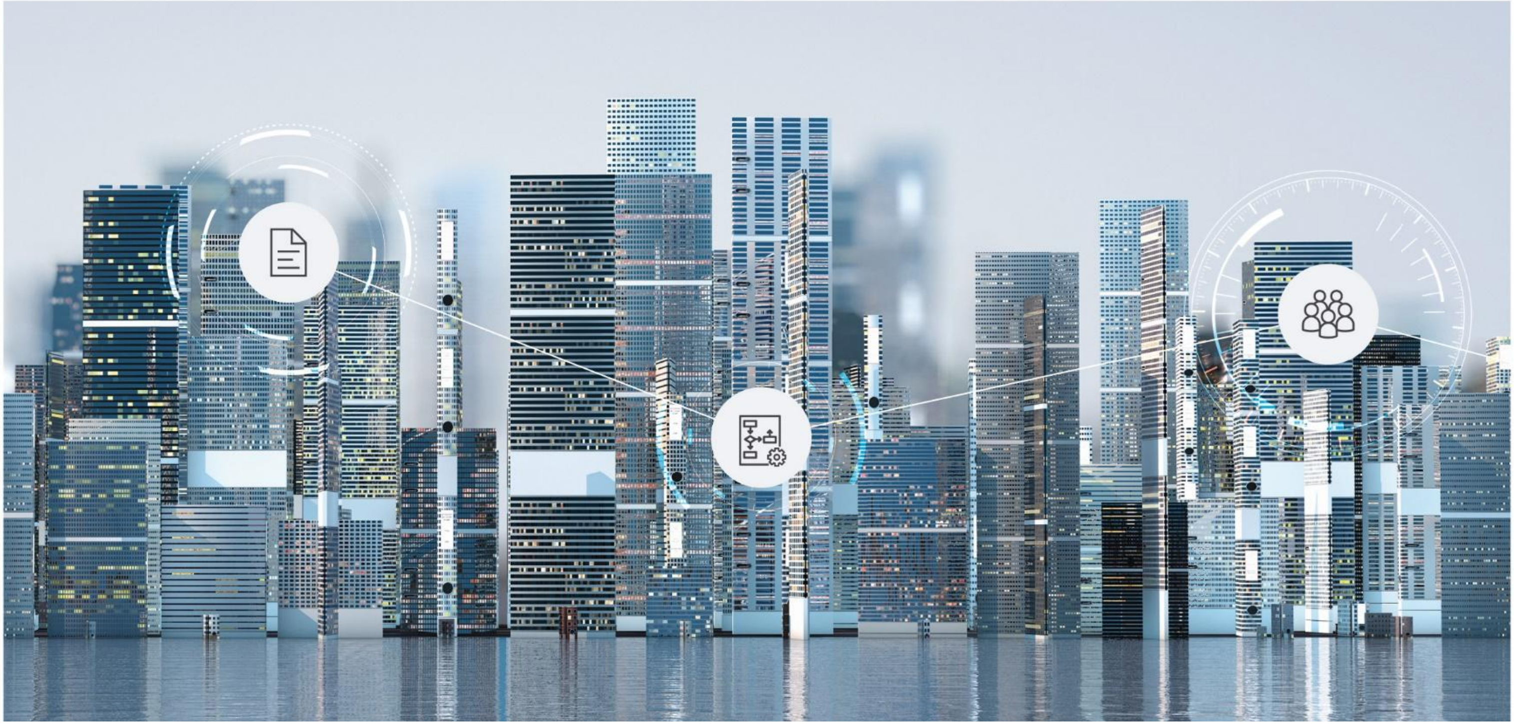
Fabasoft



User Help

Fabasoft Oblivation

Contents

1 Introduction

Fabasoft Oblivation allows for a simple sustainability questionnaire answering process. Oblivation uses existing documents to answer corporate reporting questionnaires automatically using AI.

1.1 Fabasoft Oblivation

Fabasoft Oblivation is a Fabasoft Solution for automating the sustainability questionnaire data gathering and response process. Fabasoft Oblivation automatically answers questions using source documents and provides precise reference to the information used. The application enables the complete reporting process including project management, collaboration, audit tracking and export of the questionnaire answers.

1.2 General Information About the Fabasoft Ecosystem

The Fabasoft ecosystem is a unique, entrepreneurial business process ecosystem. As a curated ecosystem, it combines digital solutions from Fabasoft for document-intensive business processes. The technological basis is the powerful and certified Fabasoft Cloud. You can find more information about the basic operating elements and basic functionalities of the Fabasoft Cloud in the Fabasoft Cloud user help (https://help.cloud.fabasoft.com).

1.3 Basic Information

Fabasoft Oblivation is a product that combines many features of the Fabasoft Cloud. This chapter offers an overview of references to basic concepts which would go beyond the scope of the current user help for the Fabasoft Cloud.

1.3.1 User Help Fabasoft Cloud

The document User Help Fabasoft Cloud offers a detailed glance at the functions and concepts of Fabasoft Cloud. These encompass, for example, login, navigation, workflow management, time travel. This document is aimed at customers who wish to familiarize themselves with basic functions. Some key selected use cases are listed below

Column Settings

By default, the detail view displays predefined properties of objects contains in the list. You can change the column settings at will and customize them according to your needs. Further information can be found in chapter “Working with Lists“ in the document “User Help Fabasoft Cloud“.

Time Travel

In order to access or restore earlier version of questions and answers, you may use time travel. Further information can be found in chapter “Time Travel“ in the document “User Help Fabasoft Cloud“.

Context Menu Actions

In order to have an overview of context menu actions such as “Sign“ or “Create Public Link“, read the chapter “Collaboration with Teamrooms“ in the document “User Help Fabasoft Cloud“.

Support Button

Should you encounter a problem while using Fabasoft Oblivation and require help, you can create a support request. Further information can be found in chapter "Support Requests" in the document "User Help Fabasoft Cloud".

Account Menu

In order to learn about aspects such as the login, basic settings and notifications, read the chapter "Account Menu" in the document "User Help Fabasoft Cloud".

1.3.2 Administration Help Fabasoft Cloud

The document Administration Help Fabasoft Cloud offers a detailed glance at the functions and concepts of organization administration. These encompass, for example, roles, report and permanent access. This document is aimed at administrators.

2 Oblivation Dashboard

The Oblivation Dashboard provides a centralized view and functionality to manage documents, questionnaires, and tasks efficiently. Below are the elements available on the dashboard and their functions:

2.1 Upload

The Upload section is at the top of the dashboard, allowing you to:

- Upload Documents and Folders: Click to upload files directly from your local device.
- Drag and Drop: Alternatively, drag and drop files onto the upload area to add them instantly.

2.2 Documents

The **Documents** section features a speedometer chart that displays an overview of the **Percentage of Completed Answers**:

- The percentage reflects the number of answers provided for the questionnaire so far, based on the documents uploaded.
- You can view a speedometer chart which details the percentage of answers available for the current questionnaire based on the documents uploaded to that questionnaire so far.

2.3 Gap Analysis

The **Gap Analysis** section provides a preview of unanswered questions.

- View a list of questions from the current questionnaire that still require completion.

2.4 Questionnaire Overview

The **Questionnaire Overview** includes a pie chart that track question status:

- Monitor the progress of all questions in the questionnaire. States include:
  - Generated
  - Editing

  - For Approval
  - Approved
- See section 7 for question state definitions.

2.5 My Tasks

The My Tasks section displays tasks assigned to you, including:

- Task Preview: View tasks related to editing and approving questions.
- Deadlines: Track deadlines for each task to ensure timely completion.

You can see a preview of the tasks assigned to you on this questionnaire. These are tasks for editing and approving questions along with deadlines for completion.

2.6 Export

The **Export** section provides a preview of available questionnaire file exports:

- **Export Ready Files**: Files can be exported once all questions are in the "Approved" state.

3 Oblivation Dashboard Actions

The actions at the dashboard level provide users with essential tools to interact with and manage their questionnaire and workflow efficiently. Below is a detailed guide to the actions available:

3.1 Upload

The Upload action allows users to:

- Initiate File Uploads: Start uploading documents or folders directly from the local device.
- Use Drag and Drop: Simply drag files to the designated upload area for quick addition.
- Monitor Upload Progress: Check real-time progress indicators for ongoing uploads.

3.2 Start Data Indexing

The Start Data Indexing action enables users to:

- Index Uploaded Data: Initiate the process of analyzing and indexing uploaded documents to ensure they are ready for use in questionnaires and reports.
- Track Indexing Progress: View a status indicator for the indexing process.

3.3 Open Questionnaire

The Open Questionnaire action allows users to:

- Access a Specific Questionnaire: Open the selected questionnaire for review or editing.
- Resume Work: Pick up where you left off by accessing saved answers and uploaded documents.
- Preview Completion Status: Quickly check the overall progress of the questionnaire.

3.4 Switch to Configuration

The Switch to Configuration action lets users:

- Access Configuration Settings: Navigate to the configuration interface to adjust system or project-level settings.
- Customize Workflow: Modify questionnaire structures, document handling rules, or task assignments as needed.
- Toggle Between Views: Seamlessly switch back to the main dashboard when finished.

3.5 Open Wastebasket

The Open Wastebasket action provides users with the ability to:

- View Deleted Items: Access documents or items that were removed but not permanently deleted.
- Restore Items: Recover deleted items if they were removed by mistake.
- Permanently Delete Items: Clear out unnecessary items permanently from the system.

3.6 Settings

The Settings action allows users to:

- Manage User Preferences: Adjust personal settings like notifications, language, or dashboard layout.
- System Settings: Access and modify administrative settings for the platform.
- Configure Integrations: Set up integrations with external tools, if applicable.

3.7 Permissions

The Permissions action enables users to:

- Manage Access Rights: Assign or revoke access for team members or external collaborators.
- Set Role-Based Permissions: Define specific roles for users, such as Editor, Approver, or Viewer.

3.8 Time Travel

The Time Travel action is a unique feature that allows users to:

- View Historical States: Access previous versions or states of questionnaires and documents.
- Restore Previous Versions: Revert to earlier versions of documents or configurations if necessary.
- Audit Changes: Examine the change history to track who made what changes and when.

4 Documents

The **Documents** section allows users to manage all uploaded files efficiently. This includes uploading new documents, organizing them, and performing key actions like editing, sharing, and downloading. Below is a detailed guide to the features and actions available in this section

4.1 Upload Action

The Upload Action provides two convenient methods to add files to the system:

- Click to Upload: Click the "Upload" button to select and upload files or folders from your local device.
- Drag and Drop: Drag files or folders directly into the upload area to add them instantly.

4.2 Documents

The **Documents view** displays all uploaded files and provides various actions to interact with them:

4.3 Actions

- **Read**: Open and view the content of the document directly in the application.
- **Edit**: Make changes to the document content or metadata, depending on your permissions.
- **Download**: Save a copy of the document to your local device.

4.3.1 Send Options

Share documents with others using the following methods:

- Send E-mail to Team Members: Directly email the document to specified team members.
- Send Link: Generate and share a secure link to the document.
- Send Public Link: Create and share a public link for external access to the document.
- Send PDF: Share a PDF version of the document.

4.3.2 Delete

- Remove the document from the system. Note: Deleted documents may be recoverable via the **Wastebasket** if not permanently deleted.

4.3.3 Properties

- View detailed metadata and properties of the selected document, such as creation date, file size, or associated tags.

4.3.4 Rename

- Change the name of the document for easier identification.

5 Gap Analysis Section Details

The **Gap Analysis Section** helps users identify and address unanswered questions within a questionnaire. This section provides tools to manage incomplete questions effectively, enabling seamless progress toward questionnaire completion. Below is a detailed guide to the features and actions available.

5.1 List of Unanswered Questions

This section displays a comprehensive list of questions that have not yet been answered. Each entry includes the following details and actions:

- **Question Name:**
  Displays the title or identifier for the question.
- **Question Text:**
  Shows the full text of the question to provide context for completing it.

5.2 Actions

- **Open Question**:
  Click to view the question in detail, allowing you to focus on answering or editing it.
- **Add Answer**:
  Input or upload an answer to the question directly from this section.
  - Supported formats may include text, documents, or links, depending on the question type.
- **Set for Approval:**
  Mark the question as ready for review by assigning it the "For Approval" status.
- **Assign Question:**
  Delegate the responsibility for answering or reviewing the question to a specific team member.
  - Include options for setting deadlines and adding comments for context.
- **Show History:**
  View the change log for the question, including previous answers, edits, and actions performed by team members.

5.3 Visual Features

Highlighting Color: Unanswered questions are visually highlighted with a distinctive color, making it easy to identify and prioritize them for completion.

6 Questionnaire Controls

The **Questionnaire Controls** provide users with the tools to manage and configure questionnaires comprehensively. These controls include actions for uploading documents, managing permissions, customizing settings, and more. Below is a detailed guide to these actions:

6.1 Questionnaire-Level-Actions

The following actions are available for managing the questionnaire as a whole:

6.1.1 Upload

- **Purpose**: Add documents for use across all questions in the questionnaire.
- **Location**: Access the **Upload** option via the left-hand side panel.
- **Actions**:
  - Upload documents to a centralized list to streamline answering questions.
  - Support for bulk uploads using drag-and-drop functionality.

6.1.2 Export Questionnaire

- **Purpose**: Export the questionnaire content for external use or review.
- **Location**: Access the **Export** option via the left-hand side panel.
- **Actions**:
  - Export the entire questionnaire to an Excel file for offline review or sharing.

6.1.3 Settings

- **Purpose**: Customize general questionnaire configurations.
- **Location**: Access the **Settings** option via the left-hand side panel.
- **Actions**:
  - **Edit Standard Deadlines**: Set default deadlines for tasks assigned within the questionnaire.
  - **Select Industries**: Choose the industries relevant to this questionnaire, enabling tailored workflows and settings.

6.1.4 Structure

- **Purpose**: Navigate through sections and questions within the questionnaire.
- **Location**: Access the **Structure** option via the left-hand side panel.
- **Actions**:
  - Open a tree view of questionnaire sections and questions.
  - Quickly navigate to specific areas of the questionnaire for review or editing.

6.1.5 Permissions

- **Purpose**: Manage user access and roles for the questionnaire.
- **Location**: Access the **Permissions** option via the left-hand side panel.
- **Actions**:
  - Add or remove users from the questionnaire.
  - Assign roles such as **Administrator**, **Editor**, **Contributor**, and **Approver**, each with specific access rights.

6.1.6 Time Travel

- **Purpose**: Review the change history of the questionnaire.
- **Location**: Access the **Time Travel** option via the left-hand side panel.
- **Actions**:
  - View a detailed audit log of changes made to the questionnaire, including edits to questions, uploads, and structure modifications.
  - Restore previous versions if necessary.

6.1.7 Dissolve Questionnaire

- **Purpose**: Delete the questionnaire entirely to restart or create a new instance.
- **Location**: Use the **Right-click Menu** on the questionnaire name.
- **Actions**:
  - Permanently delete the entire questionnaire.
  - Ensure all users are aware, as this action cannot be undone.

6.1.8 Rename Questionnaire

- **Purpose**: Modify the title of the questionnaire for clarity or accuracy.
- **Location**: Use the **Right-click Menu** on the questionnaire name.
- **Actions**:
  - Enter a new name for the questionnaire.

6.1.9 Questionnaire Properties

- **Purpose**: Adjust advanced settings specific to the questionnaire.
- **Location**: Use the **Right-click Menu** on the questionnaire name.
- **Actions**:
  - **Select Relevant Industries**: Define industries relevant to this questionnaire.
  - **Set Deadlines**: Configure:
    - A default submission deadline for all contributors.
    - A standard submission deadline for contributors working on specific sections.

6.2 Question-Level-Actions

At the question level, users can perform a variety of actions to manage, review, and refine individual questions within a questionnaire. These actions include changing states, assigning users, editing content, and more. Below is a detailed guide to each available action.

6.2.1 Change State

- **Purpose**: Transition the question through various workflow states based on its progress.
- **Actions**:

  - **Generated**: When Oblivation generates an answer using uploaded documents, the question is set to the "Generated" state automatically.
  - **Editing**: When a user manually edits the answer, the state changes to "Editing."
  - **For Approval**: After editing, you can mark the question as ready for approval. Selecting this state will highlight the question in **yellow**.
  - **Approved**: Once the answer is finalized and approved, you can set the question to the "Approved" state, which will highlight it in **green**.

6.2.2 Assign Question

- **Purpose**: Assign responsibility for editing or approving a question.
- **Location**: Access the **Assign Question** option from the left-hand panel.
- **Actions**:
  - Assign a **Contributor** to edit or review the question.
  - Assign an **Approver** to finalize and approve the question.
  - Provide additional comments or context when assigning a user.

6.2.3 Edit

- **Purpose**: Make manual edits to the generated or existing answer.
- **Location**: Click the **Edit Pencil** icon located at the top-right corner of the question.
- **Actions**:
  - Directly modify the answer text or content.
  - Save changes to transition the question to the "Editing" state.

6.2.4 Upload to Question

- **Purpose**: Upload specific documents directly linked to a single question.
- **Location**: Use the **Upload** button on the left-hand panel.
- **Actions**:
  - Add relevant documents to enhance the accuracy of the answer or provide supporting materials.

6.2.5 Add Answer (Where Applicable)

- **Purpose**: Add multiple rows of answers for specific questions that require additional responses.
- **Location**: Access the **Add Answer** option from the left-hand panel (only available for applicable questions).
- **Actions**:
  - Create additional answer rows for the same question.
  - Edit and manage these rows individually as needed.

6.2.6 Properties

- **Purpose**: Access detailed information about the question and its workflow.
- **Location**: Use the **Properties** action from the left-hand panel.
- **Actions**:
  - View and manage:
    - **Comments (Remarks):** See or add notes related to the question.
    - **Versions**: Track the question's version history.
    - **Contributors and Approvers**: Review assigned users and their roles.

6.2.7 Documents Sources Used

- **Purpose**: Review the sources of information used to generate the answer.
- **Location**: Found at the bottom of the question view.
- **Actions**:
  - See a list of documents linked to the question.
  - Highlight specific excerpts or pieces of information from the documents used in the answer.

6.2.8 Time Travel

- **Purpose**: Access the version history and audit log for a single question.
- **Location**: Use the **Time Travel** action from the left-hand panel.
- **Actions**:
  - View a detailed log of all changes made to the question, including timestamps and user details.
  - Revert to previous versions if needed.

6.2.9 Structure

- **Purpose**: Navigate between different sections and questions of the questionnaire.
- **Location**: Use the **Structure** action on the left-hand panel.
- **Actions**:
  - Open or close the tree structure view to see all sections and questions.
  - Quickly jump to another question or section within the questionnaire.

7 Question States

Questions in the application transition through specific states to reflect their progress in the workflow. Each state is visually represented with an icon on the left-hand panel, providing clarity and ease of navigation. Below is a detailed explanation of the states:

7.1 Generated

Icon:

- Black Bullet Point

Description:

- The **Generated** state indicates that Oblivation's AI has automatically generated an initial answer for the question using the uploaded documents.
- This state represents the starting point for most questions, pending review or editing.

Purpose:

- To provide users with a baseline answer derived from available data, enabling faster questionnaire completion.

7.2 Editing

Icon:

- Pen Symbol

Description:

- The **Editing** state signifies that a user has manually modified the answer.
- This state is automatically applied whenever an answer is being adjusted or refined.

Purpose:

- To highlight that the answer is a work in progress and requires further review before submission for approval.

7.3 For Approval

Icon:

- Yellow Check Mark

Description:

- The **For Approval** state indicates that the answer is ready for review by an approver.
- Questions in this state are visually highlighted in yellow, signaling their status clearly to the team.

Purpose:

- To streamline the review process by marking questions as ready for final validation.

The "For Approval" state is denoted by a Yellow Check Mark symbol on the left-hand panel at the question level.

7.4 Approved

Icon:

- Green Check Mark

Description:

- The **Approved** state confirms that the answer has been reviewed and finalized.
- Questions in this state are visually highlighted in green, signifying their completion.

Purpose:

- To indicate that the question is complete and no further edits or approvals are needed.

8 My Tasks Section

8.1 Task Overview

Description:

- Displays a comprehensive list of tasks associated with the current questionnaire.
- Includes tasks for both **Editing** and **Approving** questions.

Purpose:

- To help users keep track of their responsibilities and progress within the workflow.

8.2 Task Details

Information Provided:

- **Task Type**:
  - Clearly labeled as either an editing task or an approval task.
- **Deadlines**:
  - Each task includes a due date to ensure timely completion.
- **Question Links**:
  - Tasks are linked directly to the associated questions for quick access.

Purpose:

- To provide all necessary context and direct navigation to the relevant areas of the questionnaire.

8.3 Workflow reminders

Description:

- Automated reminders are sent to notify you of upcoming or overdue tasks.
- Notifications include the task type, deadline, and direct access to the task.

Purpose:

- To ensure users stay on track and avoid delays in the questionnaire process.

8.4 Task Completion

Description:

- Tasks are automatically updated or marked as complete when the associated action is finished (e.g., editing or approving a question).
- Completed tasks are removed from the active task list, ensuring focus on remaining items.

Purpose:

- To maintain an organized and up-to-date task view.

9 Export

The **Export** section provides tools for managing and viewing exported versions of the questionnaire. This functionality is essential for sharing, archiving, or working with questionnaire content offline. Below is a detailed explanation of the features available in this section.

9.1 Exported Versions List

Description:

- Displays a chronological list of previously exported versions of the questionnaire.
- Each entry includes relevant details such as:
  - Export Date and Time: When the export was generated.
  - Export Format: Indicates whether the export is in Excel, PDF, or another format.
  - Export Status: Confirms whether the export was successful or flagged for any errors.

Purpose:

- To provide a clear and accessible history of all past exports for reference or download.

9.2 Export Questionnaire

Description:

- Allows you to initiate a new export of the questionnaire.
- Options include:
  - Full Export: Export the entire questionnaire, including all sections and questions.
  - Section Export: Export specific sections of the questionnaire as needed.
  - Format Selection: Choose from supported formats, such as Excel or PDF.

Purpose:

- To generate an up-to-date export for review, collaboration, or submission.

9.3 Download Exported Files

Description:

- Each entry in the exported versions list includes a download button for quick access.
- Users can re-download any previously exported version without needing to regenerate it.

Purpose:

- To ensure easy retrieval of questionnaire exports for ongoing use.

9.4 Export Status Notifications

Description:

- Notifications inform users of the status of newly initiated exports.

- Alerts are provided for successful exports or if any errors occur during the process.

Purpose:

- To keep users informed and allow for quick troubleshooting, if needed.