whether automatic synchronization of record properties should be deactivated.
- *Debug Mode*
  This field makes it possible to find errors, but this is not relevant for the user.
- *Has Records*
  This field indicates whether there are records in the record register.
- *Has Requests*
  This field indicates whether there are requests in the record register.

4.5.3.3 Tab "Assignments"

The following options are available within this tab:

- *Manage Suppliers* (see chapter 4.10.1.1 "Supplier")
  This field allows you to activate the default category for new suppliers.
- *Default Category for New Suppliers*
  This field allows you to store a default category for new suppliers.
- *Use Suppliers*
  Here you can decide whether the suppliers should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the suppliers. Here you can decide whether the suppliers should be used more than once within the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used for the suppliers.

- *Manage Customer* (see chapter 4.10.1.2 “Customer”)
  This field allows you to activate the default category for new customers.
- *Default Category for New Customers*
  This field allows you to store a default category for new customers.
- *Use Customers*
  Here you can decide whether the customers should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the customers. Here you can decide whether the customer should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the customers.
- *Manage Clients* (see chapter 4.10.1.3 “Client”)
  This field allows you to activate the default category for new clients.
- *Default Category for New Clients*
  This field allows you to store a default category for new clients.
- *Use Clients*
  Here you can decide whether the clients should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the clients. Here you can decide whether the clients should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the clients.
- *Manage Corporations* (see chapter 4.10.1.4 “Corporations”)
  This field allows you to activate the default category for new corporations.
- *Default Category for New Corporations*
  This field allows you to store a default category for new corporations.
- *Use Corporations*
  Here you can decide whether the corporations should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the corporations. Here you can decide whether the use of the corporations should be used multiple times in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the corporations.
- *Manage Committees* (see chapter 4.10.1.5 ”Committees”)
  This field allows you to activate the default category for new committees.

- *Default Category for New Committees*
  This field allows you to store a default category for new committees.
- *Use Committees*
  Here you can decide whether the committees should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the committees. Here you can decide whether the use of the committees should be used multiple times in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the corporations.
- *Manage Unions* (see chapter 4.10.1.6 “Unions”)
  This field allows you to activate the default category for new unions.
- *Default Category for New Unions*
  This field allows you to store a default category for new unions.
- *Use Unions*
  Here you can decide whether the unions should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the unions. Here you can decide whether the unions should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the unions.
- *Manage Companies* (see chapter 4.10.1.7 “Companies”)
  This field allows you to activate the default category for new clients.
- *Default Category for New Companies*
  This field allows you to store a default category for new companies.
- *Use Companies*
  Here you can decide whether the companies should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if you have decided to use the companies. Here you can decide whether the companies should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the companies.
- *Manage Scopes* (see chapter 4.10.1.8 “Scopes”)
  This field allows you to activate a default category for new scopes.
- *Default Category for New Scopes*
  This field allows you to store a default category for new scopes.

- *Use Scopes*
  Here you can decide whether the scopes should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the scopes. Here you can decide whether the scopes should be used multiple times in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the scopes.
- *Manage Industries* (see chapter 4.10.1.9 "Industries")
  This field allows you to activate a default category for new industries.
- *Default Category for New Industries*
  This field allows you to store a default category for new industries.
- *Use Industries*
  Here you can decide whether the industries should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the industries. Here you can decide whether the industries should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the industries.
- *Manage Areas* (see chapter 4.10.1.10 "Areas")
  This field allows you to activate a default category for new areas.
- *Default Category for New Areas*
  This field allows you to store a default category for new areas.
- *Use Areas*
  Here you can decide whether the areas should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if you have decided to use the regions (see chapter 4.10.1.10 "Areas"). Here you can decide whether the regions should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the areas.
- *Manage Brands* (see chapter 4.10.1.11 "Brands")
  This field allows you to activate a default category for new brands.
- *Default Category for New Brands*
  This field allows you to store a default category for new brands.
- *Use Brands*
  Here you can decide whether the brands should be used in the course of the corresponding record register.

- *Multiple*
  This field is only available if it has been decided to use the brands. Here you can decide whether the brands should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the brands.
- *Manage Products* (see chapter 4.10.1.12 "Products")
  This field allows you to activate a default category for new products.
- *Default Category for New Products*
  This field allows you to store a default category for new products.
- *Use Products*
  Here you can decide whether the products should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the products. Here you can decide whether the products should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the products.
- *Manage Projects* (see chapter 4.10.1.13 "Projects")
  This field allows you to activate a default category for new projects.
- *Default Category for New Projects*
  This field allows you to store a default category for new projects.
- *Use Projects*
  Here you can decide whether the projects should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if you have decided to use the projects. Here you can decide whether the projects should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the projects.
- *Manage Licenses* (see chapter 4.10.1.14 "Licenses")
  This field allows you to activate a default category for new licenses.
- *Default Category for New Licenses*
  This field allows you to store a default category for new licenses.
- *Use Licenses*
  Here you can decide whether the licenses should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the licenses. Here you can decide

whether the license should be used more than once in the course of the corresponding record register.

- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the licenses.
- *Manage Business Units* (see chapter 4.10.1.15 “Business Units”)
  This field allows you to activate a default category for new business units.
- *Default Category for New Business Units*
  This field allows you to store a default category for new business units.
- *Use Business Units*
  Here you can decide whether the business units should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the business units. Here you can decide whether the business units should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the business units.
- *Manage Cost Types* (see chapter 4.10.1.16 “Cost Types”)
  This field allows you to activate a default category for new cost types.
- *Default Category for New Cost Types*
  This field allows you to store a default category for new cost types.
- *Use Cost Types*
  Here you can decide whether the cost types should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the cost types. Here you can decide whether the cost types should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the cost type.
- *Manage Cost Centers* (see chapter 4.10.1.17 “Cost Centers”)
  This field allows you to activate a default category for new cost centers.
- *Default Category for New Cost Centers*
  This field allows you to store a default category for new cost centers.
- *Use Cost Centers*
  Here you can decide whether the cost centers should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if it has been decided to use the cost centers. Here you can decide whether the cost centers should be used more than once in the course of the corresponding record register.

- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the cost center.
- *Manage Profit Centers* (see chapter 4.10.1.18 "Profit Centers")
  This field allows you to activate a default category for new profit centers.
- *Default Category for New Profit Centers*
  This field allows you to store a default category for new profit centers.
- *Use Profit Centers*
  Here you can decide whether the profit centers should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if you have decided to use the profit centers. Here you can decide whether the profit centers should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the profit centers.
- *Manage Architectural Objects* (see chapter 4.10.1.19 "Architectural Objects")
  This field allows you to activate a default category for new architectural objects.
- *Default Category for New Architectural Objects*
  This field allows you to store a default category for new architectural objects.
- *Use Architectural Objects*
  Here you can decide whether the architectural objects should be used in the course of the corresponding record register.
- *Multiple*
  This field is only available if you have decided to use the architectural objects. Here you can decide whether the architectural objects should be used more than once in the course of the corresponding record register.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the architectural objects.

4.5.3.4 Tab "Roles"

The following roles can be stored within a record register:

- *Primary Contact*
  A primary contact person can be defined for the specified record register. This person can be consulted in any case and has access to all objects accordingly.
- *Full Control*
  Several users can be stored here, who should have all rights in terms of the corresponding record register.
- *Change Access*
  Several users can be defined who are authorized to make changes in the corresponding record register.
- *Read Access*
  Several users can be stored here, who should be authorized to view the corresponding

objects and conditions in the sense of the corresponding record register, but not to change or manipulate them.

- *Restricted Access*
  Several users can be stored here, who should only have restricted access to the corresponding record register.

4.5.3.5 Tab "Address"

The following data can be provided with regard to the address of a record register:

- *Official Name*
  This is the official name for the record register.
- *Alternative Names*
  An alternative name can be set for the record register.
- *Street*
  This field offers the possibility to enter a street for the record register.
- *ZIP Code*
  This field offers the option of entering a zip code for the record register.
- *City*
  This field offers the option of storing a city for the record register.
- *Country*
  This field offers the possibility to define a country for the record register.
- *Telephone Numbers*
  This field offers the option of entering a telephone number for the record register.
- *Billing Information*
  This field offers the possibility to store dedicated billing information for the record register.

4.6 Subjects

Subjects contain many dynamic object structures, which you can provide in the subject settings according to the possible objects. You can also make corresponding configuration settings at subject level.

4.6.1 Areas

These areas are linked to the settings of the assignments. The following maximum areas can be available:

- *Current Cases/Cases* (see chapter 4.9 "Case")
  These are cases that were created within the subject.
- *Current Requests/Requests* (see chapter 4.11 "Requests")
  These are requests that were created within the subject.
- *Supplier* (see chapter 4.10.1.1 "Supplier")
  These are suppliers that were created within the subject.
- *Customer* (see chapter 4.10.1.2 "Customer")
  These are customers that were created within the subject.

Client (see chapter 4.10.1.3 "Client")
These are clients that were created within the subject.

Corporations (see chapter 4.10.1.4 “Corporations”)
These are corporations that were created within the subject.

Committees (see chapter 4.10.1.5 ”Committees”)
These are committees that were created within the subject.

Unions (see chapter 4.10.1.6 “Unions”)
These are unions that were created within the subject.

Companies (see chapter 4.10.1.7 “Companies”)
These are companies that were created within the subject.

Scopes (see chapter 4.10.1.8 “Scopes”)
These are scopes that were created within the subject.

Industries (see chapter 4.10.1.9 “Industries”)
These are industries that were created within the subject.

Areas (see chapter 4.10.1.10 “Areas”)
These are areas that were created within the subject.

Brands (see chapter 4.10.1.11 “Brands”)
These are brands that were created within the subject.

Products (see chapter 4.10.1.12 “Products”)
These are products that were created within the subject.

Projects (see chapter 4.10.1.13 “Projects”)
These are projects that were created within the subject.

Licenses (see chapter 4.10.1.14 “Licenses”)
These are licenses that were created within the subject.

Business Units (see chapter 4.10.1.15 “Business Units”)
These are business units that were created within the subject.

Cost Types (see chapter 4.10.1.16 “Cost Types”)
These are cost types that were created within the subject.

Cost Centers (see chapter 4.10.1.17 “Cost Centers”)
These are cost centers that were created within the subject.

Profit Centers (see chapter 4.10.1.18 “Profit Centers”)
These are profit centers that were created within the subject.

Architectural Objects (see chapter 4.10.1.19 “Architectural Objects”)
These are architectural objects that were created within the subject.

- *Documents*
  These are subject-specific objects that were created within the subject area.
- *Uploads*
  These are subject-specific uploaded objects.

4.6.2 Actions

You can perform the following actions in a subject:

- *Create Supplier* (see chapter 4.10.1.1 “Supplier“)
  Creates a new supplier within the subject and stores it in the list of suppliers.

- *Create Customer* (see chapter 4.10.1.2 “Customer“)
  Creates a new customer within the subject and stores it in the list of customers.
- *Create Client* (see chapter 4.10.1.3 “Client”)
  Creates a new client within the subject and stores it in the list of clients.
- *Create Corporation* (see chapter 4.10.1.4 “Corporations”)
  Creates a new corporation within the subject and stores it in the list of corporations.
- *Create Committee* (see chapter 4.10.1.5 ”Committees”)
  Creates a new committee within the subject and stores it in the list of committees.
- *Create Union* (see chapter 4.10.1.6 “Unions”)
  Creates a new union within the subject and stores it in the list of unions.
- *Create Company* (see chapter 4.10.1.7 “Companies”)
  Creates a new company within the subject and stores it in the list of companies.
- *Create Scope* (see chapter 4.10.1.8 “Scopes”)
  Creates a new scope within the subject and stores it in the list of scopes.
- *Create Industry* (see chapter 4.10.1.9 “Industries”)
  Creates a new industry within the subject and stores it in the list of industries.
- *Create Area* (see chapter 4.10.1.10 “Areas”)
  Creates a new area within the subject and stores it in the list of areas.
- *Create Brand* (see chapter 4.10.1.11 “Brands”)
  Creates a new brand within the subject and stores it in the list of brands.
- *Create Product* (see chapter 4.10.1.12 “Products”)
  Creates a new product within the subject and stores it in the list of products.
- *Create Project* (see chapter 4.10.1.13 “Projects”)
  Creates a new project within the subject and stores it in the list of projects.
- *Create License* (see chapter 4.10.1.14 “Licenses”)
  Creates a new license within the subject and stores it in the list of licenses.
- *Create Business Unit* (see chapter 4.10.1.15 “Business Units”)
  Creates a new business unit within the subject and stores it in the list of business units.
- *Create Cost Type* (see chapter 4.10.1.16 “Cost Types”)
  Creates a new cost type within the subject and stores it in the list of cost types.
- *Create Cost Center* (see chapter 4.10.1.17 “Cost Centers”)
  Creates a new cost center within the subject and stores it in the list of cost centers.
- *Create Profit Center* (see chapter 4.10.1.18 “Profit Centers”)
  Creates a new profit center within the subject and stores it in the list of profit centers.
- *Create Architectural Object* (see chapter 4.10.1.19 “Architectural Objects”)
  Creates a new supplier within the subject and stores it in the list of architectural objects.
- *Create Folder*
  Creates a new folder within the subject and places it in the list of documents.
- *Upload*
  Loads a new object into the structure of the subject and places this object in the list in which the “Upload” action was performed.
- *Create Case* (see chapter 4.9 “Case”)
  Creates a new case within the subject and places it in the list of current cases.

4.6.3 Properties

You can define the following settings in a subject:

4.6.3.1 Tab “Subjects”

The following setting options are available within this tab:

- *Name*
  This is the name of the subject.
- *ID*
  This is the ID of the subject.
- *Subject*
  This is the subject of the subject, which can be provided as an alternative to the name.
- *Superordinate List*
  This is a record manager list that can be made available as a superordinate element.
- *Allow Requests* (see chapter 4.11 “Requests”)
  This is the option to enable requests at subject level and below.
- *Assignments* (see chapter 4.10 “Assignments”)
  These are assignments that can be made available to the subject.
- *Default Interval for Additional Reminders*
  This is an interval that can be used as a default for a reminder e-mail.
- *Always Use Default Interval for Additional Reminders*
  Here you can specify whether the *Default Interval for Additional Reminders* should always be used for additional reminders.
- *Reminder E-Mails to Internal Editors*
  This is the activation of the reminder e-mails to an internal processor.
- *Reminder E-Mails to Internal Purchasers*
  This is the activation of the reminder e-mails to an internal purchaser.
- *Reminder E-Mails to Internal Responsibles*
  This is the activation of the reminder e-mails to an internal responsible person.
- *Reminder E-Mails to Users with Full Control*
  This is the activation of reminder e-mails to users with full control.
- *Reminder E-Mails to Users with Change Access*
  This is the activation of reminder e-mails to users with change access.
- *Reminder E-Mails to Users with Read Access*
  This is the activation of reminder e-mails to users with read access.
- *Reminder E-Mails to Users with Restricted Access*
  This is the activation of reminder e-mails to users with restricted access.
- *Dedicated Contacts for Reminder E-Mails*
  This is the option of setting dedicated contacts for corresponding reminder e-mails.
- *Reminder Custom Text*
  This is the option to specify a standard additional text for reminder emails, which should be used in the scope of the subject.

- *Reminder Process*
  This is the option to specify a standard process for reminders, which should be used in the scope of the subject.
- *Retention Period*
  This is a standard retention period that applies within the subject.
- *Process for End of Retention Period*
  This is a standard process that is to be carried out within the subject at the end of the retention period.

4.6.3.2 Tab "Details"

The following setting options are available within this tab:

- *Restrict Case Types* (see chapter 4.13 "Case Type")
  Case types that are available within the subject can be restricted.
- *Prevent Creation of Case Types as Terms*
  Preventing the creation of terms for case types can be activated here.
- *Case Types*
  This field can be expanded if the Restrict available business case types field has been checked. Corresponding available cases (see chapter 4.9 "Case") can be listed here.
- *Default Case Type for New Cases*
  This is the ability to provide a default case type for new cases.
- *Restrict Request Types*
  This is the ability to restrict the requested types.
- *Prevent Creation of Request Types as Terms*
  This is the ability to prevent creation of request types as terms.
- *Request Types*
  This is are the request types within a subject.
- *Default Request Type for New Requests*
  This is the default request type setting for new requests.
- *Restrict Document Categories*
  This is a field that activates the restriction of document categories.
- *Available Document Categories for Documents*
  If the *Restrict Document Categories* field has been selected, this field is visible. This field displays a list that reflects the available document categories or allows the available document categories to be referenced.
- *Allow Creation of Cases With Read/Restricted Access* (see chapter 4.9 "Case")
  By ticking this field, users with read-only or restricted rights can also create cases.
- *Allow Creation of Requests With Read/Restricted Access*
  This attribute allows the creation of requests with read or restricted access.
- *Special Intervals*
  This field enables the provision of special intervals within the subject.
- *Default Case State*
  A default case state can be set here, which is initially applied to all cases (see chapter 4.9 "Case"), unless another has been selected.

- *Default Category for New Confidential Rooms*
  A default category can be set for new confidential rooms within the subject.
- *Default Category for New External Rooms*
  A default category can be set for new external rooms within the subject.
- *Multiple Internal Editors*
  You can select whether several editors are required.
- *Multiple Internal Purchasers*
  You can choose whether several purchasers are required.
- *Multiple Internal Responsibles*
  You can choose whether several internal responsibles are required.
- *Hidden Elements in Cases* (see chapter 4.9 "Case")
  Here you can select whether and if so, which elements should be hidden in cases.
- *Required Properties in Cases* (see chapter 4.9 "Case")
  Here you can select whether and if so, which properties are required in the cases.
- *Hidden Elements in Requests*
  This attribute describes a list of all hidden elements in a request.
- *Required Properties in Requests*
  Here you can select whether and if so, which properties should be required in the business cases.
- *New Private PDF Annotations Accessible for Users With Change Access*
  You can choose whether private PDF comments are accessible to users with editing rights.
- *Debug-Modus*
  This field makes it possible to find errors, but this is not relevant for the user.
- *Has Cases*
  This field shows whether cases exist in the subject.
- *Has Requests*
  This field shows whether there are any requests in the subject.

4.6.3.3 Tab "Assignments"

The following setting options are available within this tab:

- *Manage Suppliers* (see chapter 4.10.1.1 "Supplier")
  This field allows you to activate the default category for new suppliers.
- *Default Category for New Suppliers*
  This field allows you to store a default category for new suppliers.
- *Use Suppliers*
  Here you can decide whether the suppliers should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the suppliers. Here you can decide whether the suppliers should be used more than once within the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used for the suppliers.

- *Manage Customer* (see chapter 4.10.1.2 “Customer”)
  This field allows you to activate the default category for new customers.
- *Default Category for New Customers*
  This field allows you to store a default category for new customers.
- *Use Customers*
  Here you can decide whether the customers should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the customers. Here you can decide whether the customer should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the customers.
- *Manage Clients* (see chapter 4.10.1.3 “Client”)
  This field allows you to activate the default category for new clients.
- *Default Category for New Clients*
  This field allows you to store a default category for new clients.
- *Use Clients*
  Here you can decide whether the clients should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the clients. Here you can decide whether the clients should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the clients.
- *Manage Corporations* (see chapter 4.10.1.4 “Corporations”)
  This field allows you to activate the default category for new corporations.
- *Default Category for New Corporations*
  This field allows you to store a default category for new corporations.
- *Use Corporations*
  Here you can decide whether the corporations should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the corporations. Here you can decide whether the use of the corporations should be used multiple times in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the corporations.
- *Manage Committees* (see chapter 4.10.1.5 ”Committees”)
  This field allows you to activate the default category for new committees.

- *Default Category for New Committees*
  This field allows you to store a default category for new committees.
- *Use Committees*
  Here you can decide whether the committees should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the committees. Here you can decide whether the use of the committees should be used multiple times in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the corporations.
- *Manage Unions* (see chapter 4.10.1.6 “Unions”)
  This field allows you to activate the default category for new unions.
- *Default Category for New Unions*
  This field allows you to store a default category for new unions.
- *Use Unions*
  Here you can decide whether the unions should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the unions. Here you can decide whether the unions should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the unions.
- *Manage Companies* (see chapter 4.10.1.7 “Companies”)
  This field allows you to activate the default category for new clients.
- *Default Category for New Companies*
  This field allows you to store a default category for new companies.
- *Use Companies*
  Here you can decide whether the companies should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if you have decided to use the companies. Here you can decide whether the companies should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the companies.
- *Manage Scopes* (see chapter 4.10.1.8 “Scopes”)
  This field allows you to activate a default category for new scopes.
- *Default Category for New Scopes*
  This field allows you to store a default category for new scopes.

- *Use Scopes*
  Here you can decide whether the scopes should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the scopes. Here you can decide whether the scopes should be used multiple times in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the scopes.
- *Manage Industries* (see chapter 4.10.1.9 “Industries”)
  This field allows you to activate a default category for new industries.
- *Default Category for New Industries*
  This field allows you to store a default category for new industries.
- *Use Industries*
  Here you can decide whether the industries should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the industries. Here you can decide whether the industries should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the industries.
- *Manage Areas* (see chapter 4.10.1.10 “Areas”)
  This field allows you to activate a default category for new areas.
- *Default Category for New Areas*
  This field allows you to store a default category for new areas.
- *Use Areas*
  Here you can decide whether the areas should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if you have decided to use the regions (see chapter 4.10.1.10 “Areas”). Here you can decide whether the regions should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the areas.
- *Manage Brands* (see chapter 4.10.1.11 “Brands”)
  This field allows you to activate a default category for new brands.
- *Default Category for New Brands*
  This field allows you to store a default category for new brands.
- *Use Brands*
  Here you can decide whether the brands should be used in the course of the corresponding subject.

- *Multiple*
  This field is only available if it has been decided to use the brands. Here you can decide whether the brands should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the brands.
- *Manage Products* (see chapter 4.10.1.12 “Products”)
  This field allows you to activate a default category for new products.
- *Default Category for New Products*
  This field allows you to store a default category for new products.
- *Use Products*
  Here you can decide whether the products should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the products. Here you can decide whether the products should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the products.
- *Manage Projects* (see chapter 4.10.1.13 “Projects”)
  This field allows you to activate a default category for new projects.
- *Default Category for New Projects*
  This field allows you to store a default category for new projects.
- *Use Projects*
  Here you can decide whether the projects should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if you have decided to use the projects. Here you can decide whether the projects should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the projects.
- *Manage Licenses* (see chapter 4.10.1.14 “Licenses”)
  This field allows you to activate a default category for new licenses.
- *Default Category for New Licenses*
  This field allows you to store a default category for new licenses.
- *Use Licenses*
  Here you can decide whether the licenses should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the licenses. Here you can decide

whether the license should be used more than once in the course of the corresponding subject.

- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the licenses.
- *Manage Business Units* (see chapter 4.10.1.15 “Business Units”)
  This field allows you to activate a default category for new business units.
- *Default Category for New Business Units*
  This field allows you to store a default category for new business units.
- *Use Business Units*
  Here you can decide whether the business units should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the business units. Here you can decide whether the business units should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the business units.
- *Manage Cost Types* (see chapter 4.10.1.16 “Cost Types”)
  This field allows you to activate a default category for new cost types.
- *Default Category for New Cost Types*
  This field allows you to store a default category for new cost types.
- *Use Cost Types*
  Here you can decide whether the cost types should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the cost types. Here you can decide whether the cost types should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the cost type.
- *Manage Cost Centers* (see chapter 4.10.1.17 “Cost Centers”)
  This field allows you to activate a default category for new cost centers.
- *Default Category for New Cost Centers*
  This field allows you to store a default category for new cost centers.
- *Use Cost Centers*
  Here you can decide whether the cost centers should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if it has been decided to use the cost centers. Here you can decide whether the cost centers should be used more than once in the course of the corresponding subject.

- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the cost center.
- *Manage Profit Centers* (see chapter 4.10.1.18 "Profit Centers")
  This field allows you to activate a default category for new profit centers.
- *Default Category for New Profit Centers*
  This field allows you to store a default category for new profit centers.
- *Use Profit Centers*
  Here you can decide whether the profit centers should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if you have decided to use the profit centers. Here you can decide whether the profit centers should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the profit centers.
- *Manage Architectural Objects* (see chapter 4.10.1.19 "Architectural Objects")
  This field allows you to activate a default category for new architectural objects.
- *Default Category for New Architectural Objects*
  This field allows you to store a default category for new architectural objects.
- *Use Architectural Objects*
  Here you can decide whether the architectural objects should be used in the course of the corresponding subject.
- *Multiple*
  This field is only available if you have decided to use the architectural objects. Here you can decide whether the architectural objects should be used more than once in the course of the corresponding subject.
- *Use Pick List*
  This field is only available if it has been decided to allow multiple settings. Here you can decide whether a selection list should be used in the course of the architectural objects.

4.6.3.4 Tab "Roles"

The following roles can be defined within a subject:

- *Primary Contact*
  A primary contact person can be defined for the specified subject. This person can be consulted in any case and has access to all objects accordingly.
- *Full Rights*
  Several users can be stored here, who should have all rights in terms of the corresponding subject.
- *Change Access*
  Several users can be stored who are authorized to make changes in the sense of the corresponding subject.
- *Read Access*
  Several users can be stored here, who should be authorized to view the corresponding

objects and conditions in the sense of the corresponding subject, but not to change or manipulate them.

- *Restricted Access*
  Several users can be stored here, who should only have limited access in terms of the corresponding subject.

4.6.3.5 Tab "Address"

The following data can be provided with regard to the address of a subject:

- *Official Name*
  This is the official name for the record subject.
- *Alternative Names*
  An alternative name can be set for the record subject.
- *Street*
  This field offers the possibility to enter a street for the record subject.
- *ZIP Code*
  This field offers the option of entering a zip code for the record subject.
- *City*
  This field offers the option of storing a city for the record subject.
- *Country*
  This field offers the possibility to define a country for the record subject.
- *Telephone Numbers*
  This field offers the option of entering a telephone number for the record subject.
- *Billing Information*
  This field offers the possibility to store dedicated billing information for the subject.

4.7 Configuration Data

Any configuration-specific documents can be provided here. These are used for further processing within the entire Records Manager application.

4.8 Records

Records contain many dynamic object structures, which you can provide in the record settings according to the possible objects. You can also make corresponding configuration settings at record level.

4.8.1 Areas

You can find the following areas in a record:

- *Record*
  This area contains all the settings that belong to the record. These settings can be changed accordingly.
- *Description*
  This area contains the description that belongs to the record.

- *Tasks* (see chapter 4.17 “Tasks”)
  This area can be accessed by creating various tasks within the record in the settings. This area contains all tasks that belong to the record.
- *Documents*
  This area contains all documents associated with the record.
- *Subordinated Records*
  This area can be accessed by linking or creating various subordinated records within the record in the settings. This area contains all subordinated records that belong to the record.
- *Documents From Subordinated Records*
  This list represents a calculated list which, if various subordinated records are available, becomes visible and contains various corresponding documents from the subordinated records.
- *Previous Records*
  This list is visible if previous records have been defined within the record. This list contains all previous records that refer to the record.
- *Documents From Previous Records*
  This list represents a calculated list which, if various previous records are available, becomes visible and contains various corresponding documents from the previous records.
- *Assigned Cases* (see chapter 4.9 “Case”)
  This calculated list appears if a case has been created within the record. This area contains all these cases.
- *Received Requests* (see chapter 4.11 “Requests”)
  This area appears if a request has been created within the record. This area contains all these requests.
- *Remarks*
  If a remark has been created, it will appear in this list.
- *Internal Remarks*
  If an internal remark has been created, it will appear in this list.
- *History*
  This list describes the history of the corresponding record.

4.8.2 Actions

You will find the following actions within a record:

- *Manage Assignments* (see chapter 4.10 “Assignments”)
  This action allows you to manage assignments within the record. A window opens in which you can decide which assignments should be possible within the record.
- *Create Subordinated Record*
  This action allows you to create a subordinate record within the record. A window opens in which all important settings relating to the new record can be made.
- *Create Following Record*
  This action allows you to create a following record within the record. A window opens in which all important settings relating to the new record can be made.
- *Create Request* (see chapter 4.11 “Requests”)
  This action allows you to create a new request within the record. This opens a window that allows you to make all the important settings for the new request.

- *Create Case* (see chapter 4.9 “Case”)
  This action allows you to create a new case within the record. A window opens which allows you to make all the important settings for the new case.
- *Upload*
  This action allows you to upload record-specific documents and places them in the list of documents within the record.
- *Manage Follow-Ups*
  A resubmission can be used to send an e-mail to a user or start a process at a specific time.
- *Start Process*
  This action allows you to start a process or configure a process directly within the relevant record.
- *Set Legal Hold*
  Set a retention requirement for the corresponding record.
- *Add Remark*
  This opens a window in which a remark can be added to the corresponding record.
- *Add Internal Remark*
  This opens a window in which an internal remark can be added to the corresponding record.
- *Properties*
  Opens the record settings.

4.8.3 Properties

You can define the following settings in a record:

4.8.3.1 Tab “Records”

The following setting options are available within this tab:

- *Record Register* (see chapter 4.5 “Record Registers”)
  This is the linked record register in which the record is located.
- *Reference Additional Record Registers*
  This can enable the addition of further necessary record registers.
- *Referenced Record Registers*
  This list only appears if the Reference additional record registers field has been activated. This is the option to set additional record registers in relation to the record.
- *Year*
  This is the year in which the record was created.
- *Ordinal*
  This is the ordinal number of the record.
- *State*
  This is the status of the record, which is set as *Active*. However, this can be adjusted by the user according to the given status.
- *Addressee*
  An addressee can be stored for the record.
- *Department*
  A corresponding department for the record can be mentioned here.

- *Addressee Contact*
  This field offers the possibility to enter a contact person for the respective addressee.
- *E-Mail Address*
  This field offers the possibility to enter an e-mail address for the contact person.
- *Contact Information*
  Within this field it is possible to enter further contact information.
- *External Reference*
  This field can be used to specify an external reference to another object.
- *Street*
  This field offers the possibility to search for the street of the respective file reference via Google Maps.
- *Zip Code*
  The zip code can be entered here.
- *City*
  The respective location can be specified here.
- *Country*
  This field allows you to specify the country.
- *Telephone Numbers*
  Important telephone numbers can be provided for the record.
- *Internal Editor*
  This field allows you to enter an internal editor.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal editor.
- *Internal Purchaser*
  This field allows you to enter an internal purchaser.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal purchaser.
- *Internal Responsible*
  This field allows you to enter an internal responsible person.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal responsible.
- *Internal Service Provision*
  The internal service provision of can be briefly mentioned here.
- *Internal Reference*
  An internal reference to another object can be provided here.
- *Subject*
  This field offers the possibility to provide a subject for the record.
- *Record Subject Matter*
  A record-specific designation can be specified here.
- *Description*
  This field allows you to enter a description for the record.
- *Terms*
  This field allows you to specify terms for the record.

- *Choose Terms*
  This opens a new field with all defined terms. These terms can be selected for the record and are then inserted in the Terms field.
- *Record Type* (see chapter 4.12 “Record Type”)
  The record type of the record can be specified here. If none has been specified, this must be created.
- *Record Language*
  Here, a language can be set in relation to the record.
- *Legal Basis*
  The legal basis of the record can be briefly described here.
- *Applicable Law*
  This field allows you to briefly mention the applicable law.
- *Jurisdiction*
  This field allows you to briefly mention the place of jurisdiction.

4.8.3.2 Tab “Dates” (see chapter 4.16 “Events”)

The following setting options are available within this tab:

- *Opened at*
  This field shows when the corresponding record was created. It can be added subsequently.
- *Opening Terms*
  A short information regarding the opening of the record can be entered here.
- *End*
  This field allows you to enter an end date.
- *End Terms*
  A short note can be entered here regarding the provisions of the end.
- *Evidence Period*
  This field allows you to store an existing evidence period or create a new evidence period.
- *Evidence Period Terms*
  This field offers the possibility to describe any provisions for the evidence period.
- *Check Period*
  This field offers the option of storing an existing check period or creating a new one.
- *Check Period Terms*
  This field allows you to describe any provisions for the check period.
- *End of Evidence Period*
  This field shows the end of the evidence period.
- *Reminder*
  This field allows you to set a time period for receiving a reminder regarding the end of the evidence period.
- *Additional Reminder Date*
  An additional reminder date can be stored for the record.
- *Repetition*
  This field allows you to set a time period in which a repeated reminder is set.

- *Additional Contacts for Reminder E-Mails*
  This field allows you to add further contacts to receive reminders.
- *Next Deadline*
  This field shows the date of the next reminder.
- *Source*
  This field shows the source of the next reminder.

4.8.3.3 Tab “Assignments”

The following setting options are available within this tab:

- *Supplier* (see chapter 4.10.1.1 “Supplier”)
  Here, the new version of supplier can be activated in the record.
- *Customer* (see chapter 4.10.1.2 “Customer”)
  Here, the new version of customer can be activated in the record.
- *Client* (see chapter 4.10.1.3 “Client”)
  Here, the new version of client can be activated in the record.
- *Corporation* (see chapter 4.10.1.4 “Corporations”)
  Here, the new version of corporation can be activated in the record.
- *Committee* (see chapter 4.10.1.5 ”Committees”)
  Here, the new version of committee can be activated in the record.
- *Union* (see chapter 4.10.1.6 “Unions”)
  Here, the new version of union can be activated in the record.
- *Company* (see chapter 4.10.1.7 “Companies”)
  Here, the new version of company can be activated in the record.
- *Scope* (see chapter 4.10.1.8 “Scopes”)
  Here, the new version of scope can be activated in the record.
- *Industry* (see chapter 4.10.1.9 “Industries”)
  Here, the new version of industry can be activated in the record.
- *Area* (see chapter 4.10.1.10 “Areas”)
  Here, the new version of area can be activated in the record.
- *Brand* (see chapter 4.10.1.11 “Brands”)
  Here, the new version of brand can be activated in the record.
- *Product* (see chapter 4.10.1.12 “Products”)
  Here, the new version of product can be activated in the record.
- *Project* (see chapter 4.10.1.13 “Projects”)
  Here, the new version of project can be activated in the record.
- *License* (see chapter 4.10.1.14 “Licenses”)
  Here, the new version of license can be activated in the record.
- *Business Unit* (see chapter 4.10.1.15 “Business Units”)
  Here, the new version of business unit can be activated in the record.
- *Cost Type* (see chapter 4.10.1.16 “Cost Types”)
  Here, the new version of cost type can be activated in the record.
- *Cost Center* (see chapter 4.10.1.17 “Cost Centers”)
  Here, the new version of cost center can be activated in the record.

- *Profit Center* (see chapter 4.10.1.18 "Profit Centers")
  Here, the new version of profit center can be activated in the record.
- *Architectural Objects* (see chapter 4.10.1.19 "Architectural Objects")
  Here, the new version of architectural object can be activated in the record.

4.8.3.4 Tab "Incoterms"

The following setting options are available within this tab:

- *Incoterms*
  Within this list, several Incoterms can be set which are to be used for the record. If *Add Entry* is clicked, the following setting should be made:
  - *Term*
    This is the term to be included in the list.
  - *Remarks*
    This is a remark that comes into effect in the course of the selected term.

4.8.3.5 Tab "Tasks"

The following setting options are available within this tab:

- *Opened at*
  This is the date on which the record was created.
- *End*
  This is the end of the record, whereby this value is referenced by the "Dates" tab.
- *End of Check Period*
  This is the end of the check period, whereby this value is referenced by the "Dates" tab.
- *End of Evidence Period*
  This is the end of the evidence period, whereby this value is referenced by the "Dates" tab.
- *Open Tasks*
  This is a list of open tasks. Tasks for the record can be stored within this list. The following settings must be made:
  - *Type*
    This is a selection, whereby the type of task is specified in more detail.
  - *Due*
    The due date of the task can be set here.
  - *Comment*
    A comment can be left as part of the task.
  - *Done*
    This field offers the option of setting the task to "Done". As a result, the task is moved from the "Open Tasks" list to the list of "Done Tasks".
- *Done Tasks*
  This is a calculated list that shows all done tasks.

4.8.3.6 Tab "Documents"

The following setting options are available within this tab:

- *Documents*
  Record-specific documents can be created or uploaded within this list.

4.8.3.7 Tab "Remarks"

The following setting options are available within this tab:

- *Enter Remark*
  This field offers the possibility to leave any remarks on the record.
- *Remarks*
  This field shows the remarks that have been added to the record so far.

4.8.3.8 Tab "Internal Remarks"

The following setting options are available within this tab:

- *Enter Internal Remark*
  This field offers the possibility to leave any remarks for internal use in the record.
- *Internal Remarks*
  This field shows the previous internal remarks that have been added to the record.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the record so far.

4.9 Case

Cases contain many dynamic object structures, which you can provide in the settings of the case according to the possible objects. You can also make the corresponding configuration settings at case level.

4.9.1 Areas

- *Case*
  This area contains all the settings that belong to the case. These settings can be changed accordingly.
- *Documents*
  This area contains all documents that belong to the record (see chapter 4.8 "Records").
- *Referenced Records* (see chapter 4.8 "Records")
  This calculated list appears if a record has been created within the case. This area contains all these records.
- *Received Requests* (see chapter 4.11 "Requests")
  This list contains all requests received within a business case.
- *Created Requests* (see chapter 4.11 "Requests")
  This list contains all requests generated in the business case.
- *Remarks*
  If a remark has been created, it will appear in this list.
- *Internal Remarks*
  If an internal remark has been created, it will appear in this list.
- *History*
  This list describes the history of the corresponding record (see chapter 4.8 "Records").

4.9.2 Actions

You will find the following actions within a case:

- *Manage Assignments*
  This action allows you to manage assignments within the case. A window opens in which you can decide which assignments should be possible within the case.
- *Create Record* (see chapter 4.8 “Records”)
  This action allows you to create a new record within the case. This opens a window that allows you to make all the important settings for the new record.
- *Upload*
  This action allows you to upload case-specific documents and add them to the list of documents within the case.
- *Manage Follow-Ups*
  A follow-up can be used to send an e-mail to a user or start a process at a specific time.
- *Start Process*
  This action allows you to start a process or configure a process directly within the relevant case.
- *Set Legal Hold*
  Set a retention obligation for the corresponding case.
- *Add Remark*
  This opens a window in which a remark can be added to the corresponding case.
- *Add Internal Remark*
  This opens a window in which an internal remark can be added to the corresponding case.
- *Properties*
  Opens the settings for the case.

4.9.3 Properties

You can define the following settings in a case:

4.9.3.1 Tab “Case”

- *Subject* (see chapter 4.6 “Subjects”)
  This is the linked subject in which the case is located.
- *Reference Additional Subjects*
  It is possible to add further necessary subjects.
- *Referenced Subjects*
  This list only appears if the *Reference Additional Subjects* field has been activated. This is the option to set additional subjects in relation to the case.
- *Year*
  This is the year in which the case was generated.
- *Ordinal*
  This is the ordinal number of the case.
- *State*
  This is the state of the case, which is set as *Active*. However, this can be adjusted by the user according to the given status.

- *Case Type* (see chapter 4.13 "Case Type")
  The case type of the case can be specified here. If one has not yet been specified, it must be created.
- *Subject*
  This field offers the possibility to provide a subject for the case.
- *Terms*
  This field allows you to specify terms for the record.
- *Choose Terms*
  This opens a new field with all defined terms. These terms can be selected for the record and are then inserted in the *Terms* field.
- *Internal Editor*
  This field allows you to enter an internal editor.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal editor.
- *Internal Purchaser*
  This field allows you to store an internal purchaser.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal purchaser.
- *Internal Responsible*
  This field allows you to enter an internal responsible.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal responsible.

4.9.3.2 Tab "Dates" (see chapter 4.16 "Events")

The following setting options are available within this tab:

- *Additional Reminder Date*
  An additional reminder date can be stored for the record.
- *Repetition*
  This field allows you to set a time period in which a repeated reminder is set.
- *Additional Contacts for Reminder E-Mails*
  This field allows you to add further contacts to receive reminders.
- *Next Deadline*
  This field shows the date of the next reminder.
- *Source*
  This field shows the source of the next reminder.

4.9.3.3 Tab "Assignments"

The following setting options are available within this tab:

- *Supplier* (see chapter 4.10.1.1 "Supplier")
  Here, the new version of supplier can be activated in the case.
- *Customer* (see chapter 4.10.1.2 "Customer")
  Here, the new version of customer can be activated in the case.

- *Client* (see chapter 4.10.1.3 “Client”)
  Here, the new version of client can be activated in the case.
- *Corporation* (see chapter 4.10.1.4 “Corporations”)
  Here, the new version of corporation can be activated in the case.
- *Committee* (see chapter 4.10.1.5 ”Committees”)
  Here, the new version of committee can be activated in the case.
- *Union* (see chapter 4.10.1.6 “Unions”)
  Here, the new version of union can be activated in the case.
- *Company* (see chapter 4.10.1.7 “Companies”)
  Here, the new version of company can be activated in the case.
- *Scope* (see chapter 4.10.1.8 “Scopes”)
  Here, the new version of scope can be activated in the case.
- *Industry* (see chapter 4.10.1.9 “Industries”)
  Here, the new version of industry can be activated in the case.
- *Area* (see chapter 4.10.1.10 “Areas”)
  Here, the new version of area can be activated in the case.
- *Brand* (see chapter 4.10.1.11 “Brands”)
  Here, the new version of brand can be activated in the case.
- *Product* (see chapter 4.10.1.12 “Products”)
  Here, the new version of product can be activated in the case.
- *Project* (see chapter 4.10.1.13 “Projects”)
  Here, the new version of project can be activated in the case.
- *License* (see chapter 4.10.1.14 “Licenses”)
  Here, the new version of license can be activated in the case.
- *Business Unit* (see chapter 4.10.1.15 “Business Units”)
  Here, the new version of business unit can be activated in the case.
- *Cost Type* (see chapter 4.10.1.16 “Cost Types”)
  Here, the new version of cost type can be activated in the case.
- *Cost Center* (see chapter 4.10.1.17 “Cost Centers”)
  Here, the new version of cost center can be activated in the case.
- *Profit Center* (see chapter 4.10.1.18 “Profit Centers”)
  Here, the new version of profit center can be activated in the case.
- *Architectural Objects* (see chapter 4.10.1.19 “Architectural Objects”)
  Here, the new version of architectural object can be activated in the case.

4.9.3.4 Tab “Documents”

The following setting options are available within this tab:

- *Documents*
  Case-specific documents can be generated or uploaded within this list.

4.9.3.5 Tab “Remarks”

The following setting options are available within this tab:

- *Enter Remark*
  This field offers the possibility to leave any remarks on the case.
- *Remarks*
  This field shows the remarks that have been added to the case so far.

4.9.3.6 Tab "Internal Remarks"

The following setting options are available within this tab:

- *Enter Internal Remark*
  This field offers the possibility to leave any remarks for internal use in the case.
- *Internal Remarks*
  This field shows the internal remarks that have been added to the case so far.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the case so far.

4.10 Assignments

Within an assignment, you can configure concrete embodiments, areas, actions and settings as follows. The following objects fall under the assignment designation:

4.10.1 Concrete Embodiments

In principle, the following concrete embodiments can be identified in the course of the assignment:

4.10.1.1 Supplier

This embodiment of the assignment represents a supplier that shares the following areas, actions and settings with the assignments.

4.10.1.2 Customer

This embodiment of the assignment represents a customer who shares the following areas, actions and settings with the assignments.

4.10.1.3 Client

This embodiment of the assignment represents a client who shares the following areas, actions and settings with the assignments.

4.10.1.4 Corporations

This embodiment of the assignment represents a corporation who shares the following areas, actions and settings with the assignments.

4.10.1.5 Committees

This embodiment of the assignment represents a committee who shares the following areas, actions and settings with the assignments.

4.10.1.6 Unions

This embodiment of the assignment represents a union who shares the following areas, actions and settings with the assignments.

4.10.1.7 Companies

This embodiment of the assignment represents a company who shares the following areas, actions and settings with the assignments.

4.10.1.8 Scopes

This embodiment of the assignment represents a scope who shares the following areas, actions and settings with the assignments.

4.10.1.9 Industries

This embodiment of the assignment represents an industry who shares the following areas, actions and settings with the assignments.

4.10.1.10 Areas

This embodiment of the assignment represents an area who shares the following areas, actions and settings with the assignments.

4.10.1.11 Brands

This embodiment of the assignment represents a brand who shares the following areas, actions and settings with the assignments.

4.10.1.12 Products

This embodiment of the assignment represents a product who shares the following areas, actions and settings with the assignments.

4.10.1.13 Projects

This embodiment of the assignment represents a project who shares the following areas, actions and settings with the assignments.

4.10.1.14 Licenses

This embodiment of the assignment represents a license who shares the following areas, actions and settings with the assignments.

4.10.1.15 Business Units

This embodiment of the assignment represents a business unit who shares the following areas, actions and settings with the assignments.

4.10.1.16 Cost Types

This embodiment of the assignment represents a cost type who shares the following areas, actions and settings with the assignments.

4.10.1.17 Cost Centers

This embodiment of the assignment represents a cost center who shares the following areas, actions and settings with the assignments.

4.10.1.18 Profit Centers

This embodiment of the assignment represents a profit center who shares the following areas, actions and settings with the assignments.

4.10.1.19 Architectural Objects

This embodiment of the assignment represents an architectural object that shares the following areas, actions and settings with the assignments.

4.10.2 Areas

You can find the following areas in an assignment:

- *Records* (see chapter 4.8 “Records”)
  These are all records that have been created within the assignment or in which the assignment has been linked.
- *Cases* (see chapter 4.9 “Case”)
  These are all cases that have been generated within the assignment or in which the assignment has been linked.
- *Requests* (see chapter 4.11 “Requests”)
  These are all requests that have been generated within the assignment or in which the assignment has been linked.
- *Assigned Record Registers* (see chapter 4.5 “Record Registers”)
  These are all record registers that have been linked to the assignment.
- *Assigned Subjects* (see chapter 4.6 “Subjects”)
  These are all subjects that have been linked to the assignment.
- *Documents*
  These are all documents that were created or uploaded within the assignment.

4.10.3 Actions

You will find the following actions within an assignment:

- *Add Remark*
  This action allows you to open a window and add a remark to the assignment.
- *Create Record* (see chapter 4.8 “Records”)
  This action allows a window to be opened, whereby a corresponding record can be created and added according to the assignment.

- *Create Case* (see chapter 4.9 "Case")
  This action allows a window to be opened, whereby a corresponding case can be created and added according to the assignment.
- *Create Request* (see chapter 4.11 "Requests")
  This action enables a window to be opened, whereby a corresponding request can be generated and added according to the assignment.
- *Refresh*
  This action updates the assignment.
- *Consolidate*
  This action consolidates the assignment with another one.
- *Prepare Test Environment*
  Prepares a test environment by creating or updating all assigned records manager lists.
- *Properties*
  Opens the properties of the assignment.

4.10.4 Properties

You can define the following settings in an assignment:

4.10.4.1 Tab "Permissions"

The following setting options are available within this tab:

- *Records Manager List*
  This field offers the option of selecting a corresponding records manager list, whereby a records manager list is already preselected.
- *Full Control for all External Rooms in Assigned Records Manager Files*
  Any users can be added who are to receive full control for all external rooms in assigned record manager records.
- *Change Access for all External Rooms in Assigned Records Manager Files*
  You can add any users who should have change access for all external rooms in assigned record manager records.
- *Read Access for all External Rooms in Assigned Records Manager Files*
  Any users can be added who are to receive read access for all external rooms in assigned record manager records.
- *Full Control for all Assigned Records Manager Lists and Files*
  Any users can be added who are to receive full control for all assigned records manager lists and records.
- *Change Access for all Assigned Records Manager Lists and Files*
  Any users can be added here who are to receive change access for all assigned records manager lists and records.
- *Read Access for all Assigned Records Manager Lists and Files*
  Any users can be added here who are to receive read access for all assigned records manager lists and records.
- *Available for Assignments by Users with Read/Restricted Access*
  This field offers the option of activating availability for assignments by users with read access and restricted access.

- *Assigned Registers* (see chapter 4.5 4.6 “Record Registers”)
  This field offers the option of mentioning the registers assigned to the assignment and assigning them accordingly.
- *Assigned Subjects* (see chapter 4.6 “Subjects”)
  This field offers the possibility to mention the subjects assigned to the assignment and to assign them accordingly.

4.10.4.2 Tab “Address”

The following setting options are available within this tab:

- *Official Name*
  This field offers the possibility to enter the official name of the assignment. This is subsequently also identified as its name.
- *Alternative Name*
  In addition to the official designation, an alternative designation can also be specified for the assignment.
- *Street*
  This is the street in which the assignment has its headquarters.
- *Zip Code*
  This is the zip code of the assignment.
- *City*
  This is the city in which the assignment has its headquarters.
- *Country*
  This is the country in which the assignment has its headquarters.
- *Billing Information*
  This field offers the option of adding any billing information to the assignment.

4.10.4.3 Tab “Remark”

The following setting options are available within this tab:

- *Enter Remark*
  This field offers the possibility to leave any remarks on the respective assignment.
- *Add Attachments*
  This field offers the option of adding files to the respective.
- *Remarks*
  This field shows the remarks that have been added to the open point so far.
- *References*
  This is a list of added attachments, which consists of content objects.

4.11 Requests

Within a request, you can configure the corresponding areas, actions and settings as follows:

4.11.1 Areas

You can find the following areas within a request:

- *Request*
  This area contains all the settings that belong to the request. These settings can be changed accordingly.
- *Description*
  This area contains the description that belongs to the request.
- *Assigned Records Manager Files*
  This area is visible if a case (see chapter 4.9 “Case”) has been created within a request. This area is therefore a calculated list that contains these cases.
- *Assigned Objects*
  This area is visible if a case (see chapter 4.9 “Case”) has been created within a request. This area is therefore a calculated list that contains these case
- *Documents*
  These are any request-specific documents.
- *Remarks*
  If a remark has been created, it will appear in this list.
- *Internal Remarks*
  If an internal remark has been created, it will appear in this list.
- *History*
  This list describes the history of the corresponding request.

4.11.2 Actions

You can find the following actions within a request:

- *Manage Assignments* (see chapter 4.10 “Assignments”)
  This action allows you to manage assignments within the request. A window opens in which you can decide which assignments should be possible within the request.
- *Create Case* (see chapter 4.9 “Case”)
  This action allows you to create a new case within the request. A window opens that allows you to make all the important settings for the new case.
- *Upload*
  This action enables the upload of request-specific documents and places them in the list of documents within the request.
- *Manage Follow-Ups*
  A follow-up can be used to send an e-mail to a user or start a process at a specific time.
- *Start Process*
  This action allows you to start a process or configure a process directly within the relevant request.
- *Set Legal Hold*
  Set a retention requirement for the corresponding request.
- *Add Remark*
  This opens a window in which a remark can be added to the corresponding request.
- *Add Internal Remark*
  This opens a window in which an internal remark can be added to the corresponding request.

- *Properties*
  Opens the properties for the request.

4.11.3 Properties

You can define the following settings in a request:

4.11.3.1 Tab “Request”

- *Shelf*
  This is the linked shelf in which the request is always located.
- *Reference Additional Shelves*
  This can enable the addition of further necessary shelves.
- *Additional Shelves*
  This list only appears if the *Reference Additional Shelves* field has been activated. This is the option to set additional shelves in relation to the request.
- *Year*
  This is the year in which the request was generated.
- *Ordinal*
  This is the ordinal number of the request.
- *Processing State*
  This is the processing state of the request, which is set as *Accepted*. However, this can be adjusted by the user according to the given processing status.
- *Request Type* (see chapter 4.14 “Request Type”)
  The request type of the request can be specified here. If one has not yet been specified, it must be created.
- *Assigned Records Manager File*
  This field shows the associated record manager file.
- *Subject*
  This field offers the possibility to provide a subject for the request.
- *Description*
  This field offers the possibility to add a description for the request.
- *Terms*
  This field allows you to specify terms for the record.
- *Choose Terms*
  This opens a new field with all defined terms. These terms can be selected for the record and are then inserted in the *Terms* field.
- *Contributor*
  This field allows you to store a contributor, which is already pre-filled.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the contributor.
- *Internal Editor*
  This field allows you to enter an internal editor.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal editor.

- *Internal Purchaser*
  This field allows you to enter an internal purchaser.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal purchaser.
- *Internal Responsible*
  This field allows you to enter an internal responsible.
- *E-Mail Address*
  This field allows you to enter an e-mail address that refers to the internal responsible.

4.11.3.2 Tab “Dates” (see chapter 4.16 “Events”)

The following setting options are available within this tab:

- *Additional Reminder Date*
  An additional reminder date can be stored for the record.
- *Repetition*
  This field allows you to set a time period in which a repeated reminder is set.
- *Additional Contacts for Reminder E-Mails*
  This field allows you to add further contacts to receive reminders.
- *Next Deadline*
  This field shows the date of the next reminder.
- *Source*
  This field shows the source of the next reminder.

4.11.3.3 Tab “Assignments”

The following setting options are available within this tab:

- *Supplier* (see chapter 4.10.1.1 “Supplier”)
  Here, the new version of supplier can be activated in the request.
- *Customer* (see chapter 4.10.1.2 “Customer”)
  Here, the new version of customer can be activated in the request.

Client (see chapter 4.10.1.3 “Client”)
Here, the new version of client can be activated in the request.

Corporation (see chapter 4.10.1.4 “Corporations”)
Here, the new version of corporation can be activated in the request.

Committee (see chapter 4.10.1.5 ”Committees”)
Here, the new version of committee can be activated in the request.

Union (see chapter 4.10.1.6 “Unions”)
Here, the new version of union can be activated in the request.

Company (see chapter 4.10.1.7 “Companies”)
Here, the new version of company can be activated in the request.

Scope (see chapter 4.10.1.8 “Scopes”)
Here, the new version of scope can be activated in the request.

Industry (see chapter 4.10.1.9 “Industries”)
Here, the new version of industry can be activated in the request.

Area (see chapter 4.10.1.10 "Areas")
Here, the new version of area can be activated in the request.

Brand (see chapter 4.10.1.11 "Brands")
Here, the new version of brand can be activated in the request.

Product (see chapter 4.10.1.12 "Products")")
Here, the new version of product can be activated in the request.

Project (see chapter 4.10.1.13 "Projects")
Here, the new version of project can be activated in the request.

License (see chapter 4.10.1.14 "Licenses")
Here, the new version of license can be activated in the request.

Business Unit (see chapter 4.10.1.15 "Business Units")
Here, the new version of business unit can be activated in the request.

Cost Type (see chapter 4.10.1.16 "Cost Types")
Here, the new version of cost type can be activated in the request.

Cost Center (see chapter 4.10.1.17 "Cost Centers")
Here, the new version of cost center can be activated in the request.

Profit Center (see chapter 4.10.1.18 "Profit Centers")
Here, the new version of profit center can be activated in the request.

Architectural Objects (see chapter 4.10.1.19 "Architectural Objects")
Here, the new version of architectural object can be activated in the request.

4.11.3.4 Tab "Documents"

The following setting options are available within this tab:

- *Documents*
  Request-specific documents can be generated or uploaded within this list.

4.11.3.5 Tab "Remarks"

The following setting options are available within this tab:

- Enter Remark
  This field offers the possibility to leave any remarks about the request.
- *Remarks*
  This field shows the remarks that have been added to the request so far.

4.11.3.6 Tab "Internal Remarks"

The following setting options are available within this tab:

- Enter Internal Remark
  This field offers the possibility to leave any remarks for internal use in the request.
- *Internal Remarks*
  This field shows the internal remarks that have been added to the request so far.
- *Internal Remarks Details*
  This list shows the internal remarks that have been added to the request so far.

4.12 Record Type

You can configure the corresponding settings within a record type as follows:

4.12.1 Properties

You can make the following settings within a record type:

4.12.1.1 Tab "Record Type"

- *Can be Used in Requests* (see chapter 4.11 "Requests")
  This allows you to use the record type in a request.
- *Override Record Register Settings For* (see chapter 4.5 "Record Registers")
  Within this field, you can decide for which options the settings of the record register can be overwritten.

4.13 Case Type

You can configure the corresponding settings within a case type as follows:

4.13.1 Properties

You can make the following settings within a case type:

4.13.1.1 Tab "Case Type"

- *Can be used in Requests* (see chapter 4.11 "Requests")
  This allows you to use the case type in a request.
- *Override Subject Settings For* (see chapter 4.6 "Subjects")
  Within this field, you can decide for which options the settings of the subject can be overwritten.

4.14 Request Type

You can configure the corresponding settings within a request type as follows:

4.14.1 Properties

You can make the following settings within a request type:

4.14.1.1 Tab "Request Type"

- *Override Shelf Settings For* (see chapter 4.11 "Requests")
  Within this field, you can decide for which options the request list settings can be overwritten.

4.15 Calendar

Calendars are objects within which events (see chapter 4.16 "Events") and tasks (see chapter 4.17 "Tasks") can be managed. There is only one area, which represents the calendar itself.

4.15.1 Actions

The following actions occur within a calendar:

- *Create Event* (see chapter 4.16 “Events”)
  This action allows you to create an event within the calendar of the record register (see chapter 4.5 “Record Registers”). This opens a window that allows you to make all the necessary settings relating to the appointment.
- *Create Task* (see chapter 4.17 “Tasks”)
  This action allows you to create a task within the calendar of the record register. This opens a window that allows you to make all the necessary settings for the task.

4.16 Events

Events are objects that can be created within a calendar. This results in the following settings.

4.16.1 Properties

Any settings must be considered when creating events:

4.16.1.1 Tab “New Event”

In principle, the following properties arise within this tab:

- *Subject*
  This field describes the subject of the event.
- *Location*
  This field describes where the event will be held.
- *Priority*
  This field describes the priority of the event.
- *Highlighting Color*
  This field determines the highlight color with which the event is displayed.
- *All Day*
  This field determines whether the event is to be held all day. If this field is activated, the *Timezone* field is no longer visible and the hours in the *Start Time* and *End Time* fields can be ignored.
- *Start Time*
  This field determines the start time of the event.
- *End Time*
  This field determines the end time of the event.
- *Timezone*
  This field determines the time zone of the event.
- *Description*
  This field allows you to briefly describe the event.
- *Attendees*
  This field can be used to add any participants to the event.
- *Categories*
  This field is a way to add categories to the event.

- Category
  This field offers the possibility to select a specific category for the event.

4.16.1.2 Tab “Event Recurrence”

In principle, the following properties arise within this tab:

- *Recurrence Rule*
  This field allows you to store a rule, whereby the event is recurring according to the rule.
  - *Repeat*
    This field allows you to set the repetition, whereby a distinction can be made between daily, weekly, monthly or yearly.
  - *Repeat Interval*
    A repetition interval can be set here.
  - *Repeat Until*
    This field offers the possibility to stop the event.

4.17 Tasks

Tasks are objects that can be created within a calendar (see chapter 4.15 “Calendar”). This results in the following settings.

4.17.1 Properties

You must take any settings into account when creating a task:

4.17.1.1 Tab “New Task”

In principle, the following properties arise within this tab:

- *Subject*
  This field is the subject of the task.
- *Location*
  The location for the task can be stored here.
- *Priority*
  The priority of the task can be specified here.
- *Highlighting Color*
  A highlight color for the task can be defined here, which is displayed in the calendar (see chapter 4.15 “Calendar”).
- *Status*
  The status of the task can be selected here.
- *Progress (in %)*
  The progress of the task can be specified here.
- *Start Time*
  This field is used to transmit information on when the task started.
- *Due*
  This field provides information on when the task is finally due.

- *Timezone*
  The time zone of the respective task can be stored here.
- *Description*
  A description of the task can be entered here.
- *Category*
  A category for the respective task can be stored here.

4.17.1.2 Tab "Task Recurrence"

In principle, the following properties arise within this tab:

- *Recurrence Rule*
  This rule defines how often and when the task must be repeated. The following properties of the repetition rule specify this data in more detail:
  - *Repeat*
    This field allows you to set the repetition, whereby a distinction can be made between daily, weekly, monthly or yearly.
  - *Repeat Interval*
    A repetition interval can be set here.
  - *Repeat Until*
    This field offers the possibility to stop the event.

4.18 Records Manager Webservice Interface

The technical records management offers you the following interfaces, which you can use with any objects and content:

4.18.1 Set Up

The WSDL can be accessed at the following URL:

- *https://<host>/<vdir>/fscdav/wsdl?WEBSVC=SOLAPPROVERECORDS_111_100_WebService*
  - "<host>" must be replaced by "https://de.cloud.fabasoft.com" for the location Germany, by "https://at.cloud.fabasoft.com" for Austria and by "https://ch.cloud.fabasoft.com" for Switzerland
  - "<vdir>" has to be replaced by "folio"
    - Call for German location:
      https://de.cloud.fabasoft.com/folio/fscdav/wsdl?WEBSVC=SOLAPPROVERECORDS_111_100_WebService

The web service also supports the JSON format:

- *https://<host>/<vdir>/wsjson/SOLAPPROVERECORDS_111_100_WebService/<operation>*

4.18.2 Authentication

For authentication, you must use your e-mail address as the user name and generate a password for applications for "Records Manager". To generate a password for applications, proceed as follows:

https://help.cloud.fabasoft.com/index.php?topic=doc/Benutzerhilfe-Fabasoft-Cloud-ger/kontoeinstellungen.htm#zugriff-fuer-anwendungen

4.18.3 WSImportZIP

`WSImportZIP` imports a ZIP archive into a base list. The optional parameter `name` receives the name of the ZIP archive; if the parameter is empty, a name for the file is automatically generated according to the pattern “Import <current date>”. The `baselist` parameter requires the Fabasoft Cloud ID as a value, otherwise the operation will fail. The optional parameter `extension` receives the file format as a value; if no value is assigned, the operation sets the ZIP format by default. The parameter `data` requires the file to be transferred as a value, otherwise the operation will fail.

4.18.4 WSGetExportZIPs

`WSGetExportZIPs` retrieves a list of all keys of ZIP archives that contain records (see chapter 4.8 “Records“) in a record register (see chapter 4.5 “Record Registers“). The `baselist` parameter requires the Fabasoft Cloud ID of a baselist as a value, otherwise the operation will fail. The `selector` parameter requires an object with an attribute or an attribute definition that contains records or assignment objects (see chapter 4.10 “Assignments . The return value `keys` contains a list of all keys for ZIP archives that are to be exported.

If the `selector` If the selector parameter does not contain a value, the Fabasoft Cloud ID of the record register is set by default.

If a record register is defined as `selector`, the keys are output in the return value according to the pattern “COO.a.b.c.d|COO.e.f.g.h”.

If an attribute definition (e.g., the list of expired contracts) is defined as the `selector`, the list in keys contains a separate entry for each contract.

4.18.5 WSExportZIP

`WSExportZIP` returns the zip content for a zip object. First and foremost, a key is required for identification. This required key is the `key` attribute. If no key is available, an error is thrown. If a key is available, a corresponding file or a list with the key is searched for and exported.

4.18.6 WSImportBaseListsAndRoles

`WSImportBaseListsAndRoles` imports a series of base lists from an Excel workbook. The parameter `data` requires an Excel worksheet as the value, otherwise the operation will fail. The `configuration` parameter requires the Fabasoft Cloud ID of an app room as the value, otherwise the operation will fail.

If permissions are defined in the imported Excel workbook, the users and organizational units are added to the current user's organization. After the import, a new Excel workbook containing the Fabasoft Cloud IDs of the is created.

Carry out the following steps before calling up the operation:

1. Create the desired objects in the cloud organization.
2. Create an Excel workbook.
3. Write comments and explanations in line 1.

4. Write the names of the previously created objects in row 2 from column “F”.
   Note: Make sure that the names of the objects created in Fabasoft Records are transferred correctly to the Excel workbook, otherwise the operation will fail
5. Write the e-mail addresses of the primary contact persons or the escalation contacts, for the respective object in line 2, in line 3 from column “F”.
6. Write the values for the following data in columns “A” to “E” from row 4 onwards:
   - Last Name
   - First Name
   - E-Mail Address
   - Team Prefix
   - Team Suffix
     Note:
     - If no team suffix is specified, the team name corresponds to the team prefix.
     - If a team suffix is specified, the team prefix and team suffix are combined with “ – “ to form a team name.
7. Write the authorizations for users and groups for the respective element in line 2 from line 4 and from column “F”:
   - “r” for “Read Access”
   - “w” for “Change Access”
   - “x“ for “Full Control”
     Note: “x” cannot be used in record types (see chapter 4.12 “Record Type”).
   - “r“ for “Restricted Access”
     Note: “r“ is only applicable in contract lists and legal areas.
   - “p” for “Primary Contact Person”
     Note: “p” is only applicable in contract lists and legal areas, in addition to the authorization and mandatory following it, e.g., “rp”.
   - “e” for “Escalation Contact Person”
     Note: “e” can only be used in assignments (see chapter 4.10 “Assignments”), in addition to the authorization and necessarily following it, e.g., “we”.
8. Save the Excel workbook.
9. Place the workbook in the context from which you are accessing the web service.

4.18.7 WSImportSuppliers

`WSImportSuppliers` imports suppliers (see chapter 4.10.1.1 “Supplier”) by transferring XML content. The parameters `context`, `data`, `synchronous` are used, whereby `context` represents the relation to a Team Room. If no `context` is specified, the configuration of the records app is used as the `context`. If the `context` does not originate from the records configuration, a base list or a contact room, an error is thrown. An object of the instance is then created and the `context` is transferred to the same object.

If the checks on the `context` went well, a check is made to see whether any required data is available in the XML.

Any IDOC references should be present within the XML, as these are required to provide any supplier objects (see chapter 4.10.1.1 “Supplier”) via the individual parts of the XML.

If this has gone well, the system continues to search for a contact space. If this is not found, one is created and any properties are made available.

4.18.8 WSCreateUpdateRecord

`WSCreateUpdateRecord` has the parameters `register`, `subject`, `additionalvalues`, `id` and `link`, whereby these parameters are used to update a record (see chapter 4.8 “Records”). The `register` parameter is required to identify the record register (see chapter 4.5 “Record Registers”). The `subject` parameter the subject of the record. `Additionalvalues` enables any attributes to be appended. The `id` identifies the respective record. The link is the link to the respective record, which is made available to the user after executing the web service.

4.18.9 WSCreateUpdateRecordDocument

`WSCreateUpdateRecordDocument` has the parameters `record`, `name`, `extension`, `data` `additionalvalues`, `id` and `link`, whereby these parameters are used to update a document in a record (see chapter 4.8 “Records”). The `record` parameter is used to identify the record. The `name` parameter represents the name of the document. The `extension` parameter represents the extension of the document. `Additionalvalues` enables any attributes to be appended. The id identifies the respective record. The link is the link to the respective record, which is made available to the user after executing the web service.