





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.

Quality Manager Configuration (Quality	y Manager Configuration): Edit			Support	<b>7</b> )	×
	✓ Manage Master Data at Site Level					^
General Settings	Corporate Language					
Details	English			•	_	
Expressions	Issue Types			Show Details (3)		
AL Configuration Sottings	↑ Multilingual Name	Object Class	Scope Note			
A configuration settings	Internal Issue	Lategory				
Inspection Planning	Supplier Issue	Category				
Logos	Add Entry Search and Add					
Mindbreeze InSpire Configurati					-	
Default Values	Default Issue Type for New Issues			•		
Content Settings	Default Issue Description					*0
General						
Remarks						
Veniero	Application Areas Production; Assembly; Commercial; Nuclear;	Type here to search for terms				
versions	Imposte					
Security	High; Type here to search for terms					
	Icoup 9D Drococc					~
			Cancel	Apply	Next	

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		Support	лх
	Settings		
Settings	Issue Source Internal		-
Category	Severity		
Retention	Low (2D)		•
Background Tasks			
Permissions			
General			
Remarks			
Versions			
Security			
	Cancel Ap	ply	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.

A .				
10	ID 0002	Short Description *	missing	
	0002	supplier Documentation is r	nissing	
	Issue Type *	•	NCR ID	
sue	Internal Issue			
D Team	Super Severe Supplier Issue		Supplier	- 0 - 0
D Schedule	Occurred on		Application Area *	
2 - Describe Problem	14.05.2024		Assembly	•
3 - Define Corrections/Cont	Severity *	Impact *	PDCA State	
4 - Cause Identification	High (8D)	•	•	<b>.</b>
5 & D6 - Define/Implement	Failure Location *		Failure Sub Location *	
5 & D0 - Dennermplement	FL0001 Assembly	•	FSL0001 Assembly Line Check	-
7 - Define Preventive Actions	Failure Type *		Failure *	
8 - Complete 8D Process	FT0001 Documentation	*	F0001 Supplier Documentation	•
eneral	Customer		Sales Order Number	
omorka		÷ Q ↔		
ernarks	Project			
rocesses				+ P +
ctivities	Units			Show Details (1)
ersions	Name			Show Details (1)

# 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.

Keview Document -009 - DEMO Document [-].	Support
Review	°≂ Overview
	^ ## ▼ Page < 1 > 1/2 ∰ ⊕ Q ⊕ □□ □ □ □ □ ↓ < 1/2 >
Document	Lorem Ipsum
Document List * Document List 1	Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut
Action Items	doores et a cobre magna angoran et al, sed usan volupicat, verte eto eto et accusan et poso doo dolores et a rebum. Stet clita kasd gubergen, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem insum dolor sit amet. conserbut sanctions effit: sed dan nonum elimont
Open Points Scrum Demo Day Project - My Company Ltd.	invidunt ut labore et dolore magna aliquyan erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet ciita kasd gubergren, no sea takimata sanctus est Lorem ijsum dolor
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History State Needs Review	Dúis autem vel oum intre doior in hendreit in vulputate velit esse molestie consequat, vel illum dolore es feugiat nulls facilisti al vero eros et accumsar et lusto otio digipistum qui blandt grazemt
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Security Supplier Document Revision	Nami like tempor can svakta notek eleftend option congue shill impercited domity al apad maxim placent foror yosika ansami. Orom japan dosi s al met. conscienciare adjacity eff. Like dd ian nonumry niche existend frickater ut laboret dolore name art voltaget. Ut visit elem a minim vesime, quis sontrad erect taldeo intercopers societ (totosti ni ut allabje er es enomedo

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.

	Support	
Type * Action	•	
Action Item Number	Status * Open -	
Subject Analyze Lorem Ipsum text		
Revision		
Detailed Description Compare Text (after)	Changes	
Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoret dolore magna aliquam erat volutpat.	Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feuglat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zrii delenit augue duis dolore te feugait nulla facilisi. Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.	
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consecteure adipicing elit, sed diam nonummy nibh eulsmod finidunt ut laoreet dolo aliquam erat volutpat. Select Remove	re magna	
		_

# 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 [-] (Doc	ument): Read		Support	א א∕	
	Supplier				^
Document					
General	Recipients				
Versions	Provision Due Date				
Security	Interval	Operator	Reference Date Milestone 1		
	Provision Due Date 05.06.2025	Adjusted Provision Due Date	Consolidated Provision Due Date 05.06.2025		
	Submission Due Date				
	Interval 2 Weeks	Operator After	Reference Date Milestone 1		
					1
	Submission Due Date 19.06.2025	Adjusted Submission Due Date	Consolidated Submission Due Date 19.06.2025		
	Initial Letter				
					~
			Cancel Edit Ne	xt	

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".

음 겄 Tree View Favorites	Home • Fabasoft Approve Corresp • Shelves • New Generation Pump - Supplier GmbH • 004 - Issue related Document [-]	View
	Document Items (1)       Vew       Comment Items (0)         Image: Comment Items (1)       Image: Comment Items (1)       There are no entries in this Its.         Image: Comment Items (1)       Image: Comment Items (1)       There are no entries in this Its.	Ver
	View  Flistory (2)  Claudia Kimble0001 has signed 004 - Issue related Document [-]. Type: Provide.  8 manitria ago Claudia Kimble0001 has added Attachment.1 to 004 - Issue related Document [-]. 8 monitris ago	

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:

Home • Fabasoft Approve Corresp • Correspondence Manager Configuration (Fabasoft Approve Cloud Collaboration) •										
Areas	Projec	ts Partners	Configuration Data Async Data	Objects Users With	nout Login (Last 90	Orphan Objects	Insight Apps Form:	s and Categories Pr	rocesses	Templates
Object	Clipboard	View Tools Vers	sions							
,	/ 🗌	↑ Name	Object Class	Category	Template Categories	Template Language	Created on/at	Last Change on/at		
		Cover Sheet Templa	ate 🛛 🔓 Microsoft Word Document	Cover Sheet Template			28/10/2024 10:30:0	8 29/10/2024 13:43:54		
		Add Entry	Search and Add							

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.

010 - test sleeve [-] (Document): Read	d				Support	⊅ ×	
		010		Open		_	^
		Document Title test sleeve				_	
Document		Revision -				_	
History		Supplier Document Number		Supplier Document	Title		Ì
General Versions		Customer Document Number		Customer Document Title			
Background Tasks		Subject				_	
Security		Owner				_	
		Supplier ﷺ Partner GmbH					
	_	Recipients Partner GmbH					
	Γ	Provision Due Date					
		Interval	Operator		Reference Date		
		Provision Due Date 15.11.2024	Adjusted Provision D	ue Date	Consolidated Provision Due Date 15.11.2024		
	L	Submission Due Date					
		Interval	Operator		Reference Date		
		Submission Due Date 16.11.2024	Adjusted Submission	Due Date	Consolidated Submission Due Date 16.11.2024		
	L						
		Initial Letter				_	
		Closing Letter				_	
		Associated Document Item IDs					
						_	1
		Default Category for New Document Items				_	
					Canad	out	~
					Cancel Edit N	ext	

# 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.

8 4	Home + Fabasoft Approve Quality + Sites + Engineering Solutions Linz +			View
Tree View Revorites	2-2024-000002 ISO 9001:2015			
Audit 2-2024-000002 ISO 9001:2015	Calendar			Vew
+ Create Finding	Tue 10/29	Wed 10/30 Thu 10/31	Fri 11/1	Sat 11/2
+ Create Audit Action				
Generate Report				
	<u><u><u></u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u>			
× Perform Completeness Check	0			
L Add Remark				
Standard"				
III Properties		View		Vev
AR Permissions	Audit		Checklists (7)	
⑦ Time Travel	Audit Type 2 Sustem Audit		4 Kontext der Organisation	
	3 System Addit		5 Leadership	
	Begin End 09/30/2024 10/0	3/2024	6 Leadership	
	Customer		7 Support	
			8 Operation	
	Supplier 45398 - ACME Inc.		9 Performance Evaluation	
		View		View
	All Checklist Entries (39)	1947	Findings	
	The organization has identified the external and inter	nal issues that are relevant to its numose	Click "View" to open this list.	
	The company monitors and reviews information on the	hese external and internal issues		
	Recause of their impact or potential impact on the or	ranization's ability to consistently provide		
	The company monitors and reviews the information is	about these interested parties and their re		
	The company has determined the boundaries and an	plicability of its quality management syste		
	In determining the scope of application the company	has taken into account a) the external an		
	Audit Actions	View	Reports (2)	View
	Click "View" to open this list.			10.2024
			Audio Bericha (Vorlage) 2-2024-000002 (SO 3001:2015 10	10.2024
			Autorebericht (vorlage) 2-2020-000002 (SO 9001/2015 11	1994 ENGLAND

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.

The View Favorites 2024-000004	oprove Quality + Stes + Engineering Solutions Linz + Change Requests + Replacing the gear system on machine ABC	View
A dd Remark     Add Remark     Time Travel	Affected Objects (1)       Ver         CESL0022.01 Pressure Delivery Pump       Ver         Attachments (1)       Ver         Change Report Report Princth       Ver	Change Actions (c) There are no actives as this list.

# 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.

입용 1년 Tree View Favorites	Home + Fabasoft Approve Quality + Fensterhebersystem + Subordinated Structure El. Wrong colls connected	. • Window motor • Sub	ordinated Structure EL.  + Commutator  + Functions  +	Transports electricity + Failure M	odes •	View
K     Failure Mode     Wrong coils connected	× Structure Fensterhebersystem					
Create Report "AIAG - VDA Form"	Subordinated Structure Elements (3)     Guide frame (0)     Lifting mechanism (0)		Failure Causes (1)	View	Failure Consequences (1)	Vew
B     Structure       R     Permissions       Imme Travel	Window motor (4)    Subordinated Structure Blements (3)    Water Comparetic transducer (9)    Magnetic mechanical transducer (10)    Commutator (4)    Subordinated Structure Blements (2)    Functions (2)		lody is bending		Torque too low	
	G Wrong colls connected (5)     G Wrong colls connected (5)     Failure Causes (1)     G Gody is bending (2)		Risk Analysis (1)	View	Optimization (1)	Vev
			9 10x5x2		● 10x1x1	
	Galactic ageing anogene (v)     Suberdinated Functions (1)     Suberdinated Functions (1)     Gonverts electric field (0)     Functions (1)     Functions (1)     Failure Modes (0)		Related issues	View	Assigned Issues (1) <ul> <li>D<sup>n</sup> 0002 Supplier Documentation is missing</li> </ul>	View

# 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 <a href="mailto:approve@fabasoft.com">approve@fabasoft.com</a> 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 360degree 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.

Supplier Metadata	Issues				Issues
Supplier Name Grundfo	Name 0032 The pressure regulator of the	Site SmartFlow <sup>m</sup> Serie	ID 0032	Failure Location Motor components	
ID SU1000	Failure Type Cracking	Meterial M5005	Purchase Order PON1000 - SU4000 - Honeywell		
Status	Show all results				
Active	Purchase Orders				Anchor MS005 Rotor
	Name 324344324 - SU1000 - Grundifos	Number 324344324	Date	Purchaser Group	Show all results
	Total Value	State Active			Purchase Order Positions
	Show all results				
	Purchase Order Positions				
	Name 324344324 - 10 - M3002	Number 10	Material Commutator	Order 324344324 - SU1000 - Grundfos	Anther Commutator
	Net Weight	Weight Unit	State Active		
	Show all results				Show all results

# 8.1.1.3 AI Chat with Documents

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

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.

ן P ♠ ♣ 1 von 1 — + Automatischer Zoom : גָיָה אָם אָם אָם אָיַ אָ	. =	New Chat		+
Arbeitsan weisung Sichtprüfung von Schweißverbindungen				
1. Ziel und Zweck der Arbeitsanweisung				
Sichtprüfung der Schweißverbindungen				
2. Anwendungsumfang der Arbeitsanweisung				
Schweißnähte zwischen Bautell 23a und 24 kontrollieren:				
<ul> <li>Wurde nie Schweishamtvordereinung genaal sein Antorderungen ausgezuntr Wurden die Schweißhaupen vor den Schweißen der Antolstens Lage entsprechend den Vorgaben gereinigt?</li> <li>Wurden alle Schweißhahte laut Zeichnung bzw. Skizze vorhanden?</li> </ul>		Current Model Approve Al Chat Pipeline - Document	~	
<ul> <li>summer, die Schweinshamlungen und Schweinshamlsahlten mit den Folgefungen überein?</li> <li>Wurden die Grenzwerte der Unregelmäßigkeiten nach DIN EN 1090-2 und DIN EN ISO 5817 eingehalten?</li> </ul>				
3. Zuständigkeit	As	k Anything		7

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

Insight App		Support
		ĺ
QM-RL_2024-01-18_iK-2024-04-20	E New Chat	+
Open         Preview         360°         Collect           BZ0024         12:20 PM - Team Room: SmartHow* Serie - Organization: Cloud Business Solutions         Ex0024         12:20 PM - Team Room: SmartHow* Serie - Organization: Cloud Business Solutions           BBBB		
Ieitfaden-qualitaetsmanagement-data           Open         Preview         360°         Collect           V20/24 12:24 PM - Team Room: SmartHow* Serie - Organization: Cloud Business Solutions         GmbH - Created by: Dangl Andreas         Object Class: PDF Document	Current Model Approve AI Chat Pipeline - Document	
Bayerisches Staatsministerium für Wirtschaft, Landesentwicklung und Energie Leitfaden zur Einführung und Weiterentwicklung eines Qualitätsmanagementsystems nach DIN EN ISO 9001:2015 ff Qualitätsmanagement für kleine und mittlere Unternehmen www.stmwi.bayern.de inhalt 1 QM-Leitfaden f	Ask Anything	1
		Close

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).

Insight App		Support X
Properties	κ Overview	× ج
	₩ × 1/2 🖑 Q Q 🖽	Q 🕹
≡ Ich bin bereit! +	Visuelle Prüfung Anna der felt Frage-dissonante bericher in Berleg anterbester	9 Chie der Hei Krepp-Umbendelung w. beid des Hei Krepp Streiten wichter au abeig antipfablict wird-
Welche Prüfmethode wurde hier angewandt? 👱 O		(1.1)
<ul> <li>Ich kann dir gerne helfen!</li> <li>Die Pr üfmethode, die hier angewandt wurde, ist "visuelle Kontrolle".</li> </ul>	Skizze	
	Beschreibung	gen (entfällt bei it im
	Ausführung durch Mitarbeiter und 2. Mitarbeiter (4-Augen-F	rinzip)
	Prüfmethode visuelle Kontrolle	
Ask Anything	Prüfkriterien Ausführung gemäß Standardablauf	
	Eskalationsszena Meldung an Teamleiter> Abklärung mit	Maictarai
		Close

# 8.1.1.4 Questionnaire: Al-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.

Fabasoft Approve		Searc	Data Locations Support Logout
년음 ☆ Tree View Favorites	Home · Fabasoft Approve Quality · Search Questionnaire Questions	RFI SKS Unternehmensgruppe     Orphaned Questions     Context Docume	rabasoft Approve
**	Object Clipboard View Tools	Versions	96 Entries unsorted 🖸 🚉
Questions RFI SKS Unternehmensgruppe	ID	Question	Answer
Generate Questions     Save Answers to Workbook     Properties	t in Europa?	Befindet sich der Serverstandort in Europa?	This answer is based on AI creative mode: The server location is not explicitly mentioned in the provided information. However, based on the context and the fact that the Fabasoft Cloud Enterprise Client is available at at.cloud.fabasoft.com, it can be inferred that the server location is likely in Europe.
	5GVO vor?	Liegt eine Zertifizierung nach DSGVO vor?	Ja, eine Zertifizierung nach DSGVO liegt vor.
88 Permissions	rare auf die Unternehmensgrö	Passt die Ausrichtung der Software auf die Unternehmensgröße von SKS?	This answer is based on AI creative mode: Die busrichtung der Software auf die Unternehmensgröße von SKS passt, da die Softwareprodukte und Dienstleistungen des Auftragnehmers auf die Bedürfnisse von Unternehmern ausgerichtet sind.
	duktionsunternehmen (Auto	Richtet sich die Software an Produktionsunternehmen (Automobil-, Sanitär-, Fahrradbranche) und passt die Ausrichtung zu dem Unternehmen SKS?	This answer is based on Al creative mode: Die Software richtet sich an Unternehmen, die sich auf die Produktion von Waren wie Automobilen, Sanitäranlagen oder Fahrrädern spezialisiert haben.
	undenbewertungen sowie allg	Die Reputation des Anbieters, Kundenbewertungen sowie allgemein die Etablierung der Software auf dem Markt Ist mir bekannt und entspricht meinen	This answer is based on AI creative mode: Die Reputation des Anbieters, Kundenbewertungen sowie allgemein die Etablierung der Software auf dem Markt ist mir

# 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: Al-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 Al. The language stored in the system configuration is automatically used as the default.

Description * The pressure regulator, a crucial component of the rotor, has suffered a failure as a result of too frequent and intense use.
Translate
Description in Corporate Language * El regulador de presión, un componente crucial del rotor, ha sufrido un fallo debido al uso excesivo y intenso.

# 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.

New Generation Pump (Project): Edit		Support	∧ ×
			^
	Reference Dates	Show Details (0)	
Project	There are no entries in this list.		
Advanced Settings	Add Entry Search and Add		_
Room Roles			
General Settings	Users/Teams not Allowed to Close Letters Type here to search for users, organizations, organizational units, teams or external organizations		
Logos			
Default Values	Restrict Purposes of Sending		
Content Settings			
E-Mail Invitations	Purposes of Sending Information For Reply Problem For Questions		11
Relations			- 1
General	Default Process for Document Item Review		
Remarks			
Versions	Default Process for Document Review	•	
Security	Default Process for Internal Document Review		
			-
	Cancel	Apply	Vext

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.

New Generation Pump (Project): Edit		Support	R	×
				•
Project	Reference Dates	Show Details (0)		
Floject	There are no entries in this list.			
Advanced Settings	Add Entry Search and Add		_	
Room Roles				
General Settings	Users/Teams not Allowed to Close Letters Type here to search for users, organizations, organizational units, teams or external organizations			
Logos				
Default Values	☑ Restrict Purposes of Sending		٦	
Content Settings			-1	- 1
E-Mail Invitations	Purposes of Sending Information			
Relations	☑ For Reply			- 1
	Problem			
General				- 1
Remarks				
Versions	Default Process for Document Item Review	-		
Security	Default Process for Document Review	•		
	Default Process for Internal Document Review			
	Cancel	Apply	Next	

# 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:

명 ☆ Tree View Favorites	Home • Fabasoft Approve Quality • Quality Manager Configur • Thesauri • Quality-VM65-Thesaurus • Quality-VM65-Top-Konzept • Top Concept Narrower Terms
~	Term Clipboard View Tools
Narrower Terms Quality-VM65-Top-Konzept	Name Name
+ Create Narrower Term	Manufacturing industry
[b] Copy	Service sector
Properties	Healthcare
00 Permissions	Construction
	Information technology
	Automotive industry
	Food industry
	Aerospace industry
	Pharmaceutical industry
	Education
	Add Entry Search and Add

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
General Settings	Default Dashboard Name
Details	Default Dashboard Class
Expressions	A Quality Manager Desinolation
Logos	Default Dashboard Form
Default Values	
Content Settings	Manage Master Data at Site Level
Encryption	
General	Default Issue Description
Remarks	
Versions	Application Areas
Security	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 Sten
	· · · · · · · · · · · · · · · · · · ·

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			
Site	Name Celeros Flow Technology			
Number Ranges				
8D Team	Default Application Area			,
Templates & Processes				
General Settings	Default Lead Time for Issues	l ead Ti	me Definition *	Show Details (1)
Logos	1 High (8D)	▼ Lead 1	Time Definition	*
Default Values	Add Entry			
Content Settings	Enabled Properties			
Encryption	BOM Item	<ul> <li>Failure Sub Location</li> <li>Failure Type</li> </ul>	PDCA State	
General	<ul> <li>Cause Identification - 5 Why</li> <li>Equipment Classes</li> </ul>	✓ Incoming Goods Object ☐ Initial State	✓ Supplier ☐ Target State	
Remarks	<ul> <li>✓ Failure</li> <li>✓ Failure Location</li> </ul>	Inspection Master Plans Material	Units	
Versions	L			
Security				

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	on (VDE Approve 0002) (Correspondence Manag	er Configuration): Edit	Support	≯ ×
	Default Form for Registered E-Mails		•	
	Intervals		Show Details (0)	
General Settings	There are no entries in this list.			
Detelle	Add Entry Search and Add			
Details				
Process Configuration				
	Documents Export Template			
Logos			• D 🕀	-
Default Values	Comments Export Template			
	· · ·		• Q 🕂	
Content Settings				
E-Mail Invitations	Action Items Export Template		• • •	
				-
General	Open Points Export Template			
Remarks			• Q +	_
Versions				
Security				
	Document Due Date Fullfilling States	_		
	Rejected	Reviewed - With Comments		
	Declined	Released - With Comments		
	Correction Requested	Approved - With Comments		
	Adjustment Requested	Outgoing Check Passed		
	Outgoing Check Failed	For Review		
	Not Submitted	Perinved		
		Closed		
		Released		
	Requested			
	Submitted			
				1
				_
		Cancel	Apply N	ext

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*.

Ec	Jit Settings for Notifications	Support	7	×
	Fabasoft Approve Correspondence Card View E-Mail			
	Letter Sent 🗹 🔽			
	Letter Recalled 🗸 🗸			
	Letter Canceled 🗹 🗹			
	Letter Restored 🗹 🗹			
	Letter Received Notification			
	Letter Reply Required Reminder 🗹 🗹			
	Case Reply Required Reminder			
	Document Changed Owner Information 🗹 🗹			
	Document Due Date Reminder			
	Document Instance Due Date Reminder			
	Action Item Changed Owner Information			
	Action Item Due Date Reminder			
	Open Point Changed Owner Information 🗹 🗹			
	Open Point Due Date Reminder 🗹 🗹			
	Document Revision Revoked			
	Requested Document Revoked			
	Document Invalidated			
	Cance	si S	ave	

# 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".

eate Purpose of Sending	Support
Purpose of Sending	
Name *	
English 👻	
•	
Description &	
English -	
•	
*	
Reply Required	
Reply Options	Show Details (0
There are no entries in this list.	
Add Entry	

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.

Purpose of !	Sending				
Name *					
English	- For Approval				
$\oplus$					
Description	*				
English (+)	→ Sends the docur	nent for techr	nical approval and expects	s an assessment from the cust	omer.
0					
Reply Re	quired				
V nephy ne	quireu				
Reply Option	ns				Show Details (3)
	State *		Set State of Original	Set Original to Final Form	
	<ul> <li>Approved</li> </ul>	<b>ب</b> +	$\checkmark$	$\checkmark$	
	Approved - With Comments	<b>م</b> •	$\checkmark$		
	B Declined	<b>م</b> •	$\checkmark$		
:	Add Entry				

# 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.

	Shelf	
Shelf	Project 谢 EN Basic - International Project	
Advanced Settings	Partner	
Room Roles	🚠 EN Partner XYZ	
General Settings	Partner Reference Number	
Logos	e Device C Mail	
Default Values	Project E-Man	>
Content Settings	Standard Users for Explicit Notifications	Additional Users for Explicit Notifications
E-Mail Invitations		Type here to search for users, organizations, organizational (
Encryption	Category	- 0
General		
Remarks	Subject	
Versions		
Security	Use Letters	Use Correspondences for Related Letters
	No Generated Names for Letters	

# 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	лх
			. '
	Street		
	Open in Google Maps		
Record	Zip Code City		
Dates			
Incoterms®	Country	۹ •	
Tasks	Telephone Numbers	Show Details (0)	
Documents	There are no entries in this list.		
History			
Remarks	Project Roles Project Role  Members	Show Details (3)	
Internal Remarks	1 Projektrolle 1 × A Millsooos Sandra		
General	3     B     Projektrolle 3     X     Neville0008 Oliver		
Remarks	Add Entry		
Versions	Internal Editor E-Mail Address		
Security		>	
	Internal Purchaser	>	
	Cancel	Apply Ne	ext

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 - Ex	terner Bereich 1 (External Room): Edit	Support	×	
				^
External Room	Estand Deer			
History	External Room			
General Settings	Records Manager List Aktenverzeichnis			
Logos	Parent			
Default Values	AV/2023/001			
Content Settings	Subject Externer Bereich 1			
E-Mail Invitations				
Relations	Project Roles With Change Access ✓ Projektrolle 1			
General	Project Dolos With Dood Access			
Remarks	✓     Projektrolle 2     ✓     Projektrolle 3			
Versions	Grant Change Access for			
Security	Type nere to search for users, organizations, organizational units, teams or external organizations			
	<b>Grant Read Access for</b> Type here to search for users, organizations, organizational units, teams or external organizations			
	Cancel Apply	Next	t	

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

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.

Shared Mailbox (Microsoft Graph E-	Mail Import): Edit	Support	⊅ ×	
	Settings			•
	Name * Shared Mailbox			
Settings	Client ID * 7fb8d69a-eade-450e-b50f-944645fa3bdf			
General	Client Secret *			
Remarks	Account Type *			
Background Tasks	Organizations Only	•		
Security	Mallbox Type * Shared Mallbox	•		
	Shared Mailbox * approvetest@02x6v.onmicrosoft.com			
	E-Mail Folder Inbox			
	Target Folder ★	• p		
	Target List * Contents	•		
	Fetch Interval 5 Minutes	Ţ		•
	Cancel Apr	oly	Next	

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.

Action		
	1	
Issue	State	
W20000-Paint Chipped on generator casing	New	
Responsible *	Due on *	
Kimble0008 Claudia	P 11/30/2023	
With Feedback?		
Short Description *		
Repaint generator casing		
Description *		
The generator casing must be repainted.		
Effectiveness Review?		

• 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.

