



What's New

Fabasoft Approve

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1 Fabasoft Approve 2025 July Release

Find out more about new features and improvements in Fabasoft Approve.

1.1 Solution Area: Correspondence Management

The following new feature awaits you in the correspondence management solution area.

1.1.1 Users

As a user you can expect the following new feature.

1.1.1.1 Assigning document entries when importing documents

In Fabasoft Approve, the import function for documents, action items and open items has been enhanced. It is now possible to assign files from a folder structure as document items to documents (or action items and open points) during import.

The following columns must be used for this:

CSV Column	Description
Document Items Container	Here you can specify a COO address of a Teamroom or folder that contains the files (Microsoft Word, PDF, ...).
Document Items File Path	The path to a folder or file (Microsoft Word, PDF, ...) can be specified here.

During import, the selected files are automatically stored as document items in the corresponding document, action item or open point.

2 Fabasoft Approve 2025 June Release

Find out more about new features and improvements in Fabasoft Approve.

2.1 Solution Area: Quality Management

The following new features await you in the quality management solution area.

2.1.1 Users

As a user you can expect the following new features.

2.1.1.1 Further development of the FMEA

In Fabasoft Approve, the FMEA has been further developed and the following functions have been added:

- *Structure tree*
The FMEA is organized in a clearly structured tree diagram, which enables a hierarchical representation of systems, structure elements, functions, failure modes, causes and actions. Individual elements can be edited directly in the tree and can be linked to the

related structure elements, functions or failure modes using drag & drop. This makes it easier to deal with failure causes and failure modes in particular.

- *Risk matrix*

Corresponding diagrams (B x A, B x E and E x A) are now displayed for the visual representation of the risk matrix.

Note: The factors "B" (significance), "A" (probability of occurrence) and "E" (probability of detection) are used in the FMEA to calculate the risk priority number (RPN). The RPN is a measure of the risk of a potential failure.

- *Focus element*

If a structure element is defined as a focus element, the associated assessments such as significance, probability of occurrence and probability of detection are displayed in the structure tree. Evaluations of malfunctions are only possible for the active focus element.

- *Attachments for each element*

Individual attachments, such as documents or drawings, can now be stored for each FMEA element (such as structure elements, functions or failure modes).

- *Importing/exporting FMEAs*

FMEAs can be exported and imported as XML.

2.1.1.2 FMEA form according to AIAG/VDA (2019)

Fabasoft Approve now offers the option of creating a form on a structure element within an FMEA that complies with the FMEA standard according to AIAG/VDA (2019).

2.2 Solution Area: Correspondence Management

The following new feature awaits you in the correspondence management solution area.

2.2.1 Users

As a user you can expect the following new feature.

2.2.1.1 Importing and exporting documents as a ZIP file

In Fabasoft Approve, it is now possible to export documents including their document entries and comments as a ZIP file and then import them again with updated content. This function is also available for requested documents.

2.3 Solution Area: Technical Records Management

The following new feature awaits you in the technical records management solution area.

2.3.1 Users

As a user you can expect the following new feature.

2.3.1.1 Simultaneous registration of multiple objects

Fabasoft Approve now supports the simultaneous registration of multiple documents. The metadata is only entered manually for the first document and then automatically transferred to all other documents to be registered.

3 Fabasoft Approve 2025 April Release

Find out more about new features and improvements in Fabasoft Approve.

3.1 Solution Area: Quality Management

The following new feature awaits you in the quality management solution area.

3.1.1 Administrators

As an administrator you can expect the following new feature.

3.1.1.1 Issue Types

Fabasoft Approve now offers the option of assigning your own “Issue Types” to an issue, which allow customer-specific configurable values.

Multilingual Name	Object Class	Scope Note
Internal Issue	Category	
Super Severe	Category	
Supplier Issue	Category	

Issue types can be created in the configuration under “Details” with the following properties:

- Issue Source:

This freely configurable field specifies where the issue originated, for example due to a problem at the supplier or an internal issue.

- Severity:

This field specifies the severity of an issue within the 8D process (e.g. 2D, 6D or 8D).

Internal Issue (Category): Edit

Settings

Issue Source
Internal

Severity
Low (2D)

Cancel Apply Next

Issue types can be assigned to a specific issue. In this case, the values stored in the issue type for issue source and severity are automatically adopted. If no values are defined for these fields in the issue type, they must be entered manually in the issue.

0002 Supplier Documentation is missing (Issue): Edit

ID
0002

Short Description *
Supplier Documentation is missing

Issue Type *
Internal Issue
Super Severe
Supplier Issue

NCR ID

Supplier
50001 - Supplier GmbH

Occurred on
14.05.2024

Application Area *
Assembly

Severity *
High (8D)

Impact *

PDCA State

Failure Location *
FL0001 Assembly

Failure Sub Location *
FSL0001 Assembly Line Check

Failure Type *
FT0001 Documentation

Failure *
F0001 Supplier Documentation

Customer

Sales Order Number

Project

Units
 Name

Show Details (1)

Cancel Apply Next

3.2 Solution Area: Correspondence Management

The following new feature awaits you in the correspondence management solution area.

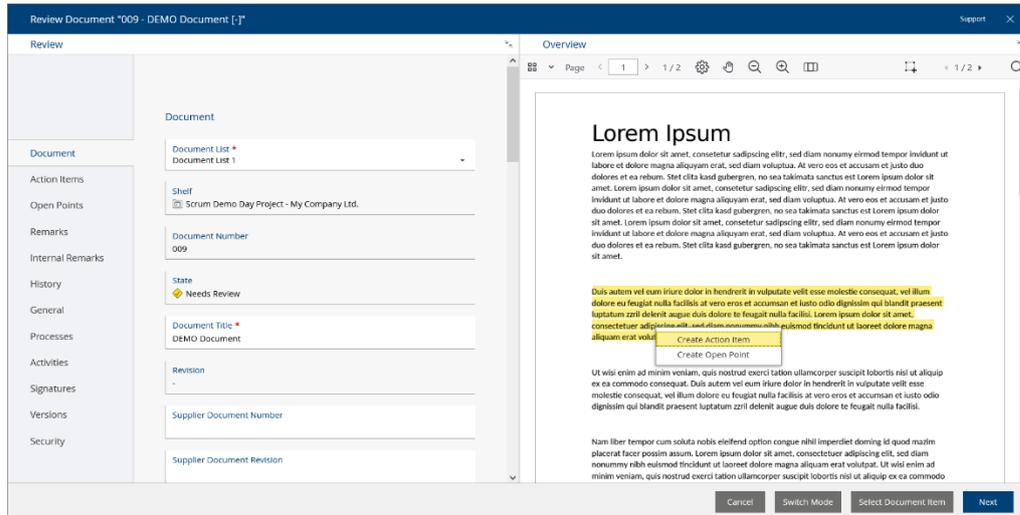
3.2.1 Users

As an end user you can expect the following new feature.

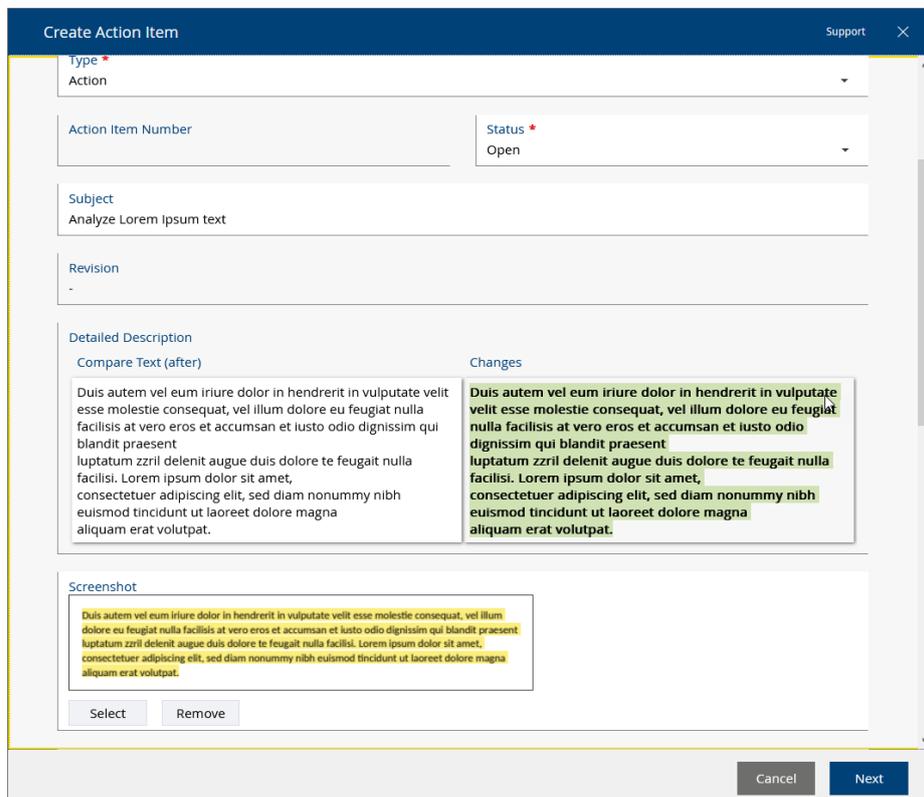
3.2.1.1 Creating Action Items and Open Points when reviewing a document

In Fabasoft Approve, it is now possible to mark texts of document entries using a PDF preview and to create Action Items and Open Points from them. All changes made to the text are documented in a traceable manner, which is particularly helpful for long tender or specification documents.

The “Check” command opens the document properties for checking a document. If the document contains document items, their PDF previews are displayed in a split view.



Clicking on “Switch Mode” activates the option to highlight text in the PDF preview. Action Items or Open Points can then be created by right-clicking on a selected text passage. A screenshot of the selection is also generated and attached to the Action Item or Open Point.



4 Fabasoft Approve 2025 March Release

Find out more about new features and improvements in Fabasoft Approve.

4.1 Solution Area: Correspondence Management

The following new feature awaits you in the correspondence management solution area.

4.1.1 Users

As an end user you can expect the following new feature.

4.1.1.1 Managing Due Dates using Reference Dates

Fabasoft Approve now offers the option of managing due dates for documents more easily so that deadlines are no longer overlooked. For this purpose, there are "Reference Dates" objects that define two types of deadlines:

1. Provision Due Date
2. Submission Due Date

In addition to the "Reference Date", there are two parameters: "Interval" and "Operator". These can be used to specify how long the time span should be and whether it is before or after the reference date.

In the following example, the due date for the provision corresponds to the reference date "Milestone 1" (05.06.2025), as neither Interval nor Operator have been defined. The due date for the submission is exactly 2 weeks after the reference date "Milestone 1", i.e. on 19.06.2025.

065 - Gen.4 Compressor Housing [-] (Document): Read		
Supplier		
Recipients		
Provision Due Date		
Interval	Operator	Reference Date
		Milestone 1
Provision Due Date	Adjusted Provision Due Date	Consolidated Provision Due Date
05.06.2025		05.06.2025
Submission Due Date		
Interval	Operator	Reference Date
2 Weeks	After	Milestone 1
Submission Due Date	Adjusted Submission Due Date	Consolidated Submission Due Date
19.06.2025		19.06.2025
Initial Letter		

These reference dates can be created on a project, area, partner or shelf and can be applied to documents, tasks and open points.

5 Fabasoft Approve 2025 February Release

Find out more about new features and improvements in Fabasoft Approve.

5.1 Solution Area: Correspondence Management

The following new features await you in the correspondence management solution area.

5.1.1 Users

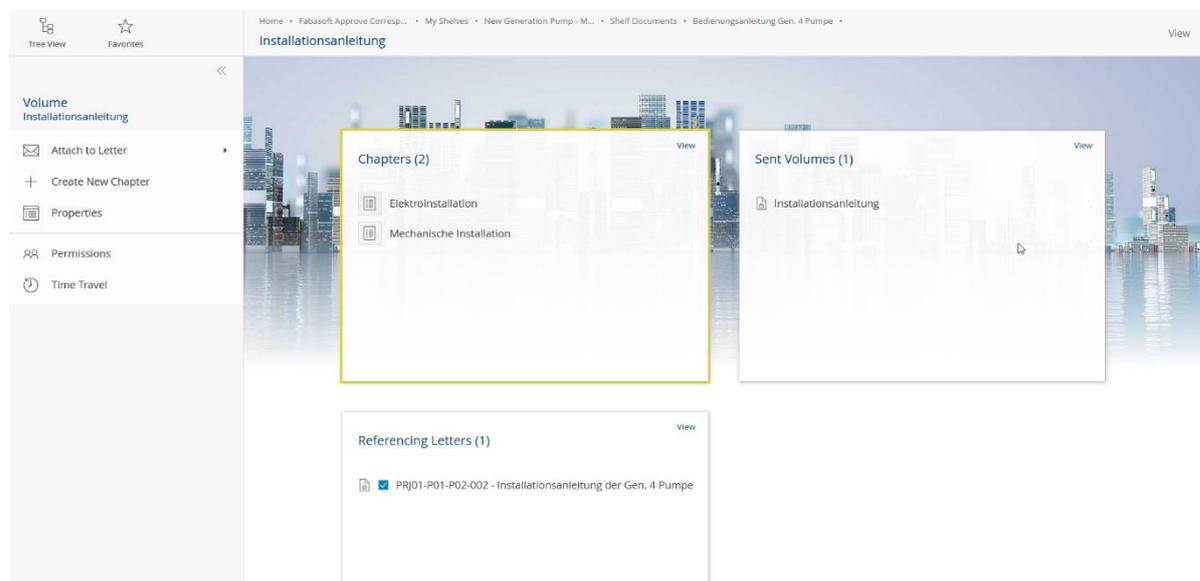
As an end user you can expect the following new features.

5.1.1.1 Handling Manuals

Fabasoft Approve now offers the option of creating your own manuals using the “Manual Structures” functionality. These are used for the central storage and organization of project documents and therefore allow flexible structuring. The manual is divided into volumes and chapters, whereby a volume can contain several chapters as well as sub-chapters.

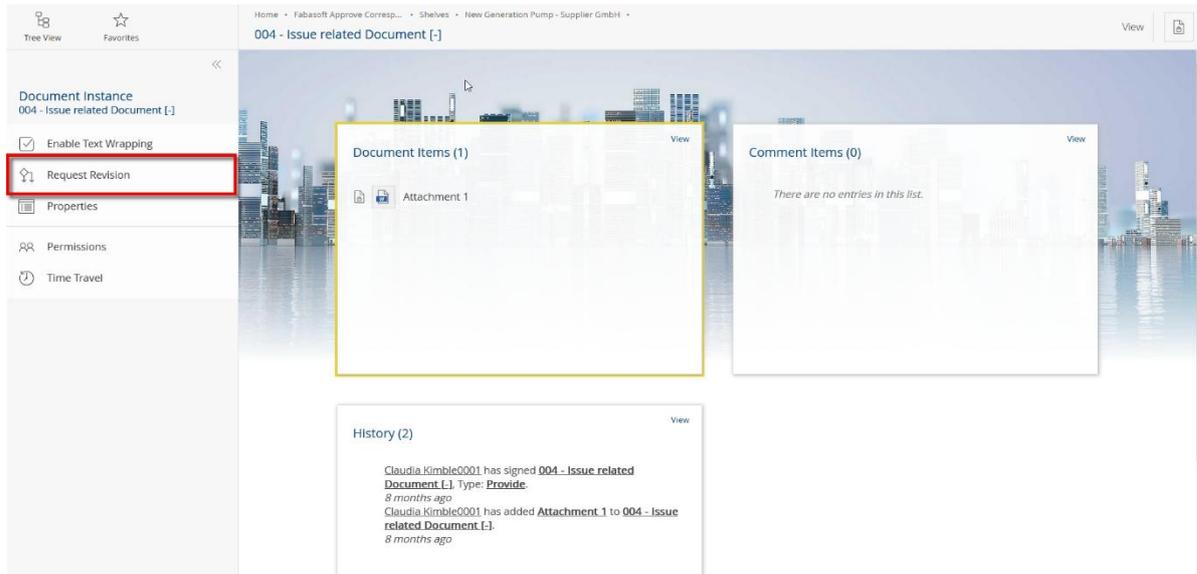
Documents can be assigned to any chapter or sub-chapter from document lists of the entire project (with the corresponding shelves). A special attribute characterizes the assignment of a document to a manual.

It is also possible to send individual volumes by letter to any partner (shelve), including all subordinate chapters and documents.



5.1.1.2 Requesting a new revision as a supplier

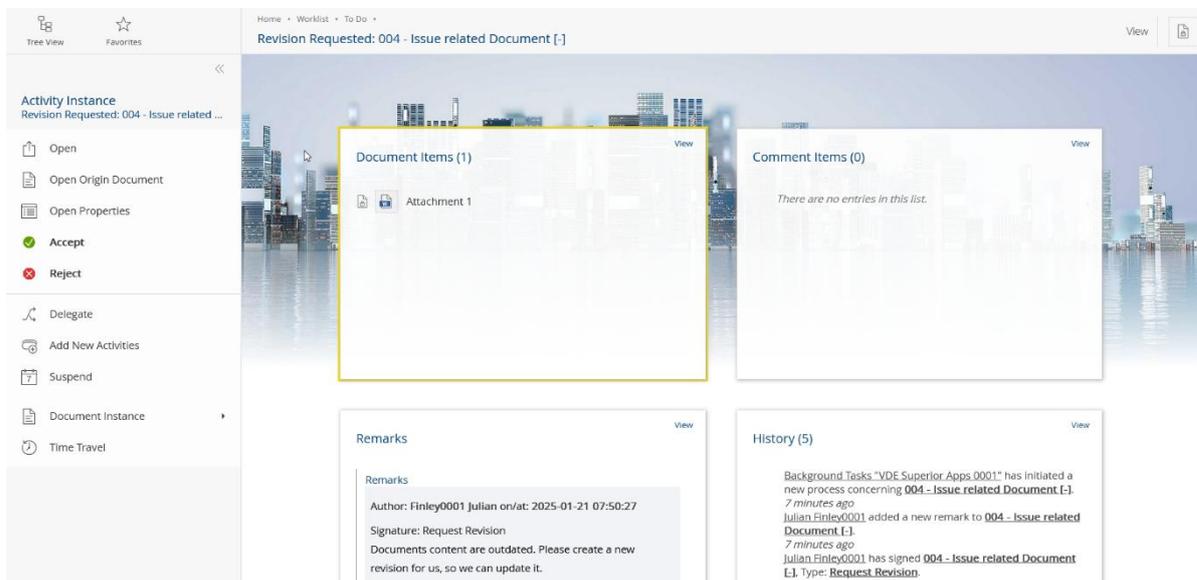
In Fabasoft Approve, it is now possible to request a new revision of a document as a supplier. If a supplier realizes that the existing document is no longer up to date, they can submit a request for a new revision of the document using “Request Revision”.



A process can be defined at the shelf level that comes into effect when a supplier makes a revision request. If no process is defined, the request revision menu is not displayed.

If a process with user interaction is defined, the document owner has the following options for processing this request:

3. Accept: A new revision is created and requested from the supplier.
4. Reject: The request is rejected and a corresponding reason is sent to the supplier.



If a process is stored without user interaction, the request is automatically accepted. As a result, a new revision is created and requested from the supplier.

6 Fabasoft Approve 2024 December Release

Find out more about new features and improvements in Fabasoft Approve.

6.1 Solution Area: Correspondence Management

The following new features await you in the correspondence management solution area.

6.1.1 Users

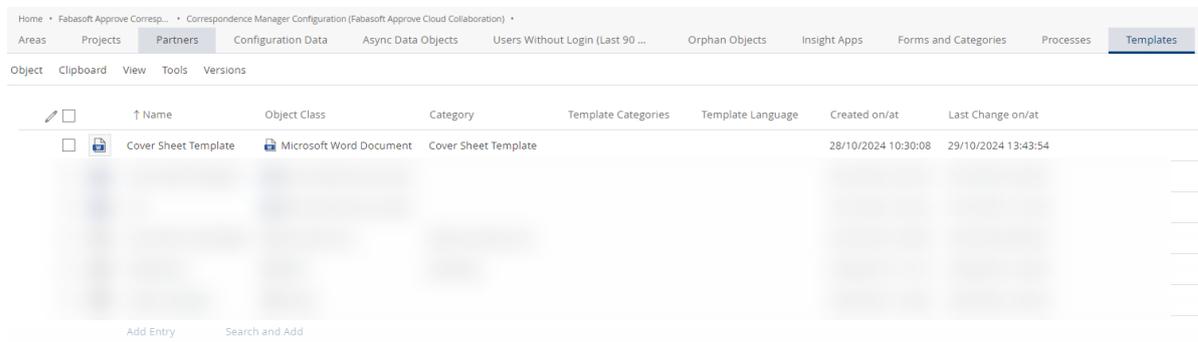
As an end user you can expect the following new features.

6.1.1.1 Adding cover sheets

Fabasoft Approve now offers the option of attaching your own cover sheets to PDF objects in the document items and removing them again if required.

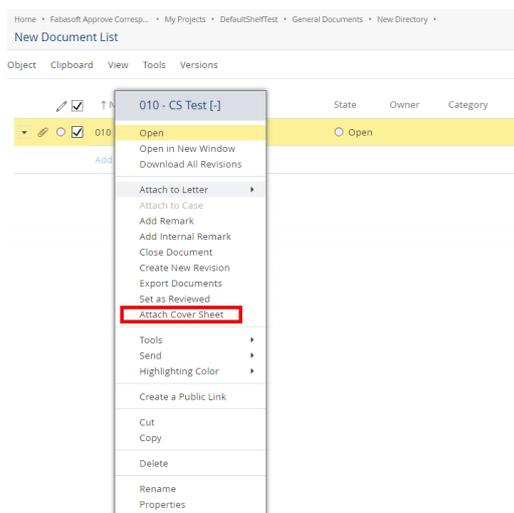
Attention: As this function changes the content of the PDF, digital signatures become invalid!

To attach a cover sheet to a PDF object, a “Cover Sheet Template” must first be created. In the following example, this is a Word template:



The cover sheet can be stored at project level, shelf level, document list level and document level.

The cover sheet can then be attached to each PDF object in the document entries of the document in the context menu under the “Attach Cover Sheet” entry. The created cover sheet is removed again with the “Remove Cover Sheet” entry.



6.1.1.2 New fields for the due date

In Fabasoft Approve, there is now a "Provision Due Date" and a "Submission Due Date" instead of the previous field called "Due date".

The Provision Due Date specifies the date by which a customer or supplier must provide the required information or documents.

The Submission Due Date, on the other hand, defines the date by which the required information or documents must be forwarded to a specific customer or supplier.

The screenshot displays the configuration page for a document titled "010 - test sleeve [-] (Document): Read". The interface includes a sidebar with navigation options: Document, History, General, Versions, Background Tasks, and Security. The main content area contains several input fields and sections:

- Document Number:** 010
- State:** Open
- Document Title:** test sleeve
- Revision:** -
- Supplier Document Number** and **Supplier Document Title** (empty)
- Customer Document Number** and **Customer Document Title** (empty)
- Subject** (empty)
- Owner** (empty)
- Supplier:** Partner GmbH
- Recipients:** Partner GmbH
- Provision Due Date:**
 - Interval (empty)
 - Operator (empty)
 - Reference Date (empty)
 - Provision Due Date: 15.11.2024
 - Adjusted Provision Due Date (empty)
 - Consolidated Provision Due Date: 15.11.2024
- Submission Due Date:**
 - Interval (empty)
 - Operator (empty)
 - Reference Date (empty)
 - Submission Due Date: 16.11.2024
 - Adjusted Submission Due Date (empty)
 - Consolidated Submission Due Date: 16.11.2024
- Initial Letter** (empty)
- Closing Letter** (empty)
- Associated Document Item IDs** (empty)
- Default Category for New Document Items** (empty)

At the bottom right, there are three buttons: Cancel, Edit, and Next.

7 Fabasoft Approve 2024 November Release

Find out more about new features and improvements in Fabasoft Approve.

7.1 Solution Area: Quality Management

The following new features await you in the quality management solution area.

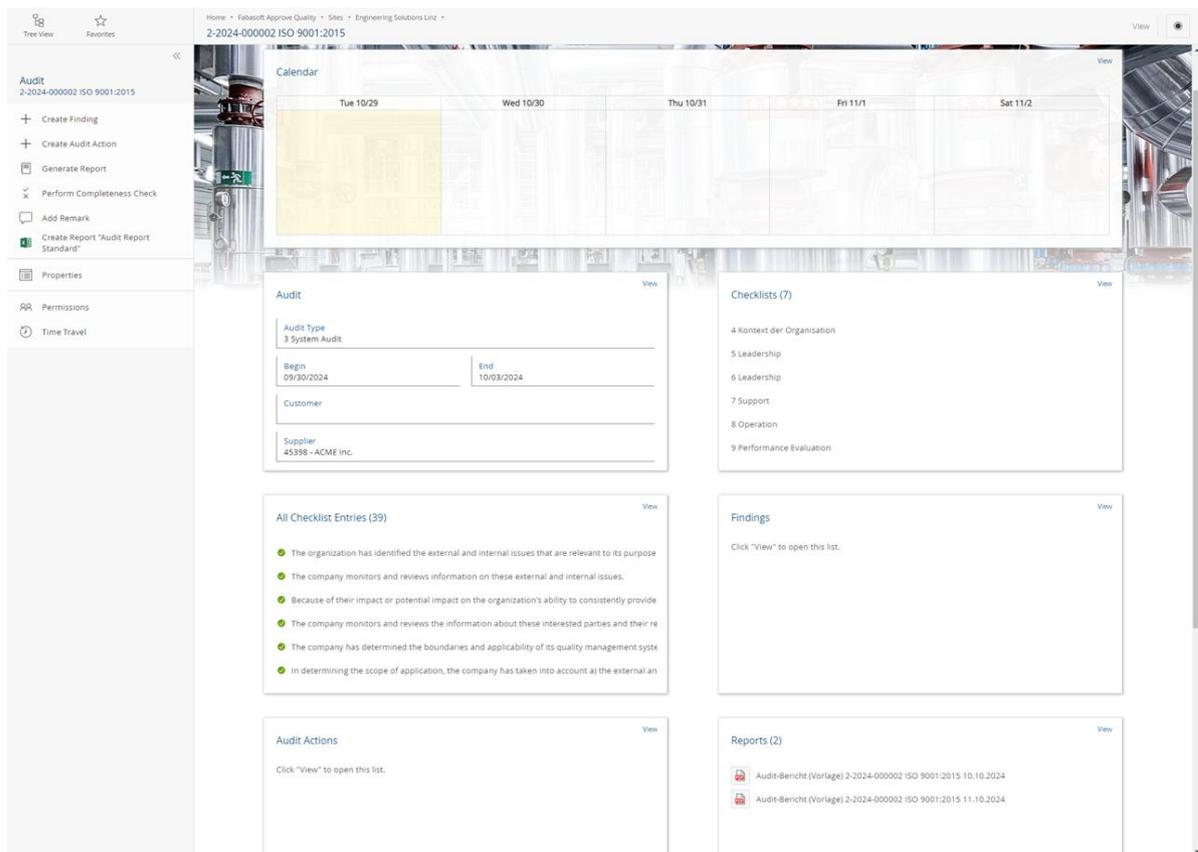
7.1.1 Users

As an end user you can expect the following new features.

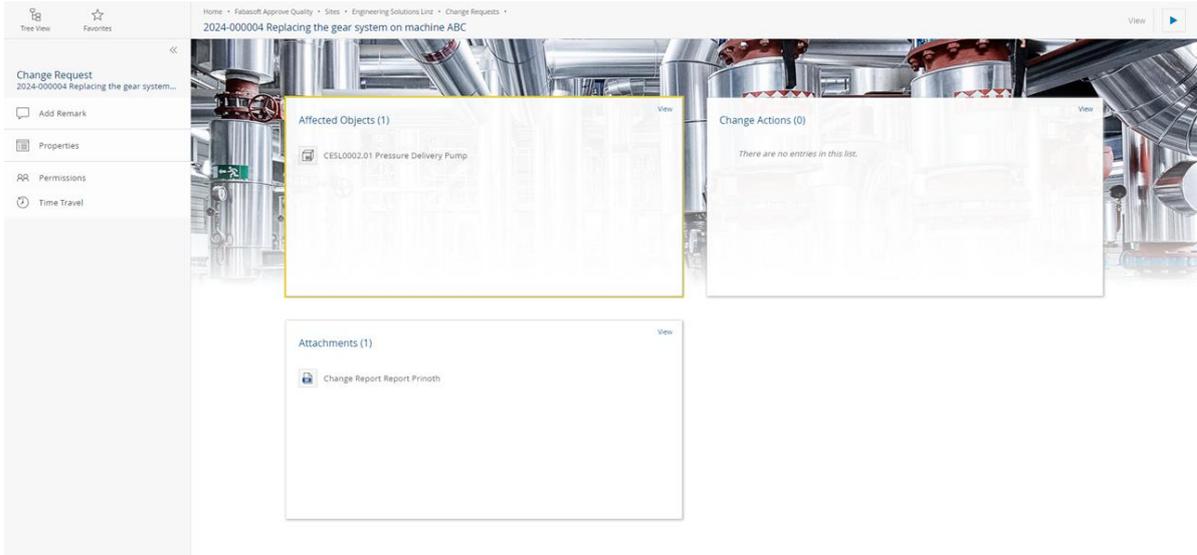
7.1.1.1 Audit-Management

Fabasoft Approve now enables the complete planning, execution and documentation of internal and external audits as well as the initiation and follow-up of corresponding findings and audit actions in the event of deviations.

An audit basically consists of several checklists, which are made up of checklist entries for which findings and audit actions can be managed.



Audit templates can be created on a plant-specific or cross-plant basis. Low-code/no-code mechanisms can be used to define intervals for recurring audits, for example, at any time. Automatic notifications and reminders (via processes) inform relevant parties about upcoming audits and deadlines. Fabasoft Approve also offers functions for tracking audit actions.

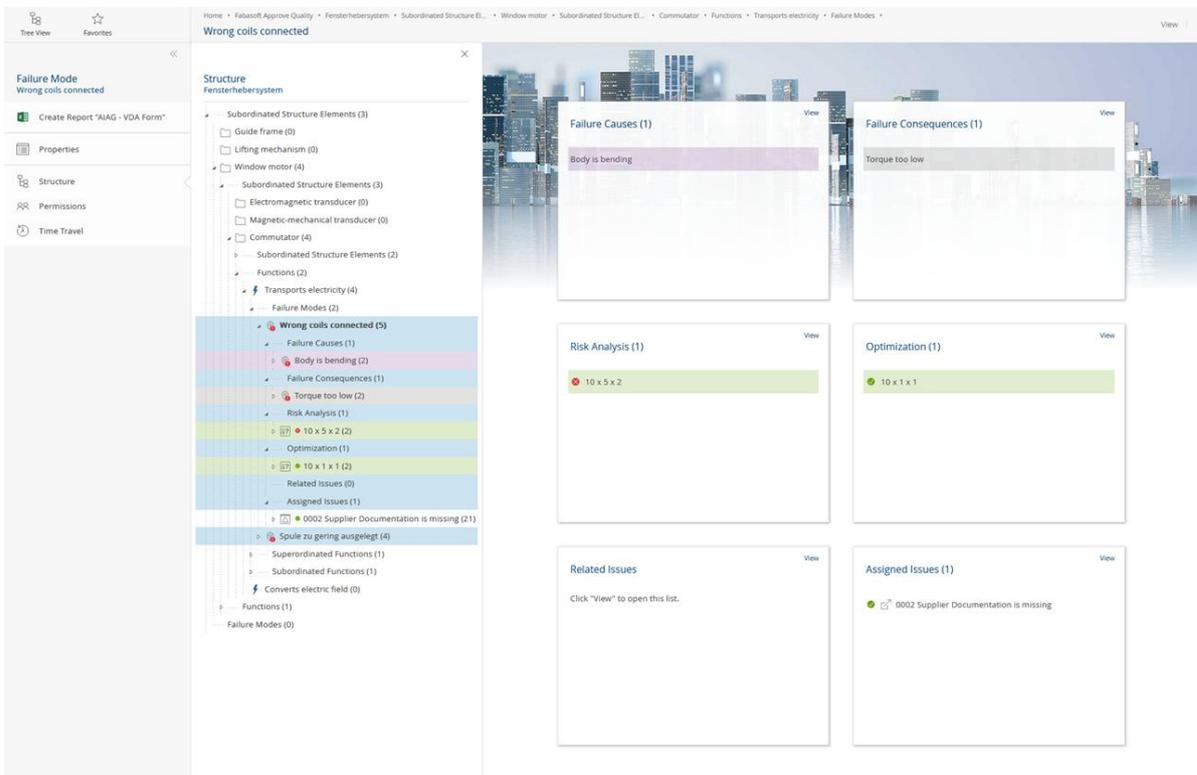


7.1.1.2 FMEA

Fabasoft Approve now offers the option of mapping and carrying out Failure Mode and Effects Analyses (FMEA). An FMEA system is used to systematically identify and evaluate potential failures and their effects on processes and products.

In Fabasoft Approve, FMEA analyses can be documented, evaluated and converted into action plans. Risks can be quantified and prioritized for each potential source of failure in order to plan targeted actions to prevent failures.

For better visualization and easier operation, a structure tree with all associated elements is available within an FMEA.



8 Fabasoft Approve 2024 October Release

Find out more about new features and improvements in Fabasoft Approve.

8.1 Common Innovations

The following common innovations await you in the current Fabasoft Approve 2024 October release.

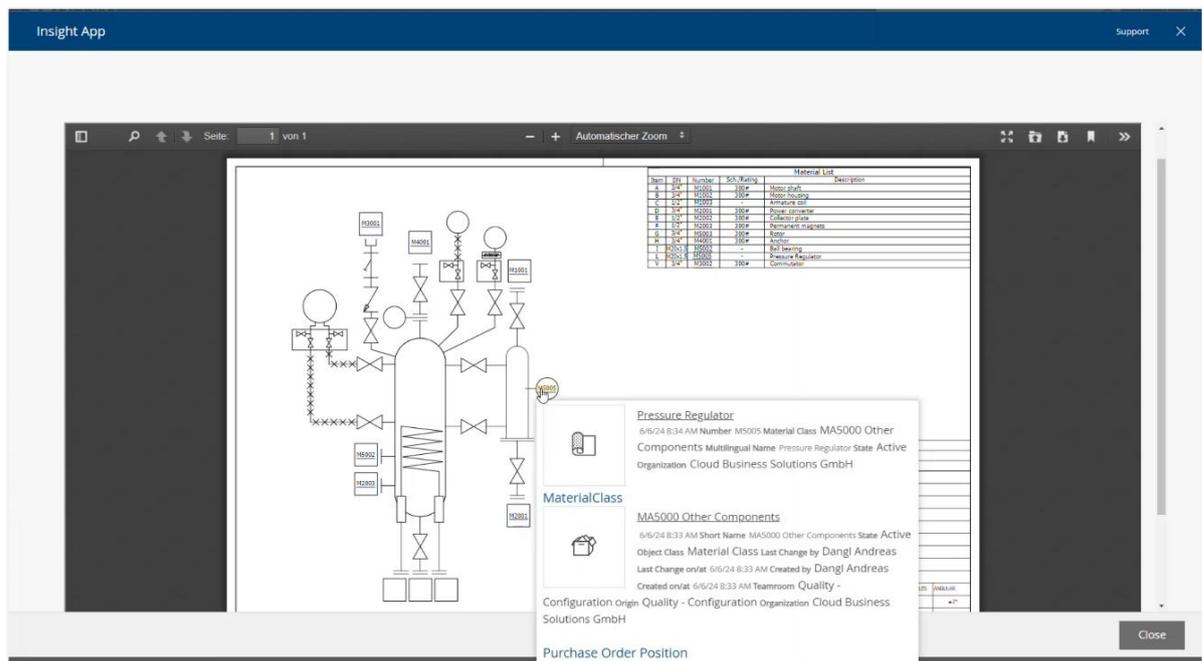
8.1.1 Users

As an end user you can expect the following new features. Note: To use these functions, separate licensing is required. Please contact approve@fabasoft.com if you have any questions.

8.1.1.1 Interactive Exploded View

In Fabasoft Approve, it is now possible to work interactively with a PDF. The so-called "Interactive Exploded View" enables effortless navigation in technical databases by adding additional information to documents.

For example, a material number noted in a technical drawing can be used to open the 360-degree view with a single click. This contains ordering information on the component, among other things.

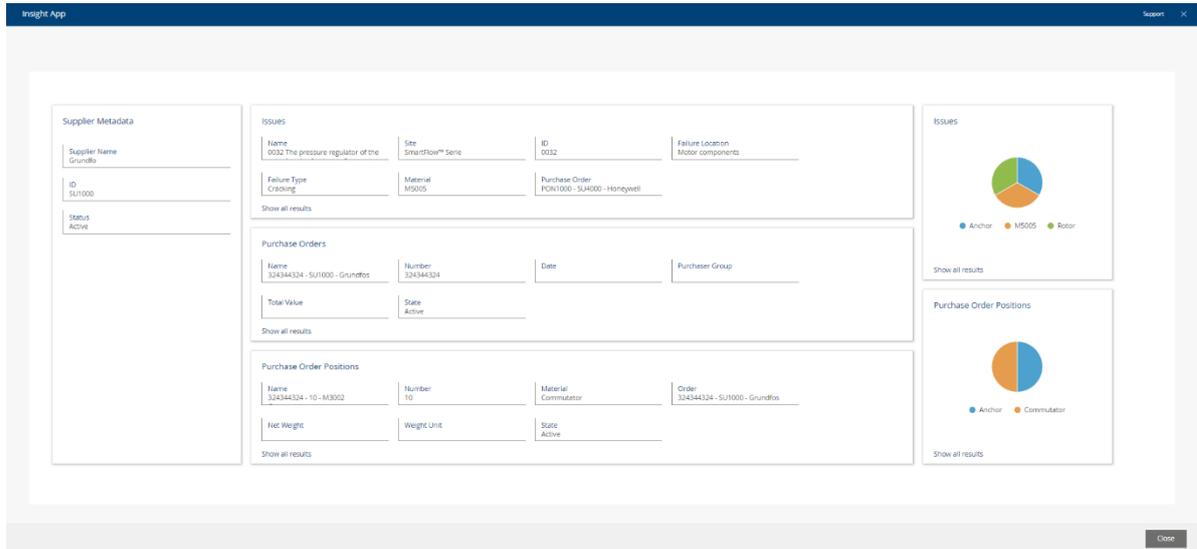


Additional details do not require any further search queries, which means that all relevant information can be found more quickly.

8.1.1.2 360-degree views

Fabasoft Approve now allows full 360-degree views. These enable a quick all-round view of relevant information, for example on projects, products or components. All information on a data record is clearly presented in a dashboard.

The AI can semantically analyze certificates or technical drawings and compare them with the stored knowledge.

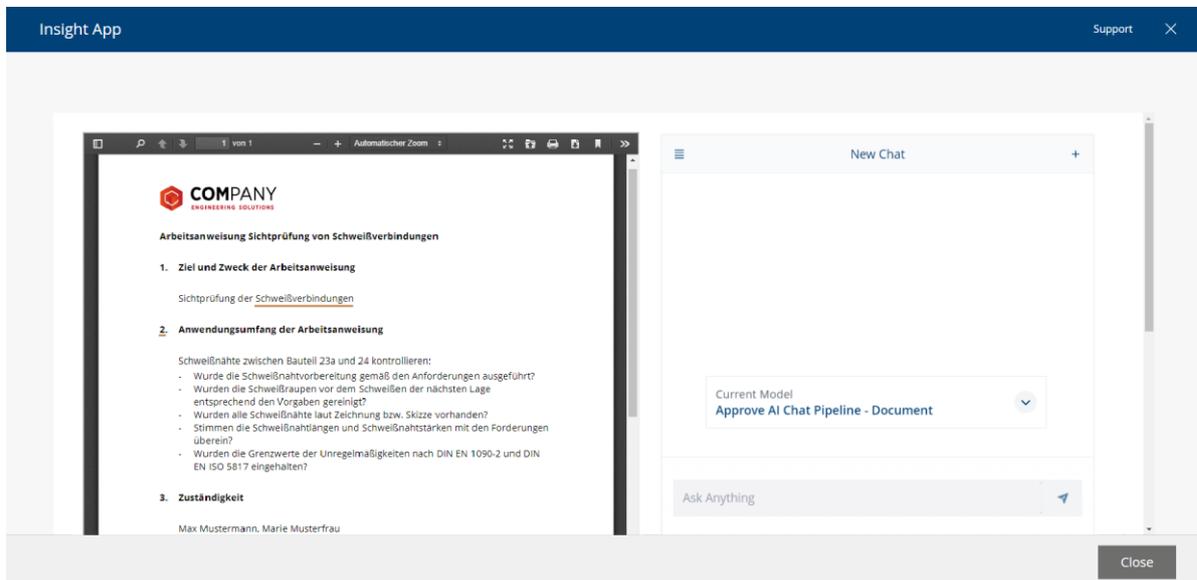


8.1.1.3 AI Chat with Documents

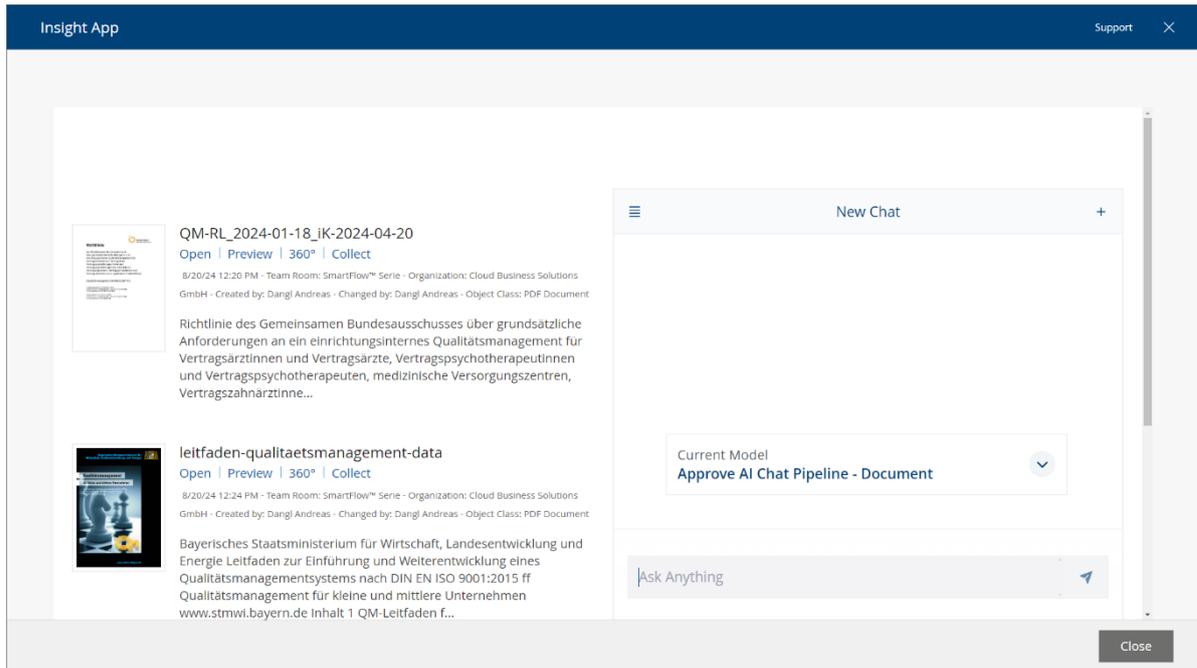
In Fabasoft Approve, it is now possible to ask questions about any document via AI.

Once the relevant information has been indexed, a chat window opens in which questions can be asked about one or more documents. The AI then checks the available information and provides suitable answers in natural language.

This function is particularly helpful in documents that contain a large amount of information.

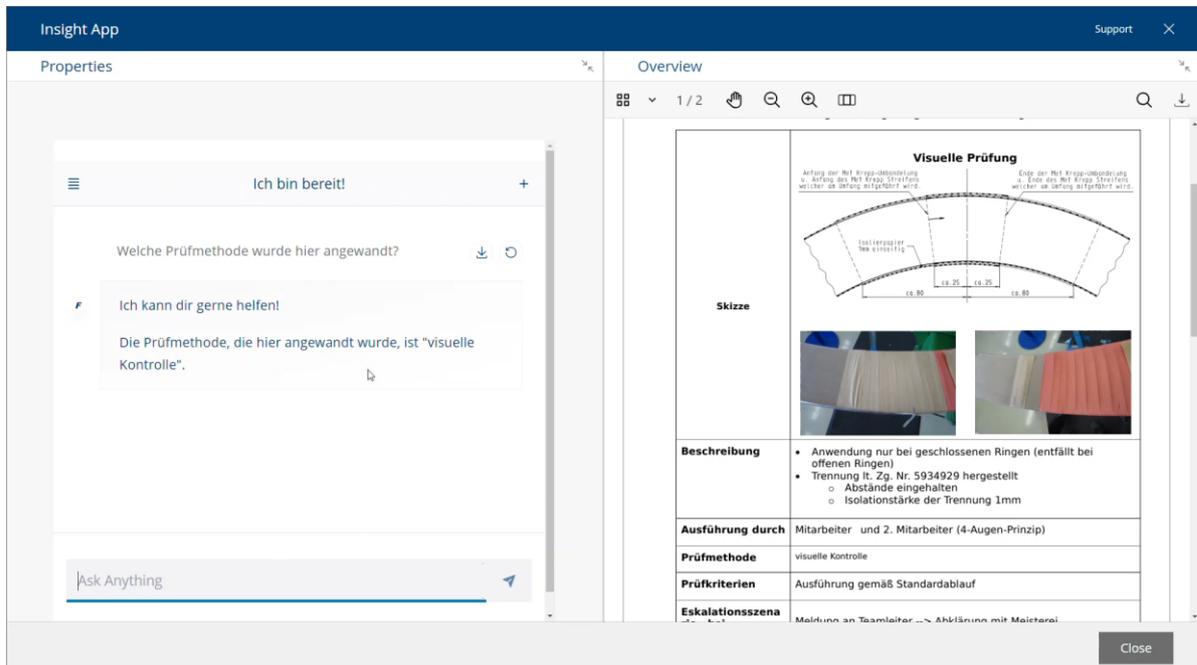


The same works with a "document collection", which contains several documents.



The chat can be called up intuitively from individual inspection steps when processing inspection plans.

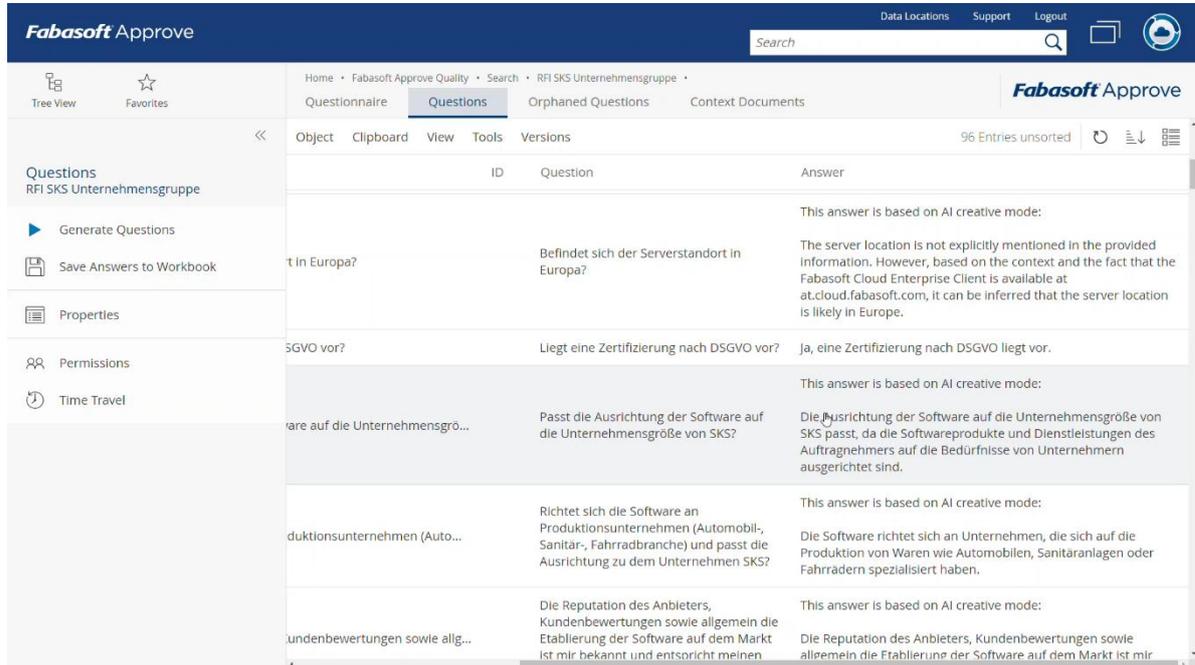
The following illustration shows how the AI supports the execution of the individual test steps by correctly answering the question about the test method used (see question about "Prüfmethode" in the left-hand area).



8.1.1.4 Questionnaire: AI-supported answering of questionnaires

In Fabasoft Approve, it is now possible to fill in inspection plans, supplier audits or requirements lists in the form of Excel tables, for example, with the help of artificial intelligence. The existing data and documents are used as a knowledge base for this.

The AI extracts questions contained in the Excel spreadsheet and transfers them to a question catalog in Approve. To answer the individual questions, it is possible to provide the AI with additional context documents. This increases the level of detail of the answers.



8.2 Solution Area: Quality Management

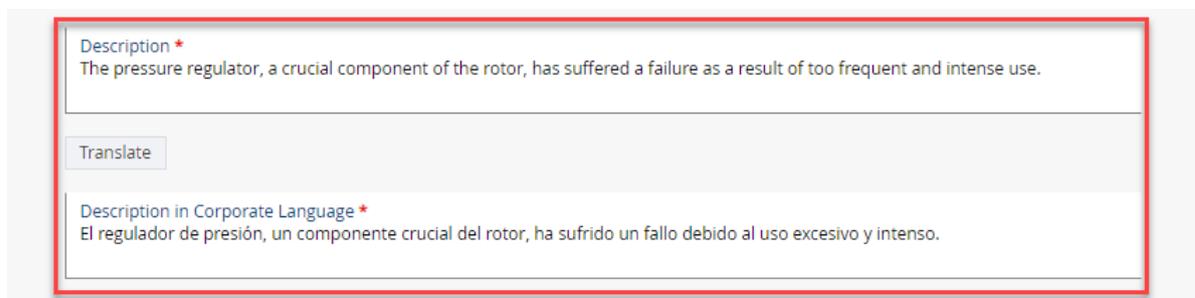
The following new features await you in the quality management solution area.

8.2.1 Users

As an end user you can expect the following new features. Note: To use this functionality, separate licensing is required.

8.2.1.1 Translator: AI-supported Translation

In Fabasoft Approve, it is now possible to have the "defect description" for an object automatically translated into your own corporate language using AI. The language stored in the system configuration is automatically used as the default.



9 Fabasoft Approve 2024 June Release

Find out more about new features and improvements in Fabasoft Approve.

9.1 Solution Area: Correspondence Management

The following new features await you in the correspondence management solution area.

9.1.1 Administrators

As an administrator you can expect the following new features.

9.1.1.1 Purpose of Sending on Project Level

In Fabasoft Approve, it is now possible to restrict purposes of sending to individual projects.

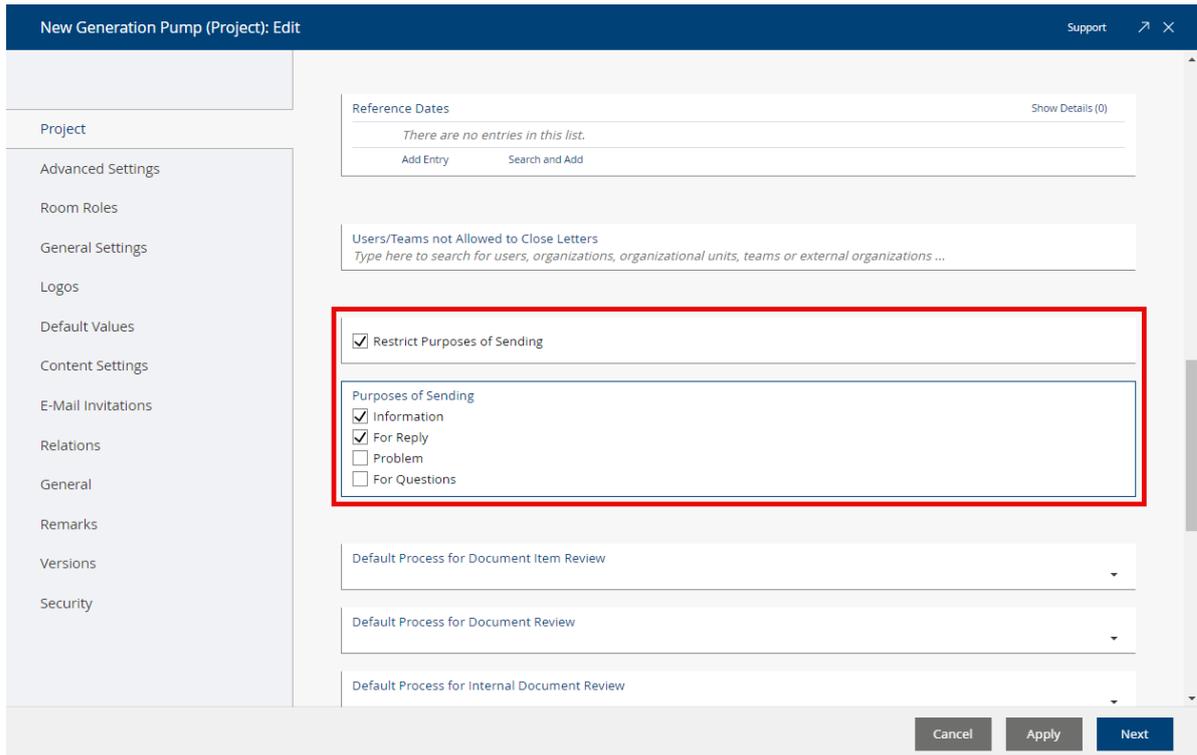
In the settings of a project, there is a new option called "Restrict Purposes of Sending". By default, this option is disabled, which means that all purposes of sending are valid for this project.

The screenshot shows the 'New Generation Pump (Project): Edit' settings page. The left sidebar contains a navigation menu with options: Project, Advanced Settings, Room Roles, General Settings, Logos, Default Values, Content Settings, E-Mail Invitations, Relations, General, Remarks, Versions, and Security. The main content area is divided into several sections:

- Reference Dates:** A section with a 'Show Details (0)' link and a message 'There are no entries in this list.' with 'Add Entry' and 'Search and Add' buttons.
- Users/Teams not Allowed to Close Letters:** A search bar with the placeholder text 'Type here to search for users, organizations, organizational units, teams or external organizations ...'.
- Restrict Purposes of Sending:** A checkbox labeled 'Restrict Purposes of Sending' is checked. Below it, the 'Purposes of Sending' section shows four options: 'Information' (selected), 'For Reply' (selected), 'Problem' (unselected), and 'For Questions' (unselected).
- Default Process for Document Item Review:** A dropdown menu.
- Default Process for Document Review:** A dropdown menu.
- Default Process for Internal Document Review:** A dropdown menu.

At the bottom right, there are three buttons: 'Cancel', 'Apply', and 'Next'.

When the "Restrict Purposes of Sending" option is chosen, all purposes of sending are unselected and you can choose, which purposes should be available for this project. In the following example, only the 'Information' and 'For Reply' sending purposes are allowed for the project.



9.2 Solution Area: Quality Management

The following new features await you in the quality management solution area.

9.2.1 Users

As an end user you can expect the following new features.

9.2.1.1 Importing Issues using the CSV Function

Fabasoft Approve now offers the option of importing issues that have occurred within a site, including all associated data.

If there are new issues, they can be easily imported and created through a CSV file. This file consists of several specific columns such as material, material description, supplier, customer, purchase order, etc. Each of these columns refer to a specific object within the Fabasoft Approve Quality Configuration to ensure correct assignment. These columns need to be filled with data.

Existing issues, for example from an external ERP system such as SAP, can also be transferred to this CSV file and then imported into Fabasoft Approve.

To import issues using a CSV file, right-click on the desired site and select "Import Issues".

9.2.1.2 Importing Actions using the CSV Function

Fabasoft Approve now offers the option of importing actions, including all associated data, with issues that have occurred within a site.

The import of actions works in a similar way to the import of issues. The actions created in this way can be assigned to a specific issue and the person responsible for it.

If there are new actions, they can be easily imported and created through a CSV file. The file consists of several specific columns such as action, description, person responsible, issue, etc. Each of these columns refers to a specific object within the Fabasoft Approve Quality Configuration to ensure proper assignment. These columns need to be filled with data.

Existing actions can also be transferred to this CSV file and then imported into Fabasoft Approve.

To import actions using a CSV file, right-click on the desired site and select "Import Actions".

10 Fabasoft Approve 2024 May Release

Find out more about new features and improvements in Fabasoft Approve.

10.1 Solution Area: Quality Management

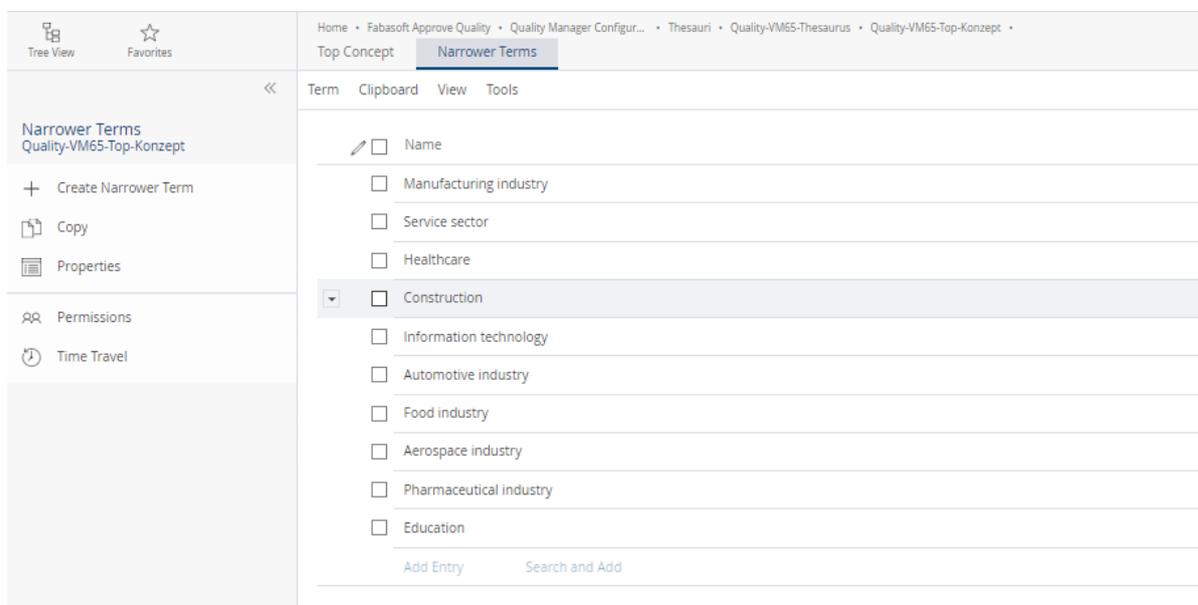
The following new features await you in the quality management solution area.

10.1.1 Administrators

As an administrator you can expect the following new features.

10.1.1.1 Dynamic integration of enabled properties

In the Fabasoft Approve Quality configuration, user-defined application areas can now be expanded by setting up a thesaurus within the organization. Various terms can be created in this thesaurus that act as subcategories:



Within the Fabasoft Approve Quality configuration, it is then possible to select the created narrower terms of the thesaurus in the "Application Areas" setting.

Details

Default Dashboard Name

Default Dashboard Class
 ▲ Quality Manager Dashboard

Default Dashboard Form

Manage Master Data at Site Level

Default Issue Description

Application Areas
 Construction; Automotive industry; Education; Type here to search for terms ...

Issue 8D Process
 8D-Process

Type for Measuring Devices Type for Operating Equipment

Correction Process
 Complete corrective action

Corrective Action Process
 Complete corrective action

Preventive Action Process
 Complete corrective action

Process After Finishing Last Issue of Test Step

A default application area can be selected at the factory according to the stored terms. To make this visible on the defect, it is necessary to click on "Application Area" in the "Enabled Properties".

Site

Name
 Celeros Flow Technology

Default Application Area
 Automotive industry

Default Lead Time for Issues Show Details (1)

Severity * Lead Time Definition *

1 High (8D) Lead Time Definition

Add Entry

Enabled Properties

<input checked="" type="checkbox"/> Application Area	<input checked="" type="checkbox"/> Failure Sub Location	<input checked="" type="checkbox"/> PDCA State
<input checked="" type="checkbox"/> BOM Item	<input checked="" type="checkbox"/> Failure Type	<input type="checkbox"/> Purchase Order
<input checked="" type="checkbox"/> Cause Identification - 5 Why	<input checked="" type="checkbox"/> Incoming Goods Object	<input checked="" type="checkbox"/> Supplier
<input checked="" type="checkbox"/> Equipment Classes	<input type="checkbox"/> Initial State	<input type="checkbox"/> Target State
<input checked="" type="checkbox"/> Failure	<input checked="" type="checkbox"/> Inspection Master Plans	<input checked="" type="checkbox"/> Units
<input checked="" type="checkbox"/> Failure Location	<input type="checkbox"/> Material	

The defect is then extended to include the default application area.

10.2 Solution Area: Correspondence Management

The following new features await you in the correspondence management solution area.

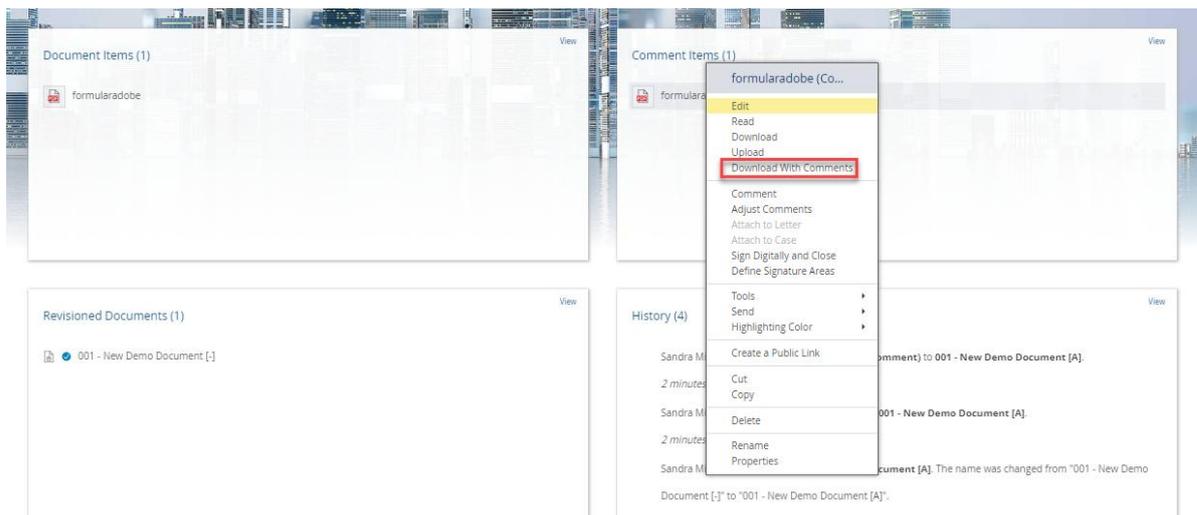
10.2.1 Users

As an end user you can expect the following new features.

10.2.1.1 Download document with comments

In Fabasoft Approve, it is now possible to download PDF documents together with the corresponding comments.

Document lists are managed in the Fabasoft Approve Correspondence application, which can contain certain correspondence-specific documents depending on the use case. These documents are treated as document "containers" and enable the inclusion of various PDF documents, which can also be provided with comments. Since the Fabasoft Approve 2024 May release, it has been possible to download these PDF documents including the associated comments.



11 Fabasoft Approve 2024 April Release

Find out more about new features and improvements in [Fabasoft Approve](#).

11.1 Solution Area: Correspondence Management

The following new features await you in the correspondence management solution area.

11.1.1 Administrators

As an administrator you can expect the following new features.

11.1.1.1 Due date display for document instances

In Fabasoft Approve, the display of the due date icon of a document instance is now handled in the same way as for a document. The administrator can use the "Document Due Date Fulfilling States" field to define criteria for the respective document instance that determine whether the due date icon of a document instance has been met.

Correspondence Manager Configuration (VDE Approve 0002) (Correspondence Manager Configuration): Edit

Support

Default Form for Registered E-Mails

General Settings

Details

Process Configuration

Logos

Default Values

Content Settings

E-Mail Invitations

General

Remarks

Versions

Security

Intervals

There are no entries in this list.

Show Details (0)

Add Entry Search and Add

Documents Export Template

Comments Export Template

Action Items Export Template

Open Points Export Template

Document Due Date Fulfilling States

<input type="checkbox"/> Rejected	<input type="checkbox"/> Reviewed - With Comments
<input type="checkbox"/> Declined	<input type="checkbox"/> Released - With Comments
<input type="checkbox"/> Correction Requested	<input type="checkbox"/> Approved - With Comments
<input type="checkbox"/> Adjustment Requested	<input type="checkbox"/> Outgoing Check Passed
<input type="checkbox"/> Outgoing Check Failed	<input type="checkbox"/> For Review
<input type="checkbox"/> Not Submitted	<input type="checkbox"/> For Information
<input type="checkbox"/> Needs Review	<input type="checkbox"/> Reviewed
<input type="checkbox"/> Open	<input type="checkbox"/> Closed
<input type="checkbox"/> In Progress	<input type="checkbox"/> Released
<input type="checkbox"/> Requested	<input type="checkbox"/> Approved
<input type="checkbox"/> Submitted	

Cancel Apply Next

For example, if the field contains the status "Submitted", the due date icon "Document is overdue since ..." is no longer displayed for a document instance that has this status.

The administrator can set the criteria as to whether the due date of a document instance has been met under "Dashboard" > "Switch to configuration" > "Settings" > "Details" > *Document Due Date Fulfilling States*.

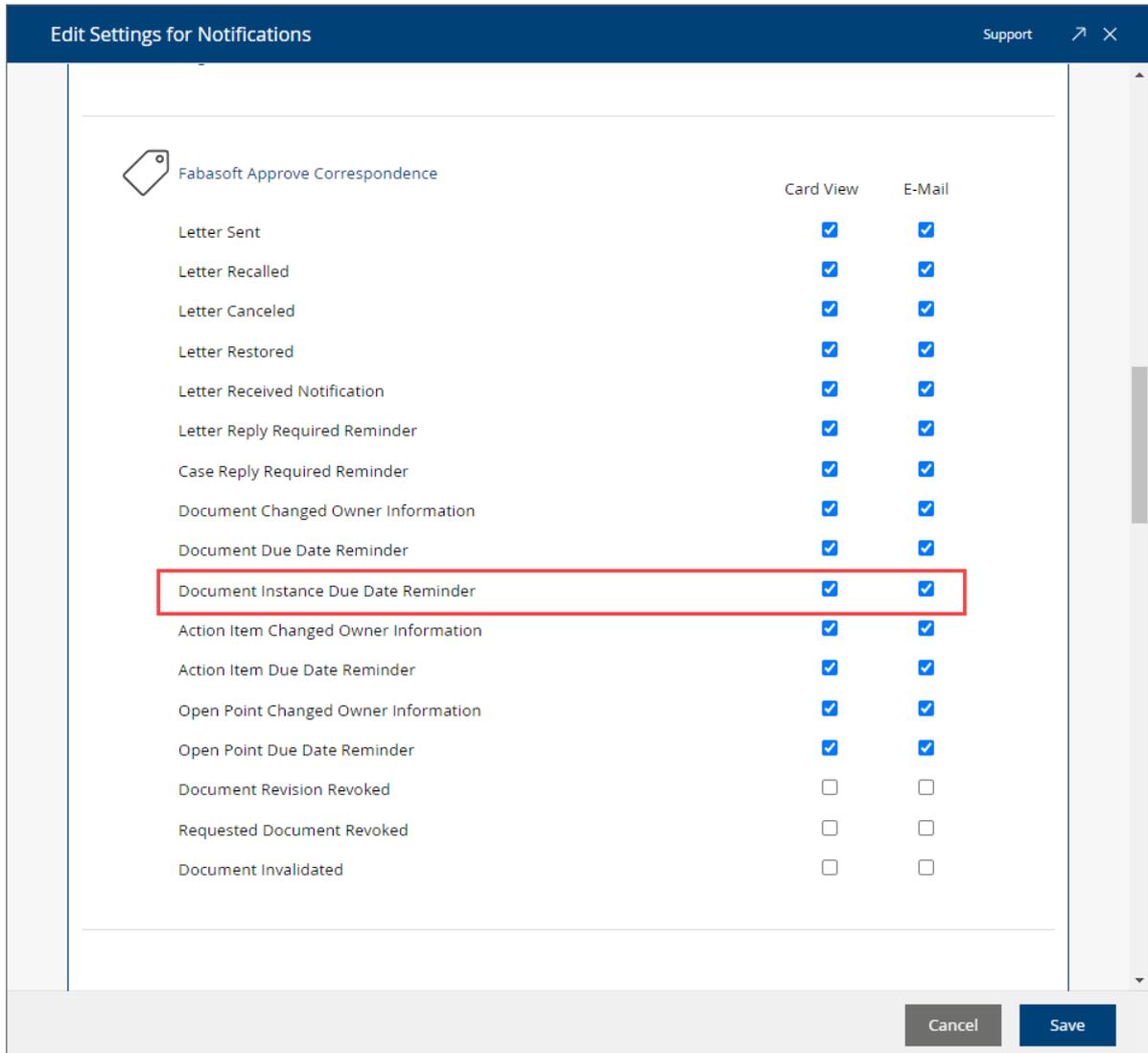
11.1.1.2 Sending reminder e-mails for overdue document instances

In Fabasoft Approve, reminder e-mails are now sent when a document instance is overdue.

The following rules apply to reminder emails:

- The first reminder is sent 14 days before the due date.
- Thereafter, a further reminder is sent every week until 4 weeks after the due date.

The setting as to whether or not reminder e-mails are sent can be made both centrally by the administrator and individually by the users themselves under the account menu (your user name) > "Advanced settings" > "Notifications" > "Settings" > "Fabasoft Approve Correspondence" > *Document Instance Due Date Reminder*.



12 Fabasoft Approve 2024 March Release

Find out more about new features and improvements in Fabasoft Approve.

12.1 Solution Area: Correspondence Management

The following new features await you in the correspondence management solution area.

12.1.1 Administrators

As an administrator you can expect the following new features.

12.1.1.1 Extension of the "Sending Purposes" functionality

Fabasoft Approve allows new setting options in the "Details" tab within the correspondence management configuration, which extend the current "Sending Purposes". In the "Reply Options" list, you can now define whether an incoming reply should adjust the status of the original document or not. You can also decide whether the document should be set to "Final Form".

The screenshot shows the 'Create Purpose of Sending' window. It has a dark blue header with the title 'Create Purpose of Sending' and a 'Support' link with a close icon. Below the header, the 'Purpose of Sending' section contains three input fields: 'Name' with a dropdown menu showing 'English', 'Description' with a dropdown menu showing 'English', and a checkbox for 'Reply Required' which is currently unchecked. At the bottom, the 'Reply Options' section is highlighted with a red border. It contains the text 'There are no entries in this list.' and an 'Add Entry' button. A 'Show Details (0)' link is also visible in the top right of this section.

If a document is sent within a letter to a customer, partner or, for example, a certification body, the "Create Purpose of Sending" window can be used to specify which "Reply Options" are to be transferred. If the recipient of the letter makes changes to the document copy and then sends it back, he or she can choose from the predefined response options (such as "Approved", "Approved - With Comments" or "Declined").

In the following example, the status is set to the original document and to "Final Form" when the document is approved.

The screenshot shows the 'Create Purpose of Sending' window with populated fields. The 'Name' dropdown is set to 'For Approval' and the 'Description' dropdown is set to 'Sends the document for technical approval and expects an assessment from the customer.'. The 'Reply Required' checkbox is now checked. The 'Reply Options' section contains a table with three entries:

	State	Set State of Original	Set Original to Final Form
<input type="checkbox"/>	1 Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2 Approved - With Comments	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3 Declined	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The 'Declined' row is highlighted in yellow. There is an 'Add Entry' button at the bottom of the table. A 'Show Details (3)' link is in the top right of the section.

12.1.1.2 Hide Tiles for Letter Exchange

If the "Use Letters" tile is not ticked in the settings within the structure in a filing system, the "Drafts", "Inbox" and "Sent Letters" tiles are hidden.

The screenshot shows the 'General Settings' configuration page in Fabasoft Approve. The left sidebar lists various settings categories, with 'General Settings' selected. The main content area displays configuration options for a project named 'EN Basic - International Project'. A red rectangular box highlights the 'Use Letters' checkbox, which is currently checked. Other visible options include 'Use Correspondences for Related Letters' (unchecked) and 'No Generated Names for Letters' (unchecked). The 'Partner Reference Number' field contains the value '1'.

13 Fabasoft Approve 2023 December Release

Find out more about new features and improvements in Fabasoft Approve.

13.1 Solution Areas: Technical Records Management and Correspondence Management

The following new features await you in the technical records management and correspondence management solution areas.

13.1.1 Administrators

As an administrator you can expect the following new feature.

13.1.1.1 Support for Project Roles

Fabasoft Approve now enables efficient authorization management through the definition and management of project roles. In addition to the previous standard roles (full control, change access and read access), dynamic roles can now also be defined in the app configuration. In large projects with complex structures, this standardization of project structures makes administration easier.

With records as templates, it is possible to define project roles for the individual users/teams that occupy the respective project role. If external areas are included in the file, the respective authorization (full control, change access and read access) can also be defined.

AV/2023/001 (Record): Edit Support ↗

Street
 [Open in Google Maps](#)

Zip Code City

Country [↗](#)

Telephone Numbers Show Details (0)
There are no entries in this list.
[Add Entry](#)

Project Roles Show Details (3)

	Project Role *	Members
1	Projektrolle 1	Mills0008 Sandra
2	Projektrolle 2	Neville0008 Oliver
3	Projektrolle 3	Projectteam

[Add Entry](#)

Internal Editor Mills0008 Sandra [↗](#) [+](#)

E-Mail Address mills0008@clouddev.fabasoft.com [↗](#)

Internal Purchaser [↗](#) [+](#)

E-Mail Address [↗](#)

[Cancel](#) [Apply](#) [Next](#)

Once a record has been created, project roles can be personalized and managed. In an external area, the roles configured on the record can be selected for change and read rights. Changes to users/teams in project roles automatically affect underlying areas.

External Room for AV/2023/001 - Externer Bereich 1 (External Room): Edit Support ↗

External Room

External Room

Records Manager List
 Aktenverzeichnis

Parent
 AV/2023/001

Subject
 Externer Bereich 1

Project Roles With Change Access
 Projektrolle 1

Project Roles With Read Access
 Projektrolle 2 Projektrolle 3

Grant Change Access for
 Type here to search for users, organizations, organizational units, teams or external organizations ...

Grant Read Access for
 Type here to search for users, organizations, organizational units, teams or external organizations ...

[Cancel](#) [Apply](#) [Next](#)

13.2 Common Innovations

The following common innovations await you in the current Fabasoft Approve 2023 December release.

13.2.1 Administrators

As an administrator you can expect the following new feature.

13.2.1.1 Show due document instances in partner Shelf Calendars

In Fabasoft Approve, it is now possible for partners to see the calendar entry with a defined due date for requested document instances in their shelf calendar so that they can submit them on time. The requirement for this is that the partner has access to a shelf system in which the requested document instance is located.

In the list of shelves of a partner, there is now a special shelf in which a list of documents can be created. Within this list, a document can be created in which a partner and a due date are assigned.

The "Request document" function starts a background task which transfers the requested document to the shelf of the stored partner and then inserts it into the calendar on the due date.

14 Fabasoft Approve 2023 November Release

Find out more about new features and improvements in Fabasoft Approve.

14.1 Common Innovations

The following common innovations await you in the current Fabasoft Approve 2023 November release.

14.1.1 Administrators

As an administrator you can expect the following new feature.

14.1.1.1 IAM Integration

Fabasoft Approve uses the "Microsoft Graph User Import Object" to enable end-to-end synchronization of users assigned to Microsoft Azure Active Directory (AD) groups with Teams within a Fabasoft Cloud organization.

Automated identity and access management is used to determine which authorizations are assigned to those Fabasoft Approve users who are linked to the AD. This makes it possible to automatically authorize users (groups) for previously defined roles in rooms such as plants, projects, directories, etc. in Fabasoft Approve.

To be able to use the Microsoft Graph Toolkit, an application must be registered directly in the Active Directory. This enables access to resources via the OAuth (Open Authorization) standard. Registration is carried out by clicking the "New registration" button in the AD.

For more information on IAM integration and how to use it, please refer to our white paper "[IAM Integration Documentation](#)".

15 Fabasoft Approve 2023 October Release

Find out more about new features and improvements in Fabasoft Approve.

15.1 Common Innovations

The following common innovations await you in the current Fabasoft Approve 2023 October release.

15.1.1 Administrators

As an administrator you can expect the following new feature.

15.1.1.1 Mail Import via Microsoft Graph

In Fabasoft Approve, it is now possible to retrieve emails from the Microsoft Azure Cloud via the Microsoft Graph API. Project-relevant emails can be assigned to existing projects in the Fabasoft Cloud in this way. To do this, a "Microsoft Graph email import" object must be created in a Teamroom or folder, which is used to configure the required parameters.

In the Microsoft Azure Cloud, a Microsoft Azure Cloud application must first be created, a secret (client secret) generated for it and the following "Redirect URI" stored:

- Location Austria: <https://at.cloud.fabasoft.com/folio/graphauthcodecallback>
- Location Germany: <https://de.cloud.fabasoft.com/folio/graphauthcodecallback>
- Location Switzerland: <https://ch.cloud.fabasoft.com/folio/graphauthcodecallback>

The application ID of the created Microsoft Azure Cloud application and the generated secret must then be stored in the properties of the import object. You must also select whether the retrieved mailbox is a personal or shared mailbox.

The retrieved emails are imported into the "Target list" list of the object defined in the "Target object" property (e.g. a folder or Teamroom must be specified here). A "Retrieval interval" must also be selected. A background task then checks periodically for new emails.

After storing and saving the required parameters, the "(Re)Authenticate" use case must be executed from the context menu of the "Microsoft Graph email import" object, during which an authorized user must log in to the Microsoft Azure Cloud in order to obtain the necessary authorizations to retrieve emails and a "refresh token" required for this.

If a "retrieval interval" has been defined, the emails are then imported periodically in the context of a background task. Manual retrieval is also possible via the "Import now" use case from the context menu.

16 Fabasoft Approve 2023 September Release

Find out more about new features and improvements in Fabasoft Approve.

16.1 Solution Area: Quality Management

The following innovations await you in the Quality Management solution area.

16.1.1 Users

As an end user you can expect the following new features.

16.1.1.1 Create Measures in a Defect

In quality management, authorized users can now enter the following measures for a defect:

- *Immediate action*

Immediate actions are primarily used to limit the damage so that the underlying problem is prevented from spreading further until a permanent solution has been found.

The screenshot shows a 'Create Correction' form with the following fields and values:

- Issue:** WZ0006-Paint chipped on generator casing
- State:** New
- Responsible *:** Kimble0008 Claudia
- Due on *:** 11/30/2023
- With Feedback?:**
- Short Description *:** Repaint generator casing
- Description *:** The generator casing must be repainted.
- Effectiveness Review?:**

Buttons at the bottom right: Cancel, Next.

- *Corrective action*

Corrective action serves to eliminate the root causes of the problem in order to solve it permanently.

- *Preventive action*

Preventive action is used to ensure that the same or similar errors cannot occur again in the future and is usually linked to an effectiveness test over an appropriate period of time. The risks identified during the root cause analysis should be addressed by appropriate preventive measures.

The following metadata can be specified for each measure (see immediate action):

- *Person responsible*

This user is responsible for processing the measure and is assigned corresponding activities of the measure process.

- *Due on*

The due date for the completion of the measure.

- *Short description*

The short description of the measure, limited to a maximum of 254 characters.

- *Description*

A comprehensive description of the measure, which must contain all relevant information.

- *With feedback*
If this flag is set, the user selected in the "Feedback to" field will receive feedback in the form of an activity once the action has been completed.
- *With effectiveness check*
If this flag is set, the user selected in the "Effectiveness check by" field receives a request to check the effectiveness of the implemented measure in the form of an activity once the measure has been completed. In the "Effectiveness check after" field, select the period after which the activity is to be prescribed, calculated from the completion of the measure.

16.1.2 Administrators

As an administrator you can expect the following new feature.

16.1.2.1 Managing Roles in a Plant

The following roles are now available in a "plant" in Quality Management:

- *Plant administrator*
Users in this role have comprehensive rights and can edit all objects belonging to a plant as well as the settings in the plant.
- *Coordinator*
Users in this role can create defects and be defined as coordinators. Coordinators receive comprehensive authorizations in the course of defect processing.
- *8D team*
8D team members can create defects and are granted change rights to the defects in which they are part of the 8D team. They can enter and process measures for a defect.

