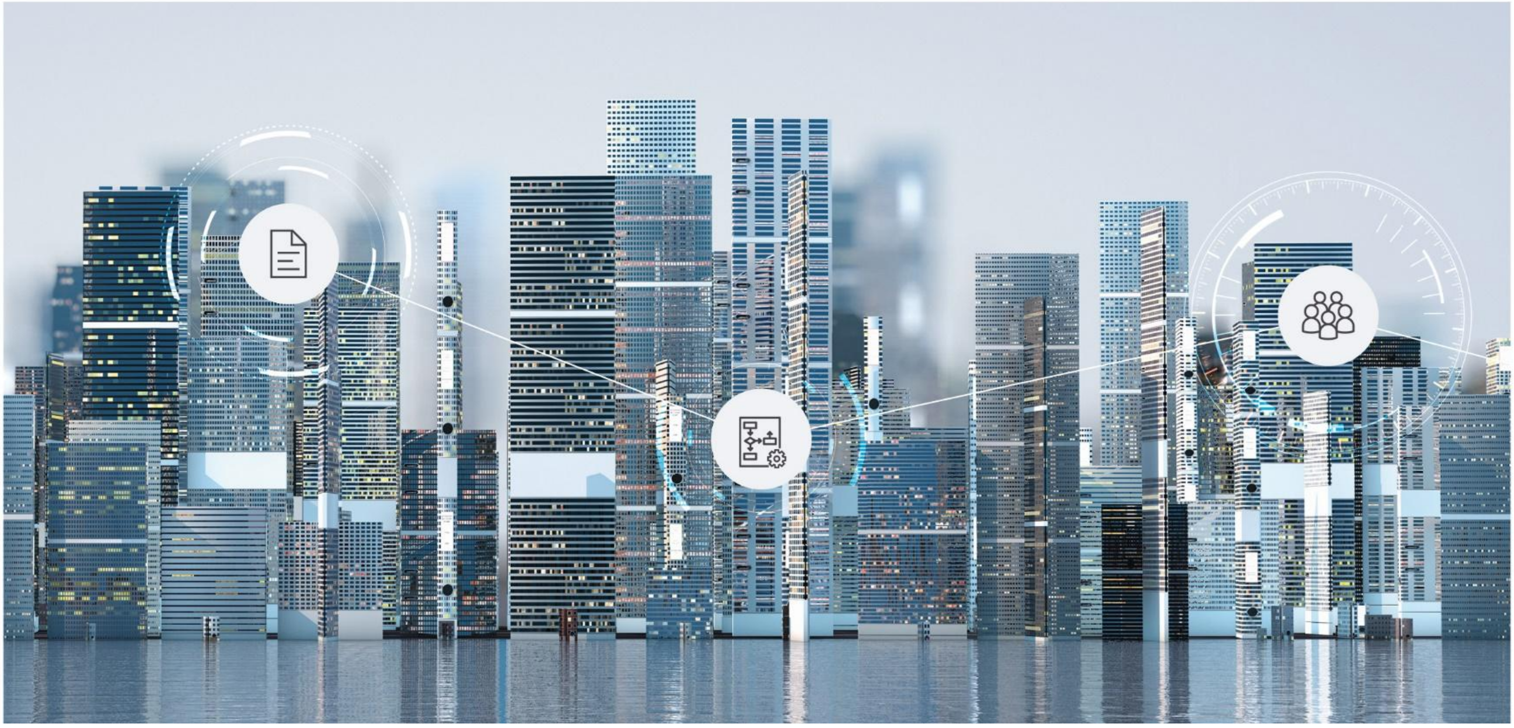


User Help

Fabasoft Folio

Contents

1 Introduction

Fabasoft Folio takes care of the consistent, secure and reliable document management within your company as well as for the implementation of digital business processes.

2 General Handling Information

The functionality available in Fabasoft Folio is configurable in many cases. Therefore, there may be deviations from the standard behavior described here.

An easy-to-use, accessible web client is available for accessing Fabasoft Folio. Further information on accessibility can be found in chapters 11 “Accessibility” and 12 “Keyboard Operations”.

2.1 Starting the Fabasoft Folio Web Client

You can access your Folio installation via the Fabasoft Folio Web Client. The Fabasoft Folio Web Client is opened like a website in your web browser.

1. Open your preferred web browser.
2. Enter the address of your Folio installation in the address bar. If you do not know the address, please contact your IT help desk.
   Note: For quick access, it is recommended that you either define Fabasoft Folio as start page in your web browser or that you add the address to your favorites.
3. Depending on the configuration of your Folio installation, you may need to log in, for example, using a certificate or user name and password.

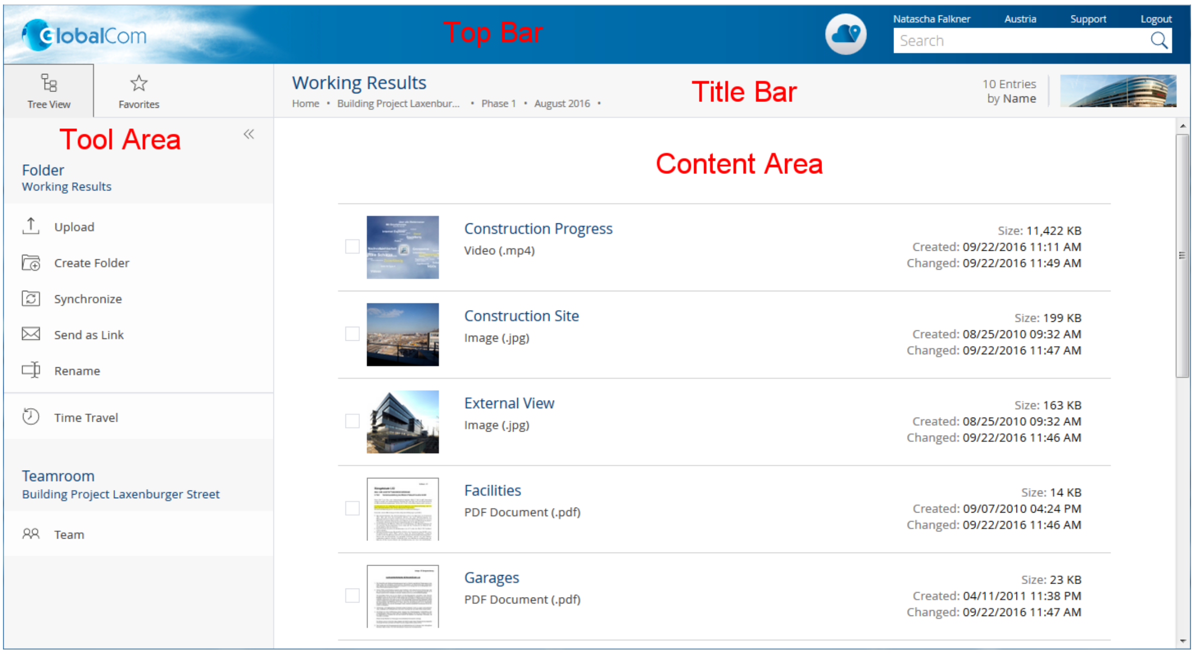
If your web browser is not optimally configured for using Fabasoft Folio, this is indicated by a warning symbol (web browser state) in the header bar. If necessary, click on the icon and follow the instructions to create the optimal configuration.

2.2 Exiting the Fabasoft Folio Web Client

The Fabasoft Folio Web Client is closed by closing all Fabasoft Folio Web Client windows. In general, you do not need to log off separately. For special authentication methods (e.g. SAML), logoff may be required. In this case, the “Logout” button is located in the top right-hand corner of the top bar.

2.3 Structure of the Fabasoft Folio Web Client

The Fabasoft Folio Web Client offers you an intuitive, easy-to-learn and individually customizable user interface that enables you to efficiently complete your daily tasks.



The web client is divided into the following areas:

- home (starting page)
- top bar
- tool area
- title bar
- menu bar (hidden by default)
- content area

Home

The dashboard concept of the home area allows you to show or hide widgets, change their size and move them.

- Personal Folder
  In your personal folder, you can store documents, folders and Teamrooms that are important for you.
- Teamrooms Shared With Me
  Contains all Teamrooms in which you are authorized as a team member. Teamrooms that you have created yourself are excluded from this list. For a better overview, the list is structured by years and months. Via the “Integrate in My Folder Hierarchy” action, you can add the desired Teamrooms to your personal folder, to your favorites or directly to “Home”.
- Favorites
  Favorites allow you to quickly access objects that you need repeatedly.
- Worklist
  Shows your worklist.

- History
  Contains the most recently used objects and most recently sent e-mails.
- Follow-Ups
  Contains your follow-ups that that fall within the period you defined.
- Other Dashboards
  Apps that offer their own dashboards are also displayed directly on “Home”.

Customizing the Home Area Individually

The following options are available for customizing your home area:

- Show or hide widgets
  The “View” menu allows you to show or hide widgets.
- Moving or resizing widgets
  You can move widgets using drag-and-drop or the context menu. You can also specify the size in the context menu of the widget.
- Storing objects on “Home”
  In addition to the widgets, you can also copy and paste important objects directly to “Home”.
- In the basic settings under accessibility, you can specify whether background images are to be displayed in the *Show Background Images in Dashboards and Home* field.
- The “Restore Standard” background context menu command can be used to restore the standard settings of the widgets (position, size, visibility).

Top Bar

In the top bar, you will find your logo on the left and the account menu (your user name), the role button, the support button, the logout button, the quick access button, the home button and the search field on the right.

Note: The buttons displayed depend on the configuration of your Folio installation.

Tool Area

The tool area is available in all widgets, but not directly on “Home”.

The context-independent tools “Tree View” and “Favorites” can be opened or closed via a quick selection. The “Actions” (e.g. “Upload”) are always at your disposal. Depending on the context, different actions are offered to you.

Up to three tool areas can be displayed next to each other (e.g. “Tree View”, “Actions” and “Permissions”). The tree view can be enlarged to make it easier to read even longer entries.

Tree View

Objects that have an object list property are displayed hierarchically in the tree view. These are, for example, folders that can contain additional folders or documents. Clicking an object in the tree view displays the object list of the corresponding object in the content area.

To display or hide all subordinate objects of an object in the tree view, you can use the “Expand All” or “Collapse All” context menu commands.

You can search for the names of objects in the tree view using the “Find entry” context menu command. The system searches the subordinate hierarchy of the object on which the context menu command was executed. The first object that matches the search criterion during the depth-first search is displayed in the content area. If necessary, the corresponding subtree is expanded to the search hit in the tree view. In the search criterion, the wildcards * (any number of characters) and ? (one character) are allowed.

If folders are opened in the content area, the hierarchy in the tree view is also opened accordingly.

Favorites

You can add frequently used objects (for example, Teamrooms or documents) to your favorites. To do so, navigate to the desired object. It is offered in the “Favorites” tool for adding.

Actions

The “Actions” tool area contains important actions that are valid in the current context.

Title Bar

The title bar contains the breadcrumbs of the currently opened hierarchy. Clicking on a breadcrumb takes you to the corresponding object. By right clicking the context menu of the object can be opened.

If you navigate in a widget, all other widgets of the same level are display as tabs.

Menu Bar

Menu commands are offered via the menu bar (hidden by default). Menu commands can either be context-independent (e.g. “User Settings”), refer to the object displayed in the content area (e.g. “New”) or to the objects selected in the content area (e.g. “Rename”).

To display the menu bar, proceed as follows:

1. Click the account menu (your user name) and then click “Basic Settings”.
2. Select the “Show Menu Bar” option.
3. Click “Save”.

Note:

- If the window width is not sufficient for displaying the menu commands, they are hidden and can be reached via the “More” button,
- Depending on the context, more buttons of important commands can be displayed if the window width allows it.
- Regardless of whether the menu bar is shown or not, the status information of the list (e.g. number of entries, sorting) is displayed. In addition, the “Refresh”, “Sort” and “View” buttons are available.

Content Area

The content area displays the content of the current object. This can be the content of a folder or the preview of a document, for example. The top level is called “Home”.

2.4 Customizing the Fabasoft Folio Web Client

To adjust the basic settings (e.g. the language) of the Fabasoft Folio Web Client, proceed as follows:

1. Click the account menu (your user name) and then click “Basic Settings”.

2. Make the desired settings and click “Save”.
   Note: When saving the basic settings, the page is reloaded to enable them.

“General” tab

- *Language*
  Defines the language of the web client.
  Note: By default, the mobile app is displayed in the device language. If the device language basically matches the user language in the basic settings, the language characteristic defined in the basic settings is preferred.
  Example: If the device language is German (Austria) and the user language is German (Switzerland), the strings for German (Switzerland) are displayed. If the device language is English (US) and the user language is German (Switzerland), the strings for English are displayed.
- *Locale*
  The selected locale affects the representation of property values such as the format of the date or the decimal separator.
- *Default Currency*
  The default currency can be considered in currency properties.
- *Show Menu Bar*
  Defines whether the menu bar is shown. The option refers to the content area. In the property editor, menu bars are always displayed, regardless of the setting.
- *Show Hints*
  Defines whether object hints are displayed in an info box.
- *Read Properties by Default*
  Defines whether the properties of an object are displayed in read-only or edit mode (for example, when using the “Properties” action).
- *Start With*
  Defines which widget is displayed initially when you start the program.
- *Show Upload Confirmation*
  Defines whether a confirmation dialog is shown when importing files.
- *Show Exit Confirmation*
  Defines whether a security prompt is displayed when closing the client by closing the web browser.

“Accessibility” tab

On this tab you can find settings that are helpful when using the keyboard and screen readers. Refer to chapter 11 “Accessibility” for more information.

2.5 Basic Terms

If you work with Fabasoft Folio, you will come across the following terms repeatedly.

- In Fabasoft Folio, you work with objects.
- Depending on the type of object (e.g. folder or Microsoft Excel worksheet), an object can store different information.
- Objects that store content (a file) are often referred to as documents.

- Objects exist independently of their visual representation in the Fabasoft Folio Web Client. In the web client, you see links or references to the objects. To avoid unnecessary complexity in the descriptions, the term object is used nevertheless.
- The properties (metadata) of an object (e.g. the name) are displayed as fields in the property editor.
- The term “field” is used for all properties (including list properties).
- Typical types of properties are: string, string list, number, date and time, Boolean property, content property, enumeration property, object property, object list, aggregate (compound property) and aggregate list.
- The context menu is the central element for executing commands.
- The context menu of an object is opened by right clicking on the object.
- The context menu of an object property is opened by right clicking on the empty object property (e.g. to insert an object from the clipboard). If an object is already contained, the context menu of the object and the object property are merged together.
- The context menu of an object list (background context menu) is opened by right clicking on an empty area of the object list.
- There is a significant difference between the frequently used instruction steps “navigating in an object” and “navigating to an object”. When you navigate to a folder “B”, its content is displayed in the content area. If you navigate to this folder “B”, the content of the parent folder “A” will be displayed in the content area.

3 Document Management

Document management covers the basic functionality of managing objects, documents and metadata in Fabasoft Folio.

3.1 Creating and Deleting Objects

By creating objects, you can save your data (metadata and content).

3.1.1 Creating an Object

To create a new object, proceed as follows:

1. Navigate in the folder in which the object should be stored.
   The folder's object list is displayed in the content area.
2. Click the “New” action.
3. Click the desired object type. A filter field is available in the top area that allows you to restrict the selection based on the name of the object type or template. If the filter term is contained in the name of a category, all object types and templates of this category are displayed. A category can be selected in the drop-down menu.
4. Depending on the selected object type, selected metadata can be entered.
5. Click “Next”.

The newly created object is stored in the object list into which you navigated previously.

3.1.2 Deleting an Object

Objects are deleted with the “Delete” command. If no wastebasket is set up, the object is deleted irretrievably. If a wastebasket exists, the item is first placed in the wastebasket, where it can be permanently deleted or restored.

To delete an object, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Delete”.
3. In the confirmation prompt, click "Yes" to confirm that the item is to be deleted or placed in the wastebasket.

Note:

- To delete an object, you need the corresponding rights.
- Some objects are protected from deletion for reasons of traceability.
- Before deleting an object, remember that this object may be required by other users. After deletion, it is no longer available for other users.
- If no confirmation prompt is displayed, the wastebasket is configured such that deleted items are placed in the wastebasket without being asked.

Excursus “Shortcuts”

Objects exist independently of their visual representation in the Fabasoft Folio Web Client. The Fabasoft Folio Web Client displays shortcuts that refer to an object.

- If you remove a shortcut to an object, the shortcut to this object is deleted. The object itself remains intact.
- If you delete an object, the object itself is deleted, regardless of how often it is referenced. Further shortcuts to this object point to nothing after deleting the object.
- If a shortcut to an object is removed, a new shortcut to the object can be inserted again using the search, for example.

3.1.3 Using a Wastebasket

If you delete an object (“Delete” command), this object is permanently deleted if no wastebasket has been set up. Otherwise, the object is placed in the wastebasket and can be restored as long as the wastebasket is not emptied.

Wastebasket Types

- A *Wastebasket* is personally available to a user (must be created).
- A *Global Wastebasket* is available for all users (must be created by an administrator). To restore an object, contact your administrator. If a global wastebasket exists, user-specific wastebaskets are ignored.
- Teamrooms have their own wastebasket. Objects that are assigned to a Teamroom are stored in the wastebasket of the Teamroom when you delete them.

Confirmation Dialogs

- If you delete an object and no wastebasket or global wastebasket is available, the following message is displayed: 'Are you sure, you want to delete “<name>“?’ If you click “Yes”, the object is permanently deleted.
- If a wastebasket is available, the following message is displayed: ‘Are you sure, you want to move “<name>” to the wastebasket?’ If you click "Yes", the object is placed in the wastebasket. As long as the wastebasket is not emptied, the object can be restored.
- If a global wastebasket is available, the following message is displayed: ‘Are you sure, you want to move “<name>” to the global wastebasket?’ If you click “Yes”, the object is placed in the global wastebasket. As long as the global wastebasket is not emptied, the object can be restored.
- You can configure the wastebasket so that deleted items are placed in the wastebasket without a confirmation prompt.

Emptying a Wastebasket

Items in the wastebasket can be permanently deleted. The following menu commands are available:

- Empty Wastebasket
  All items in the wastebasket are permanently deleted.
- Delete Expired Objects
  You can define a retention period for deleted objects in the wastebasket. All objects that have exceeded the retention period are permanently deleted.
- Delete
  Select the objects that you want to delete permanently.

Restore an Object From the Wastebasket

Objects in the wastebasket can be restored. Select the desired object and execute the “Wastebasket” > “Restore” menu command. The restored object is placed in the original folder (does not apply to the global wastebasket). If the original folder no longer exists or the global wastebasket is used, the object is moved to “Home”. The security-relevant metadata, *ACL Object* and *Referenced Object* are also restored.

3.2 Copying and Moving Objects

Objects can be copied, pasted, cut, duplicated and removed. In object lists, it is generally possible to perform the described actions on several objects simultaneously by selecting the desired objects.

The permitted object types can be restricted in fields. Not every object can be stored in every field.

3.2.1 Copying an Object

To copy an object to the clipboard, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Copy” (`Ctrl + C`).

The selected object is copied to the clipboard and can be pasted again as a duplicate or shortcut (see chapter 3.2.2 “Pasting a Duplicate” and 3.2.3 “Pasting a Shortcut”).

3.2.2 Pasting a Duplicate

The “Paste Duplicate” command inserts duplicates of the objects from the clipboard. When an object is duplicated, a new object is created with the values of the original object. Values of some fields (for example, *Change Access*) are not copied to the duplicate by default.

To insert an object from the clipboard as a duplicate, proceed as follows:

1. Copy the desired object to the clipboard (e.g. “Copy” command).
2. Navigate to the field in which you want to insert the object as a duplicate.
3. In the context menu of the field, click “Paste Duplicate”.

The object from the clipboard is inserted as a duplicate. By default, the object name is extended by the suffix “(Copy)”.

3.2.3 Pasting a Shortcut

The “Paste Shortcut" command inserts a shortcut to the object. No new object is created.

To insert an object as a shortcut, proceed as follows:

1. Copy the desired object to the clipboard (e.g. “Copy” command).
2. Navigate to the field in which you want to insert the object as a shortcut.
3. In the context menu of the field, click “Paste Shortcut” or “Paste”.

The object from the clipboard is pasted as a shortcut.

3.2.4 Cutting/Moving an Object

To remove an object from one field and insert it into another field, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Cut” (`Ctrl + X`).
   The selected object is removed and copied to the clipboard.
3. Navigate to the field in which you want to insert the object as a shortcut.
4. In the context menu of the field, click “Paste Shortcut” (`Ctrl + V`).

3.2.5 Duplicating an Object

In object lists, objects can be duplicated with a single command “Duplicate” (instead of the otherwise required two commands “Copy” and “Paste Duplicate”). When an object is duplicated, a new object is created with the values of the original object. Values of some fields (for example, *Change Access*) are not copied to the duplicate by default.

To duplicate an object, proceed as follows:

1. Navigate to the desired object in an object list.
2. In the context menu of the object, click “Duplicate”.

The selected object is duplicated. By default, the object name is extended by the suffix "(Copy)".

3.2.6 Removing an Object

When objects are removed, the shortcut to the object is removed, and the object is not deleted.

To remove an object, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Remove” (`Ctrl + X`).

Note: If an object is removed, the object can be inserted again using the search, for example.

3.3 Displaying and Editing Objects

Fabasoft Folio objects are generally available to several users. To prevent an object from being changed by several users at the same time, the object is automatically locked during editing. If another user tries to open this object while editing, a dialog indicates the object lock.

Note:

- If an object you want to open is locked by another user, you can still open it in read mode.
- Objects that are opened in read mode are not locked for editing.
- If the edit mode is not completed correctly, the object lock is released automatically after eight minutes.

3.3.1 Properties of an Object

The property editor displays the properties (metadata) of objects as fields. You can open the properties of an object using the “Properties” context menu command.

Note:

- According to the *Read Properties by Default* option of the basic settings, an object is opened in read mode or edit mode by default. If an object is opened for reading, you can switch to edit mode at any time by clicking on the “Edit” button.
- If an object is open in edit mode, it is locked for other users to edit.

Buttons

Header

- “Role”
  Defines the rights context in which you see the properties.
- “Object Role”
  Some objects (e.g. employee, user, person) can have object roles. Defines the object for which the properties are displayed.
- “Open in New Window”
  pens the property editor in a new window. This allows you to continue working in the otherwise hidden background.

Edit mode

By default, the following buttons are available in edit mode of the property editor:

- “Cancel”
  Click the “Cancel” button to cancel the editing process. Changes that have not yet been applied are not saved.

- "Apply"
  Click the "Apply" button to save the changes you have made. The property editor remains open for editing.
- "Next"
  Click the "Next" button to save changes and close the property editor.

Read mode

The following buttons are available in read mode of the property editor:

- "Cancel"
  Click the "Cancel" button to close the property editor.
- "Edit"
  Click the "Edit" button to switch to edit mode. If you have the appropriate rights and the object is not being edited by another user, the object is opened in edit mode.
  Note: This button is not displayed if the object is already locked.
- "Next"
  Click the "Next" button to close the property editor.

Display of Fields

In the edit mode of the property editor, you can change the values of the properties of an object.

- Mandatory fields
  Mandatory fields are marked with a red asterisk. They must contain a value.
- Editable fields
  Editable fields are displayed with a white background.
- Not editable fields
  Fields that cannot be edited are displayed with the background color.

Types of Properties

The most important property types are described below and how you can edit them in the property editor.

- **String property**
  String properties are fields that can contain strings. Depending on the definition, up to 254 characters can be entered.
- **String list**
  Strings can be entered in text fields with several lines.
- **Properties with date and time**
  Properties with date and time can store date and time information. The input and display format depends on the locale ("Basic Settings" > "Locale"). You can insert the current date and time by pressing the "F6" function key. You can also select the date using a calendar.
  Note: Times are stored in the database as Universal Time Coordinated (UTC) time by default. The UTC time corresponds to the time at the zero meridian (Greenwich time). Conversion to local time is performed automatically by the system.
- **Boolean property**
  A Boolean property is a property whose value can be "Yes" or "No". If the value is "Undefined", the default value for this property (either "Yes" or "No") is assumed.

- **Content property**
  Objects can also store files as property values. The files are stored in content properties. Content properties can be edited in the property editor:
  - If you want to open the file that is saved in the content property in the associated application, click the “Read” button. The content is displayed in read mode.
  - If you want to overwrite an existing file with a file from your file system, click the “Select file” button. Select the file you want to save as new content. As soon as you confirm your entry by clicking the “Apply” or “Next” button, this file is saved as the content of the object.
  - Use the “Download” button to download the contents to the file system.
- **Enumeration property**
  An enumeration property is displayed in the property editor as a drop-down list. A value can be selected from a set of predefined values.
  Note: To open the drop-down list, you can click the down arrow button or directly the field. You can then select the desired value from the list.
  It can be helpful to type the first letter or letters of the desired value on the keyboard. The appropriate entry is selected and can be accepted by pressing the `Enter` key.
- **Object property**
  Object properties are similar in appearance and behavior to enumeration properties. However, there is a significant difference. For an enumeration property, you can only select from a predefined set of values. An object property allows you to reference an object.
  The values in the list are determined dynamically. If you cannot find the desired object in the list, you can perform a search by clicking the “Search” button. Use the “Create” button to create a new object.
  Quick search
  You can perform a quick search by pressing the `Insert` key. Enter the first letters of the name of the desired object and press the `Enter` key. All matching objects are displayed. You can also use wildcards in the search query (* or ?).
- **Object list**
  A multi-valued object property is called an object list. An object list can contain several objects.
- **Aggregate (compound property)**
  Aggregates consist of individual properties. For example, the *File* aggregate consists of the properties *Content*, *Size*, etc. Compound properties allow displaying complex representations.
- **Aggregate list**
  A multivalent aggregate is called an aggregate list. The context menu buttons are available for handling aggregate lists. With these buttons you can edit, copy, paste and remove line entries. You can create new lines using the “Add Entry” button. A click on the “Show Details” button opens the full view of the aggregate list.

3.3.2 Reading or Editing an Object With Content

Depending on the object type, objects can also save a content (for example, a Microsoft Word document). The “Edit” context menu command can be used to open and modify the content directly in the corresponding third-party product and save it in Fabasoft Folio.

If you do not want to change the content, use the “Read” context menu command instead. The object is not locked and changes cannot be saved in Fabasoft Folio by mistake.

Note: You can also crop or scale images directly in Fabasoft Folio. To do this, execute the “Properties” context menu command and click “Edit” on the “Image” tab.

3.3.3 View as PDF

Objects can be displayed as PDF documents, whereby the content of the PDF document depends on the object type.

- For documents, the document itself is displayed.
- For business objects, the documents contained are displayed.
- For Teamrooms, folders and ZIP files, a table of contents is displayed.
- For other objects, the metadata is displayed.

To display an object as a PDF document, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Tools” > “View as PDF”.

3.3.4 Renaming an Object

To rename an object, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Rename”.
3. Enter a new name and click “Rename”.

The object has been renamed. Alternatively, you can rename a selected object in an object list using the `F2` function key.

3.3.5 Editing Common Properties

If you select several objects and execute the “Edit properties” context menu command, you can change the common properties of the objects simultaneously. This is possible for scalar properties (such as a string), object lists, aggregate lists, and aggregates (with scalar values).

Scalar property

- If the corresponding value is the same in all objects, the value is displayed during common editing. Otherwise, an empty field is displayed.

Object list

- If the content of the object list is the same in all objects, the content is displayed during common editing. Otherwise, an empty object list is displayed.
- If the content of the object list is the same in all objects, the old object list is overwritten by the new object list. Otherwise, you can decide whether the new objects are added to the object list or whether the old object list is overwritten by the new object list.

Aggregate list

- If the content of the aggregate list is the same in all objects, the content is displayed during common editing. Otherwise, an empty aggregate list is displayed.

- If the content of the aggregate list is the same in all objects, the old aggregate list is overwritten by the new aggregate list. Otherwise, you can decide whether new aggregate lines are added to the aggregate list or whether the old aggregate list is overwritten by the new aggregate list. If an existing key is violated during adding, the corresponding aggregate line is ignored.

Aggregate

- If the corresponding aggregate value is the same in all objects, the value is displayed during common editing. Otherwise, an empty field is displayed.

3.3.6 Showing New Events

In order to be able to trace changes in the course of time of objects, an own overview of the history is available, which can be viewed from various angles.

To display events, proceed as follows:

1. Navigate to the desired object and select it.
2. In the "Tools" menu, click "Show New Events".

An overview of past events is displayed. The “History” tab provides a textual overview. The other tab pages provide various grouping types.

3.3.7 Navigating in an Object

Objects with an object list (e.g. folders) can be opened in a separate web browser tab or window (depending on the web browser settings).

To open an object in a new window, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Open in New Window”.

3.4 Uploading, Scanning, Downloading and Synchronizing

Files can be uploaded to or downloaded from Fabasoft Folio. The following options are available for this.

3.4.1 Uploading a File

To upload files from your operating system environment to your Fabasoft Folio Web Client, following options are available:

- “Tools” > “Upload” menu command or “Upload” context menu command
- drag and drop
- clipboard (`Ctrl` + `C` and `Ctrl` + `V`)

Note:

- Depending on the web browser used, not all options are always available.
- Depending on the configuration, the confirmation dialog may not appear: “account menu (your user name)” > “Basic Settings” > “General” tab > "Show Upload Confirmation".

- In the settings of a Teamrooms, on the “Content Settings” tab, in the *Remove PDF Document Restrictions on Upload* field, you can specify whether to remove the PDF document restrictions when uploading PDF documents. A possibly defined password to open the document will not be removed.

Upload via drag and drop

Using the drag and drop feature, files, folders or folder hierarchies can be uploaded. The following description refers to a file. Folders or folder hierarchies can be uploaded the same way.

1. Locate the relevant file in your operating system environment.
2. Drag and drop the file into the Fabasoft Folio Web Client, directly onto the object into which the file is to be uploaded (e.g. a folder). If the file is dragged onto the background in the content area, it is stored in the displayed object.
3. Confirm the upload by clicking the “Yes” button.

If there is already an object with the same name in the object list, you can either create a new object or overwrite the existing one. Identically named folders can be merged.

Upload via the clipboard

Using the clipboard, files, folders or folder hierarchies can be uploaded. The following description refers to a file. Folders or folder hierarchies can be uploaded the same way.

1. Locate the relevant file in your operating system environment.
2. Copy the file to the clipboard (e.g. `Ctrl` + `C`).
3. Navigate in the target folder and press `Ctrl` + `V` (alternatively, you can use the “Paste Shortcut” context menu command).
4. Confirm the upload by clicking the "Yes" button.

If there is already an object with the same name in the target list, you can either create a new object or overwrite the existing one. Identically named folders can be merged.

Note: Screenshots can be uploaded directly into Fabasoft Folio using the clipboard, without the need to create a file beforehand. Select the field where the image should be uploaded and press `Ctrl` + `V`. This will open the upload dialog and a PNG image named “clipboardimage” is created.

Upload via the “Tools” > “Upload” menu command or “Upload” context menu command

1. Navigate in the desired destination folder.
2. In the “Tools” menu, click “Upload”. Alternatively, execute the background context menu command “Upload”.
3. Select the file. Depending on the web browser, you can select multiple files at the same time.
4. Confirm the upload by clicking the “Yes” button.

The newly created object is stored in the object list from which you started the upload process. If there is already an object with the same name in the object list, you can either create a new object or overwrite the existing one.

Uploading a file into an existing content object

A file can be uploaded to the content of an existing object using the property editor. The property editor can be opened, for example, using the “Properties” context menu command. Click the “Select File” button in the *File* field.

Alternatively, you can also execute the “Upload” context menu command of the object.

3.4.2 Downloading a Document

To download a document from the Fabasoft Folio web client, proceed as follows:

1. Navigate to the desired document.
2. In the context menu of the document, click “Download”.

Note:

- Alternatively, you can copy objects to the clipboard (`Ctrl` + `C`) and paste the corresponding files in the operating system environment (`Ctrl` + `V`).
- You can download multiple files or entire folder structures at once. To do so, select the desired objects and execute the “Download” context menu command.
- If the downloaded folder structure contains recursions, the recursion-triggering folders are downloaded only once.
- If you have installed the Fabasoft Folio Client, multiple documents or even extensive folder structures are downloaded using the Fabasoft Folio Client. Single documents are downloaded using the standard web browser functionality. You can access the downloaded documents or folders by double-clicking the corresponding entry in the automatically opened overview of the notification symbol. Alternatively, the “Show” context menu command is available. Folders with more than 200000 objects cannot be downloaded.
  In the options of the Fabasoft Folio Client, you can define the download folder.
- If you have not installed the Fabasoft Folio Client or in case of public links, folder structures are combined into a ZIP file. Note that you can download folder structures with a maximum of 1000 objects. The ZIP file must not exceed 2.5 GB in size.

3.4.3 Uploading an E-Mail from Microsoft Outlook

To upload an e-mail from Microsoft Outlook to the Fabasoft Folio Web Client, proceed as follows:

1. Open Microsoft Outlook.
2. Drag and drop the e-mail into the Fabasoft Folio Web Client, directly onto the object into which the file is to be uploaded (e.g. a folder). If the e-mail is dragged onto the background in the content area, it is stored in the displayed object.
   Note: Not every web browser supports drag and drop. Alternatively, use `Ctrl + C` to copy and `Ctrl + V` to paste the e-mail.
3. Confirm the upload by clicking the “Yes” button.
4. If the e-mail contains an attachment, you can define the way in which the e-mail text and the attachments are uploaded. The following options are available:
   - Original E-Mail (Default)
   - Original E-Mail and Attachment Separated
   - E-Mail Text and Attachment Separated

- E-Mail Text Only
- Attachment Only

Click the desired entry to upload the e-mail and/or the attachment.

The e-mail will be saved in the selected object as *E-Mail (Microsoft Outlook)*. Specific e-mail metadata is automatically taken over.

Note: When uploading e-mails from the "Sent Items" folder, the values of the *Bcc* field are only displayed if the sender e-mail address matches an e-mail address stored with the user.

3.4.4 Uploading and Downloading Contacts

For uploading and downloading contacts following functionality is provided:

- Contacts can be uploaded directly from Microsoft Outlook into Fabasoft Folio (e.g. with `Ctrl + C` and `Ctrl + V`). These contacts include both the original uploaded Outlook MSG file and a converted VCF file.
- VCF contact files can be uploaded into Fabasoft Folio (e.g. with drag and drop).
- Folio contacts can be downloaded into Microsoft Outlook, for example, using the keyboard shortcuts `Ctrl + C` and `Ctrl + V`.
- Downloaded contacts are stored as VCF files in the file system.
- When you access Fabasoft Folio via WebDAV contacts are displayed as VCF files.
- If you upload a contact and a contact with the same e-mail address already exists in Fabasoft Folio a version is created and the contact is updated. This requires that the user who uploads the contact has search and edit rights for the existing contact.

3.4.5 Uploading and Downloading Events

For uploading and downloading events following functionality is provided:

- Events can be uploaded directly from Microsoft Outlook into Fabasoft Folio (e.g. with `Ctrl + C` and `Ctrl + V`). These events include both the original uploaded Outlook MSG file and a converted ICS file.
- ICS event files can be uploaded into Fabasoft Folio (e.g. with drag and drop).
- Folio events can be downloaded into the Microsoft Outlook calendar, for example, using the keyboard shortcuts `Ctrl + C` and `Ctrl + V`.
- Downloaded events are stored as ICS files in the file system.
- When you access Fabasoft Folio via WebDAV events are displayed as ICS files.

3.4.6 Downloading an Image

Images in Fabasoft Folio can be downloaded in different formats in the file system or in the clipboard.

To download an image, proceed as follows:

1. Select the desired image in an object list.
2. In the "Clipboard" menu, click "Download Image".
3. Specify the desired width, height and target format. Following buttons are provided for the download: "Copy Image to Clipboard", "Copy Link to Clipboard" and "Download Image".

Frequently used export formats can be predefined by the administrator in the digital assets configuration and are available as own menu commands. The standard product defines the export formats “Copy Image for Presentation”, “Copy Image for E-Mail” and “Copy Link for Website”.

3.4.7 Scanning and Editing a Paper Document

Fabasoft Folio uses software from third-party manufacturers to scan paper documents and edit scanned documents. The functions in respect of scanning and editing are therefore dependent on the functions supported by the respective third-party manufacturers.

For scanning on the device, following two possibilities are provided:

First possibility:

To scan a document in Fabasoft Folio perform the following steps:

1. Navigate in the business object or the particular folder where the document should be stored.
2. On the “Tools” menu, click "Scan". Now it is waited as long as the scanner puts a file path to the scanned document in the clipboard.
3. Perform the necessary steps in the scan software. The scanned file is uploaded.

Note: Make sure that the scan software writes the file path of the scanned document automatically in the clipboard. Either this is supported directly by the scan software or you can assign the tool `copytoclipboard.exe` as post-processing step in the scan software. The tool can be downloaded here:
`https://<webserver>/<vdir>/fscasp/content/lib/copytoclipboard.zip`

Second possibility:

A document scanned on the device can be uploaded to Fabasoft Folio using the drag and drop feature. The scanned document can be stored directly in Fabasoft Folio using a web folder and “Save as”.

3.4.8 Synchronization

The Folio Folder allows you to synchronize folder structures of your Fabasoft Folio Web Client with the file system. You can synchronize either your entire “Home” or a dedicated folder.

Note:

- System administrators can enable the functionality in the user environment or the group of the user (“Advanced” tab, *Synchronization Mode* field: “No Synchronization”, “Synchronized Folder”, “Synchronized Desktop or Synchronized Folder”).
- The Folio Folder supports local NTFS 3.1 file systems on Microsoft Windows, and local HFS+ or APFS file systems on Apple macOS. Each Folio Folder is assigned to one user and one device only. Hence, several users cannot synchronize into the same Folio Folder, and one user cannot synchronize from several devices into the same Folio Folder. The Folio Folder is not supported on Microsoft Windows server operating systems.

3.4.8.1 Using the Synchronization for the First Time

Depending on the system settings you can decide whether you want to synchronize your entire “Home” or just one dedicated folder with the file system.

To activate the dedicated synchronized folder, proceed as follows:

1. Click the account menu (your user name) and then “Advanced Settings” > “Synchronization”.
2. Click the “Enable Synchronized Folder” button.
   Note: the button is only visible, if the system settings allow this.
3. Click the “Enable” button. All previously synchronized data is removed from your device.
4. Click “Close”.

The dedicated synchronized folder is automatically stored on “Home”.

Note: Deactivating the dedicated synchronized folder works in the same way (“Disable Synchronized Folder” button).

Start Synchronization

On the notification icon in the task bar, execute the “Open Folio Folder” context menu command.

- If you synchronize “Home”, the top level is synchronized to the file system. When you navigate in a folder, the contents of this folder are synchronized (at the first level). You can also synchronize entire folder hierarchies (see next chapter).
- If you use a dedicated synchronized folder, the entire folder hierarchy is synchronized to the file system by default.
- The successful synchronization is visualized by a green checkmark.

Now you can edit the files and folders either in the Fabasoft Folio Web Client or in the file system.

3.4.8.2 Selecting Folders and Documents for Synchronizing

You can select folders and documents for synchronization as follows:

- If you synchronize “Home”, the contents of the current folder are automatically synchronized and kept synchronized as you navigate through the folder structure.
  Note: If you use a dedicated synchronized folder, the entire folder hierarchy is synchronized to the file system by default.
- To synchronize an entire folder hierarchy and keep it synchronized, you can use the “Folio Folder” > “Keep Folder Up to Date” context menu command for folders.
- Synchronized folders can be excluded from synchronization using the “Folio Folder” > “Remove Local Files” context menu command. Thereby the local files of the entire folder hierarchy will be deleted. This has no effect on the corresponding objects in the Fabasoft Folio.

Note:

- Synchronization takes place automatically in the background, but can be deactivated via the options dialog of the notification icon ("General” tab > “Folio Folder” > *Offline* field).
- If you no longer need synchronization, you can remove the Folio Folder from the file system using the “Delete Folder” button in the options dialog of the notification icon.

3.4.8.3 Symbols for Visualizing the Status

Notification Symbol

The notification symbol is displayed smaller when you set the Folio Folder to “offline” or if you are not logged in. If there are several Folio Folders, the status refers to the currently selected Folio Folder.

File System

Following symbols visualize the synchronization status in the file system:

- Not synchronized
  Not synchronized folders are displayed without any special visualization.
- Synchronized
  Synchronized folders and documents are marked with a green check mark.
- Keep folder up to date
  Folders in which the entire hierarchy should be synchronized are represented with a blue border.
- Modified
  The element has been modified locally or a synchronization process is currently carried out.
- Error
  If an error occurred, the context menu provides corresponding commands under “Resolve Error”.

Note: In order that changes and errors can be easily identified, they are displayed over the entire hierarchy.

3.4.8.4 Context Menu of the Notification Symbol

In the context menu of the Fabasoft Folio notification symbol following commands that are relevant for the Folio Folder are available:

- Open Folio Folder
  Opens the folder in the local file system that was created for synchronizing with Fabasoft Folio.
- Synchronize
  Starts the synchronization process manually.

Note: If you work with different Fabasoft Folio installations, you can also choose the system that should be synchronized in the context menu.

3.4.8.5 Context Menu of the Folio Folder

In the context menu of synchronized elements the following commands are available under “Folio Folder”:

- Show in Folio Web Client
  The Fabasoft Folio Web Client is opened and the element is selected.
- Show Properties in Folio Web Client
  Opens the properties of the element in the Fabasoft Folio Web Client.
- Copy Link
  Copies the link to the respective object to the clipboard.
- Keep Folder Up to Date
  The entire folder hierarchy is synchronized and is kept synchronized.

- Remove Local Files
  The local files are removed. This has no effect on the corresponding elements in the Fabasoft Folio.
  If a folder contains unsynchronized documents, an error will be displayed. When you execute the context menu command again, the unsynchronized documents are removed and a backup is stored in `\Users\<user>\Documents\My Recovered Documents`.
  Note: If you want to cancel the download of a too large file, you can execute this context menu command on the parent folder.

3.4.8.6 Resolving a Conflict

If a document has been changed in the web client and file system simultaneously, this is detected during synchronization. For visualization, a yellow call sign is displayed on the notification icon and in the web client on the document.

To resolve the conflict via the file system, proceed as follows:

1. Click the notification icon.
2. Click “Resolve Conflict” for the corresponding document.
3. In the following dialog, you can choose whether you want to continue using the current version or the last version before the conflict. The content of the discarded version is still accessible via time travel and can be taken over manually, if necessary.

Alternatively, you can execute the “Resolve Conflict” context menu command in the web client. If you edit the document using the web client, the conflict dialog opens automatically.

3.4.8.7 Error Handling

If an error occurred, the context menu provides corresponding commands under “Resolve Error”. In order that errors can be easily identified, they are displayed over the entire hierarchy.

3.4.8.8 Document Exchange via LAN

By default, synchronization or editing documents is carried out with Fabasoft Folio. Alternatively, you can also enable document exchange via LAN.

When data in Fabasoft Folio has changed, all Folio Folders in the local network are contacted first, whether the changed data is already available locally. If this is the case, the data is synchronized over the LAN and not over the Folio installation. After the data was modified it will be stored for 20 minutes on the client to allow other clients to retrieve the edited document via LAN. Security is ensured in both cases by encryption.

To be able to use the document exchange via LAN, you have to enable it:

1. Click the account menu (your user name) and then click “Advanced Settings” > “Fabasoft Folio Client”.
2. Enable the *Allow Document Exchange via LAN* option.
3. If necessary, define trusted networks for document exchange via LAN.
   If no network is configured, document exchange via LAN is possible on Microsoft Windows in all private networks and on Apple macOS in all networks.
   If one or more networks are configured, document exchange via LAN is only enabled in

these networks (connection to the Fabasoft Folio must be possible). Define one IPv4 address or IPv4 address range per line (in CIDR notation, e.g. 198.51.100.0/24).

4. Click “Next”.

Note:

- Files will be provided via LAN without any access check, but the requesting user must know the object address, the hash and the modification date of the requesting file. Since this information must be provided by the requesting user, it is assumed that the user has access to the object within the Fabasoft Folio to retrieve the information from the server.
- The clients must be connected to both, the LAN (same subnetwork) and Fabasoft Folio.
- The communication uses the TCP port 17096 and the IP multicast address 224.0.0.202 or ff02::1 (local subnetwork). If necessary, appropriate settings must be made in the firewall. If you are encountering problems with document exchange via LAN, please contact your network administrator with this information.
  In the Windows firewall, for example, two inbound rules can be defined (one for the TCP protocol and one for the UDP protocol):
  - Program:
    `C:\Program Files\Fabasoft\Folio <version>\Client\x64\FabasoftFolioUI<version>.exe`
  - Local address, remote address, local port, remote port, authorized users, authorized computers: `any`
  - Protocol: `TCP` or `UDP`

3.4.8.9 Synchronization Exceptions

Excluded Files

To avoid the temporary files from third-party products are uploaded, there are following synchronization exceptions:

- Hidden files.
- Files that start with `~WRD`, `~WRL`, `ps` or `ppt`, followed by at least one decimal or hexadecimal (upper case) digit and followed by `.tmp` (uppercase and/or lowercase).
- Files that start with `~`, followed by an arbitrary string and followed by `.idlk`.
- Files that start with a least one decimal or hexadecimal (uppercase) digit and followed by `.tmp` (uppercase and/or lowercase).
- Files that consist solely of digits (decimal or hexadecimal digits in capital letters). However, files beginning with “00” followed by any number of decimal digits are excluded from this rule.
- Files that start with `aa`, followed by a lower-case character, followed by five digits and optionally followed by a string that also matches the previously stated rule.
- Files that start with `Icon` follow by a “carriage return” (only Apple macOS).

Note:

- The PDF representation for “Search” is not displayed.
- Folders with more than 10000 objects cannot be synchronized. A corresponding error is displayed.

Additional file information

Additional file information (e.g. file tags), such as those provided on Apple macOS, are not synchronized and will be lost.

3.4.8.10 Configuration in the Web Client

Which objects are synchronized on which devices can also be seen in the Fabasoft Folio Web Client.

1. Open the Fabasoft Folio Web Client.
2. Click the account menu (your user name) and then click “Advanced Settings” > “Synchronization”.
3. One line is displayed for each device on which you keep objects up to date. Click on the magnifying glass symbol to see the details.
   Note: You can delete all settings using the "Remove Synchronization Settings" button.
   - *Device*
     Shows the ID of the respective device.
   - *Included Objects*
     Shows the folders that are to be kept up to date.
     Note: If a folder is kept up to date, all subordinate objects are automatically synchronized.
   - *Excluded Objects*
     Shows folders that are not synchronized even if they are in a folder kept up to date.
4. Click “Close”.

3.5 Working with Documents

Documents in Fabasoft Folio are objects that save a file.

3.5.1 Editing a Document

There are various ways of editing a Fabasoft Folio document (e.g. Microsoft Word document):

- Via the “Edit” action
  Navigate in a document and click the “Edit” action.
- Via the context menu
  Execute the “Edit” context menu command on the document.
- Via the menu
  Select the document. Open the “Object” menu and execute the “Edit” command.
- Upload a content
  Execute the “Upload” context menu command on the document.

3.5.2 Saving a Document

A document is saved using the saving function of the third-party product. The document is automatically uploaded to Fabasoft Folio via the Fabasoft Folio Client.

3.5.3 Printing a Document

You can print the content of a document using the print function of the assigned third-party product (for example, for a Microsoft Word document using Microsoft Word).

3.5.4 Commenting Documents

PDF documents, images or documents that can be converted into PDF documents can be commented using an integrated PDF viewer. The comments are extracted from the PDF document and saved in a public or private layer. Thus, the document does not have to be duplicated if you want to share general comments with other team members but private comments should only be visible to you.

To attach comments, navigate in the document. In the PDF preview, use the “Comment” button to open the PDF document for commenting.

- Select “Comment Privately” or “Comment Publicly” in the toolbar.
- Use the “Drawing”, “Note”, “Text” and “Line” buttons to select the desired comment type. Depending on the comment type, further options are available.
- In the left area you will find an overview of the attached comments, which you can also delete again if necessary.

Note:

- Commented documents are marked with a status symbol.
- If the content itself changes (e.g. by replacing it with another file), the previous documents including comments are still available. The documents can be selected via a drop-down field in the PDF preview.
- When you download a PDF document with comments or execute the “Send” > “Send Commented PDF” context menu command, the PDF content is commented with the comments visible to you.
- When an AutoCAD file is printed to PDF, comments are implicitly created. These comments are not separated.
- Comments can also be attached in the two-part view of documents (e.g. in the course of registration).
- For Teamrooms, the following can be defined on the “Content Settings” tab:
    - *Allow Comments*
      Defines whether PDF comments can be added to documents of the Teamroom.
    - *Allowed Types for Comments*
      Defines the allowed types of comments (public or private).
    - *Preferred Type for Comments*
      Defines the type of comment initially selected when commenting (overrides the setting in the user's basic settings).
    - *Users With Read Access Are Allowed to Comment Publicly*
      Defines whether users with read access are allowed to add public comments.

3.5.5 Assigning Addressees to a Document

One or more addressees can be assigned to a document in the properties on the "Addressees" tab. An addressee is either an object (for example, a person) or a free text addressee, that is, an address defined individually for this document and not reusable. Addressees can be inserted into Word documents as mail merge fields, for example.

3.5.6 Inserting DocProperties or Fields

To insert a DocProperty or field into a Microsoft Word document, proceed as follows:

1. In Microsoft Word, switch to the “Fabasoft Folio” tab.
2. In the group “Document”, click “Insert text” > “Property” or “Insert Field”.
3. Select the desired property.

The property is inserted in the document as DocProperty or field.

Note:

- DocProperties are used to display metadata. Fields can also be changed in the Word document. The change is automatically saved in the properties of the object.
- This functionality is only available if the Fabasoft Folio COM add-in is activated.
- To have metadata available in a Microsoft Excel worksheet, you can enable the option *Use Fields in Microsoft Excel* on the “Contents” tab. The “Define Fields” button allows you to define the available fields and the name of the worksheet on which the values of the fields are to be included.
  The selected fields are exported to the defined worksheet and can be linked in the Excel workbook. Available columns: “Identity” (short reference), “Display Name” (tab > property name) and “Display Value” (value of the property).

3.6 Working with Object Lists

A folder is a typical object with an object list. Object lists are mainly displayed in the content area, but you can also repeatedly find object lists in the property editor.

Similar to a file manager, Fabasoft Folio offers a context menu (background context menu) in the empty area of an object list, which provides frequently used commands.

If a large number of objects is stored in an object list, not all objects are loaded at once for performance reasons. When scrolling, the corresponding areas are loaded. Operations that affect all objects in the object list are still performed on all objects.

For more information on keyboard operation, see chapter 12.5 “Content Area”.

3.6.1 Selecting Objects

You can select one or more objects in an object list to execute commands on them.

- To select an object, click in the checkbox.
  Note: Depending on the view, the checkbox may be only visible when you move the mouse pointer over the corresponding object.
- To select multiple objects in any order, hold down the `Ctrl` key while clicking.

- To select several objects in a range, click on the first desired checkbox and, while holding down the `Shift` key, click on the last desired checkbox.
- In the detail view, you can select all objects by clicking on the checkbox in the column header. With `Ctrl + A`, you can select all objects independently of the view.

For example, if you execute the “Copy” context menu command, all selected objects are copied.

3.6.2 Modifying the Order of Objects in an Object List

You can freely adjust the order of objects in an object list using drag-and-drop. To do this, the object list must not be grouped or sorted.

- Clicking on the cell in the first column of the object to be moved and holding the mouse button initiates the move.
- The object is not moved until the mouse button is released. The object can either be moved to another position in the list or in another object.
- The target for the move operation is visualized graphically by a line.
- Several selected objects can be moved at the same time, even if the objects are not in consecutive lines.
- If not all list entries can be displayed, the list is scrolled when the mouse pointer is at the top or bottom of the list. Thus, even in long lists, the desired result can be achieved with a single move operation.

3.6.3 Sorting Objects Within the Object List

The objects in an object list can be displayed unsorted, sorted in ascending order or descending order. If several columns are displayed, multiple sorting is also possible. The sorting only affects the view, the stored order of the objects is not changed and corresponds to the unsorted view.

The number of objects and the sort order are displayed in the title bar on the right-hand side. You have the following options for changing the sort order:

- Click on the “Sort” button in the title bar. In the menu that opens, you can set the sort order. Alternatively, you can also define the sort order using the background context menu.
- In the detail view, you can click on a column in the column header to sort by that column. Another click changes the sort order. A click on another column cancels the previous sorting. The sorting is visualized by an arrow symbol. The sorting can be removed via the context menu of the column in the column header (“Sort” > “No Sorting”).
- In the detail view, you can also sort by several columns. To do this, open the context menu of the first desired column in the column header and specify the sort order. Proceed in the same way for the other desired columns.
  It is sorted by the first column. If the first column contains same values, the system sorts by the second column, and so on.

Note:

- Keyboard operation: The shortcut `Alt + F9` takes you to the column header if the details are displayed, otherwise to the “Sort” button.
- Objects in unsorted lists can be moved not only by drag-and-drop but also with the context menu commands “Move” > “Prepare for Moving” and "Move" > "Move Before" or "Move After". Thus, the move functionality can also be used via keyboard operation.

- In search-based lists and in the search portal, you can also sort by specific, correspondingly indexed properties. The sortable properties can be found in the menu of the “Sort” button in the upper right corner (e.g. *Name* or *Created on/at*). In the column header, the “Sort” context menu command is only available for sortable columns. Clicking on the column header also only changes the sorting for sortable columns, otherwise nothing happens.

3.6.4 Grouping Objects Within the Object List

In the detail view, it is possible to group objects in an object list according to one or more columns. This means that even long object lists can be displayed clearly.

To group objects in an object list according to the values of a column, execute the “Group by” > “*grouping method*” command in the context menu of the desired column in the column header.

The objects are grouped together using the grouping method.

Note:

- The symbol next to the column caption indicates whether the grouping is ascending or descending. By clicking on the column in the column header, you can switch between ascending and descending grouping.
- A grouping in a column containing strings (e.g. *Name*) can also be carried out for the initial letter of the entries.
- A grouping in a column containing dates can also be carried out for year, month, day or hour.
- Keyboard operation: The shortcut `Alt + F9` takes you to the column header.

3.6.5 Column Editing in the Details View

You can edit property values displayed as columns directly in the object list.

To change a property value, proceed as follows:

1. Click the cell you want to edit.
2. Click on the cell again or press the `F2` key. This makes the field editable. Depending on the property type, you can select or enter values.
3. To end editing, press the `Enter` key or click outside the edit box.

Note: To edit the first cell, select the entire row and press `F2`.

In addition to the option of entering values in individual cells, the detail view also offers options similar to a spreadsheet program.

Editing options:

- copy (`Ctrl` + `C`, `Cmd + C`)
- cut (`Ctrl` + `X`, `Cmd + X`)
- paste (`Ctrl` + `V`, `Cmd + V`)
- delete (`Del` key)

Several non-contiguous cells within a column can be copied and pasted simultaneously. If the number of selected cells during insertion is greater than the number of selected cells during copying, the system starts again with the first value. If fewer cells are selected during insertion, only values in the selected cells are changed.

Note: On Linux no empty object pointers are copied.

The values can also be copied from Fabasoft Folio and pasted into Microsoft Excel, for example. The insertion of values from third-party applications into Fabasoft Folio is only conditionally possible (depending on the clipboard format of the third-party application).

Table Handling

The alternatively available table editing can be activated by pressing the "Table Handling" button (`Alt + F2`) in the column header. This makes the operation similar to a spreadsheet program:

- The cells are displayed with border lines.
- The hover highlighting is displayed per cell.
- Cells that cannot be edited are displayed with a gray background.
- Editing a cell is activated with `F2`, a double-click (fast and slow) or typing letters/numbers.
- A click on the object name does not open the object.

3.6.6 Calculations Within Object Lists

For numerical and currency values displayed in a column, the number (of entries with a value), the total and the average can be calculated. The "Calculate" command is available in the context menu of the column header for the corresponding column. The result is displayed at the bottom of the page.

If the list is grouped, the calculations are performed per group and displayed at the end of the group entries. For filtered object lists, only the entries displayed are used for the calculation.

If a value is changed, for example, with the `F2` key a recalculation only takes place after the list has been updated. The values of the old calculation are grayed out.

3.6.7 Data Table

The columns displayed in an object list can be copied to the clipboard as a table. This allows you to insert a textual representation of the list in Microsoft Excel, for example.

To copy a data table to the clipboard, proceed as follows:

1. Open the desired object list in the detail view.
2. In the "Clipboard" menu, click "Data Table" > "Copy Simple" or "Copy Extended". If you choose "Copy Extended", entries from displayed object lists and all values of aggregates and aggregate lists are copied as nested tables in addition to the visible columns.

Note: If you select lines, only these are copied to the clipboard.

3.6.8 Refreshing

The view of the displayed objects can be refreshed at any time. By refreshing, you bring the view displayed on the screen up to the current state. This is necessary, for example, if you work with other users simultaneously in an object list (for example, in a folder or a search folder) and want to see the latest state.

To refresh the displayed object list, click on "Refresh" in the background context menu of the object list.

Note: Almost every object list is automatically refreshed when you navigate in it.

3.6.9 Lists in the Property Editor

To reduce the complexity of the property editor and improve the overview, a simplified view is available for object and aggregate lists. The "Show details" button takes you to a full view of the list optimized for editing.

Simplified List

The reduced editing options in the simplified list provide an improved overview.

- No menu bar is displayed.
- The number of entries displayed depends on the context. In general, a maximum of 15 entries are displayed. The "Further Entries" button takes you to the full view.
- Sorting and grouping cannot be carried out in the simplified list. These are taken over by the settings in the full view.
- Only as many columns as space is available are displayed. Thus, horizontal scroll bars can be avoided.
- Thumbnails are not displayed in the detail view.
- Actions on the entries can be carried out via the context menu.
- Actions concerning the list can be offered via buttons above the list.
- Direct editing with F2 is possible depending on the list.
- If there are more entries that can be displayed on a page, the column headings are fixed.

Full List

The full list is used in particular for editing and can be accessed via the "Show Details" button of the simplified list. If the list is the only field on a tab, the full list can also be displayed directly.

- The full view makes optimum use of the window width.
- The full list offers the complete list functionality as usual.
- If there are more entries that can be displayed on a page, the column headings are fixed.

3.7 Defining the View of Object Lists

Several views are available for object lists to meet the various requirements.

For more information on keyboard operation, see chapter 12.5 "Content Area".

3.7.1 Changing the View

To change the view of an object list, open the background context menu and execute the "Change View" > "*view type*" command.

The following views are available:

- Details
  The objects are displayed as list entries with the defined column settings.
- Thumbnails
  The objects are represented by a generated preview (if possible) and the object name.

- Card View
  The objects are visualized as cards. This view can only be selected for special lists like "Personal Folder".
- Content View
  The objects are displayed as list with the most important metadata.
- Preview
  The objects are displayed as a full-page preview (if possible).

3.7.2 Adjusting Columns in the Detail View

You can use the column settings to customize columns in an object list to suit your requirements.

To add a column, proceed as follows:

1. Select the object in the object list whose properties you want to display.
2. Click "Add Column" in the context menu of the column header and select the property to be displayed from the corresponding category.

Note:

- Which properties are available as columns depends on the object selected in the object list.
- To adjust the width of one or all columns to the displayed values, use the "Size to Fit" > "This Column" or "All Columns" context menu command.
- Use drag and drop to move columns. Alternatively, the "Move to" context menu command is available.
- To remove a column, click the "Remove" context menu command.
- For object properties, properties of the referenced object can be displayed using the "Next level" context menu command.
- For aggregates, properties of the aggregate can be displayed using the "Details" context menu command.
- A separate editor is also available for defining the columns. To display the editor, open the "View" menu and execute the "Display Settings" > "Change" command.
- Keyboard operation: The shortcut `Alt + F9` takes you to the column header.

3.7.3 Freezing Columns

Frozen columns can be used to prevent columns from being hidden by horizontal scrolling. For example, the column with the name can always be visible.

To freeze columns, proceed as follows:

1. Open the context menu of the column header of the rightmost column that should be frozen.
   Note: There must be at least two columns after the last column to be frozen so that the "Freeze" context menu command is available.
2. Click the "Freeze" context menu command.

Note:

- To unfreeze columns, perform the same steps.

- The horizontal scroll bar only extends over those columns that are not frozen.
- Keyboard operation: The shortcut `Alt + F9` takes you to the column header.
- To display scrollbars for fixed columns under Apple macOS, the option “System Settings” > “Appearance” > “Show scrollbars” > “Always” must be selected. Scrolling with the “Left” and “Right” arrow keys works independently of the system setting.

3.7.4 Filtering Columns

The column filter allows you to filter the displayed entries of an object list according to the values in the respective column. The column filter can be enabled in the context menu of the column header with the “Filter” context menu command.

The column filter provides the following functionality:

- If the string in the column contains the entered filter string, the respective object is displayed.
- You can use the placeholder * for any number of characters and the placeholder ? for one character.
- When characters are entered in the filter field, the list is updated after every 350 milliseconds pause.
- It can be filtered in several columns at the same time.
- The filter can be removed by executing the “Filter” context menu command again. Alternatively, the entry in the filter field can be deleted and confirmed with the `Enter` key.
- For object, date and enumeration properties, a values filter is available in addition to the text filter. When using the text filter, all rows containing the entered string are displayed (case-insensitive). When using the values filter, all rows that correspond to the selected values are displayed.

Note:

- Keyboard operation: The shortcut `Alt + F9` takes you to the column header if the details are displayed, otherwise to the “Sort” button.
- The values filter is only offered if no element of the property path is defined as "multiple".
- The values filter for date values now has a tree structure and is therefore easier to use with keyboard and screen reader. The tree elements can be expanded or collapsed using the keyboard or by clicking on the corresponding symbol. Expanding and collapsing does not change the filter behavior and only serves to make operation easier. If subordinate tree elements have only been partially selected (for example, only one day of several in a month), then the superordinate tree elements have the status "partially selected". Clicking on a partially selected element selects all subordinate elements.

3.7.5 Display Settings

With the menu bar displayed, you can make appropriate view adjustments via the menu “View” > “Display Settings”. If “Customizing” is not enabled for you, not all options are available.

Load

Allows you to load a saved display setting or the product setting.

Reset

Restores the default display settings (only visible if the current settings differ from the default settings).

Save

The current display setting (view, columns) is saved.

Following storage options are available:

- Set Default View for All Users
- Create New Display Setting
  - *Save as*
    The display settings can be saved at different levels. The display setting actually used is determined by the following evaluation hierarchy:
    - For This Object for all Users
      If you have change rights, you can change the display setting for all users.
    - Personal Presettings
      Personal display settings are available only to yourself.
      Note: All saved personal display settings can be found under "account menu (your user name)" > "Advanced Settings" > "Presettings".
    - Room
      Display settings can be saved in the current Teamroom or shelf.
    - Configuration
      If the room is based on a configuration, the display settings can be saved in the configuration.
    - Presetting Collection
      Display settings can also be stored in a presetting collection to which you are authorized ("Customizing" required).
  - *Name*
    Assign a name to the new display setting.
  - *Define as Default for Objects of This Type*
    Defines whether this display setting is applied to new objects of this type and to existing objects whose display settings have not been changed. The display setting actually used is also determined by the evaluation hierarchy.
- Overwrite Existing Display Setting
  - *Existing Display Setting*
    Select a display setting to overwrite.
  - *Define as Default for Objects of This Type*
    Defines whether this display setting is applied to new objects of this type and to existing objects whose display settings have not been changed. The display setting actually used is also determined by the evaluation hierarchy.

Change

Allows you to define and position the displayed columns via a selection dialog. Alternatively, columns can also be added, removed and moved using the header bar.

Copy

Copies the current display setting to the clipboard.

Paste

Applies the display setting in the clipboard to the current list.

3.7.6 Using Highlighting Colors

To highlight an entry in a list, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Highlighting Color” > “*color*”.

The selected highlight color is visible to all users.

3.7.7 Enabling and Disabling Filters

You can use filters to filter object lists according to specific criteria: Objects that match the filter criteria of the enabled filter are displayed in the object list and in the tree view. Objects that do not meet the filter criteria are not displayed.

Enable filter

To enable a filter, proceed as follows (the administrator must provide filter expressions such that filters can be used):

1. Switch to the object list whose entries you want to filter.
2. In the „View” menu, click "Filter" > "*filter name*“.

The object list is filtered according to the criteria of the filter you executed. Only those objects that meet the filter criteria are displayed.

Note: Objects that are not displayed due to the filter criteria are not permanently removed from the object list. These objects are simply not displayed. If you copy a list for which a filter is enabled using the “Clipboard” > “Data Table” > “Copy Simple” command and paste it into a third-party product such as Microsoft Excel, all objects in the list are inserted and not only those objects that are displayed according to the filter criteria.

Disable filter

To disable a filter, proceed as follows:

1. Switch to the object list whose filter is to be disabled.
2. In the „View” menu, click "Filter" > "*activated filter*“.

The object list is displayed unfiltered.

3.8 Performing a Search

You can use a search to find objects and, for example, store them in a folder for further processing. In the search dialog, you define the search criteria. The result list displays the objects that match your search criteria. Objects that you select can be taken over to the object list from which you started the search by clicking the “Next” button. You can also save the specified search criteria as search form for later reuse.

Note: In order for objects to be found, you must have the “Search Object” right for these objects.

3.8.1 Searching for Objects

To perform a search, proceed as follows:

1. Click the "Find" action.
2. There are now three ways to continue the search:
   - From the *Selection* drop-down list select either an object class, a category of a user-defined form or an object aspect in the *Selection* field. When selecting a category or an object aspect, the *Detailed Selection* field is displayed, which allows you to additionally select an object class. The object classes for which the category or object aspect is intended are offered for selection.
   - Click "Next" to accept the selection.
   - In the *Suggestion* field, click the required object class. This field contains the object classes of objects that are contained in the object list from where the search was started.
   - In the *Search Form* field, click a search form to perform the search using that search form. The *Search Form* field is only offered if search forms are available for you in the current context.
3. Define the search criteria.
   For details on defining search criteria, see chapter 3.8.2 "Defining Search Criteria Using Options" and 3.8.3 "Defining Search Criteria Using Wildcards".
4. Click the "Find Now" button.
5. The search is performed according to the defined search criteria. The objects that match the search criteria are displayed as search result.
6. Select the hits that are to be copied to the object list from which the search was started.
   - To collect hits from several different searches in a common list, use the hit collection ("Collect" button). See chapter 3.8.4 "Using the Hit Collection".
   - To change the search criteria, click the "Adjust Search" button.
   - To perform a new search, click the "New Search" button.
7. Click the "Next" button to add the marked hits to the object list from which the search was started.

3.8.2 Defining Search Criteria Using Options

You can define the required values for properties as search criteria. You can specify the type of value comparison (e.g. "begins with") using the search option of the respective property.

Short description of all options

Different options are available depending on the property type.

- "equal"
  This option is used to find all objects whose value of this property is equal to the defined value.
- "not equal"
  This option is used to find all objects whose value of this property is not equal to the defined value.

- “any value”
  This option is used to find all objects whose value of this property is not empty. If this option is selected, no input is required in the input field. It is therefore displayed inactive.
- “no value”
  This option is used to find all objects whose value of this property is empty. If this option is selected, no input is required in the input field. It is therefore displayed inactive.
- “begins with”
  This option is used to find all objects whose value of this property begins with the defined string.
- “does not begin with”
  This option is used to find all objects whose value of this property does not begin with the defined string.
- “ends with”
  This option is used to find all objects whose value of this property ends with the defined string.
- “does not end with”
  This option is used to find all objects whose value of this property does not end with the defined string.
- “contains”
  This option is used to find all objects whose value of this property contains the defined string.
- “does not contain”
  This option is used to find all objects whose value of this property does not contain the defined string.
- “Full Text” Query
  If this option is selected, a full text search in string properties is performed (corresponding system configuration required). Operators like “AND” and “OR” are supported.
- “sounds like”
  If this option is selected, a phonetic search is performed. Objects will be found whose value of this property sounds like the defined string.
  Example: A search for “sounds like Meier” will return e.g. “Meyer”, “Meier”, “Maier” and “Mayr”.
- “does not sound like”
  If this option is selected, a phonetic search is performed. Objects will be found whose value of this property does not sound like the defined string.
  Example: A search for “does not sound like Meier” will return all objects except e.g. “Meyer”, “Meier”, “Maier” and “Mayr”.
- “from”
  This option is used to find all objects whose value of this property is equal or greater than the defined value.
- “up to”
  This option is used to find all objects whose value of this property is equal or lower than the defined value.
- “between”
  This option is used to find all objects whose value of this property is between the defined values.

3.8.3 Defining Search Criteria Using Wildcards

In the search query, wildcards act as placeholders for any characters or strings.

Example: A search using the string "_andy" in the *Name* field will return all objects with a name containing any character followed by the string "andy".

Wildcards

- "*" or "%"
  These wildcards are placeholders for any string.
  Examples:
  A search for "*ergy" will return results containing any string followed by the "ergy" string: "energy", "synergy", "allergy".
  A search for "berg*" will return results containing "berg" followed by any string: "bergamot", "bergenia".
  A search for "bl*d" will return results containing "bl" followed by any string and ending with the character "d": "blood", "bleed", "blond".
- "?" or "_"
  These wildcards are placeholders for exactly one character. You can either use "?" or "_".
  Example: A search for "_andy" will return results containing one arbitrary character followed by the string "andy": "Dandy", "Candy", "Sandy".
- "~"
  The wildcard tilde "~" will run a phonetic search. All objects will be determined that are pronounced similarly to the defined string. A tilde always has to be entered at the beginning of the search string.
  Example: A search for "~Maier" will return results sounding like "Maier": e.g. "Meier", "Mayr", "Maier".
- "%%" or "**"
  To perform a full text search in string properties, the wildcards "%%" and "**" can be used.
  Example: A search for "%%energy" in the *Name* field will return all objects with a name containing the word "energy".

Most options available via wildcards can also be defined via options in from the menu (see chapter 3.8.2 "Defining Search Criteria Using Options"). For the "?" and "_" wildcards, no equivalent options are available in lists.

Comparison: options and wildcards

- '"begins with" agreement' corresponds to 'agreement*'
- '"ends with" agreement' corresponds to '*agreement'
- '"contains" agreement' corresponds to '*agreement*'
- '"sounds like" agreement' corresponds to '~agreement'
- ''"Full Text" Query' agreement'' corresponds to '%%agreement'

3.8.4 Using the Hit Collection

To collect search results of several searches in one hit collection, use the "Collect" button. Thus, selected search results are collected on the "Hit Collection" tab and a new search can be performed.

To collect search results of several searches in one hit collection, proceed as follows:

1. Select the objects, which should be collected in the hit collection.
2. Click the “Collect” button.
3. Click the “Hit Collection” tab to check the listed objects.
4. You have two possibilities to continue your search:
   - Click “Adjust Search” to search for other objects of the same object type but using different search criteria.
   - Click “New Search” to search for objects of another object type.
5. Perform the search.
6. Select the objects you want to take over to the hit collection.
7. Click the “Collect” button.
8. The selected objects are added to the “Hit Collection” tab.
9. As soon as all desired hits from the different searches are collected in the hit collection, you can take them over by clicking “Next”. Thus, the objects in the hit collection will be inserted into the object list from which you started the search.

3.8.5 Creating a Search Form

To save your search criteria as a *Search Form* for reuse, proceed as follows:

1. Click the “Find” action.
2. Select the object type from the *Selection* drop-down list.
3. Define the desired search criteria.
4. Click the “Save as Search Form” button.
5. In the *Name* field, enter a meaningful name for the search form.
6. Click “Next”.

3.8.6 Making a Search Form Available

To use a search form that is not yet offered in the “Search” dialog in the *Search Form* field, proceed as follows:

1. In the „Settings” menu, click “User Settings“.
2. Switch to the “Search” tab, select the *Search Form* field and perform a search or quick search to add the search forms you want to use.
   All search forms listed in this field are offered when a search is performed.
3. Click "Next".

3.8.7 Using a Search Form

To avoid having to enter search criteria more than once (for example, for more complex queries or if a search is performed very often), you can save the search as a search form. If you perform a search and select a search form in the “Search” dialog, the search criteria of this search form are displayed pre-filled. The search criteria can still be edited if required.

To perform a search based on a search form, proceed as follows:

1. Click the “Find” action.

2. In the *Search Form* field, click the desired search form.
3. The search dialog is provided pre-filled according to the settings in the search form. If necessary, edit the search criteria.
4. Click the “Find Now” button to perform the search.

3.8.8 Defining Search Options

For example, to limit the number of hits or the search time for a search, the “Search Options” button can be used. To make this button available in the search dialog, select the *Show Search Options* option (“Settings” > “User Settings” > “Search” tab).

To edit the search options of a search, proceed as follows:

1. Click the “Search Options” button.
2. Define the desired settings. The following search options are available:
    - *And Derived Classes*
      Defines whether it should also be search for derived object types. For example, contact persons are also taken into account when searching for persons.
    - *Object Limit*
      Defines the maximum number of objects that are displayed as hits.
    - *Time limit (sec)*
      In this field you can limit the search time. If a time limit is defined here, the search is terminated after this time limit has expired. All hits determined so far are displayed in the hit list.
    - *Choose Domains for Search*
      Here you can select the Fabasoft Folio domains to search in.
3. Click "Next" to accept your settings for the current search.

3.8.9 Performing a Quick Search in Object Lists

To add an object to an object list in the property editor, a quick search can be performed in the search field. This simplified search only searches for a character string without specifying an object type or further search criteria. If returned entries are not unique, the properties of the objects found can be viewed via the context menu.

Note: The “Search and Add” button is only displayed in object lists in which objects may be inserted.

To perform a quick search in the search field, proceed as follows:

1. Click the “Search and Add” button.
2. Select the desired search mode by clicking on the search symbol.
    - When using the Folio search, only the names of objects are searched for.
    - When using the Mindbreeze search, a full text search is performed. In a full text search, the entered character string is searched in all contents and properties of the object, not only in the object name.
3. Enter the string you want to search for. In a quick search, the character string entered is interpreted as the beginning of the name by default. You can also use wildcards (for example, *).

4. Press the `Enter` key to perform the quick search.
5. All objects whose names correspond to the defined character string are displayed as the result. Select the desired entry from this list of results by clicking it.
6. The entry is taken over to the object list in which you started the quick search.

3.8.10 Performing a Quick Search in Object Properties

A quick search can be performed directly in object properties. The “Search” button next to a drop-down list indicates that you can perform a quick search.

To perform a quick search in object properties, proceed as follows:

1. Click in the field.
2. To perform a standard quick search, press the `Insert` key. In this case, the system only searches in the name of the objects.
   To perform a full text search, press `Ctrl + Ins`. In a full text search, the entered character string is searched in all contents and properties of the object, not only in the object name.
   This way the field becomes editable.
   Note: To cancel a quick search, press the `Esc` key.
3. Enter the string you want to search for. In a quick search, the character string entered is interpreted as the beginning of the name by default. You can also use wildcards (for example, *).
4. Press the `Enter` button to perform the quick search.
5. All objects whose names correspond to the defined character string are displayed as the result.
   Select the desired entry from this list of results by clicking it.
6. The entry is copied to the object property in which you started the quick search.

If you could not find the desired object using the quick search, you can still open the search dialog using the “Search” button, to perform a search using further search criteria.

3.8.11 Performing a Full Text Search

You can use the following full text search options (with the appropriate system configuration):

- Full text search in content properties
  The content property of documents can be searched for specific words (for example, a full text search can be performed in the content of a Microsoft Word document). All objects that contain the words searched for in the content are displayed as hits.
- Full text search in string properties
  String properties can also be searched for specific words, such as the names of objects. All objects that contain the searched words in the string property are displayed as search results. For the full text search in string properties, the option ‘“Full Text” Query’ is available in the menu of the search dialog.
- Full text search in the search field (see chapter 3.8.9 “Performing a Quick Search in Object Lists")
- Full text search in object properties (see chapter 3.8.10 "Performing a Quick Search in Object Properties")

Performing a Full Text Search in Content Properties

To perform a full text search in content properties, proceed as follows:

1. Click the “Find” action.
2. Select the object type from the *Selection* drop-down list.
3. Click “Next”.
4. Switch to the “File” tab.
5. Enter the search criteria in the *Content* field.
   - It is possible to combine search criteria with operators (e.g. “AND”).
   - Full text searches can take a lot of time. Therefore, it makes sense to limit the search criteria as far as possible.
6. Click the “Find Now” button.

All objects that you can search for and that contain the specified search criteria in the content property are displayed as result.

Performing a Full Text Search in String Properties

To perform a full-text search in string properties, proceed as follows:

1. Click the “Find” action.
2. Select the object type from the *Selection* drop-down list.
3. Click “Next”.
4. In a string field (for example, *Name*), enter the required search criteria.
5. Select the '“Full Text” Query' option to perform the search as a full text search (see chapter 3.8.2 “Defining Search Criteria Using Options”). It is possible to combine search queries with operators (e.g. "AND").
6. Click the “Find Now” button.

All objects that match your search criteria are displayed.

3.8.12 Performing a Research

The research is a special variant of search. You can use a simple search form (standard case: one search field) to carry out a preconfigured search for objects of different types in one step.

Note: A research is defined by a *Research Configuration* object. In most cases a *Research Configuration* is created by the system administrator.

To carry out a research, proceed as follows:

1. In the „Tools” menu, click “Research“.
2. Select the research configuration to be used from the *Selection* drop-down list.
   Note: This intermediate step only exists if more than one research configuration is available.
3. In the *Search for* field, enter the required search criteria.
4. The result of your research is displayed.
5. Select the objects to be taken over to the object list from which the search was started.
6. Click "Next".

3.8.13 Search With Mindbreeze

You can perform a full-text search using the search field in the top bar (`Alt + 4`) or via the search portal (“Search” widget on Home).

To perform a search, proceed as follows:

1. Enter the desired search term in the search field and press “Enter”.
   Note: The search is not case-sensitive. If you start directly in the search portal, you can, if necessary, narrow down the search criteria even before you perform the search. The following search criteria are offered as standard, which can be extended depending on the object types found:
   - Where
     The objects found must belong to the specified context.
   - Date
     The objects found must have the specified change date.
   - Type
     The objects found must be of the specified type (e.g. text document).
   - Contained in Teamroom
     The objects found must be assigned to the specified Teamroom.
2. The search result is displayed in the search portal. Only results on which you have search rights are displayed. You can use the search criteria to further restrict the search (e.g. to Teamrooms or types).

Note:

- In the search result, next to the search field, you can select the type of conjunction of the search terms: AND (all terms), OR (one of the terms), NEAR (all terms close to each other).
- In the result list, you can sort by specific, correspondingly indexed properties. The sortable properties can be found in the menu of the “Sort” button in the upper right corner (e.g. *Name* or *Created on/at*). In the column header, the “Sort” context menu command is only available for sortable columns. Clicking on the column header also only changes the sorting for sortable columns, otherwise nothing happens.
- The “Save Search Query” action allows you to save the search term and the currently selected search criteria under a freely selectable name.
- The "Saved Queries” > “<name>” action allows you to execute a saved search query. The last five search queries or the last five favorite search queries are displayed.
- The “Saved Queries” > “Further Search Queries” action allows you to view a list of all search queries. By clicking on a search query, it will be executed. In addition, you can rename, delete and mark search queries as favorite via the context menu.
- The “Save Search Result” action can be used to persist the search result in a "saved search result". You can select whether you want to remove entries that are already contained. Thus, you can easily perform a research even if there are many hits. To display the saved search result, you can use, for example, the “Open in New Window” context menu command.

The Mindbreeze query language offers the following possibilities. The listed options can also be combined.

Option	Example

Search for a term `term`	Objects that contain a text with the term “Contract” `contract`
Not included `NOT term`	Objects that contain no text with the term “Contract” `NOT contract`

Search for a whole word or an exact phrase
`"word1"`
`"word1 word2 word3"`
	Objects that contain a text with the phrase “Contract with Fabasoft”
	`"contract with fabasoft"`

AND operator
`term1 term2 term3`
or
`term1 AND term2 AND term3`
	Objects that contain a text with the terms “Fabasoft” and “Contract”
	`fabasoft contract`

OR operator `term1 OR term2 OR term3`	Objects that contain a text with the term “Fabasoft” or “Contract” `fabasoft OR contract`
Precedence of logical operators by brackets `(term1 OPERATOR term2) OPERATOR term3`	Objects that contain a text with the term “Fabasoft” or “Mindbreeze” and the term “Contract” `fabasoft OR mindbreeze) AND contract`
Term near to another term `term1 NEAR term2`	Objects that contain a text with the term “Fabasoft” near the term “Contract” `fabasoft NEAR contract`
Ranking in the search result (importance of terms) `term1^number term2`	In the search result ranking, the occurrence of the term “Contract” is rated twice as highly as “Fabasoft” `contract^2.0 fabasoft`

Search for defined fields
`metadata:term`
The following metadata is generally available:
Object
• `title` (Name)
• `objsubject` (Subject)
• `objcreatedby` (Created by)
• `objchangedby` (Last Changed by)
• `objterms` (Terms)
• `objteamroom` (Teamroom)
	Objects that contain the term “Contract” in the subject
	`objsubject:contract`
	Content objects with “DOCX” or “MSG” extension that contain the term “faba”
	`faba (extension:docx OR extension:msg)`
	Content objects with size between 5 KB and 10 MB
	`mes:size:[5KB TO 10MB]`
	Content objects with a 2020 change date
	`mes:date:[2020-01-01 TO 2020-12-31]`
	E-mail objects sent from “Jones”
	`from:jones`

• `objprimaryrelated` (Origin) • `objfile` (File) • `objappconfigurationroom` (App Configuration) • `objroomapp` (App) • `organization` (Organization) **Content** • `content` (Content) • `extension` (File Extension) • `mes:size` (File Size) • `mes:date` (Change Date) **E-Mail** • `subject` (Subject) • `from` (From) • `to` (To)	

3.9 Working with Versions

Versions reflect the status of an object at a certain point in time. By creating versions, you can later return to a previous point in time and view the status of the object at that time. Several versions of an object can exist. Even if several versions of an object are available, the object itself only exists once (versions are part of the object).

An object has at least one version: the “current version”. Versions can be created by explicit or automatic versioning. Each object has a “Versions” tab that contains information about the versions of the object. Explicit versions are created by executing “Save Version” from the “Versions” menu. Automatic versions are created, for example, when changing users or when adding a signature (configurable). This ensures that the processing is clearly traceable.

Note: Only the current version can be edited. All other versions of an object save a status that can no longer be changed.

To view the versions of an object, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Properties”.
3. Switch to the “Versions” tab.

The “Versions” tab contains the following fields:

- *Version Number*
  The version number is a consecutive number that starts at one and is increased by one for each version. If the version number displays the number one, only the current version of this object exists. The list of *Object Versions* is therefore empty.
- *Version Started on/at*
  Shows the creation date of the currently viewed version.

- *Released Version Date*
  Shows date and time of the released version.
- *Current Released Version Date*
  Always shows the date and time of the current release version, regardless of which version is currently being viewed.
- *No Automatic Deleting of Versions*
  Settings in this field determine whether versions are deleted automatically. Automatic deletion can occur if a configured time span or the defined *Maximum Number of Versions Kept* has been exceeded.
- *Maximum Number of Versions Kept*
  Defines the maximum number of versions stored for this object. If the number is exceeded, the oldest version is deleted.
- *Days After Which Older Versions Are Automatically Deleted*
  Defines after how many days versions are deleted automatically.
- *Object Versions*
  In this list the versions of the object are displayed. The basic data of the versions is displayed. This includes the *Version Number*, the *Description* as well as the information whether the version was created manually or automatically. The current version is not displayed in this list field.

A version always includes all properties of the object (both structured properties and content properties).

The following sections provide explanations of the individual menu commands in the “Versions” menu.

3.9.1 Using a Version

To make a version of an object available for reading, proceed as follows:

1. Select the object, of which you want to read versions.
2. In the „Versions” menu, click “Use Version“.
3. The object versions are listed in the *Object Versions* field.
   There are two different ways to provide a version in read mode:
   - In the *Saved on/at* column of the *Object Versions* field, click the creation date of a saved version. Thus, the current dialog closes and the selected object version is available in read mode.
   - In the *Date/Time* field, type the date of which you want to read the version. Click “Next” to obtain the object version, which was active at the specified time.

A clock symbol indicates that not the current version but an older version is available in read mode.

Note:

- If you move your mouse pointer over the clock symbol, the creation date and the version number is displayed.
- The displayed version only affects the respective user and has no effect on other users.

3.9.2 Using the Current Version

If an object is displayed in a previous, non-editable version, this is indicated by a clock symbol.

To return to the current, editable version, proceed as follows:

1. Select the object, which is displayed in a previous version.
2. In the „Versions" menu, click "Use Current Version".

The object is available again in the current, editable version. You can recognize this by the fact that the clock symbol no longer exists.

3.9.3 Saving a Version

To save the current state of an object as a version, proceed as follows:

1. Select the object, of which you want to save the current version.
2. In the „Versions" menu, click "Save Version".
3. Type a description of the version in the *Description of Version to Be Saved* field.
4. Click "Next" to save the version and start a new version.

Note: A version always covers all properties of an object (structured properties as well as content properties). Thus, it is possible to create a version of an object with object list (e.g. of a folder). Whether the objects in the object list are versioned depends on the superordinate object. For example, objects in a folder or Teamroom are versioned.

3.9.4 Restoring a Version

To restore an object version, the "Restore Version" command is available. By restoring a version, the current version is overwritten by a previous version. The previous version is as current version editable again.

To restore a version, proceed as follows:

1. Select the object, of which the version should be changed to a previous version.
2. In the „Versions" menu, click "Restore Version".
3. In the *Saved on/at* column of the *Object Versions* field, click the creation date of a previous version to make this version to the current version.
4. Click "Yes" to confirm that the selected version is taken over as current version.

Note: The state of the object before the version was restored is lost after restoring a version. If you want to save the current state of the object, you have to create explicitly a new version before restoring the object.

3.9.5 Deleting a Version

To delete a version, proceed as follows:

1. Select the object, of which a version should be deleted.
2. In the „Versions" menu, click "Delete Version".
3. In the *Saved on/at* column in the *Object Versions* field, click the creation date of a previous version to delete this version.
4. Click "Yes" to confirm that the selected version should be deleted.

Note: You can only delete versions of an object, if you have the appropriate permissions.

3.9.6 Releasing a Version

If a version of an object has been released, the following applies:

- Users with the right “Read Non-Released Version” can access the current version. To all other users with at least read access the released version is displayed.
- If an object has a release version and the current version of the object is displayed, it is visualized by a double check mark.
  The release version can be accessed via the menu command “Versions” > “Use Release Version”.
- If an object has a release version and the release version of the object is displayed, it is visualized by a single check mark.
  The current version can be accessed via the menu command “Versions” > “Use Current Version”.
  Note: Users who can only access the release version cannot access the current version.
- Under “Settings” > “User Settings”, on the “General” tab, in the *Use Release Version by Default* field can be defined whether users with write access also get the release version displayed by default.
- If it is tried to edit a release version, the editing process may be started directly with the “Edit Current Version” button without the need for switching explicitly to the current version beforehand.

To release a version, proceed as follows:

1. Select the object, of which a version should be released.
2. In the „Versions” menu, click “Release Version“.
3. In the *Saved on/at* column of the *Object Versions* field, click the creation date of a previous version to release this version.
   Note: You can revoke this released version if you click “Release Version” again and then “Do Not Use Released Version”.

3.9.7 Displaying Modifications to Content

For some documents, e.g. Microsoft *Word Document,* it is possible to compare the content of versions. Therefore, a third-party product, e.g. Microsoft Word, is used.

To compare versions of a *Microsoft Word Document*, proceed as follows:

1. Select the object, of which versions should be compared.
2. In the „Versions” menu, click “Show Content Modifications“.
3. Select the two versions, which you want to compare.
   Note: If you want to compare a previous version and the current version, select only one version.
4. Click “Compare Contents”.

The differences of the versions are displayed in Microsoft Word.

Note: To use this functionality with LibreOffice as a third-party product, the LibreOffice buttons must be installed.

3.9.8 Time Travel

The time travel is another way to view versions in the past. Via the "Time Travel" > "Start Time Travel" action you can start the time travel. Use the timeline to reach easily and quickly the desired point in time.

- "Start Time Travel", "Continue Time Travel", "End Time Travel"
  Select the version you want to view or end the time travel. As an alternative to selecting a version, you can specify a point in time.
- "Save Current Version"
  Saves a version of the current state. The version can also be treated as "release version". This way, team members with read access can only see this version. A new release version replaces a possibly present release version.
- "Clean up Versions"
  You can delete versions that are no longer needed.
  - *How many versions should be kept?*
    You can define the maximum number of versions you want to keep.
  - *How many days versions should be kept?*
    You can define how many days the versions should be kept at maximum.
  - *Apply these rules automatically*
    You can specify that in the future too many or too old versions will be automatically deleted.
    Note: To disable automatic execution, run the "Clean up Versions" action again. Remove all values, disable this option and click "Clean up".
  - "Select Versions"
    You can explicitly select and delete versions via the "Select Versions" button. The button is displayed if there are at least two versions.
- "Compare"
  Compares the selected version with an arbitrary other version. The contents of Word documents can also be compared.
- "Restore"
  The current version is replaced by the selected version.
- "Delete"
  You can delete the currently displayed version that is no longer needed.

Note: The timeline is not operable with the keyboard.

3.10 Indexing Based on Terms (Thesaurus)

Fabasoft Folio supports extensive indexing of objects in the sense of terms, which enables topic-specific searches or researches using terms.

3.10.1 Indexing an Object

To index an object, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click "Properties".
3. Switch to the "General" tab.

4. In the *Terms* field select existing terms or create new ones.

Note:

- Depending on the object type, the *Terms* field can also be placed on another tab.
- The *Terms* field is not available for all object types.

3.10.2 Creating a Thesaurus

A thesaurus allows creating and maintaining a systematically organized collection of terms of a specific field. A term can be set in relation to other terms: *Broader Terms*, *Narrower Terms*, *Related Terms*, *Synonyms* and *Homonyms*.

To create a thesaurus, proceed as follows:

1. Click the “New” action.
2. Select “Thesaurus” entry and click “Next”.
3. Enter the *Multilingual Name* of the thesaurus and optionally a *Scope Note.*
4. Click “Next”.

3.10.3 Importing or Exporting a Thesaurus

The “Import from File” and “Download as RDF” context menu commands can be used to import and export a thesaurus in RDF format (Resource Description Framework).

With a repeated import, you can determine whether existing and possibly changed names of terms are overwritten. The terms are identified via the import URI (“Relations” tab).

Note: If an RDF file contains multiple thesauri, all contained thesauri are imported or updated.

3.10.4 Creating a Term

To create a term, proceed as follows:

1. Navigate in a thesaurus or an existing term.
2. Click the “Create Top Concept” or “Create Narrower Term” action.
3. Enter the *Multilingual Name* of the term and optionally a *Scope Note.*
4. Click “Next”.

3.10.5 Searching for Objects Using a Term

You can search for objects using terms. You simply enter the respective term as a search criterion. When entering a term as a search criterion you can stipulate whether the term for the desired hits needs to match the term perfectly or related terms should also be considered.

To search for an object using a term, proceed as follows:

1. Click the “Find” action.
2. Select the type of the object you want to search for and click “Next”.
3. Switch to the “General” tab.
4. In the *Terms* field, select a term. In the *Including* field, you can also specify a relationship to other terms.

5. Click the “Find Now” button.

3.10.6 Releasing Terms

Terms can be released for usage for different groups by defining access rights (ACLs) accordingly.

3.11 Templates and Template Collections

Templates make daily work easier. They allow you to reuse content and metadata of objects that are defined as templates stored in a template collection. Any objects, but especially documents, can be used as templates. If an object is created based on a template, the template object is copied so that the contents and metadata of the template are copied to the newly created object. The copy can then be edited independently of the template.

3.11.1 Managing Template Collections

Multiple template collections can be created. However, so that the templates of a template collection are displayed in the “create” dialog, the template collection must be referenced by an administrator in the working environment, in the user object, in the group of the user, in a position, in a structure unit or in the current domain. These template collections can be easily accessed via the "Template collections" submenu in the "Settings" menu.

Note: Template collections can contain additional template collections, which supports the structured management of large amounts of templates.

3.11.2 Creating a Template Collection

Authorized users can create a new template collection. Objects to be used as templates are stored in a template collection.

To create a template collection, proceed as follows:

1. Click the “New” action.
2. Select the “Template Collection” entry and click “Next”.
3. Enter a *Multilingual Name* of the template collection and click “Next”.
4. Navigate in the template collection.
5. Add objects that should be available as templates.

3.11.3 Categorizing a Template Collection

The categorization of template collections is used to group templates (potentially large numbers of them) in the “create” dialog.

To categorize a template collection, proceed as follows:

1. Navigate in the template collection.
2. Click “Categories”.
3. Add existing categories or create new ones.

3.11.4 Creating and Editing a Template

Templates are objects that are stored in template collections and can be used as a pattern to create new objects.

Technically speaking, templates are no different from other objects.

3.11.5 Creating an Object Using a Template

To create an object using a template, proceed as follows:

1. Click the “New” action.
2. Select the category of the template.
3. Select the desired template and click “Next”.

3.12 Managing a Classification System

A classification system is a hierarchical arrangement of files, which define defaults for new business objects (short form, responsibilities, standard process and retention periods) according to the assigned category.

3.12.1 Create a Category

A *Category* is used to categorize business objects.

To create a *Category*, proceed as follows:

1. Click the “New” action.
2. Select “Category” and click “Next”.
3. Edit the metadata of the category (for example, *Multilingual Name*, *Short Form*, *Standard Process/Activity* and *Life Cycle Rules*) and click “Next”.

3.12.2 Assign a Category to a New Business Object

A category can be assigned to every business object while creating the respective object. In the *Category* list of the business object, select an existing category or click the “Create” button to create a new category.

Note:

- If a business object is created by selecting a template, the *Category* field of the new business object is pre-filled with the category of the respective template.
- The defaults in respect of short form, responsibility, standard process and save rules will be taken from the selected category.
- The assigned category and the respective defaults can be individually adjusted until the business object is created.

3.12.3 Create a Subject Area

A subject area is a folder for which the possible categories are defined (using the *Available Categories* property).

To create a subject area, proceed as follows:

1. Click the “New” action.
2. Select the “Folder” entry, enter a name and click “Next”.
3. In the context menu of the folder, click “Properties”.
4. On the “Folder” tab, in the *Available Categories* field, select the desired categories.
5. Click “Next”.

3.13 Configuring User Settings

You can use the user settings to adapt Fabasoft Folio to your needs.

To edit the *User Settings*, proceed as follows:

1. In the „Settings” menu, click “User Settings”.
2. Define the desired settings.
3. Click “Next”.

Following settings are available:

General Settings

- *Show Hints*
  Defines whether an info box is displayed when you move the mouse pointer over a selected object.
- *Read Properties by Default*
  Defines whether an object is opened in read or edit mode, when opening it via the “Properties” command.
- *Show Upload Confirmation*
  Defines whether a confirmation dialog is displayed when uploading files.
- *Show Exit Confirmation*
  Defines whether a confirmation dialog is displayed when closing Fabasoft Folio.
- *Use Release Version by Default*
  Defines whether users who are allowed to read not released versions see the release version by default.
- *Days After Which a New Version is Automatically Started*
  Defines the number of days after which a new version is automatically started if it is only changed by the same user.
- *Enable Domain Selection During Create*
  If objects can be created in several domains, the selection possibility of a domain can be enabled.
- *User Profile*
  In this field a user profile can be selected if several user profiles are available. A user profile defines which object types can be created or searched for and which menu entries, form pages, categories, event types, portal pages, process and activity definitions are available.
- *Available User Profiles*
  In this field administrators can define which user profiles are available.
- *Show Welcome Screen*
  This field defines whether starting the Fabasoft Folio web client a window with news, web browser state and account activity information is displayed.

Note: The welcome screen is only displayed, if the administrator activates the welcome screen for the Fabasoft Folio Domain in the vApp configuration.

Accessibility

Screen reader users should consider following settings.

- *Play Acoustic Signals*
  Defines whether acoustic signals are played for successful processing steps, errors and questions.
- *Include All fields in Tab Order*
  Defines whether read-only fields are also included in the tab order.
- *Use Advanced Mode for Prescriptions per Default*
  Defines whether the advanced mode suitable for keyboard operation is used.
- *Show Alternative Text for Highlighted Fields*
  Defines whether highlighted fields are marked textually.
- *Prepare Foreign Language Expressions for Speech Output*
  Defines whether well-known English terms are specifically marked to ensure correct pronunciation.
- *Increase Contrast*
  Defines whether the user interface is displayed with increased contrast.
- *Show Background Images in Dashboards and Home*
  Defines whether the background image is displayed.
- *Preview in the Document View*
  The preview can be displayed either as a PDF or as an image.

Localization

- *Language*
  Defines the language of the user interface.
- *Locale*
  The local affects the display of numbers, currencies, date and time.
- *Multilingual Input*
  Defines whether a list of languages is available for multilingual strings. Otherwise only the string of the language of the user environment is displayed.
- *Default Currency*
  In this field a currency can be selected, which is used for all entered amounts of money by default.
- *Disable Currency Symbol*
  Defines whether the currency sign is displayed or not.
- *Reference Currency*
  In this field a currency can be selected, which acts as a reference.
- *Disable Reference Currency Symbol*
  Defines whether the reference currency sign is displayed or not.

Search

- *Extended Search for Object Pointer Properties*
  Defines whether the search symbol (magnifier glass) is displayed beside object pointer properties.

- *Search Defaults*
  In this field, settings for the search are defined.
  - *Object Limit*
    Defines the maximum number of objects in the search.
  - *Time Limit (sec)*
    Defines after which period a search is aborted. If a search is aborted, the objects found so far are displayed in the result list.
  - *Query Scope*
    Restricts the search scope (e.g. COO stores).
  - *Show Query Text*
    Defines whether a user can edit a search query.
  - *Show Search Options*
    Defines whether the advanced search options are available.
- *Search Forms*
  In this field saved search forms are displayed.

E-Mail

- *Use Access via Send by Default*
  This field defines whether the recipient automatically gets rights to objects when sending object pointers. The receiver is entered in the field *Access via Send* on the "Security" tab of the object. The kind of rights granted to the object is defined by the ACL entry "(Access via Send) COOSYSTEM@1.1:objsecdelegated".
- *E-Mail Settings*
  In this field settings for e-mails are defined.
  - *Use Formatted Text*
    Defines whether formatted text is inserted into e-mails when objects are sent.
  - *Open "E-Mail (Microsoft Outlook)" as*
    Defines whether Outlook e-mails are opened in MSG format or in MIME format.
  - *Open "E-Mail (MIME)" with Microsoft Outlook*
    Defines whether MIME e-mails are opened with Microsoft Outlook by default.

Workflow

- *Activities for Current Role Only*
  Defines whether only activities that match the current role are displayed in addition to personal activities.
- *Define Deadlines as Timespan in Days (Instead of a Date)*
  Defines whether deadlines are specified as time span in days instead of a date.
- *Show Deadlines for Prescriptions per Default*
  Defines whether the deadline fields are displayed by default when prescribing.
- *Use Advanced Mode for Participants per Default*
  Defines whether the tabular mode is used for prescriptions. The graphical process editor displayed by default is not suitable for keyboard operation.
- *Show Advanced Properties for Activities*
  Defines whether additional properties are displayed for activities that are generally not user-relevant.

- *Show News About New Activities on the Welcome Screen*
  Defines whether news about new activities in the worklist is displayed in the welcome screen.
- *Automatically Open the Next Activity After Finishing an Activity*
  Defines whether the next activity is opened directly when an activity is closed or whether the system navigates back to the to do list.
- *Period for Statistics*
  Defines the period for which the workflow statistics are calculated.
- *Workflow Preferences*
  Defines default settings in the workflow using a configuration object.
- *Workflow Notifications*
  Defines how the notification of workflow events is carried out.
  - *Notification Type*
    Defines for which event notifications should be received.
  - *Receive Notification*
    Defines whether notifications should be received.
  - *Consider Role/Group Restrictions Even for Personally Defined User*
    Defines whether the role/group restrictions are also considered if the user is additionally personally defined. By default, a personally defined user always receives the defined notification.
  - *Receive Notification Only for the Following Roles*
    If notifications are to be received in general, the notifications can be restricted to the specified roles.
  - *Receive Notification Only for the Following Groups*
    If notifications are to be received in general, the notifications can be restricted to the specified groups.
- *Workflow Push Notifications*
  Defines how the push notification of workflow events is carried out.

Applications

- *Local RSS Feeds*
  In this field you can administer your subscribed RSS feeds centrally.
- *Favorite Folder (Tasks)*
  The defined folder is displayed in the detail view of the „Tasks“ portal page.
- *User Calendar List*
  In this field a calendar list is defined that contains your calendars. The calendar list can be accessed e.g. with Apple iCal.
- *Address Book List*
  In this field your CardDAV address book list is defined.

User Interface

- *Show Search Field*
  Defines whether the search field is displayed for object lists.
- *Simple Mode*
  Defines whether the menu bar and the tree view or the simple button bar and no tree view is displayed.

- *Open Documents Read-Only by Default*
  Defines whether an object is opened in read or edit mode by default.
- *Upper Limits For "Most Recently Used"*
  Defines the upper limits for the number of object types and objects displayed.
  - *Object Classes*
    Defines the maximum number of object types displayed e.g. as proposal when an object is created.
  - *Objects*
    Defines the maximum number of objects displayed.
- *Custom Task Panes, Toolbars and Menus*
  In this field special user interface scoping rules can be defined, if provided by the administrator.
- *Slideshow Interval (in Seconds)*
  Specifies the number of seconds after which the next image in a slideshow is displayed.
- *Show Tab Icons*
  Defines whether symbols are displayed on the left of the tab label.
- *Show Only Symbols in Portal Page Selection*
  Defines whether the name of the portal pages is displayed.
- *Available Elements on Home*
  Defines the elements that are directly available on "Home".
- *More Elements on Home*
  Defines additional elements that are display on "Home".
- *Font Size*
  Defines the font size of the display: "Small", "Medium", "Large" or "Huge".

SAP

- *SAP Connection Information*
  If you are using an SAP system, you can specify the connection information here.

Contact Synchronization

- *Contact Folder*
  Defines the contact folder for contact synchronization.

3.14 Substitution

A user can be substituted by another user in a specific role and even personally.

One or more users who will either generally or personally substitute the user in this rile can be assigned for each role of a user. The substitute receives the same access rights for the role of the user who is being substituted.

3.14.1 Defining a Substitution

A substitution can be defined by authorized users and/or by the user being substituted. A substitution can be established either for a specific (from-to) and/or unlimited period.

To define a substitution, proceed as follows:

1. Click "account menu (your user name)" > "Substitutions".

2. Click the “Define Default Values for Substitutions” button.
3. Define the desired default values.
   The default values are used for new roles, new substitutions and when resetting substitutions. In the following dialog, these values can also be applied to existing substitutions.
4. Click “Define”.
5. You can apply the desired default values to the selected substitutions. Click “Define”.
6. Click “Define” to save the changes.

Note:

- The “Reset to Default” button can be used to apply the default values to all roles.
- The context menu of a role can be used to individually define the settings for the corresponding role.

3.14.2 Substituting

Users can act as an assigned proxy by selecting the respective role and placing themselves in the context of the access rights of the substituted user. The proxies have the same rights as the user being substituted.

To change into substitution role, proceed as follows:

1. Click “account menu (your user name)” > “My Roles”.
   Note: Alternatively, you can click the role button (your current role).
2. Click the corresponding substitution role.

3.14.3 Terminating a Substitution

You can use the “account menu (your user name)” > “Substitutions” menu command to terminate the substitution (for instance, by setting the end date or by removing the substitute).

Note: In the welcome screen you get a message that a substitution is active.

Substitutes can terminate the substation by switching back to their own role from the substitution role.

3.15 Additional Features

The document management provides following additional features.

3.15.1 Permanent Login

With the help of a device binding, you can remain permanently logged in to the Fabasoft App. This is especially useful if you are on the move and your IP address changes frequently.

Fabasoft App

When logging in to the Fabasoft App, you need to set up a code lock. If you wish, you can also enable authentication methods such as Touch ID or Face ID to unlock the app, depending on the device you are using.

Once you have logged in to Fabasoft Folio, you remain logged in until you explicitly log out again. In the settings you can manage the code lock and the alternative authentication methods.

Logging off devices via the web client

Under "Account menu (your user name)" > "Advanced Settings" > "Devices" you can manage your permanently logged in devices and log out a device if necessary. The next time you use Fabasoft Folio on the corresponding device, you will be prompted to log in again.

3.15.2 Creating a Final Form

The final form is used to make the content of a document available in read mode in a well-defined target format (e.g. PDF).

How to create a final form

To convert documents to final form, proceed as follows:

1. Select the object.
2. In the „Object" menu, click "Convert Final Form".
   The primary content is saved to the *Primary Content as Final Form* field.

Note:

- As final form, e.g. the PDF or TIFF format can be created (depending on the configuration settings of your Fabasoft Folio domain).
- When you close a document (e.g. "Tools" > "Close" context menu command), a final form is also generated.
- If a final form already exists and can be changed, the "Update Final Form" and "Remove Final Form" menu commands are available.
- If the document is a PDF document with a digital signature, you can choose to take over the existing content as final form or generate a final form (the digital signatures will be invalidated).

How to view and download final form content

To view or download final form content, proceed as follows:

1. In the context menu of the object, click "Properties".
2. Click the "Content" tab.
3. To read the converted content, click "Read" in the *Primary Content as Final Form* field. The primary content in final form is opened in the appropriate third-party product.
4. To download the converted content, click "Download".
5. The "File download" dialog is displayed. Click "Save" and select a name and a location for the file.

3.15.3 Compare Objects

Two different objects can be compared. To do so, select any two objects and execute the "Compare" context menu command. If two Microsoft Word documents are involved, the "Compare Content" button is also available in the comparison dialog.

3.15.4 Sending as E-Mail

Objects can be conveniently sent by e-mail via the corresponding context menu commands:

- Send Link
  Opens an e-mail with a hyperlink to the object. In order to access the object the recipients of the e-mail must have a Folio account and at least read access is required on the object.
- Send File
  Opens an e-mail with the file itself as an attachment. This command is only available for documents.
- Send PDF
  Opens an e-mail with a PDF file as an attachment. For documents, the content is converted in a PDF file. For Teamrooms and folders an index is generated.
  Note: Not all objects can be converted in a PDF document.

To send objects, proceed as follows:

1. Navigate to the desired object.
2. Click in the context menu of the object on "Send" > "Send *method*".

The corresponding e-mail is opened automatically and can be further processed and sent.

3.15.5 RSS Feeds

Objects and events can be subscribed as RSS feeds. The user is informed about changes on these objects and events. The RSS feeds can be read with a common RSS reader.

Predefined Objects

Objects, which are available as RSS feeds, may be predefined by the system administrator, or manually specified.

Subscribe an Object

An object can be subscribed as RSS feed using the "Subscribe to RSS Feed" menu command.

To subscribe to an object, proceed as follows:

1. Select the object you want to subscribe to.
2. In the „Tools" menu, click "Subscribe to RSS Feed".
   Note: Object classes, which are not configured for RSS feeds do not provide this menu command.
3. Copy the RSS feed URL and add it to your RSS reader.
4. Click "Next".

Unsubscribe an Object

Objects can be unsubscribed. Unsubscribed objects are still available in the RSS reader.

To unsubscribe an object, proceed as follows:

1. Select the object you want to unsubscribe.
2. In the „Tools" menu, click "Unsubscribe From RSS Feed".

Note: The subscribed objects can also be found in the “User Settings” in the *Local RSS Feeds* field (“Applications” tab). Adding or removing objects in this list provide the same function as subscribing and unsubscribing using the menu commands.

3.15.6 Forms

With the graphical form editor, you can create new forms with drag-and-drop and extend objects with new properties without programming knowledge.

Either you can add a form to an existing object (shown in the properties of the object) or you can create basic objects based on a form.

Form Fields

You can use the following form fields on your form:

- Input Field
  A single-valued field of a particular type (e.g. string, date or object).
- Item List
  A list of fields of a particular type (e.g. string, date or object)
- Multiline Text
  A multi-valued field of type plain text, code or HTML.
- Check Box
  One or more check boxes (multiple selection is possible).
- Radio Buttons
  One value can be selected from several values with radio buttons.
- Combo Box
  One value can be selected from several values in a drop-down box.
- Standard Property
  Provides the ability to display standard properties of objects on the user-defined form.
- Separator
  Used to structure related properties.
- HTML Text
  Allows providing formatted descriptions on the form.

Types

You can define the following types for input fields and item lists:

- String
- Integer
- Float
- Date
- Date and Time
- Timespan
- Numerator (only input fields)
- Hyperlink
- Password

- Currency
- Object
  You must also define the type of objects allowed (for example, standard objects).
- Compound Type
  You must also select either a standard type or a type defined via a form. You can choose between standard and chart display.

Note: If the form has already been released, the type of a field can only be changed to compatible types (e.g. from string to hyperlink or password).

Additional Settings

Depending on the type, you can make further settings for form fields. In general, you can specify:

"General" tab

- Label
- Mandatory field
- Description (is displayed with the field as an additional description to the label)
- Help text (is displayed as context-sensitive help)
- Initialization value

"Advanced" tab

- Programming name
- Readability or changeability depending on user rights
- Mask (string and integer)
- Expressions for computing and validating
  You are supported by syntax checking and auto-completion when entering an app.ducx expression. You can find more information in the white paper „Model-Base Customizing".

"Display" tab

- Control (the used control, based on the field type, is displayed read-only)
- Compute control styles
- Compute control options
- Display in New Row (if disabled, the field will be displayed next to the previous field)
- Field Width (in percent in relation to the other fields in a row)

Trace output

When you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console. To do this, you must go to the context menu of the Teamroom where the form is used, choose "Tools" > "Activate Trace Outputs" and allow trace output.

Call in expressions:

- `cooobj.Trace("string");`
- `cooobj.Trace("string", value);`

Output:

The output is a JSON data record.

- c
  Context of the call (Teamroom).
- d
  Current time.
- s
  Section of the expression (if available).
- t
  The text to be traced (first parameter of the trace call).
- u
  Current user.
- v
  The value to be traced (second parameter of the trace call).

3.15.6.1 Creating a Form

Forms can be used in the context in which they are defined or referenced. To make forms generally available (but not for app rooms), use a form and category collection in “Customizing”. Otherwise, forms can be stored in app configurations (“Forms and Categories” widget), in app rooms (“Templates and Presettings” action > “Forms and Categories” widget) or in Teamrooms (“Templates and Presettings” action > “Forms and Categories” widget).

To create a form, proceed as follows:

1. Navigate in the “Forms and Categories” widget in the desired context.
2. Click the “Create Form” action.
3. Define the initial data of the form and click “Next”.
   - Enter a multilingual name.
   - Define a base form, if you want to take over tabs and fields of another form.
     Note: Template categories (component objects) can also be used as base forms. When template categories of installed software components change, the forms based on them are marked as “Changed After Release”. These forms must be re-released to apply the changes.
   - Define the incoming category for registration, if you want to register objects based on the form in a specific way.
     Note: When using the “Category for Generic Registration With Form”, only the user-defined form is displayed without default tabs during registration.
   - Define the base class to specify which objects the form is basically suitable for. If the form is used directly as a template, the template will have the corresponding object class.
     - Object With User Data
       Can be used for base objects, objects with object list and documents.
     - Document With User Data
       Can be used for documents.
       Note: If the form is used directly as a template, a content (“Content” tab) can be saved.
     - Container With User Data
       Can be used for objects with object list.

Note: You can additionally specify whether it is a file. For the subordinate objects, the reference to the file is saved. This makes it possible, for example, that the properties of the file are also available as fields in Microsoft Word. In addition, file-typical actions such as "Replace", "Close", "Cancel", "Restore" and "Scan" are automatically available.

  - Room With User Data
    Can be used for rooms.
    Note: If the form is used directly as a template, roles analogous to a Teamroom are available.

- If you specify a symbol, it will be displayed instead of the object class symbol for objects that have the form assigned.
- Abstract forms cannot be used directly but serve as base forms.
- Check *Suppress Template Creation*, if you want to prevent that objects based on the form can be directly created. In this case, the form can only be assigned to existing objects (using the form category).

4. Arrange the desired fields with drag-and-drop.
5. Click "Next".
6. In the context menu of the form, click "Release for Usage".

Note:

- To use a form, on the one hand the users must be authorized in the corresponding room and on the other hand the form must be released for usage.
- Changes can be released using the "Re-Release" context menu command.
- You can withdraw the release with the "Withdraw Release" context menu command.
- You can export a form as JSON file with the "Download" action. The import takes place via the "Upload" action.
- An existing, currently not released category can be converted into a form ("Tools" > "Convert to Form" context menu command). Thus, no migration is necessary if the category is to be extended by user-defined fields.

Backward Linking

For an input field or an item list of type "Object" (type of content: forms), a backward linking with another input field or item list of type "Object" can be defined. In the case of backward linking, the other object is automatically referenced in the object entered in the field.

Note: The field or fields for backward linking can be located either on one form or on two forms.

To define a backward linking with only one form involved, proceed as follows:

1. Create the form.
2. Define an input field or an item list of type "Object".
3. Select "Forms" as type of content.
4. Define the form you have just created as the default form for objects in the field.
5. If the backward linking is to refer to a second field, define a corresponding second field.
6. Apply the changes so that you can define the link.

7. Edit the first field again. In the *Link to Field* field, which is now available, you can define the field for backward linking.
8. Apply the changes.

To define a backward linking with two forms involved, proceed as follows:

1. Create the first form.
2. Define an input field or an item list of type "Object".
3. Select "Forms" as type of content.
4. Define the form you have just created as the default form for objects in the field.
5. Apply the changes.
6. Create the second form in the same way as the first form, but select the first form as the default form for objects in the field.
7. Edit the field in the first form again.
8. Define the second form as the standard form for objects in the field.
9. Define the field for the backward linking of the second form in the *Link to Field* field.
10. Apply the changes.

Example

The following example shows in particular the possibility of using expressions in forms. The amount of each installment is to be calculated based on a total amount and a payment frequency.

Create a form ("Object With User Data" base class) with following three properties:

- *Total Amount* (input field)
  Type: Currency
  Programming Name: `totalpayment`
- *Payment Frequency* (radio buttons)
  Options: Monthly (ID: 1), Quarterly (ID: 2), Semi-Annual (ID: 3), Annual (ID: 4); The ID is determined by the order of the options.
  Programming Name: `paymentfrequency`
- *Installment* (input field)
  Type: Currency
  Programming Name: `installment`

To calculate the installment dynamically, you must define expressions for the fields:

- For the *Total Amount* and *Payment Frequency* field enable the *Handle Changes of Values* option and enter `true` as expression. This means that if you change the values, the installment value is updated directly.
- For the *Installment* field enable the *Compute Value of Field* option and enter the following expression:

Calculating Value

```
Currency @installment = cooobj.totalpayment;
if (@installment.currvalue) {
  // switch based on the ID of paymentfrequency
  switch (cooobj.paymentfrequency) {
  case 1:
```

```
    @installment /= 12;
    break;
  case 2:
    @installment /= 4;
    break;
  case 3:
    @installment /= 2;
    break;
  }
}
@installment;
```

3.15.6.2 Metadata of a Form

You can also make the following settings in the properties of a form.

“Advanced” tab

- *Available Processing States*
  You can define processing states that can be selected in the *Processing State* standard field.
- *Name Build Configuration*
  You can specify a name build for the names of objects based on the form.
- *Prepare Commit Configuration*
  You can define an app.ducx expression that is executed as part of the prepare commit.
- *Applicable for*
  You can specify the object classes for which the form can be used.

“Retention” tab

You can specify whether objects based on the form are retention worthy. This tab displays the *Category (Draft)* retention properties. When the form is published, the settings are applied to the *Category (Published)*.

“Translations” tab

For the languages available in Fabasoft Folio, you can provide translations for the names and context-sensitive help. For each multilingual name of the form, you will find a corresponding entry.

3.15.6.3 Form Template

In the form's properties on the “Form” tab, you will find the corresponding templates. You can use the templates to create objects directly based on the form. If you want to prevent this, choose *Suppress Template Creation* and publish the form again.

- Generated Default Template
  If you do not define your own template, the default template is used to generate the template and published template, which are used when creating objects based on the form.
- Template (Draft)
  You can define your own template (e.g. a Word document with default content), which is used when creating objects based on the form.
- Template (Published)
  When releasing a form for usage the *Template (Published)* is generated from the *Template (Draft)*.

3.15.6.4 Form Category

In the form's properties on the “Form” tab, you will find the corresponding *Category (Published)*.

The category can be used for the following use cases:

- Adding a form to an object
- Defining the registration behavior
- Defining the applicability
- Defining retention worthiness
- Defining background tasks
- Defining permissions

Note: The settings of the *Category (Draft)* are applied to the *Category (Published)* when the form is published.

Adding a Form to an Object

Not only basic objects that are based on a form can be created but it is also possible to extend existing objects with a form. This is particularly useful for templates.

To add a form to an object, proceed as follows:

1. Navigate in the desired object.
2. Click the “Properties” action.
3. In the *Category* field (typically on the “General” tab), select the desired category. The category name corresponds to the form name.
4. Click “Next”.

The form is displayed in the properties of the object. When you define the object as a template, the form is available with each newly created object that is based on the template.

Further Use Cases

A description of the further use cases of a form category can be found in chapter 3.15.7 “Categories”.

3.15.6.5 Defining and Using a Compound Type

Forms can also be used to define compound types, which in turn can be used in other forms as types for input fields or element lists.

Defining a Compound Type

To define a compound type, proceed as follows:

1. Navigate in the “Forms and Categories” widget in the desired context.
2. Click the “Create Form” action.
3. Define the initial data of the form and click “Next”.
    - Enter a multilingual name.
    - Define “Compound Type” as base class.

4. Arrange the desired fields with drag-and-drop.
   Note: Compared to a standard form, the selectable fields and settings are reduced accordingly.
5. Click “Next”.

Note:

- The following additional settings can be made on the "Advanced" tab in the form properties:
  - *Key for Unique Lists*
    Defines the properties that are used as keys for unique aggregate lists.
  - *Key for Sorting Lists*
    Defines the properties that are used as keys for sorting aggregate lists.
  - *Simple View of Properties*
    Defines the properties that are displayed in the simple representation of an aggregate list (for example, in the property editor).
- The form is now available as a draft. Publish the form for general use.

Using a Compound Type

To use the compound type, proceed as follows:

1. Create a new form or open an existing form.
2. Define an input field or an element list and select “Compound Type” as type.
3. Select "Forms" as the type of content.
4. In the *Compound Type User Form* field, select the previously defined type.
5. In the *Compound Type Display Mode* field, select “Standard” or “Chart”. If you choose “Standard”, the field values of the aggregate are displayed. If you choose “Chart”, a Highchart diagram based on the aggregate data is displayed. However, the aggregate must have a certain structure according to the diagram type. The chart type (line chart by default) is defined on the “Display” tab in the *Expression for Calculating the Control Options* field.
   Example: `dictionary({ chart: { type: "bar" } });`
   For more information see:
   https://api.highcharts.com/highcharts/
6. Click "Next" twice to complete the editing.

3.15.7 Categories

Categories can be assigned to objects (“General” tab) and thus influence the behavior of the objects.

Categories can be used for the following use cases:

- Defining the registration behavior
- Defining default follow-ups
- Defining the applicability
- Defining retention worthiness
- Defining background tasks
- Defining permissions

User-defined categories can be used in the context in which they are defined or referenced. To make categories generally available (but not for app rooms), use a form and category collection in “Customizing”. Otherwise, categories can be stored in app configurations (“Forms and Categories” widget), in app rooms (“Templates and Presettings” action > “Forms and Categories” widget) or in Teamrooms (“Templates and Presettings” action > “Forms and Categories” widget).

The “Change Assignment” context menu command can be used to change the context of the category.

Defining the Registration Behavior

By default, the “Register as” context menu command provides all possible registration targets. If the registration target is well-known, it can be restricted to improve the usability (*Incoming Category for Registration* field).

Defining Default Follow-Ups

To receive a reminder at a specific time, follow-ups can be used (*Default Follow-Ups* field).

Defining the Applicability

Not every category make sense for every object class. Thus, the object classes for which the categories are allowed can be restricted (*Applicable for* field). In addition, if you want to use special base dates for follow-ups or retention periods a restriction to the object classes that provide the desired properties is needed.

If you want to restrict a BPMN process to a category and use activities that are allowed only for a certain object class, you can define the category accordingly (only the corresponding object class must be entered).

Defining Retention Worthiness

Compliance rules may enforce that objects must not be deleted for a defined time period (“Retention” tab).

In the properties of the category, on the “Retention” tab you can define whether objects with this category are retention worthy. In addition, define a *Retention Period* and a *Base Date for the Beginning of the Retention Period*. The calculation of the concrete retention period is carried out via a background task, which must be defined on the “Background Tasks” tab.
Note: Alternatively, you can also use the “Create/Edit Background Task” button on the “Retention” tab.

In the background task, select the “Determine Retention Period Based on the Category” action. In addition, determine the date when the background task should run. In general, it makes sense to use the *Base Date for the Beginning of the Retention Period* as *Base Date* for the time interval and, for example, “Immediately” as time interval.

For disposal, you can define another background task in the category. In general, it makes sense to define the *Retention Period* as base date for the execution of the task. As action, you can either select “Delete Automatically” or “Start Process”. If you want to start a process, you must also specify the process. In the process, a task with the activity “Retention Period Exceeded” should be defined.

When the background task is executed, the process is started and can be processed by the defined users in the worklist. The “Retention Period Exceeded” activity provides the steps “Delete”, “Extend Retention Period” and “Accept”.

Defining Background Tasks

Background tasks allow you to perform actions at a specific time ("Background Tasks" tab).

More information can be found in chapter 3.15.8 "Background Tasks".

Defining Permissions

In general, the defined team can access the Teamroom and its contents. Access to individual objects can also be granted via a category ("Permissions" tab).

Note: In order that the access rights granted via categories are evaluated, the entry "Extended by category" or "Extended by category and workflow" must be selected in the *Access Protection* field of the Teamroom.

3.15.8 Background Tasks

For categories, background tasks can be stored that execute an action at a definable point in time.

Actions

Possible actions (extendable by apps):

- Determine Retention Period Based on the Category
- Determine Retention Period Based on the Category and Close (File and Documents)
- Execute Expression (App: Forms)
  Only available if the user is allowed to create user-defined forms.
- Delete Automatically
- Anonymize Object
  By default, the following data is removed (for special objects, such as support requests or tickets, additional fields are considered):
  - History
  - Remarks
  - References (referenced objects are deleted if the object is the origin, otherwise objects are removed)
  - Processes (the processes must be completed, otherwise the background task will fail)
  - Versions
- Start Process (App: Workflow)

Note: The background tasks of objects are displayed on the "Background Tasks" tab. Whether background tasks that have already been processed are displayed depends on the action. You can override the default setting of the action using the *Remove Processed Entries From the List of Background Tasks* field.

Point in Time

The action can be executed at an explicit time or at a time based on a base date. Optionally, the execution date can be redefined if the base date is changed.

Repetition

It is also possible to repeat background tasks. The following cases can be distinguished.

Explicit date or date is not recalculated when the base date is changed

You can define a repetition rule that is applied starting with the execution time.

- Unit
  Defines the unit of the interval (e.g. day or month).
- Interval
  Defines the interval between the repetitions (number).
- Repeat Until
  Defines the end time of the repetitions (infinite, explicit date, date value of a property).

Date is recalculated when the base date is changed

The background task is rescheduled after the selected action is executed and the base date is changed. Only *Repeat Until* can be defined as a repetition rule.

Suspend Background Task When Deleting

You can define whether the background task is automatically suspended when the affected object is deleted or canceled and again activated when the object is restored.

4 Collaboration

Collaboration is the joint work of several users on objects. The access rights of users or groups are defined via ACLs (Access Control Lists). The rights concept is generally implemented on a customer-specific basis.

Note: As long as a user edits an object, it can only be read by other users.

4.1 Access Rights

For each object, it is defined who is allowed to perform which action on the object. You will find the corresponding settings for each object on the “Security” tab and optionally on the “Security Details” tabs.

In general, access rights are already defined via the respective context. However, you can change the authorizations within your rights. If you have any questions, please contact your IT help desk.

To authorize a user on an object, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Properties”.
3. Switch to the “Security” tab.
4. Add the appropriate user in the *Full Control*, *Change Access* or *Read Access* field.
5. Click “Next”.

Note:

- How and whether the *Full Control*, *Change Access* and *Read Access* fields are evaluated depends on the ACL. In general, full control also entitle the user to delete.
- For objects that are assigned to Teamrooms, access rights are primarily defined by the team defined in the Teamroom.

4.2 Using a Teamroom

The Teamroom enables informal collaboration across departmental boundaries. A separate area in the Teamroom is available for the administration of the team. The simple access rights structure makes it easy to exchange documents within the team. Team calendars, news feeds and other useful features complete the functionality of the Teamroom.

Not all object types can be stored in the Teamroom. These are, for example, business objects that are intended for formal cooperation with its own rights concept.

4.2.1 Creating a Teamroom

To create a Teamroom, proceed as follows:

1. Navigate in your “Personal Folder”.
2. Click the “New” action.
3. Select the “Teamroom” entry and click “Next”.
4. Enter a name for the Teamroom and select a group if applicable.
   Note: When you define a logo for the Teamroom, the logo of the defined group is offered for selection.
5. Click “Next”.

4.2.2 Structuring Teamrooms

For structuring documents in a Teamroom, folders are provided.

To create a folder, perform the following steps:

1. Navigate in the desired Teamroom.
2. Click the “New” action.
3. Select the “Folder” entry.
4. Enter a name of the folder and click “Next”.

Note:

- You can also create folders within folders.
- In Teamrooms, additional Teamrooms can be created. The access rights defined by the Teamroom only apply to assigned objects but not to contained Teamrooms. A Teamroom always defines its own security context.

4.2.3 Defining Team Members

To define access rights for a Teamroom, perform the following steps:

1. Navigate in the desired Teamroom.
2. Click the “Permissions” action.
3. You can add users or groups to the team using the plus symbol at the corresponding rights.

The Teamroom is stored in “Teamrooms Shared With Me” for the added team members. Therefore, it makes sense to prepare the Teamroom first, to create structures and to store the documents before the team is authorized.

Access rights:

- **Read Access**
  These team members can
  - read existing documents,
  - only see release versions (if existing),
  - create public links (if generally permitted for the Teamroom) and
  - add additional team members with read access (if correspondingly configured for the Teamroom).
- **Change Access**
  These team members can
  - change existing documents, create new documents or folders and delete them (wastebasket),
  - define Teamroom templates,
  - create public links (if generally permitted for the Teamroom),
  - define logos and
  - add additional team members with change access or read access (if correspondingly configured for the Teamroom).
- **Full Control**
  These team members can
  - change existing documents, create new documents and delete documents (wastebasket),
  - define Teamroom templates,
  - permit and create public links,
  - empty the wastebasket,
  - dissolve the Teamroom,
  - define settings regarding access protection, shortcuts, team visibility, adding team members and group restrictions,
  - define logos,
  - delete the history,
  - read audit log entries,
  - change the branding,
  - change the group and
  - grant all access rights.

Note:

- Via the context menu of a team member, you can change the access rights or even remove the team member.
- In the properties of a Teamroom, on the "Teamroom" tab, you can define following settings:
  - *Access Protection*
    Defines who is allowed to access the Teamroom. By default, only the specified team is allowed to access the Teamroom.
  - *Security Level*
    Defines (if you have a security level by yourself) whether only users with the specified or higher security level have access.

- *Restrict Shortcuts Within Teamroom*
  Defines which type of shortcuts may be stored in the Teamroom. You can restrict the permitted shortcuts to objects that are assigned to the group or to objects that are assigned to the Teamroom. In this way, you can prevent, for example, that shortcuts are stored to which the members of the Teamroom do not have access.
- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during tagging.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows to restrict team members who can open or download content at the device.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which permissions a team member must have in order to open or download content at the device.
- *Team Members Visible to All Members*
  Defines whether all members are allowed to see the team members. Note that disabling this setting also restricts other use cases.
  Note: Team members with change access can be eventually seen by all members, since changes are logged in log properties such as *Last Change by*.
  - Only team members with “Full Control” have access to the “Permissions”, can start processes, duplicate objects, use templates and release templates and presettings.
  - Only team members with “Full Control” see the events by default. The display of events can also be enabled for team members who are not allowed to view the team. However, only events that could not lead to conclusions about team members with read access will be displayed.
  - Team members with read access cannot use remarks, public comments, signatures, processes or comment on news feeds.
  - Team members with read access cannot use the time travel.
  - Team members with read access cannot be selected as participants in processes.
  - Team members with read access cannot create public links.
  - Team members with read access cannot view the “Processes” and “Activities” tabs of assigned objects.
- *Display Events for Team Members Who Are Not Allowed to View the Team*
  Only team members with “Full Control” see the events by default. The display of events can also be enabled for team members who are not allowed to view the team. However, only events that could not lead to conclusions about team members with read access will be displayed.
- *All Team Members May Add Members*
  Defines whether all team members can add users to the team or only team members with “Full Control”. Members with change access may grant or revoke change access or read access to other members. Members with read access may grant or revoke read access to other members.
- *Restrict Team Members*
  Defines the groups whose members may be added to the Teamroom. If the list does not contain any entries, members can be added without restriction.
- *Main Administrator*
  Defines the user who will receive the automatically generated e-mail messages

concerning the Teamroom. Otherwise, all Teamroom administrators receive the e-mail messages. The user is also listed as contact in case of missing permissions.

- When editing the properties of several Teamrooms together, you can also define the permissions on the “Security” tab. This allows you to efficiently adjust the access rights of many Teamrooms.

4.2.4 Sending an E-Mail to Team Members

To simplify collaboration even further, e-mails can be sent directly from Teamrooms to the team. The “Send” > “Send E-Mail to Team Members” context menu command is available for Teamrooms and for objects assigned to Teamrooms. When using the context menu command on objects, they are added as links to the e-mail.

For easy selection of recipients, they can be set based on their role in the Teamroom.

Note: The sent e-mails can be viewed in the Teamroom properties on the “Recently Sent E-Mails” tab.

4.2.5 Working With Shortcuts

The same objects can be stored as shortcuts (“Paste Shortcut” context menu command) in different Teamrooms or subfolders.

- When you delete a shortcut, only the shortcut is removed. The object itself and other shortcuts are not affected. If the object is in the wastebasket, the shortcuts are displayed with the additional text “(Deleted)”. If the object is permanently deleted, the shortcuts will be removed, too.
- When you store shortcuts within a Teamroom in different folders, the shortcuts are visualized with an arrow. If the object itself is cut, the next succeeding shortcut becomes the “object”.
- Each object can be assigned to only one Teamroom, which defines the access rights. If you store an object in several Teamrooms, the shortcuts are visualized with an arrow in a square. Note that team members have no access to the shortcut, if they are not authorized in the assigned Teamroom of the object.
- When you cut an object that has no shortcut in another Teamroom and paste it to a Teamroom, the object will be assigned to that new Teamroom.
- When you cut an object that has a shortcut in exactly one other Teamroom, the object will be assigned to that Teamroom. If shortcuts exist in several Teamrooms, the object is not assigned automatically to another Teamroom. In this case you can assign the Teamroom manually with the “Tools” > “Change Teamroom” context menu command.
  The change of the assignment can only be carried out, if you have full control in the original Teamroom and at least change access in the target Teamroom.
- In the properties of an object, on the “General” tab, in the *Teamroom* field you can find the assigned Teamroom that defines the access rights. The *Contained in* field shows the Teamrooms and folders in which the object is stored.
- In the properties of a Teamroom, on the “Teamroom” tab, in the *Restrict Shortcuts Within Teamroom* field you can define which type of shortcuts should be allowed. This way, for example, it can be prevented that not accessible shortcuts are stored.

4.2.6 Changing the Teamroom Assignment

An object is always assigned to only one Teamroom. In case shortcuts of the object are stored in further Teamrooms, the assigned Teamroom can be changed.

To change the Teamroom assignment, perform the following steps:

1. Navigate to the object, which should be assigned to another Teamroom.
2. In the context menu of the object, click “Tools” > “Change Teamroom”.
3. Select the Teamroom the object should be assigned to.
   Note: If the object is stored in exactly two Teamrooms, the Teamroom must not be selected.
4. Click “Change Teamroom”.

Note: To change the assigned Teamroom of an object, full control is needed in the original Teamroom and at least change access in the target Teamroom.

4.2.7 Setting the Access Protection

The access protection defines whether non team members can read the Teamroom.

To change the access protection of a Teamroom, proceed as follows:

1. Navigate to the desired Teamroom.
2. In the context menu of the Teamroom, click “Properties”.
3. Select the *Access Protection* on the “Teamroom” tab.
   - “Default”
     The Teamroom and its content can only be read by team members.
   - “Extended by category”
     The defined team can access the Teamroom and its contents. Access to individual objects can also be granted via the category.
     Note: You can assign access rights on the “Permissions” tab of the category. When the category is assigned to an object, the defined permissions are considered.
   - “Extended by category and workflow”
     The defined team can access the Teamroom and its contents. Users participating in workflow are granted read access. Access to individual objects can also be granted via the category.
   - “Generally searchable and readable”
     The Teamroom and its content can be found and read by all users.
   - “Generally readable”
     The Teamroom and its content can be read by all users.
4. Click “Next”. You will receive a notice that this Teamroom becomes public. Click “Next” again.

Note: An access protection can only be selected, if the Teamroom has no security level.

4.2.8 Setting the Security Level

If a user has a security clearance (user object > “User” tab > *Security Clearance*), the user can define a *Security Level* for the Teamroom.

To change the security level of a Teamroom, proceed as follows:

1. In the context menu of the Teamroom, click “Properties”.
2. On the “Teamroom” tab, select the desired *Security Level*.
   Note: The security levels inclusive all subordinated security levels that are assigned to the user are provided for selection.
3. Click “Next”.

Only users with the specified or higher security level have access to the Teamroom.

Note:

- The symbol of the Teamroom denotes if a security level is defined.
- The security level cannot be defined if the Teamroom is public.

4.2.9 Creating Public Links

You can provide documents read-only to users who have no account.

To create a public link, proceed as follows:

1. Navigate to the desired Teamroom, subfolder or document.
2. On the context menu, click “Create a Public Link”.
3. You can define a description, a validity period and a password. In addition, you can define whether the “Download” button is available for the public link (if basically allowed in the Teamroom).
4. Click “Create”.

You get a link that can be directly sent or you can copy the link in the clipboard.

Note:

- In the properties of the Teamroom, on the “Content Settings” tab, you can define following settings:
  - *Allow Public Links*
    Defines whether public links can be published.
  - *Block Downloading of Content*
    Defines whether the “Download” button is offered for public links (even if they already exist).
  - *Storage Period of Expired Public Links*
    Entries for expired public links are deleted after the specified period of time. If no time period is specified, the entries are kept.
  - *Default Access Protection*
    When creating public links, the specified default values are suggested and used when sending directly.
- Via the “Send” > “Send Public Link” context menu command you can directly open an e-mail with the public link. In the Teamroom properties, on the “Content Settings” tab, you can define the default access settings that apply to directly sent public links.
- If public links exist, it is visualized with a chain symbol.
- Existing public links can be managed with the “Manage Public Links” context menu command.

  - You can also retrieve an access report.
  - For Teamrooms, you can use the “All Public Links” button to open a query-based list that allows you to search for objects with public links. Within the query-based list the “Delete Public Links” context menu command can be used to delete all public links of the selected objects.
  - For Teamrooms, you can use the “Delete Expired Public Links” button to manually delete the expired public links of the Teamroom.
- The *State* field of a public link shows the state. Public links can be deactivated, valid or expired. If the issuer's rights in the Teamroom have been revoked, access to the public link is no longer possible. When revoking the rights, a corresponding warning is shown.

4.2.10 Defining a Logo

For each Teamroom an own logo can be defined. This logo is displayed in the card view, the thumbnail view and the preview.

To define a logo for a Teamroom, proceed as follows:

1. In the context menu of the Teamroom, click “Properties”.
2. Switch to the “Logos” tab.
3. Click “Select” to browse for an image on your computer or select one from Folio.
4. Click “Next”.

Note: You can select a second logo that is used as a thumbnail. This logo will be displayed for example on the welcome screen.

4.2.11 Managing Teamroom Templates

You can define objects in a Teamroom as Teamroom templates that are available in the create dialog.

To define a Teamroom template, proceed as follows:

1. Navigate in the desired Teamroom to the document that should serve as template.
2. On the context menu of the document click “Tools” > “Add to Teamroom Templates”. The document is added to the Teamroom templates as shortcut.
   Note: If you have enabled “Customizing”, the “Add to Templates” context menu command is available. In this case, you can specify in a further step whether the template should be added as a copy to the Teamroom templates of the Teamroom (or superordinate Teamroom) or to a template collection.

The Teamroom template is displayed in the create dialog in the “Teamroom Templates” category.

Note:

- Documents that already serve as Teamroom templates provide the “Tools” > “Remove From Teamroom Templates” context menu command.
- To display a list of all Teamroom templates, click the “Templates and Presettings” action and navigate in the “Templates” list. Here you can also add and remove Teamroom templates.

- Objects that are assigned to other Teamrooms can also be used as Teamroom templates. Make sure that the team members are authorized in the other Teamrooms to use the templates.

4.2.12 Changing the Owner of a Teamroom

You can become the owner of a Teamroom, only if you have “Full Control” on this Teamroom. The owner has the same rights as a team member with full control, but the object quota and storage quota (if configured) are assigned to the owner.

To change the owner of the Teamroom, proceed as follows:

1. Select the Teamroom.
2. In the „Tools” menu, click “Take Ownership”.
3. Click the “Yes” button.

You are now the owner of the Teamroom and therefore the owner of the objects inside this Teamroom. The previous owner becomes a team member with full control.

Note: You just can enter yourself as owner of a Teamroom.

4.2.13 Wastebasket and Orphan Objects

When deleting objects of Teamrooms they are not deleted immediately but put in the Teamroom wastebasket. The “Open Wastebasket” action is only available if at least one object is in the wastebasket. Objects in the wastebasket can be permanently deleted (“Empty Wastebasket” or “Delete”) or restored.

You can find objects that are assigned to the Teamroom but no longer stored in the Teamroom via the “Tools” > “Show Orphaned Objects” context menu command.

4.2.14 Displaying New Events

In the card view, the number of changes of Teamrooms is displayed, since you viewed the history for the last time.

1. Navigate in a Teamroom with new events.
2. Click the “Show New Events” action.
3. On the “New Events” tab, you find all current events. The tab is only shown if there are current events.

Note:

- The “Show New Events” action leads to the history that contains older entries, too. The “Delete History” button allows deleting the history and all versions of the objects that are assigned to the Teamroom (full control is needed).
- You can use the “Disable Notification” or “Enable Notification” button to specify whether you want to see new events about this Teamroom at all. Alternatively, corresponding context menu commands are available for Teamrooms.
- Which changes are considered as new events can be configured under “account menu (your user name)” > “Advanced Settings” > “Notifications” > “Settings”.

- You can display the history of objects via the “Tools” > “Show History” context menu command. If there are too many events, the oldest ones are deleted or events worth keeping are saved in an archive.

4.2.15 Hierarchical Teamroom Relations

In order to manage hierarchies of Teamrooms easily and clearly, relations between Teamrooms are available as metadata. The relations without the complete hierarchy across all levels are displayed on the “Relations” tab. The relations including the complete hierarchy can be displayed via the “Tools” > “Show Teamroom Relations” context menu command.

Note:

- The “Relations” tab is only displayed, if the Teamroom is related to at least one other Teamroom.
- The access rights defined by the Teamroom only apply to assigned objects but not to assigned Teamrooms. A Teamroom always defines its own security context.
- The Teamroom hierarchy includes all types of rooms.

Relations:

- Superordinate Teamroom
  A Teamroom can be assigned to exactly one superordinate Teamroom.
- Referencing Teamrooms
  A list of all Teamrooms in which the current Teamroom is stored.
- Subordinated Teamrooms
  A list of all Teamrooms that are assigned to the current Teamroom.
- Referenced Teamrooms
  A list of all Teamrooms that are stored in the current Teamroom.
- Orphan Teamrooms
  A list of all Teamrooms that are assigned to the current Teamroom but which are no longer stored in this Teamroom.
- Subordinated Teamrooms (incl. Hierarchy)
  A list of all Teamrooms that are assigned to the current Teamroom or to a Teamroom in the Teamroom assignment hierarchy.
- Referenced Teamrooms (incl. Hierarchy)
  A list of all Teamrooms that are stored in the current Teamroom or in a Teamroom in the Teamroom hierarchy.
- Orphan Teamrooms (incl. Hierarchy)
  A list of all Teamrooms that are assigned to the current Teamroom or to a Teamroom in the Teamroom assignment hierarchy but which are no longer stored in the Teamroom.

4.2.16 Transferring a Teamroom

Transfer Teamrooms to the Fabasoft Cloud to profit from the possibilities of cross-company collaboration. With the Teamroom, all folders and contents as well as all object types (that are not programmatically excluded from transferring) are transferred. Later you can retract the Teamroom to the Folio installation again.

Note: For the functionality to be available, it must be configured accordingly by an administrator: https://help.folio.fabasoft.com/index.php?topic=doc/Administration-Help-Fabasoft-Folio-eng/configuration-tasks.htm#transferpublish-a-teamroom

To transfer a Teamroom, proceed as follows:

1. In the context menu of the Teamroom, click “Transfer Teamroom” > “name of the target domain”.
2. In the *Access Rights of the Source Teamroom* field, define the access rights to the source Teamroom after the transfer.
    - Keep Access Rights of Previous Team Members
    - Restrict Access to the Members of My Group
    - Restrict Access to the Team Members With “Full Control”
3. In the *Dissolve Source Teamroom* field, define whether the source Teamroom should be dissolved.
    - Do Not Dissolve
      The Teamroom will not be dissolved.
    - Assign Activity “Dissolve Teamroom”
      A workflow activity will be assigned to the specified recipient at the specified time.
    - Dissolve Automatically
      The Teamroom will be dissolved at the specified time.
4. Click “Transfer” to confirm the transfer.
5. If you are not logged in to the target domain, a login dialog is displayed.
6. Click “Allow” to grant the “OAuth Client” the “Transfer Teamroom” right (only necessary once).
7. Click “OK” after the transfer has been completed.

Note:

- The Teamroom and the associated objects are marked as transferred in Fabasoft Folio.
- The Teamroom and the associated objects are no longer editable in Fabasoft Folio.
- The Teamroom is stored in the "Personal Folder" of the target domain.
- The user rights are transferred. Users are identified by the e-mail address. If contacts do not yet exist in the target domain, new contacts are created.
- Categories of objects are also considered if they exist in the source and target systems and can be identified by a unique import ID.
- With the “Transfer Teamroom” > “Restore Version Before Transfer” context menu command you can restore the version of the Teamroom, which was saved by default prior to the transfer. Incompletely transferred Teamrooms will be deleted in the target domain. If a Teamroom was successfully transferred, the connection to the transferred Teamroom in the target domain will be lost.
- With the “Transfer Teamroom” > “Define Dissolve Period” context menu command, you can also subsequently specify whether and when the source Teamroom should be dissolved.
- With the “Transfer Teamroom” > “Open in <name of installation>” context menu command, you can navigate directly to the target Teamroom. The corresponding action is also available for objects in the Teamroom.

4.2.17 Retracting a Teamroom

After completing the cross-company collaboration, the Teamroom can be retracted to Fabasoft Folio.

To retract a Teamroom, proceed as follows:

1. In the context menu of the Teamroom, click “Transfer Teamroom” > “Retract form <name>”.
2. Click “Retract” to confirm the retraction.
3. If you are not logged in to the target domain, a login dialog is displayed.
4. Click “Allow” to grant the “OAuth Client” the “Retract Teamroom” right (only necessary once).
5. Click “OK” after the retraction has been completed.

Note:

- The Teamroom and the associated objects are marked as retracted in the target domain.
- The Teamroom and the associated objects are no longer editable in the target domain.
- If users do not yet exist in the source domain, contact persons are created.
- If the Teamroom could not be successfully retracted, you can restore the version of the Teamroom in the source domain and in the target domain, which was saved by default prior to the transfer, with the context menu command “Transfer Teamroom” > “Restore Version Before Transfer”.

4.2.18 Publishing a Teamroom

Teamrooms can be published read-only to the Fabasoft Cloud.

To publish a Teamroom, proceed as follows:

1. In the context menu of the Teamroom, click “Publish Teamroom” > “name of the target domain”.
2. Click “Publish” to confirm the transfer.
3. If you are not logged in to the target domain, a login dialog is displayed.
4. Click “Allow” to grant the “OAuth Client” the “Transfer Teamroom” right (only necessary once).
5. Click “OK” after the transfer has been completed.

Note: Teamrooms may be republished (either all objects or only the changes since the last publishing).

4.2.19 Converting a Folder to a Teamroom

The access rights to Teamrooms and the contained objects are defined by the team specified in the Teamroom. Folders are used for structuring, but do not have their own rights context.

If you want to give a folder in a Teamroom a different right context, you can use the “Tools” > ‘Convert to “Teamroom”’ context menu command to convert a folder to a Teamroom. Conversely, you can also convert a Teamroom located in another Teamroom to a folder.

Note:

- To convert a folder into a Teamroom, you need to have full control in the Teamroom associated with the folder. If there are other Teamrooms in the folder, you also need full control in these Teamrooms.
- To convert a Teamroom to a folder, you need full control in that Teamroom and change access in the target Teamroom for the folder.
  If the converted Teamroom is located in multiple Teamrooms, you can select the target Teamroom for the folder.

4.2.20 Dissolving a Teamroom

As a user with full control in a Teamroom, you can delete the Teamroom and all its objects.

To delete a Teamroom and its objects, perform the following steps:

1. Navigate to the desired Teamroom.
2. in the context menu of the Teamroom, click “Dissolve”.
3. Click “Delete” to confirm that the Teamroom and its objects should be deleted. Shortcuts to these objects will also be removed from other Teamrooms.
   Note: If the Teamroom contains subordinate Teamrooms, you can either resolve all Teamrooms or only the parent Teamroom.

4.3 Using Newsfeeds in Teamrooms

With the newsfeed, you can keep your team members up to date with the latest news.

4.3.1 Creating a Newsfeed

To create a newsfeed, proceed as follows:

1. Navigate in the desired Teamroom.
2. Click the “New” action.
3. Select the “Newsfeed” entry.
4. Enter a name and click “Next”.

4.3.2 Creating Newsfeed Entries

Any user who has change rights in the Teamroom can write posts in the newsfeed. These posts are readable for all team members. For a newsfeed, it can be configured that team members with read access can also write posts.

To write a post in the newsfeed, proceed as follows:

1. Navigate in the newsfeed.
2. Enter the text in the textbox and possibly add an attachment.
3. Click “Send”.

Any user can remove their posts. Team members with full control can remove any post.

Note:

- A maximum of 2000 characters can be entered.
- Posts can be commented.

- Links starting with http://, https:// or ftp:// will be displayed as a hyperlink.

4.4 Using a Project

Projects can be used to manage the documentation of projects. Properties like *External Project Sponsor*, *Project Manager*, *Deputy Project Managers*, and *Project Members* can be used to represent the project organization.

Business objects, which are stored within a project, are explicitly assigned to this project. A business object can only be assigned to one project.

To create a *Project*, proceed as follows:

1. Click the “New” action.
2. Select the “Project” entry and click “Next”.
3. Edit the metadata of the project (for example, *Project Name* and *Start on/at*) and click “Next”.

4.5 Involving a User via Workflow

Users can be included in the processing of business objects via workflow by prescribing an activity (for example, “Approve” or “For information”) to a user, which is then placed in the user's work list.

To involve a user via workflow, proceed as follows:

1. Navigate to the desired object.
2. In the context menu of the object, click “Tools” > “Start New Process”.
3. Define the prescription and click “Next”.

Depending on the configuration the user will automatically obtain the permissions required to perform the activities.

4.6 Using Notifications

Via notifications, a user can be informed automatically about certain changes on subscribed objects.

To edit the settings for notifications, proceed as follows:

1. Click the account menu (your user name) and then click “Advanced Settings” > “Notifications”.
2. Click the “Settings” button.
3. Define about which events you want to be informed and click “Save”.
4. Click the “Define Affected Objects” button.
5. In the newly opened window, use, for example, the “Enable Notification” or “Disable Notification” context menu commands to specify the Teamrooms or dashboards for which you want to receive notifications and close the window.
   Note: For the Teamrooms entered, the setting applies to the entire hierarchy unless a different setting has been made for a subordinate Teamroom.
   For the dashboards with enabled notifications, the *Notification Sources* field of the dashboard is considered.

6. Click “Close” to close the notifications dialog.

Following settings are available:

“Settings” tab

- *E-Mail Notification Interval*
  In this field you can define how often you want to receive an e-mail containing new events.
- *Schedule E-Mail Notification*
  In this field the date and time for the next e-mail to be sent can be defined.
  Note: This setting also schedules all following e-mails according to the value in the *E-Mail Notification Interval* field.
- Notify Me About the Following Events
  In this field you can define how to be informed about certain events.
  - *Symbol*
    The number of events is displayed for Teamrooms in the card view.
  - *E-Mail*
    The selected events are displayed in the notification e-mail and in the RSS feed. See chapter 3.15.5 “RSS Feeds” for further information on RSS feeds.

4.7 Using Follow-Ups

When using the follow-up functionality an e-mail can be sent to a user or a process can be started at a particular time.

To define a follow-up, proceed as follows:

1. Navigate to the desired object.
2. On the context menu of the object, click “Tools” > “Create Follow-Up” or “Manage Follow-Ups” (at least one follow-up is already defined).
3. If you mark the follow-up as personal (only valid for the "Send e-mail" action), it will not be visible to other users.
4. Select the *Action* that should be executed.
   - Send E-Mail
     Define *Recipients* for the e-mail. In the *Message* field, you can specify the e-mail text.
   - Start Process
     Define the process that should be executed.
5. If applicable, enter a reason. The text is displayed as a suffix of the follow-up name and calendar event.
6. Define the point in time of the follow-up and whether it should be repeated. For more information, refer to the “Point in Time” and “Repetition” sections below.
7. Click “Next”.

Upon reaching the follow-up point in time and after processing the automatic task the defined action will be executed.

Note:

- “Immediately after last change on/at” can also be selected for the execution time. Changes within the first 10 seconds after definition of the follow-up are ignored. After that, the next change to the object is considered.

- A default category can be defined for follow-ups (“Default Values” tab in app configurations or app rooms).
- If a form category is assigned to a follow-up, the name build of the form category is considered for the follow-up name.
- If a follow-up date has been defined as an explicit date, this can be changed programmatically via a low-code expression using the `ReCalculateResubmissionDate` action.
  Example:
  ```
  cooobj.myproperty.FSCNOTIFICATION@1.1001:objresubmissions[0].FSCNOTIFICATION@1.1001:ReCalculateResubmissionDate(null, datetime("2030-01-01"));
  ```

Point in Time

You can either specify an explicit date or let the date be calculated based on a base date field of the object. Optionally, the execution date can be redefined if the base date is changed.

Note: In addition to the date, the specified time is also considered. For fields without a time, 00:00:00 is used as the time.

Repetition

It is also possible to repeat follow-ups. The following cases can be distinguished.

Explicit date or date is not recalculated when the base date is changed

You can define a repetition rule that is applied starting with the execution time.

- Unit
  Defines the unit of the interval (e.g. day or month).
- Interval
  Defines the interval between the repetitions (number).
- Repeat Until
  Defines the end time of the repetitions (infinite, explicit date, date value of a property).

Date is recalculated when the base date is changed

The background task is rescheduled after the selected action is executed and the base date is changed. Only *Repeat Until* can be defined as a repetition rule.

Follow-Ups Dashboard

You can manage the follow-ups in the follow-ups dashboard. The dashboard is divided into the following areas:

- Calendar
  Shows all follow-ups of the “My Follow-Ups” list.
- My Follow-Ups
  Shows the follow-ups that were created by you or in which you are entered as the recipient. You can also store other follow-ups by yourself. You can use the “Settings” action to adjust the filter criteria and to find the CalDAV URL, which you can use to integrate your follow-ups as a calendar in Microsoft Outlook, for example.
- Further Follow-Ups
  Shows follow-ups determined by you. You can define the search criteria using the “Determine Follow-Ups” action.

5 Contact Management

Fabasoft Folio supports the management of contacts. In addition to the classic contact management, a separate contact management solution that can be enabled is also available.

5.1 Classic Contact Management

The following object types define contacts:

For persons

- *Contact Person*
  Is used to store the contact data of an external contact person.
- *Employees*
  Is used to store the data of an in-house employee.

Name and address details, including e-mail addresses and telephone numbers, can be entered for individual persons. Each person has a list of business objects directly assigned to the person and a list of correspondence (*Communication*) and a journal. In general, the person's main address is the first address entered. However, if the option to use the organization's address as the main address has been selected, this is the main address.

For organizations

- *Organization*
  Is used to store the contact data of an external organization. Contact persons can be assigned to organizations.
- *Own Organization*
  Is used to store the data of an own organization. Employees can be assigned to own organizations.

Note: To search for persons and organizations, search for "Contact".

5.1.1 Creating an Organization

An organization represents a legal person. Contact persons who are employed in this organization can be added. In addition, the corresponding business objects are stored in an organization, as well as the direct correspondence with the legal person. All correspondence with an organization - i.e. both those conducted directly with the organization and those conducted indirectly via contact persons - appears in the communication.

To create an *Organization*, proceed as follows:

1. Click the "New" action.
2. Select "Organization" and click "Next".
3. Edit the metadata of the organization and click "Next".

5.1.2 Creating an Own Organization

In contrast to organizations representing external partners, an own organization is represented by an *Own Organization*. Employees can be assigned to own organization.

To create an *Own Organization*, proceed as follows:

1. Click the "New" action.

2. Select “Own Organization” and click “Next”.
3. Edit the metadata of the organization and click “Next”.

5.1.3 Creating an Employee

An employee can be created in the *Employees* field of an own organization or on “Home”.

To create an *Employee*, proceed as follows:

1. Click the “New” action.
2. Select “Employee” and click “Next”.
3. Edit the employee's metadata and click “Next”.

5.1.4 Creating a Contact Person

A contact person can be created either in the *Contact Persons* field of an organization or on “Home”.

To create a *Contact Person*, proceed as follows:

1. Click the “New” action.
2. Select “Contact Person” and click “Next”.
3. Edit the metadata of the contact person and click “Next”.

Note: Contact persons are not allowed in the *Employees* field of an own organization.

5.1.5 Displaying the Communication With a Person/Organization

Persons and organizations have a *Communication* field, in which the incoming and outgoing communication of this organization/person is recorded.

- *Incomings*
  All incomings for which the person or organization is specified as the addressee are displayed in the *Communication* field.
- *Outgoings*
  For outgoings with the mail processing type “E-Mail Dispatch (Interactive)”, the personalized *Outgoing* will be entered after generation of the fair copies (if the outgoing was undeliverable, the icon of the fair copy changes).
  For outgoings with the mail processing type “E-Mail Dispatch (Background)”, the *Outgoing* will be entered upon confirmation of dispatch/printing (if undeliverable, the outgoing no longer appears).

To display the communication with a person/organization, proceed as follows:

1. In the context menu of the person/organization, click “Properties”.
2. Switch to the “Communication” tab.

All business objects that have been received from/sent to this person/organization will be displayed in the *Communication* field.

5.1.6 Creating an Addressee List for Bulk Mailings

Addressee Lists can be created for bulk mailings. An *Addressee List* is created using sets of contacts, which can be filtered by individual countries.

The contacts determined this way can have several addresses, so a *Topic* (i.e. a *Term*) can be specified in an addressee list that gives the purpose of the addressee list (for example, TechEd invitation). In this case, the address of a contact that has this (or a higher-level) *Term* entered will be used. If no address is found for the *Term*, the main address of the contact will be used.

To create an *Addressee List* for bulk mailings, proceed as follows:

1. Click the "New" action.
2. Select "Addressee List", type a name for the addressee list and click "Next".
3. In the context menu of the addressee list, click "Properties".
4. Edit the metadata of the addressee list (for example, *Topic*, *Country*, *Addressees*).
   - In the *Addressees* field, enter individual addressees, *Search Folder*, *Selection Result* or further *Addressee Lists*.
   - In the *Country* field, enter a country to restrict the addressee list to addressees of a particular country (compared with the country of the address of the addressee).
   - In the *Topic* field, select a *Term* to use the corresponding address (for addressees with several addresses entered).
   - In the *Exclusions* field, enter individual addressees, *Search Folder*, *Selection Result* or further *Addressee Lists* that are contained in the *Addressees* and are to be excluded from the dispatch.
5. Click "Next".

Resolving an addressee list

Before an *Addressee List* can be used for mailings, it must be resolved. For this purpose, the "Resolve" context menu command is available.

During resolving, the individual addresses will be determined and stored for the addressee list in the form of a CSV file. This CSV file will be stored on the "Result" tab and can be downloaded using the "Download" button. In addition, the number of determined addresses will be provided in the *Count* field and a preview will be provided in the *Addressees (Preview, Maximal 100 Lines)* field.

5.2 Contact Management Solution

The contact management allows you to create and manage contacts in contact rooms. Based on user-defined criteria you can specify address lists that can be exported for sending newsletters, for example.

Contacts can be either contact persons or organizations. Duplicate checks support the avoidance of different datasets.

Special property values of contacts (e.g. salutation, address, telephone number and so on) can be assigned to different contact rooms and are therefore only visible to authorized users in the respective contact rooms. This makes it possible, for example, to ensure that the business contact data of employees are accessible to all employees, while the private contact data is only accessible to the HR department.

Note: To enable the contact management solution, an administrator must add the app to a group, the primary domain or a tenant on the “Apps” tab, in the *Licensed Apps* field. After applying the changes, a corresponding configuration is automatically added to the *App Configurations* field or in the “App License Configuration” object. Users who should administer the app can be added as *Contacts Administrator* to the configuration.

5.2.1 Contacts Dashboard

The contacts dashboard is your central access point for contact management.

When you are added to a contact configuration as a contacts user, a dashboard is automatically created and placed on “Home”. If you are removed as a contacts user, the dashboard will also be removed.

The contacts dashboard is divided into the following areas:

- *Recently Used Contacts*
  Shows the last contact persons and organizations you have used.
- *Contact Rooms*
  Shows the contact rooms in which the contacts are managed. Each contact room defines its own rights context.
- *Address Lists*
  Shows all address lists. In address lists, contacts can be collected and exported from different contact rooms.

You can perform the following actions:

- Create Contact Room
  As contacts administrator you can use the “Create Contact Room” action to create new contact rooms.
- Switch to Configuration
  Use the “Switch to Configuration” action to view the configuration associated with the dashboard.
- Settings
  The “Settings” action allows you to set general contacts dashboard properties, such as the logo or notification setting.

5.2.2 Contacts Configuration

In the contacts configuration, you can define as contacts administrator settings for the metadata of contacts. In addition, you can specify users who are allowed to use the contact management.

Note: As contacts administrator, you can switch to the assigned configuration via the contacts dashboard.

Areas

The contacts configuration dashboard is divided into the following areas:

- *Contact Rooms*
  Shows the contact rooms in which the contacts are managed. Each contact room defines its own rights context.

- General areas

Actions

You can perform the following actions:

- Create Contact Room
  With the “Create Contact Room” action you can define a new contact room.
- Translations
  The “Translations” action can be used to export or import a CSV file containing the multilingual names of the customizing objects. This enables an external translation.
- Settings
  Use the “Settings” action to define settings for the metadata of contacts.
- Permissions
  The “Permissions” action allows you to specify contacts administrators who can edit the configuration. Contacts administrators have full control on all contact rooms. Contacts users are authorized to use the contact management. The respective rights are determined by the contact rooms.
  Note: Based on the specified users the consumed licenses of the respective service package are calculated.

Settings

In the contact configuration, you can make the following settings:

“Contact Person” tab

- Contact Person
  Specifies which optional contact person metadata should be displayed for a contact person.
- Address
  Specifies which optional address metadata should be displayed for a contact person.
- Organization
  Specifies which optional organizational metadata should be displayed for a contact person.
- Further Information
  Specifies which optional additional information metadata should be displayed for a contact person.
- Declarations of Consent
  Specifies which fields should be displayed for a contact person with regard to declarations of consent for data processing.

“Organization” tab

- Organization
  Specifies which optional organizational metadata should be displayed for an organization.
- Address
  Specifies which optional address metadata should be displayed for an organization.
- Further Information
  Specifies which optional additional information metadata should be displayed for an organization.

“Predefined Values” tab

- Relationship Types
  Specify values that you want to be selectable for relationship types (for example, business partners).
- Industries
  Specify values that you want to be selectable for industries (for example, trade).
- Functions
  Specify values that you want to be selectable for functions (for example, consultant).
- Kinds of Social Media
  Set values to be selectable for types of social media (for example, Facebook).
- Kinds of Other Information
  Specify values to be selected for types of additional information (for example, hobby).
- Declarations of Consent
  Specify values to be selected for types of declarations of consent (for example, e-mail).

"Externally Managed Fields" tab

- Contact Person
  The selected metadata is displayed read-only for a contact person, if the *Managed Externally* option is selected for the contact person. This means that the metadata can no longer be changed via the user interface, but only via the import mechanism.
- Organization
  The selected metadata is displayed read-only for an organization, if the *Managed Externally* option is selected for the organization. This means that the metadata can no longer be changed via the user interface, but only via the import mechanism.

5.2.3 Contact Rooms

Contact rooms are used for the structured administration of contacts and to define access rights ("Permissions" action) and default values ("Settings" action > "Default Values" tab).

You can store the contacts directly in the contact room at top level or structure them further with folders. Special property values of contacts (e.g. the salutation) can be assigned to different contact rooms and are therefore only visible to authorized users in the respective contact rooms.

Address lists allow collecting and exporting contacts from different contact rooms.

In addition to the structured management of contacts, it is also possible to manage them in an unstructured way. You can find more information on unstructured shelves in chapter 10.2.3 "Unstructured Shelves".

5.2.4 Creating Contact Persons

To create a contact person, proceed as follows:

1. Navigate in the desired contact room.
2. Click the "Create Contact Person" action.
3. Enter the contact person's data. First name and surname are mandatory fields.
4. Optionally, click the "Show Additional Fields" button to see all available fields of the contact person.
5. Click "Create".

Note:

- If no main organization is assigned to the contact person, an organization name and the function in the organization can be assigned textually.
- If organizations are assigned to the contact person, the addresses and telephone numbers of the current organizations are added to the contact person.
- Before a contact person is created, a duplicate check is automatically carried out (see chapter 5.2.6 "Duplicate Check").

5.2.5 Creating Organizations

To create an organization, proceed as follows:

1. Navigate in the desired contact room.
2. Click the "Create Organization" action.
3. Enter the organization's data. The name is a mandatory field.
4. Optionally, click the "Show Additional Fields" button to see all available fields of the organization.
5. Click "Create".

Note: Before an organization is created, a duplicate check is automatically carried out (see chapter 5.2.6 "Duplicate Check").

5.2.6 Duplicate Check

When creating or changing contacts, it is checked whether a corresponding contact already exists. The duplicate check is only performed with contacts that the user, who executes the action, has access to. If a duplicate has been found, you can clean up or merge the contacts in a dialog.

Contact persons are recognized as duplicates if

- either the e-mail address already exists and/or
- the given first name and surname already exist.
  Note: If the first name is empty, contact persons with the same last name and also empty first name will be recognized as duplicates.

Organizations are recognized as duplicates if

- either the e-mail address already exists and/or
- the entered organization name already exists.

To perform a duplicate check, proceed as follows:

1. When creating or editing a contact, a duplicate check is automatically carried out. If a duplicate is found, a dialog will be opened.
2. Values that differ are highlighted. The new value is highlighted in yellow and the old value is crossed out. Move the mouse pointer over the corresponding line. You can adjust the values accordingly by using the "Insert", "Remove", "Replace" or "Discard" buttons. The "Restore" button can be used to discard an adjustment.
3. Click "Next" after resolving all conflicts.

5.2.7 Changing the Assignment of Contacts

Contacts can be assigned to another contact room. Full control is required in the source contact room and change access in the target contact room. If you do not have the necessary rights, the change request can also be forwarded to another user.

To change an assignment of contacts, proceed as follows:

1. Navigate to the desired contact.
2. In the contact's context menu, click “Change Assignment” (available only for users with full control).
3. If you have change access in the target contact room, you can change the assignment by yourself, otherwise you can forward the change request, for example, to a contact administrator.
   - Case 1: Select the target contact room and click “Change Assignment”.
   - Case 2: Click “Forward”. Select a user (contact administrator) and click “Forward”. The selected user receives an activity in the worklist. The assignment to the contact room can be changed via the “Change assignment” work step.

Note: You can determine contact administrators by switching to the configuration and clicking the “Permissions” action.

5.2.8 Using Address Lists

Address lists can be created in a contact room (access rights context) using the “Create Address List” action. However, the contacts in address lists can be collected from different contact rooms.

If a user does not have access rights to a contact in the address list, the contact is displayed with “Access Denied”.

Additional address lists can be created in address lists. This makes it possible to create an address list hierarchy. For example, an address list “Events” can consist of address lists for different events. When exporting the “Events” address list, all contacts of the subordinate address lists are taken into account.

You can manually compose address lists by copying and pasting contacts into the address list. Alternatively, you can also define search criteria.

To define search criteria for an address list, proceed as follows:

1. Navigate in the desired address list.
2. Click the “Define Search Criteria” action.
3. Select whether you want to search for contact persons or organizations.
   You can also restrict the objects you are looking for to the current contact room or your organization.
4. Enter the search criteria and click “Save Query”.
5. Click on the “Refresh Result” action to apply the search criteria.

Note:

- “Refresh Result” applies the last saved query to the address list.

- You can also use the “Define Search Criteria” action for a standard search without saving the query. You can copy the search hits manually.

5.2.9 Importing and Exporting Contacts

The import and export of contacts is possible in address lists. When importing contacts, they are assigned to the contact room of the used address list. If a user-defined form is assigned to contacts, these properties can also be imported and exported (the programming name of the respective property serves as the column caption).

Import

Contacts can be imported and updated using a CSV or XLSX file.

To import contacts, proceed as follows:

1. Navigate in the desired address list.
2. Click the “Import Contacts” action.
3. Click the “Download CSV Template” button to obtain a template describing the required data structure.
4. In the *Content* field, enter the path to the CSV or XLSX file that defines the contacts.
5. Click “Start import”.
6. After the import has completed, click “Next”.

The imported contacts are stored in the address list and in the corresponding contact room.

The CSV columns are generally user-defined text fields of the type string or date (`yyyy-mm-dd`). For multi-value fields (e.g. `nameorgext`) a carriage return (`CR LF`) is used as separator.

Note: The externally managed properties of a contact can only be updated, if the specified data source matches the data source of the existing contact.

Organization

The following table contains all relevant columns for organizations.

CSV Column	Field	Possible Value
`objexternalkey`	Import ID	String To fill fields with several lines (e.g. addresses), you can specify several lines with the same external key (`objexternalkey`) in the CSV file.
`objclass`	Object Class	String (ContactRoom`Organisation`)
`externaldatasource`	External Data Source	String

orgname	Name	String
address.addrstreet	Addresses (Street)	String
address.addrpostofficebox	Addresses (P.O. Box)	String
address.addrzipcode	Addresses (Zip Code)	String
address.addrcity	Addresses (City)	String
address.addrstate	Addresses (State)	String
address.addrcountry	Addresses (State)	String
address.addrtopic	Addresses (Type)	Reference of an address type (e.g. TermBusiness, TermPrivate)
emailinformation.emailaddress	E-Mail Addresses (E-Mail Address)	String
emailinformation.addrtopic	E-Mail Addresses (Type)	Reference of an address type (e.g. TermEMail1, TermEMail2)
telephone.telnumber	Telephone Numbers (Telephone Number)	String
telephone.addrtopic	Telephone Numbers (Type)	Reference of an address type (e.g. TermBusiness, TermFax)
website	Web Site	String
telephonebusiness	Telephone Numbers (Telephone Number, Business)	String
telephonefax	Telephone Numbers (Telephone Number, Fax)	String
telephonemobile	Telephone Numbers (Telephone Number, Mobile)	String
telephoneprivate	Telephone Numbers (Telephone Number, Private)	String
emailbusiness	E-Mail Addresses (E-Mail Address, Business)	String

emailprivate	E-Mail Addresses (E-Mail Address, Private)	String
addressbusiness.addrstreet	Addresses (Street, Business)	String
addressbusiness.addrpostofficebox	Addresses (P.O. Box, Business)	String
addressbusiness.addrzipcode	Addresses (Zip Code, Business)	String
addressbusiness.addrcity	Addresses (City, Business)	String
addressbusiness.addrstate	Addresses (State, Business)	String
addressbusiness.addrcountry	Addresses (Country, Business)	String
addressinvoice.addrstreet	Addresses (Street, Invoice)	String
addressinvoice.addrpostofficebox	Addresses (P.O. Box, Invoice)	String
addressinvoice.addrzipcode	Addresses (Zip Code, Invoice)	String
addressinvoice.addrcity	Addresses (City, Invoice)	String
addressinvoice.addrstate	Addresses (State, Invoice)	String
addressinvoice.addrcountry	Addresses (Country, Invoice)	String
addressprivate.addrstreet	Addresses (Street, Private)	String
addressprivate.addrpostofficebox	Addresses (P.O. Box, Private)	String
addressprivate.addrzipcode	Addresses (Zip Code, Private)	String
addressprivate.addrcity	Addresses (City, Private)	String
addressprivate.addrstate	Addresses (State, Private)	String
addressprivate.addrcountry	Addresses (Country, Private)	String
orgsuppliernr	Supplier Number	String
orgsuppliernr	Supplier Number	String
orgcustomernr	Customer Number	String
orgtradeid	Trade Directory ID	String

orgvatid	VAT ID	String
orgdataprocid	Data Processing ID	String
orgjurisdiction	Court of Jurisdiction	String
orgindustries	Industries	Import ID of a term
overridekeys	-	CSV columns of properties to be overwritten separated by commas (otherwise empty values are ignored and values are added in list properties)

Note: For `overridekeys` with multipart CSV column names, specify the string before the dot (e.g. `telephone`). Overwriting therefore affects all values of the telephone aggregate and all other telephone columns serving simplification purposes (`telephone.telnumber`, `telephone.addrtopic`, `telephonebusiness`, `telephonefax` etc.). For addresses, e-mail addresses and telephone numbers you have to specify the respective base column (`address`, `emailinformation` or `telephone`).

Contact Person

The following table contains all relevant columns for contact persons.

CSV Column	Field	Possible Value
objexternalkey	Import ID	String To fill fields with several lines (e.g. addresses), you can specify several lines with the same external key (`objexternalkey`) in the CSV file.
objclass	Object Class	String (`ContactRoomPerson`)
externaldatasource	External Data Source	String
userfirstname	First Name	String
persmiddlename	Middle Initial	String
usersurname	Surname	String
persposttitle	Post Title	String
persawardedtitle	Awarded Title	String

persjobtitle	Job Title	String
persacademictitle	Academic Title	String
persnickname	Nickname	String
perssex	Sex	String (SEX_FEMALE or SEX_MALE)
persbirthday	Date of Birth	Date
perssalutations.salutation	Salutations (Salutation)	String
perssalutations.addrtopic	Salutations (Type)	Reference of a salutation type (either TermFormalSalutation or TermPersonalSalutation)
persmothertongue	Mother Tongue	Reference of a system language (e.g. LANG_GERMAN, LANG_ENGLISH)
commlanguage	Language for Communication	Reference of a system language (e.g. LANG_GERMAN, LANG_ENGLISH)
address.addrstreet	Addresses (Street)	String
address.addrpostofficebox	Addresses (P.O. Box)	String
address.addrzipcode	Addresses (Zip Code)	String
address.addrcity	Addresses (City)	String
address.addrstate	Addresses (State)	String
address.addrcountry	Addresses (State)	String
address.addrtopic	Addresses (Type)	Reference of an address type (e.g. TermBusiness, TermPrivate)
emailinformation.emailaddress	E-Mail Addresses (E-Mail Address)	String
emailinformation.addrtopic	E-Mail Addresses (Type)	Reference of an address type (e.g. TermEMail1, TermEMail2)

telephone.telnumber	Telephone Numbers (Telephone Number)	String
telephone.addrtopic	Telephone Numbers (Type)	Reference of an address type (e.g. TermBusiness, TermFax)
website	Web Site	String
telephonebusiness	Telephone Numbers (Telephone Number, Business)	String
telephonefax	Telephone Numbers (Telephone Number, Fax)	String
telephonemobile	Telephone Numbers (Telephone Number, Mobile)	String
telephoneprivate	Telephone Numbers (Telephone Number, Private)	String
emailbusiness	E-Mail Addresses (E-Mail Address, Business)	String
emailprivate	E-Mail Addresses (E-Mail Address, Private)	String
addressbusiness.addrstreet	Addresses (Street, Business)	String
addressbusiness.addrpostofficebox	Addresses (P.O. Box, Business)	String
addressbusiness.addrzipcode	Addresses (Zip Code, Business)	String
addressbusiness.addrcity	Addresses (City, Business)	String
addressbusiness.addrstate	Addresses (State, Business)	String
addressbusiness.addrcountry	Addresses (Country, Business)	String
addressinvoice.addrstreet	Addresses (Street, Invoice)	String
addressinvoice.addrpostofficebox	Addresses (P.O. Box, Invoice)	String
addressinvoice.addrzipcode	Addresses (Zip Code, Invoice)	String
addressinvoice.addrcity	Addresses (City, Invoice)	String

addressinvoice.addrstate	Addresses (State, Invoice)	String
addressinvoice.addrcountry	Addresses (Country, Invoice)	String
addressprivate.addrstreet	Addresses (Street, Private)	String
addressprivate.addrpostofficebox	Addresses (P.O. Box, Private)	String
addressprivate.addrzipcode	Addresses (Zip Code, Private)	String
addressprivate.addrcity	Addresses (City, Private)	String
addressprivate.addrstate	Addresses (State, Private)	String
addressprivate.addrcountry	Addresses (Country, Private)	String
persfunctionbc	Function According to Business Card	String
perssupervisor	Supervisor	String
persassistent	Assistant	String
persmainorgname	Name of the Organization	String
persfunctions	Functions	Import IDs of terms separated by a carriage return
persmainorg	Main Organization	Import ID of an organization
perscurremployments.emplorg	Current Organizations (Organization)	Import ID of an organization
perscurremployments.emplfunction	Current Organizations (Function)	String
perscurremployments.emplfrom	Current Organizations (From)	String
perscurremployments.emplto	Current Organizations (To)	String
perspastemployments.emplorg	Previous Organizations (Organization)	Import ID of an organization
perspastemployments.emplfunction	Previous Organizations (Function)	Import ID of a term

`perspastemployments.emplfrom`	Previous Organizations (From)	String
`perspastemployments.emplto`	Previous Organizations (To)	String
`persconsentdeclarations`	Declarations of Consent	Import IDs of terms separated by a carriage return
`overridekeys`	-	CSV columns of properties to be overwritten separated by commas (otherwise empty values are ignored and values are added in list properties)

Note: For `overridekeys` with multipart CSV column names, specify the string before the dot (e.g. `telephone`). Overwriting therefore affects all values of the telephone aggregate and all other telephone columns serving simplification purposes (`telephone.telnumber`, `telephone.addrtopic`, `telephonebusiness`, `telephonefax` etc.). For addresses, e-mail addresses and telephone numbers you have to specify the respective base column (`address`, `emailinformation` or `telephone`).

Export

Contacts can be exported as CSV file. For property lists, the first value found is exported.

To export contacts, proceed as follows:

1. Navigate in the desired address list.
2. Click the “Export Contacts” action.
3. By default, the columns to be included in the CSV file are determined by the column settings of the address list. Adjust the columns if necessary.
   Note: The last used settings are saved for the address list, if the export was carried out by a user with at least change rights. You can restore the columns according to the address list by clicking the “Reset” button.
4. Optionally, click “Show Details” to set the order for exporting addresses, phone numbers, e-mail addresses, salutations and contact rooms. The order of the contact rooms is always the second criterion. Only the first value found is exported.
   Example: If you specify the sequence for e-mail addresses with “Business, Private” and the sequence of contact rooms with “Room 1, Room 2”, the following sequence is defined:
   - First, the first business e-mail address assigned to room 1 is searched for.
   - if no e-mail address was found, the first business e-mail address assigned to room 2 is searched for.
   - If no e-mail address was found, the first private e-mail address assigned to room 1 is searched for.
   - If no e-mail address was found, the first private e-mail address assigned to room 2 is searched for.
5. Click “Export”.

The CSV file with the selected columns is downloaded.

Note: Contacts in the wastebasket are not exported.

5.2.10 Deleting Contacts

To delete a contact (to be placed in the recycle bin) you need to have change access. If property values of the contact are assigned to a different contact room, also change access is required in this room. If you do not have the necessary rights, contact a contacts administrator. To delete permanently a contact (to be removed from the recycle bin) full control is required.

To delete a contact, execute the “Delete” context menu command.

5.2.11 Using Address Books

Access to contacts is also possible via third-party products such as “Apple Contacts”, which support the CardDAV standard.

To display contacts in a third-party product, proceed as follows:

1. Navigate in a contact room or address list.
2. Click the “Add to Address Book List” action.
   Note: The “Remove From Address Book List” action can be used to remove the contact room or address list again.
3. Switch to your third-party contacts product.
4. Configure a new account in the third-party product. Enter your Folio log-in e-mail address and password.

The Folio contacts are now displayed in the third-party product and can be edited if applicable.

5.2.12 Serial E-Mails

Via a serial e-mail you can send personalized e-mails to defined recipients from the contact management.

To send a serial e-mail, proceed as follows:

1. Navigate to a Teamroom and create a “Serial E-Mail” object.
2. Define the metadata for the e-mails to be sent (see below).
3. The “Define Addressees” action can be used to define the recipients and to generate the CSV file with the contact data.
4. The “Execute E-Mail Test Dispatch” action can be used to specify test recipients who receive the specified number of sample e-mails. This allows you to check whether the e-mails meet your requirements.
5. The “Send Serial E-Mail” action can be used to send the e-mails to the recipients. In the send overview you can also create or update the CSV file with the recipient data.
   You can check the result on the “Transmission Log” tab of the serial e-mail. For the recipient contacts, the serial e-mail is stored on the “Communication” tab.
   When the action is executed again, only e-mails that have not yet been sent are sent (e.g. due to a sending error).

Metadata

“Serial E-Mail” tab

- *Name*
  The name of the serial e-mail.
- *E-Mail Subject*
  Defines the subject of the e-mail.
- *Use E-Mail Message From Document*
  Defines whether the e-mail text should be entered directly or whether a file should be uploaded. For directly entered text or for an HTML file, the following placeholders can be used to personalize the e-mail:
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrSurName]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrFirstName]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrSalutation]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrSexSalutation]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrStreet]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrPostOfficeBox]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrZipCode]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrCity]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrTitle]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrContact]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrCountry]`
  - `[=addressee_FSCFOLIO_1_1001_FieldTelNumber]`
  - `[=addressee_FSCFOLIO_1_1001_FieldOrganization]`
  - `[=addressee_FSCFOLIO_1_1001_FieldAddrState]`
  - `[=addressee_FSCFOLIO_1_1001_FieldMiddleName]`
  - `[=addressee_FSCFOLIO_1_1001_FieldPostTitle]`
- *E-Mail Message*
  The e-mail message as text or file.
- *Attachments*
  The specified contents are added as attachments to the e-mail. HTML attachments can also be personalized.
- *Send Attachments as*
  The contents can be sent in the original format or as a PDF file. If conversion to PDF is not possible, the file is sent in the original format.

“Addressees” tab

- *Name of Sender*
  Defines the name of the sender. By default, your user name is used.
- *E-Mail Address of Sender*
  Defines the e-mail address of the sender. By default, your user e-mail address is used.
- *Addressees*
  The e-mail is sent to the defined addressees (contact persons, organizations and address lists).
- *Robinson List*
  Allows filtering the specified addressees by contacts, organizations and address lists.

- *Create/Recreate CSV File*
  To determine the contact data from the addressees, a CSV file must be created before sending.

"Transmission Log" tab

- *Transmission Errors (Preview)*
  Shows a limited number of transmission errors that occurred.
- *Transmission Log*
  Contains the complete transmission log. If applicable, the corresponding error message is shown for each e-mail.

6 Business Process Management

The integrated workflow system is a core component of Fabasoft Folio.

6.1 Executing an Ad Hoc Process

An ad hoc process allows you to define the process flow by yourself. Consequently, you can react flexibly to situations for which no predefined processes are available.

To execute an ad hoc on an object, perform the following steps:

1. Navigate to the desired object.
2. On the context menu of the object click "Tools" > "Start New Process".
3. Select a template for an ad hoc process or start with an empty template. The step is omitted if there are no predefined processes.
   Note: In an empty template, you can also use an existing ad hoc process template by clicking the "Insert Template" button.
4. If you start with an empty template, define an activity and a participant for the first task in the process. Further information about the possible settings can be found in the next chapter.
5. Click "Next", if you do not want to add further activities.
   Otherwise, click "Take". You can add further activities by selecting an activity and participants and clicking "Take" again. The last activity with a defined participant is considered even if you do not click "Take".
   Note: If you need the ad hoc process regularly, you can save it as template. You can specify the storage location. All saved personal ad hoc process templates can be found under "account menu (your user name)" > "Advanced Settings" > "Workflow" > "Personal Settings" tab > *Ad Hoc Process Templates*.

The first activity is placed in the work list of the defined participant.

Note:

- In an ad hoc process (possibly parallel), activities with different participants can be defined. Further sequence flows can only be used in predefined processes.
- For ad hoc process templates, the applicability can be defined in the same way as for BPMN processes (*Applicable for*, *Object Class/Category of the File*, *Object Class/Category of the Teamroom*).

- Deadlines can be defined for activities, depending on your settings ("account menu (your user name)" > "Advanced Settings" > "Workflow" > "Personal Settings" tab).
  - Deadlines as dates can be entered directly in the overview.
  - Initially invisible time spans can be defined using the "Advanced Settings" button.
  - You can either define a time span starting from the current time or using a base date. If the base date changes, the deadline is recalculated.
  - app.ducx expressions for calculating the deadlines can be defined using the "Advanced Settings" button. The expressions are re-evaluated when the activity would become startable and no value already exists.
    Note: If an activity is suspended or delegated, expressions can only be defined if the user has the "Edit BPMN Process Diagrams" policy.
    Example:
    ```
    datetime visibledate = coonow + 86400;
    if (coonow.year == 2023) {
      visibledate = coonow + 172800;
    }
    visibledate;
    ```

6.2 Activities and Participants

Activities

By default, following activities are provided:

- Edit
  Allows editing a document.
- Forward for Editing (only available in BPMN processes)
  Allows editing a document.
- Close
  Allows closing a document, such that no further changes are possible.
  Note: The corresponding context menu command is "Tools" > "Close". If the object should be editable again, you can execute the "Tools" > "Revert Status 'Closed'" context menu command.
- Close Documents
  Allows closing documents within a folder, such that no further changes are possible.
- Close File
  Allows closing a file, such that no further changes are possible on the file and assigned objects.
- Release
  Allows releasing a document. The document will be signed with a corresponding signature. If the document is released, additionally a release version is created for the document.
- Release and Close
  Allows releasing and closing a document. The document will be signed with a corresponding signature and closed, such that no further changes are possible.
- Release Documents
  Allows releasing documents within a folder. The documents will be signed with a corresponding signature. If the documents are released, additionally a release version is created for the documents.

- Release and Close Documents
  Allows releasing and closing documents within a folder. The documents will be signed with a corresponding signature and closed. If the documents are released, additionally a release version is created for the documents.
- Approve
  Allows approving a document. The document will be signed with a corresponding signature.
- Approve and Close
  Allows approving and closing a document. The document will be signed with a corresponding signature and closed, such that no further changes are possible.
- Approve and Close Documents
  Allows approving and closing documents within a folder. The documents will be signed with a corresponding signature and closed.
- Forward for Approval (only available in BPMN processes)
  Allows a document to be forwarded for approval.
- Review
  Allows reviewing a document.
- Forward for Review (only available in BPMN processes)
  Allows a document to be forwarded for review.
- Take Note
  Allows taking note of a document. The document will be signed with a corresponding signature.
- Add Remark
  Allows adding a remark to a document.
- Add Comment
  Allows adding a comment to a document (see also chapter 3.5.4 "Commenting Documents").
- Send
  Allows sending an object as a link or public link.
- Send Link
  Allows sending an object as a link.
- Send Public Link
  Allows sending an object as a public link.
- Release for Usage (only available in BPMN processes)
  Allows a template, form, etc. to be released for usage. In addition, a corresponding signature is applied.

Note:

- Multi-instance activities can be used for processing an activity sequentially or in parallel by several participants.
- If the activities "Review", "Approve" or "Release" are used in ad hoc processes, the following applies:
  - Negative results (e.g. "Approval denied") are reported via an automatically inserted activity to the person who started the ad hoc process. The remaining commonly prescribed activities that have not yet been completed are set to "Not Executed".

- Activities for positive results (e.g. “Released”) are only automatically inserted if they are the last activity in the process.

- If the activities “Review”, “Approve” or “Release” are inserted in running processes, negative results are reported to the person who inserted the activities. The remaining commonly inserted activities that have not yet been completed are set to “Not Executed”.
- For objects that are in the worklist, the work steps are also available in the object actions. Conversely, the standard actions of the concerned object are also available in the actions of the activity.
- For activities, the associated work items are displayed in the properties and in the info box. For each work item, the following additional information is displayed if it applies:
  - Multiple
  - Must Be Executed
  - Completes Activity
  - Conditionally Visible
  - With Precondition
  - Executed by (for activity instances)
  - Started or Completed (for activity instances; process administrators additionally see the time)

Participants

By default, following participants can be defined:

- Abstract Participant
  Abstract participants allow generic sequence flows.
  - Process Initiator
    The participant who starts the process.
  - Responsible for Process
    By default the participant who starts the process.
  - Process Owner
    By default the participant who starts the process.
  - Current User
    The participant who has executed the previous activity or for the first activity, the participant who has started the process.
  - Property of the Object
    The participants are evaluated based on a property of the object (e.g. *Last Signature by*).
  - Property of the File of the Object
    The participants are evaluated based on a property of the object’s file (e.g. *Last Signature by*).
  - Property of the Teamroom of the Object
    The participants are evaluated based on a property of the object’s Teamroom.
- User
  A concrete participant.
- Group
  A group of participants.

- Distribution List
  A list of participants (only usable for multi-instance activities).

Note:

- Distribution lists can only be used together with multi-instances.
- A group or property of the object can be used both in multi-instances and in non-multi-instances.
- In the case of multi-instances, a separate activity instance is created for each resolved process participant, in the case of non-multi-instances only one activity instance for the entire group or property of the object is created.
- Distribution lists are immediately resolved at the start of the process. When a *Property of the Object* or group is used, the process participants are resolved during the runtime of the workflow (when the state of the corresponding activity is set to “Can Be Started”)
- If the property of the object is single-valued and contains a group, all users directly assigned to the group receive an activity. Subordinate groups are not considered.
- If the property of the object is multi-valued, all directly defined users receive an activity. In addition, all directly defined groups receive a joint activity.

6.3 Executing a Predefined Process

Recurring processes can be efficiently represented with predefined processes.

To execute a predefined process on an object, perform the following steps:

1. Navigate to the desired object.
2. In the context menu of the object click “Tools” > “Start New Process”.
3. Click “Start Process” to directly start the desired process or click “Open Process” to view the process beforehand.

The first activity is placed in the work list of the defined participant.

6.4 Worklist and Ad Hoc Workflow

A central element of the workflow is the "worklist", which lists the activities to be completed (=activities and the working steps to be carried out in it) clearly for individual users in the form of a “To Do” list. Processes are used to define who gets which activities in their worklist and when. The respective users can then edit the activities or influence the process ad hoc within the context of their authorizations via delegations or prescriptions.

The work list consists of following lists (only visible if at least one entry is present):

- *To Do*
  Contains the current activities that have to be processed.
- *Suspended*
  Contains activities that are suspended for a defined time span.
- *Last Finished*
  Contains completed activities.
- *Concerned Objects*
  Contains objects of the current activities.

- *Tracking*
  Contains objects of already completed activities.

6.4.1 Starting an Activity in the Worklist

All activities of a user are displayed in his or her worklist. An activity is an activity to be executed, which is divided into several working steps. If you carry out a working step, the activity is implicitly started. But you can also explicitly start an activity.

To start an activity, proceed as follows:

1. Locate the activity you want to start
2. In the context menu of the activity, click “Properties”.
3. Click “Yes”, to confirm, that you want to start this activity.

6.4.2 Executing a Working Step of an Activity

Users can perform the steps defined for an activity if the activity is in the worklist.

To execute a working step of an activity, proceed as follows:

1. Locate the working step to be executed in the *Work Items* column.
2. Click the working step, to execute it.

In addition to the name of the work step, the status is indicated in parentheses, if applicable:

- Work step has not yet been executed: no status text
- Work step has already been executed: (repeat)
- Work step could only be carried out once: (executed)
- Mandatory work step that does not complete the activity has not yet been executed: (to do)
- Work step is not yet executable: (not executable)
- Mandatory work step that cannot yet be executed: (to do, not executable)

Note: For work steps that require a password to be entered, the mobile app offers the option of using biometric authentication instead of a password. This requires an active code lock in the mobile app (including biometric unlocking) and permanent login.

6.4.3 Suspending an Activity

An activity can be postponed and set to be completed later. The activity is removed from the “To Do” tab and placed on the “Suspended/Pending” or “Long-Term Suspended” tab. After the set period has elapsed, the respective activity will re-appear on the “To Do” tab.

Note: The “Long-Term Suspended” tab is only available if it is correspondingly configured. For this purpose, a time interval has to be defined in the workflow configuration from when a suspension is considered as long-term. As soon as the activity is no longer considered as log-term suspended, it will be moved from the “Long-Term Suspended” tab on the “Suspended/Pending” tab.

To suspend an activity, proceed as follows:

1. Locate the activity, which should be suspended.
2. In the context menu of the activity, click “Suspend”.

3. Define a re-submission date and enter a remark if necessary. The re-submission can be carried out either by a certain date (type: *Fixed Date*) or after a certain period (type: *Time Interval*).
4. Click “Next”.

6.4.4 Reactivating a Suspended Activity

Activities that have been postponed can be manually reactivated for completion before the period has elapsed.

To reactivate a suspended activity, proceed as follows:

1. Click the “Suspended/Pending” or “Long-Term Suspended” tab in your worklist.
2. Right-click the activity that should be activated and then click “Activate”.

The activity is removed from the “Suspended/Pending” tab and moved to the “To Do” tab of the worklist.

6.4.5 Accepting an Activity as Substitute

A user can be substituted by another user in a specific role and even personally. Users can act as substitute by selecting the respective role and placing themselves in the context of the access rights for that specific user.

To accept an activity as a substitute, proceed as follows:

1. Click the account menu (your user name) and then “My Roles”.
2. Click the corresponding substitution role.
3. Locate the activity on the “Substitutions/To Do” tab or on the “Substitutions/Other” tab.
4. In the context menu of the activity, click “Take Over”.

The activity is moved to the “To Do” tab and the working steps can be executed.

6.4.6 Delegating an Activity

A user can delegate an activity in his/her worklist to another user, which also delegates the process responsibility. The other user receives that activity in his/her worklist.

To delegate an activity, proceed as follows:

1. Locate the activity, which should be delegated.
2. In the context menu of the activity, click “Delegate”.
3. Select a responsible user for the process and click “Next”.

Note:

- If an activity is set to ignore completion, no new activities can be inserted if the following activity has already been prescribed. In this case, the “Delegate Multiple” action is available to still be able to assign a copy of the current activity to multiple process participants.
- If the *Team Members Visible to All Members* option is disabled for the Teamroom and you do not have “Full Access” in the Teamroom, the “Delegate” action is not available.

6.4.7 Prescribing an Activity (With or Without Template)

A user can prescribe a certain activity to another user. It is also possible to prescribe activities to several users (at the same time or one after the other). Templates can be created and applied repeatedly for prescriptions that are performed regularly.

1. Locate the activity, which should be prescribed.
2. In the context menu of the activity click “Add New Activity”.
3. If prescribe templates are available, these will be offered for selection. Select a prescribe template if applicable.
4. In the *Activity* field, select an activity.
5. In the *Participant* field, specify an abstract participant, a user, a group or a position.
6. Define further fields if necessary and click “Next”.

Details for performing a prescribe

In the standard view, the following fields are available for defining a prescription:

- *Activity*
  Defines the activity to be prescribed.
- *Name*
  Defines the displayed name for the activity.
- *Remark*
  You can enter a remark in this field.
- *Participant*
  To define the participants, you can complete several fields.
  - *Abstract Participant*
    Using this drop-down list, you can select an abstract participant (for example, “Person responsible for process”, “Approver”, “Responsible”). The activity will then be automatically prescribed to the assigned user.
  - *User*
    By specifying a user, the activity will be assigned specifically to this user. Users can be selected from the drop-down list. Furthermore, a user can be selected from the group hierarchy using the “Select from hierarchy” button, or a search can be performed using the “Find” button.
  - *Group*
    In this field, you can specify a group to which the activity is prescribed. Groups can be selected from the drop-down list. Furthermore, a group can be selected from the group hierarchy using the “Select from hierarchy” button, or a search can be performed using the “Find” button.
    Note: For a group, you can define which position within the group is responsible for the group's work list. Users in this position receive the activity in their work list.
  - *Position*
    In this field, you can specify a position. The activity will be prescribed to all users in this position. If the activity is started by a particular user, then it will be removed from the work list of the other users.
- *Distribution List*
  When using a multi-instance, you can specify a *Distribution List* containing several users.

The activity will then be prescribed to all users in this list.
Note: A *Distribution List* can be created by an administrator in an *Administration Tool*.

- *Insert Activity More Than Once*
  Multi-instance activities can be used for processing an activity sequential or parallel by several participants.

Define deadlines

Deadlines can be defined for every prescribed activity. Click “Show Deadlines” to show the fields for specifying deadlines. The following fields are available:

- *Date for Submission*
  In this field, you can define when the activity should be submitted.
  Note: Until this date, the activity can be found in the work list of the relevant user on the “Suspended/Pending” tab.
- *Deadline for Start*
  In this field, you can define when the activity should be started.
- *Deadline for Completion*
  In this field, you can define when the activity should be completed.

Prescribe several activities

To apply the settings for a prescribed activity, click the “Take” button. A graphical preview of the prescribed activities is displayed, and you now have the option to insert additional activities that are also prescribed. Click the relevant “+” button in the graphical display to insert an activity before, after or parallel to an already defined activity and enter the prescribe data.

In the graphical display, you can switch between the individual prescribe activities and edit these again. To do so, click the activity you want to edit. The prescribe data will be displayed again and can be edited. To apply the changes, click the “Take” button.

Change order of the prescribed activities

In the graphical display, you can also change the order of the prescribed activities using the drag and drop feature. To do so, proceed as follows:

1. Point to the dotted area of the activity the position of which you want to change, and press and hold down the mouse button.
2. Drag the object to where you want to insert the activity. A grey bar indicates that the activity can be inserted at this place.
3. Release the mouse button. The activity will be inserted into the desired place.

Delete an activity again

To remove a prescribed activity, select the activity and click the “Delete” button.

Store the prescription as a template

To store the prescription as a template for repeated use, click the “Save as Template” button, enter a *Name* for the prescribe template and click “Next”.

Advanced view

To switch to the advanced view, click the “Advanced View” button. There you can make additional entries (for example, regarding substitution).

6.4.8 Viewing Processes of an Object

To view the processes of an object, perform the following steps:

1. Navigate in the desired object.
2. Click the “Properties” action.
3. Click the “Processes” tab.
4. Click “Open Process” to display the complete process with any loops and conditions. The process flow that has already been executed is indicated by bold lines. Paths that were not traversed are visualized with dashed lines.
5. You can use the context menu of the process elements to execute the commands allowed in each case. For example, if you have the appropriate rights, you can change the participant of an activity that has not yet been executed using the “Edit” context menu command.
6. To make it easier to terminate processes that are no longer relevant, the “Change State” button is available. This allows you to change the state to “In Progress”, “Suspended”, “Completed” or “Aborted”.
7. A started process can be deleted via the "Delete" button as long as no activity has been started.

Note:

- The “Processes” tab is only visible if at least one process is present.
- Completed processes are collapsed by default.
- When you collapse or expand processes, the state is saved.

6.4.9 Viewing Activities of an Object

To view the activities of an object, perform the following steps:

1. Navigate in the desired object.
2. Click the “Properties” action.
3. Click the “Activities” tab.

All current, planned and completed activities are shown.

Note: The “Activities” tab and the fields for current, planned and completed activities are only visible if at least one activity is present.

6.4.10 Process Statistics

To obtain an overview of the running processes, several process statistics are available that illuminate the individual aspects of process execution.

Note: The settings can be configured for groups on the “Workflow” tab.

The statistics can be displayed for:

- Process Administrators
  Provides an overview of all predefined and ad hoc processes.

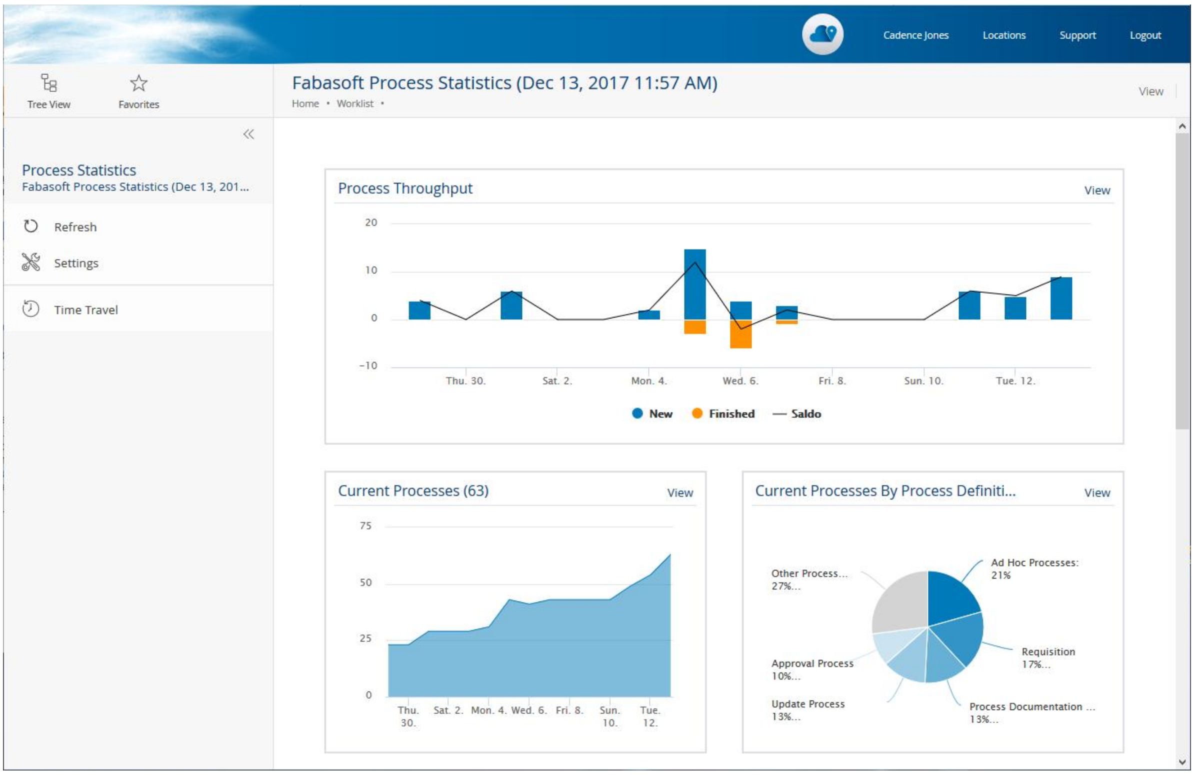
- Process Owners
  Provides an overview of all predefined processes for which the user is defined as the process owner.

Note: The process owner can be defined on the “BPMN Process Diagram” tab of a BPMN process diagram.

You access the process statistics via your worklist. The statistics are available for the following three levels: general overview, process definition and specific process.

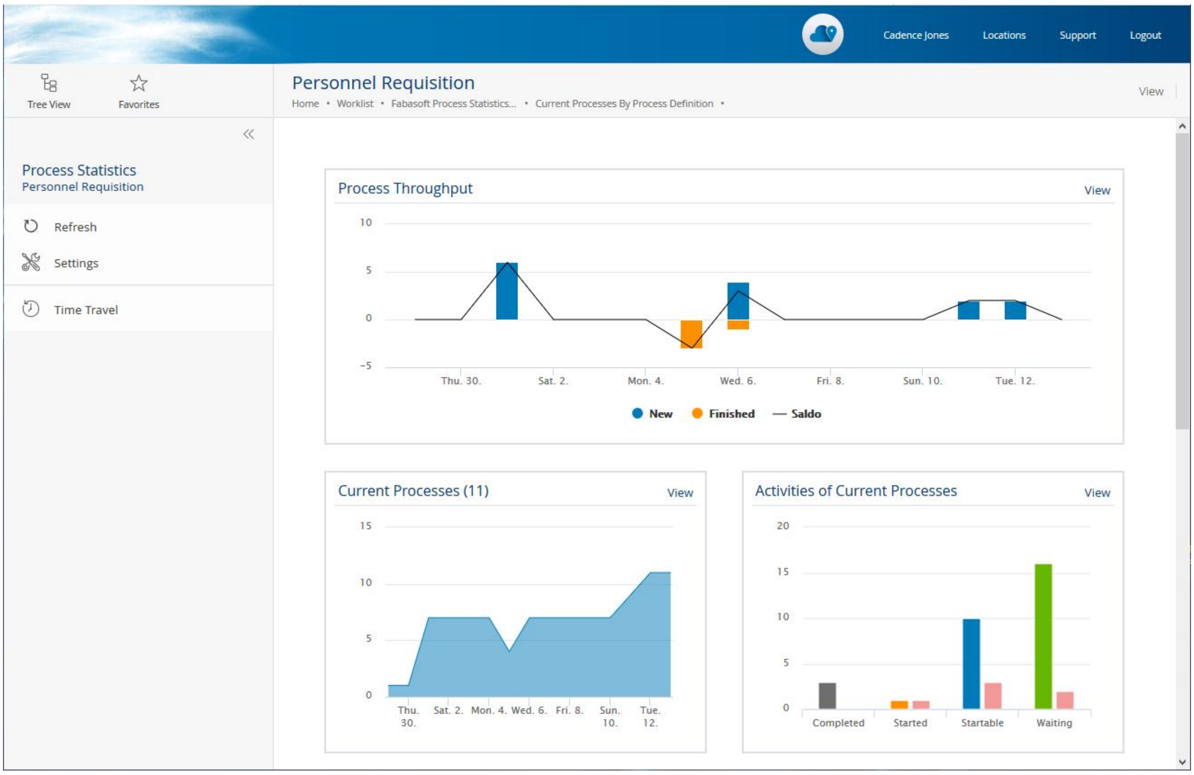
General Overview

- Process Statistics
  Provides an overview of the number of running processes and delayed processes.
- Process Throughput
  Shows the number of started and completed processes and their difference in the selected time period.
- Running Processes
  Shows the number of running processes and their changes in the selected time period.
- Running Processes per Process Definition
  Shows the percentage breakdown of the process definitions of the running processes.
- Current Activities
  Shows the percentage breakdown of the current activities of the running processes.
- Delayed Activities
  Shows the percentage breakdown of the delayed activities of the running processes.
- Planned Activities
  Shows the percentage breakdown of the planned activities of the running processes.
- Activities With Participants Without Access Rights
  Shows the activities in which the participant does not have access to the affected object.
- Start Date of Running Processes
  Shows the number of running processes grouped by the start date in the selected time period.
- Due Date of Activities
  Shows the activities of the running processes that need to be processed in the next two weeks.



Based on a Process Definition

- Process Throughput
  Shows the number of started and completed processes and their difference in the selected time period.
- Running Processes
  Shows the number of running processes and their changes in the selected time period.
- Current Activities
  Shows the percentage breakdown of the current activities of the running processes.
- Delayed Activities
  Shows the percentage breakdown of the delayed activities of the running processes.
- Planned Activities
  Shows the percentage breakdown of the planned activities of the running processes.
- Activities With Participants Without Access Rights
  Shows the activities in which the participant does not have access to the affected object.
- Start Date of Running Processes
  Shows the number of running processes grouped by the start date in the selected time period.
- Due Date of Activities
  Shows the activities of the running processes that need to be processed in the next two weeks.
- Processes
  Displays all processes (including completed processes) of the process definition.



Based on a Process

- Runtime
  Shows the runtime of the process in days compared to the average runtime of the underlying process definition.
- Activities
  Shows the percentage breakdown of the status of the process's activities.
- Overview
  Shows the most important metadata of the process.

Note: The “Settings” action can be used to define the time period (from last week to last year) of the time-dependent statistics.

6.5 Settings

In the account menu (your user name), the “Advanced Settings” > “Workflow” entry provides following settings:

“Personal Settings” tab

- *Notify Me About the Following Events*
  You can define for which workflow events you want to be informed by e-mail or push notification.
  Note: To receive push notifications, you must allow them in your web browser or Fabasoft App. Additionally, push notifications must be configured by an administrator for the installation.
- *Use Advanced Mode for Prescriptions*
  Defines whether the graphical or tabular process editor is used for prescriptions. The tabular process editor is especially defined for users who rely on keyboard operation.

- *Define Deadlines as Time Span (Instead of a Date)*
  Defines whether deadlines are entered as time span instead of a date.
- *Show Advanced Settings for Deadlines in Ad Hoc Processes*
  Allows you to change the way you enter deadlines. Additionally, you can specify the type of escalation.
- *Show Deadlines for Ad Hoc Processes per Default*
  Defines whether the deadlines are displayed by default when prescribing.
- *Show News About Activities Which Have to Be Done on the Welcome Screen*
  Defines whether news about activities in the worklist, which have to be carried out, are shown on the welcome screen.
- *Automatically Open the Next Activity After Finishing an Activity*
  Defines whether when finishing an activity, the next activity will be opened or whether the "to do" list will be opened.
- *Ad Hoc Process Templates*
  Contains your personal templates for ad hoc processes. If a template is no longer needed you can remove it.
- *Predefined BPMN Processes*
  Defines your personal BPMN processes that are released for execution.
- *Predefined Escalations*
  Defines your personal escalation definitions that are released for execution.

6.6 "Approval Processes

Approval processes comprise those process definitions and activity definitions that Fabasoft Folio provides as standard.

6.6.1 Obtain Approval for a Business Object

For each business object, you can define a responsible user for the various tasks. These responsibilities are entered on the "Document" tab in the *Responsibility* field of the business object. If responsibilities have been defined in a *Category*, they are automatically taken over by the assigned business objects. The responsibilities can be adjusted in single business objects.

Note: If for the "Approve" role no responsible user has been defined, the "No participant defined" error message is displayed when executing the approval process.

To obtain approval for a business object, proceed as follows:

1. Select the business object you want to have approved.
2. Execute the "Tools" > "Initialize Process" > "Approval Process" command.

The approval process will then be initiated for the business object and the user responsible receives the *Approve* activity in his/her work list.

After the approval you get the *Approved* activity, if the business object is not approved you get the *Approval denied* activity. Both activities can be finished clicking *Accept*.

6.6.2 Approve a Business Object

To approve a business object, proceed as follows:

1. Locate the *Approve* activity for which the business object for approval is displayed in the *Applies to* column.
2. Click the *Open* work step to view the documents for approval.
3. Click the *Approve* work step.
4. Enter your password.
5. Type a *Remark* and click “Next”.

Note: The approval (including the remark) will be added to the business object on the “Signatures” tab. In addition, the approved status of the object will be backed up in the form of a recorded or approved version.

6.6.3 Refuse Approval of a Business Object

To refuse approval of a business object, proceed as follows:

1. Locate the *Approve* activity for which the business object for approval is displayed in the *Belongs to* column.
2. Click the *Open* work step to view the documents for approval.
3. Click the *Refuse Approval* work step.
4. Enter your password.
5. Type a *Remark* and click “Next”.

Note: The non-approval (including any comment) will be added to the business object on the “Remarks” tab.

6.7 Business Processes With BPMN 2.0

The support of BPMN 2.0 (Business Process Model and Notation) allows you to model business processes and benefit from the advantages of a platform-independent notation. The created process diagrams can be directly executed with the Fabasoft Folio Workflow Engine.

For BPMN process diagrams a meaningful presentation is chosen depending on the context. In PDF overviews, when using the Folio network drive or the Fabasoft App a picture of the process is displayed. In exported process diagrams (ZIP file) a PNG file and an SVG file (vector graphic) are provided as graphical preview.

Besides process diagrams also choreography and conversation diagrams can be created.

6.7.1 Creating a BPMN Process Diagram

BPMN process diagrams are used to model business processes, which can be directly executed. The BPMN process diagrams can be used in the context in which they are defined or referenced. To make BPMN process diagrams generally available, use a process folder or collection for templates and presettings in “Customizing”. Otherwise, BPMN process diagrams can be stored in app configurations (“Processes” widget), in app rooms (“Templates and Presettings” action > “Process Templates” widget) or in Teamrooms (“Templates and Presettings” action > “Process Templates” widget).

To create a process diagram, proceed as follows:

1. Navigate in the “Processes” or “Process Templates” widget in the desired context.

2. Click the “Create Process” or “New” action.
3. Enter a name and click “Next”.
4. In the context menu of the process diagram, click “Open”.
5. Model the desired process and click “Next”.
   More information about working with the BPMN editor can be found in the next chapter.
6. In the context menu of the process diagram, click “Release for Usage” (not necessary in the context of a process folder).

Note:

- In the properties of the BPMN process diagram, on the “Process execution” tab, the *Automatically Suspend the Process When Deleting the Affected Object and Activate It When Restoring* field defines whether the process is automatically suspended when the affected object is deleted or canceled and again activated when the object is restored.
- To be able to use a BPMN process that is defined in the context of a process folder, it must be referenced in the personal workflow settings (“account menu (your user name)” > “Advanced Settings” > “Workflow”).
- To be able to use a BPMN process that is not defined in the context of a process folder, on the one hand the users must be authorized in the corresponding room and on the other hand the BPMN process must be released for usage.
    - On the “Process Execution” tab, all released instances are displayed in the *Release Version* field and the *Formerly Released for Execution* field.
    - Changes can be released using the “Re-Release” context menu command. Processes that have already been started continue to run according to the old released BPMN process diagram. New processes are initiated based on the currently released version.
    - You can withdraw the release with the “Withdraw Release” context menu command.

6.7.2 Working With the BPMN Editor

In the graphical BPMN editor, besides the modeling of the process, for example Folio users and activity definitions can be assigned to BPMN elements, in order to be able to execute the process directly with the Fabasoft Folio Workflow Engine.

The BPMN editor is subdivided in three areas. The left pane contains the BPMN elements that can be dragged and dropped on the middle design pane. The right pane (folded by default) shows properties for the element that is currently selected in the design pane. The right pane is also used to assign Folio objects for process execution purposes.

The keyboard shortcuts `Ctrl + Z` and `Ctrl + Y` can be used to undo and redo actions. `Ctrl + S` allows saving changes made in the editor. For copying, cutting, pasting and deleting elements the keyboard shortcuts `Ctrl + C`, `Ctrl + X`, `Ctrl + V` and `Del` are provided. The executability of the process can be checked with the “Check Executability in Fabasoft Folio” button.

Executable process must or may contain following elements:

- Pool
  The pool consists of activities of a delimited unit (e.g. an organization). Exactly one pool per process diagram can be put into execution. Thus, the *Is executable* property must be set to “Yes” for one pool.
    - In the *Applicable for* field, click the “Edit” button to define the following settings.

        - The *Applicable for* property is used to restrict processes to object classes and categories. This way processes are only offered if they are useful for the object, on which the process should be executed. When selecting activities for tasks in the BPMN editor, only activities are provided that correspond to the applicability of the process diagram. If the process is restricted to a category of a user-defined form, the defined fields can be used in the condition editor. If the process is restricted to the category of a user-defined base form, the process can also be used for forms derived from the base form.
        - The *Object Class/Category of the File* property can be used to define the object class or category of the object’s file. This allows access to the properties of the file when defining the abstract participants “Property of the File of the Object” and “Role by Property of the File of the Object”.
        - The *Expression for Determining the Visibility* property defines an app.ducx expression that determines whether the process is offered for selection when a process is started.
        - The *Expression for Determining the Usability* property defines an app.ducx expression that determines whether the process can be started. This allows, for example, to check preconditions that must be fulfilled before the process can be started.
    - In the *Initializations* field, click the “Edit” button to define the following setting.
        - The *Expression for Initializations* property defines an app.ducx expression that allows defining common initializations and global process parameters.
- Lane
  Lanes represent responsibilities. A Fabasoft Folio workflow participant can be assigned to a lane. When creating tasks the values defined for the lane are used as default values for the tasks, which allows comfortable working.
  Note: When creating a pool one lane is implicitly generated.
- Start event
  The process flow starts with a start event. For documentation purposes all types of start events can be used in executable processes. But the start event type has no effect on the execution of the process.
- Conditional start event (optional)
  A wait action can be implemented using an conditional start event. The process is not started until the condition (app.ducx expression) has been fulfilled. The check interval determines how often the condition is checked.
- Intermediate conditional event (optional)
  A wait action can be implemented using an intermediate conditional event. The process is not continued until the condition (app.ducx expression) has been fulfilled. The check interval determines how often the condition is checked.
- End event
  The process flow ends with an end event.
- Terminate end event (optional)
  Terminates the whole process (incl. subprocesses) and the process is marked as completed. When used in subprocesses, only the subprocess is terminated (without special marking).
- End error event (optional)
  Terminates the whole process (incl. subprocesses) and the process is marked as aborted. When used in subprocesses, only the subprocess is terminated (without special marking).

- Task
  A task represents an atomic unit of work that has to be done within a process. Currently, tasks of type “User” are supported. The task must have a Fabasoft Folio activity and one or more participant assigned. When carrying out a process the tasks are displayed in the worklists of the corresponding users.
    - If the activity “Execute Expression in Background” is used, an app.ducx expression can be executed in the background. The process is not continued until the background task has been executed.
    - Deadlines can be defined as date, time span or expression (*Enter Deadline as* field). The “Advanced Settings” button takes you to all deadlines.
    - The *Started Activity Remain in All Worklists* field can be used to define whether the corresponding activity is removed from the worklists of the additional affected participants when the activity is started.
    - The *Ignore Completion* field can be used to define whether subsequent activities can be started although this activity has not yet been completed.
    - The *Skip Invalid Participant* field can be used to define whether the activity is skipped for an invalid participant (e.g. inactive user, missing license).
    - The *Display Activity Only if the Participant Has Access to Affected Object* field can be used to define whether the activity is only displayed in the worklist if the participant has at least read rights to the affected object of the process.
      Note: If the activity is not visible to any participant, the process stops. When starting the process, no warning is displayed if the activity goes to a team in which at least one user has rights to the affected object.
    - The *Disable Substitution* field can be used to define whether the activity may be executed by a substitute.
    - The *Escalation* field you can overwrite the escalation definition that is stored with the respective activity definition. The default escalation is defined for all Fabasoft Folio activity definitions. If the default escalation is used, a welcome screen entry is shown and a notification e-mail is sent to the current workflow participant if the start or completion date is exceeded.
    - In the *Expression When Completing the Activity* field an app.ducx expression can be defined that is executed when completing the activity.
      In the app.ducx expressions, you can use `object` to access the object of the process.
    - A loop type can be defined for tasks.
        - None
          From the defined activity, one instance is created, which is offered to the defined process participants in the worklist. The first process participant, starting the processing, takes over the activity. The activity will be removed from all other worklists.
        - Standard
          Tasks can be run in a loop. The loop condition can be tested before or after the iteration. The maximum number of iterations can be defined, too.
        - MI Parallel
          From the defined activity, one instance is created for each defined process participant and stored parallel in the respective worklists. All process participants must process the activity.

- MI Sequential
  From the defined activity, one instance is created for each defined process participant and stored sequentially in the respective worklists. All process participants must process the activity one after the other.

  - If an activity such as "Approve", "Release", "Review", “Sign”, “Close”, “Approve and Close”, “Release and Close” or “Close File” is denied, activities are not executed if they belong to the same multi-instance task. The default behavior can be changed by the process parameter `keepactivitiesstarted`:
    ```
    process.SetProcessParameter("keepactivitiesstarted", true);
    ```
  - The `signdialogtitle`, `signdialogheading` and `signdialogdescription` process parameters can be used to customize the texts of the sign dialog. For multilingual strings, a `LanguageStringList` can be provided.
    For example: `process.SetProcessParameter("signdialogtitle", "Sign");`

- Sequence flow
  The sequence flow describes the order of events, tasks and gateways. A condition expression (Fabasoft app.ducx Expression Language) may be assigned to a sequence flow outgoing from a gateway. The expression can be entered directly in the text field or can be defined in the condition editor.
- Gateway (optional)
  A gateway allows the distinction between cases or parallelization in a process. Currently data-based exclusive gateways and parallel gateways are supported. For a converging parallel gateway, the join type (AND or OR join) can be defined.
- Subprocesses (optional)
  Subprocesses are used to enclosure complexity. Subprocesses can be nested and run in a loop (type “Standard”). The loop condition can be tested before or after the iteration. The maximum number of iterations can be defined, too.
  - Expanded subprocess
    An expanded subprocess is embedded in the process as structuring element.
  - Collapsed subprocess
    A collapsed subprocess references a separate BPMN process diagram that is therefore reusable. Released changes to subprocesses are taken over when subprocesses are expanded.
- Artifacts and data objects (optional)
  For documentation purposes all artifacts and data objects can be used in executable processes. But these elements have no effect on the execution of the process.

Note:

- Go-to sequence flows can currently not be executed.
- In the app.ducx expressions global process parameters can be defined, to influence the process execution.
  ```
  process.ClearProcessParameters();
  process.SetProcessParameter("key", "value");
  process.GetProcessParameter("key");
  process.GetProcessParameters();
  ```
- The `keeporiginaldiagramversion` process parameter can be used to specify whether the at the start of the process released versions of subprocesses are retained. This way, re-releasing subprocesses does not affect processes that are already running:
  ```
  process.SetProcessParameter("keeporiginaldiagramversion", true);
  ```

- `GetNextActivityInstances` can be used to determine the following activity in app.ducx expressions. `HasValidParticipant` can be used to check the validity of the participant.
- When initially defining a condition, you can decide whether you want to define the condition using the condition editor (graphical user interface with predefined properties) or the code editor (app.ducx expression). Subsequent changes will open the corresponding editor directly. You can switch from the condition editor to the code editor using the "Open Code Editor" button. In doing so, the condition is taken over, but must be manually converted into a valid app.ducx expression.
- Condition expressions are evaluated with `NOCHECK`. This avoids evaluation errors that properties are not assigned to the object class.
- Using the "Show Overview of app.ducx Expressions" context menu command, you get an overview of all app.ducx expressions defined in the process and, if applicable, in the subprocesses. This facilitates troubleshooting in particular.

Multilingual Names

If you assign or change your own names for process elements in the BPMN editor, these are saved in the current user language. For users with different language settings, you can store the translated names on the "Translations" tab. In this way, the name is displayed in the BPMN editor and also in the worklist according to the language settings of the respective user.

6.7.3 Downloading and Uploading a BPMN Process Diagram

BPMN process diagrams may be exported and imported. In case of an executable process diagram, possibly assignments to Folio objects have to be adapted, if the Folio objects are not available in the target system. Component objects will be identified by the reference. Non-component objects will be identified by the *External Key* (if defined by the administrator) or object address.

When downloading BPMN process diagrams, the following options are available:

- Download Diagram With Preview
  Downloads the XML representation and preview images of one or more BPMN process diagrams including any sub-processes that may be contained.
- Download
  Downloads the XML representation of one or more BPMN process diagrams including any sub-processes that may be contained.
- Upload
  The downloaded BPMN process diagrams can be uploaded again (also in another installation if applicable). Either a single XML file or an entire ZIP file can be uploaded. If a ZIP file is uploaded, existing diagrams can be updated.

Download

To download a process diagram, proceed as follows:

1. Navigate in the process diagram and click the "Download" or "Download Diagram With Preview" action.
2. An XML file or ZIP file will be downloaded that contains the process diagram as XML file.

Note: To download several processes at once as a ZIP file, select them and execute the "Download" or "Download Diagram With Preview" context menu command.

Upload

To upload a process diagram, proceed as follows:

1. Navigate in the process diagram and click the “Upload” action.
2. Click the “Select File” button.
3. Enter the path to the process diagram XML file and click “Next”.
4. Click “Next” and “Close”.

Note: To upload several processes at once as a ZIP file, navigate in a process list and click the “Upload” action.

6.7.4 Creating Escalation Definitions

When workflow deadlines expire, the affected workflow participant is notified by default via welcome screen and e-mail. However, you can also define your own escalation definitions and use them with the respective activity.

The escalation definitions can be used in the context in which they are defined or referenced. To make escalation definitions generally available for Teamrooms (but not for app rooms), use a collection for templates and presettings in “Customizing”. Otherwise, escalation definitions can be stored in app configurations (“Processes” widget), in app rooms (“Templates and Presettings” action > “Process Templates” widget) or in Teamrooms (“Templates and Presettings” action > “Process Templates” widget).

Settings of an Escalation Definition

- *Name*
  The name of the escalation definition.
- *Escalations*
  Defines the desired escalations.
  - *Escalation Time*
    Defines the time of escalation.
    - *Time Span*
      Defines a time span in days, hours and minutes (working days are not considered). If no operator and base date are specified, the time span is starting from now.
    - *Operator*
      Defines whether the time span is added to or subtracted from the base date.
    - *Base Date*
      Defines the base date for calculating the deadline (“Visible in Worklist From", “To Be Started at the Latest by” or “To be Completed at the Latest by”). If the base date changes, the deadline will be recalculated.
      Note: For “Visible in Worklist From", escalations probably do not make sense, as the activity is automatically moved to the “To Do” list.
  - *Repetition*
    Defines how often the notification should be repeated.
    - *Time Span Until Next Escalation*
      Defines a time span in days, hours and minutes until the next notification (working days are not considered). Leave blank if you do not want a repetition.

        - *Repeat Until*
          Defines how long the notification will be repeated (“Infinite”, “Date”, “Date Value of a Property”).
        - *End Date/*Date Value of a Property
          Depending on *Repeat Until* an end date or a property can be defined.
    - *Recipients of Escalation Message*
      Defines the recipients of the notification (e.g. "Current Participant" or "Responsible for Process").
    - *Expression for Computing the Subject*
      Allows using an app.ducx expression to change the default subject of the notification e-mail.
    - *Expression for Computing the Additional Message*
      Allows using an app.ducx expression to add an additional text to the notification e-mail.
- *Applicable for*
  The use of the escalation definition is restricted to the listed object classes and categories of the object.
- *Object Class/Category of the File*
  The use of the escalation definition is restricted to the specified object classes and categories of the object's file.
- *Object Class/Category of the Teamroom*
  The use of the escalation definition is restricted to the listed object classes and categories of the object's Teamroom.

Note:

- If no date can be determined, no notification will be sent.
- If the escalation definition is no longer usable in the corresponding context (e.g. due to a change in usability), no notification is sent.

Default Escalation

With the generally available default escalation, a notification is sent to the current workflow participant one minute after the expiration of *To Be Started at the Latest by* and *To be Completed at the Latest by*. The notification is repeated daily. The default escalation is defined for all Fabasoft Folio activity definitions.

6.7.5 Executing a BPMN Process

To execute a BPMN process on an object, proceed as follows:

1. In the context menu of the desired object, click “Start New Process”.
2. Select a predefined BPMN process.

The process is started on the object.

6.7.6 Managing BPMN Process Diagrams

For managing business processes under “account menu (your user name)” > “Advanced Settings” > “Workflow” the tab “Personal Settings” is provided. The *Ad Hoc Process Templates* and *Predefined BPMN Processes* fields show an overview of the templates and BPMN processes that are available for the user. You can edit your personal settings.

Note: BPMN processes that can be used by the user can also be defined via the user's group ("Workflow" tab > *Group Workflow Preferences* > *Predefined BPMN Processes*).

6.8 Process Folder

The process folder allows you to file processes in a structured way and link them with documents, participants and outputs. The processes can be viewed and analyzed from different angles.

The process folder is structured in following four areas:

- Processes
  A modeled business process can reference subprocesses, documents, participants and outputs.
- Documents
  The documents that are needed in the process.
- Participants
  A participant represents an area of responsibility within a process.
- Outputs
  An output defines a result of a process. Outputs can be structured with help of output groups.

In each area a folder is provided that lists all corresponding objects of the process folder as a not hierarchically structured list.

Processes, participants and outputs that are assigned to the process folder but currently not used in the structure are shown on the "Recycle Bin" tab of the process folder.

For each document, participant and output you can view the related processes at any time.

6.8.1 Defining a Process

To define a process, proceed as follows:

1. Navigate in the process folder to the "Processes" list.
2. Create a new BPMN process diagram, or add an existing one.
3. In the context menu of the process diagram, click "Open".
4. Define the process. On the right section (by default collapsed), you can assign documents, activities and participants to the BPMN elements.
   - A Fabasoft Folio process participant can be assigned to pools, collapsed pools, lanes, tasks and additional participants. You can define either a *Process Participant* or a *Process Participant (Execution)*. If you do not just document the process but also want to run it in the Fabasoft Folio workflow, use the *Process Participant (Execution)*.
   - A Fabasoft Folio activity can be assigned to a task.
   - Fabasoft Folio documents can be assigned to every BPMN element.
   - A BPMN process diagram can be assigned to a collapsed sub-process.
5. Click "Next" to complete the editing.

To assign outputs to a BPMN process diagram, edit the properties of the BPMN process diagram. Define the outputs on the “Process Folder” tab in the *Outputs* field.

Note: On the “Process Folder” tab of a BPMN process diagram the sub-processes, documents and participants are listed that are defined in the process diagram. In the detail view on the desk, the information can also be found on different tabs.

6.8.2 Defining Documents, Participants and Outputs

You can define documents, participants and outputs implicitly via BPMN process diagrams, as described in chapter 6.8.1 “Defining a Process”. Alternatively, you can define documents, participants and outputs in the corresponding lists of the process folder and use them in the BPMN process diagrams.

To define a document, a participant or an output, proceed as follows:

1. Navigate in the process folder to the appropriate list.
2. Search for existing objects or create new documents, participants and outputs.

Note: You can use output groups to structure outputs.

6.8.3 Show Related Processes

To show the processes that are assigned to a document, a participant or an output, proceed as follows:

1. Navigate in the process folder to the desired document, participant or output.
2. In the context menu of the object, click “Tools” > “Show Related Processes”.

7 Compliance Management

Fabasoft Folio allows you to manage records, cases and their documents, incomings and outgoings (hereinafter referred to as business objects) in order to implement compliance in your organization.

7.1 Managing Business Objects in General

This chapter refers to use cases that affect all business object types.

7.1.1 General Information

The following contains general information about business objects.

Business Objects in Fabasoft Folio

Business objects include *Records*, *Cases*, documents (*Incomings*/*Outgoings*) and contents.

Recorded vs. Not Recorded Business Objects

Fabasoft Folio differentiates between recorded and not recorded business objects. Recorded business objects are those with an external effect and those that contain signed contents (for example, for approval).

If a business object becomes recorded, a (recorded) version of the business object is automatically created. All business objects contained within it likewise become recorded. Recorded business objects cannot be deleted, but only cancelled before the end of the retention period.

Unlike other business objects, *Records* are always recorded; however, the cases and documents contained therein only become recorded if the record is approved, for example.

Business Object Processing States

Business objects can be in various states: “In Process”, “Cancelled”, “Suspended” and “Closed”. Each state is linked to particular authorizations (ACL). The state of a business object is indicated by the symbol. In order to change the state of a business object, the “Change document state” access permission is necessary.

- In Process
  The “In Process” state is the default state for business objects and characterizes business objects that are still being edited. Not recorded business objects can be edited and deleted in this state. Recorded business objects can be edited, but not deleted.
- Suspended
  The “Suspended” state characterizes business objects that must remain in the current state (for example, because the business object is required in ongoing legal proceedings). The business object can be neither edited nor deleted, and system-controlled actions for business object elimination are suppressed. The suspension can be linked to a period.
- Closed
  The “Closed” state characterizes business objects that are not changed any longer. The business object can no longer be edited or deleted. The business object is eliminated at the defined time.
- Canceled
  The “Canceled” state is only available for recorded business objects and characterizes those business objects that should no longer be integrated into the business process. Canceled documents can no longer be edited.

State Changes

In principle, each state can be changed to any other state.

Propagation of States to Children

If the state of a *Record* is changed, this change in principle will also affect the *Cases* contained therein. A *Record* can therefore be closed in full or set to “In Process” again (including the *Cases* contained therein). If, on the other hand, the state of a *Case* is individually changed, this change is not passed on to the superordinate *Record*. In this way, individual *Cases* can be declared closed before the *Record* is closed. The same applies in the relationship between cases to documents and documents to contents.

The following rules also apply to state inheritance:

- A *Record* can only be closed if it contains no suspended *Case*.
- A cancelled *Case* remains canceled, even if the associated *Record* is closed.
- A *Record* can only be canceled if all *Cases* contained within it are “In Process”. They are then likewise canceled.
- The suspension of the *Record* overwrites the “In Process” and “Closed” states of the *Case*.

Inherited states versus individually specified states

The state of a *Case* may have been inherited from the associated *Record* or it may have been individually specified for the *Case*. If, for example, a *Case* is closed before the entire *Record* is closed and the *Record* is subsequently set to "In Process" again, this *Case* will remain closed. The same applies in the relationship between cases to documents and documents to contents.

Life Cycle Rules for Business Objects

The life cycle is defined through particular events that trigger particular actions depending on conditions (Event Condition Action, or "ECA rules" in brief).

Events

- After creation
- After recorded state
- After closure

Conditions

- Any expression (usually state)

Actions

- Transfer content to archive
- Transfer content and metadata to archive
- Delete permanently

The occurrence of an event is checked daily by the Fabasoft Folio AT service. If an event occurs, the respective action is performed in the context of the AT service user. If the respective condition is not fulfilled at the time when the event occurs, the action is not performed and the condition is re-checked during the next run of the Fabasoft Folio AT service.

7.1.2 Delete a Business Object

Business objects can be deleted provided they are not recorded. Recorded business objects can only be canceled. Business objects that are not themselves recorded, but contain recorded business objects, cannot be deleted either, as the subordinate business objects would also be deleted.

If deletion is allowed, the business object is either deleted immediately or moved to the wastebasket (if available). Wastebaskets can be set up by the system administrator across the system and/or for individual users.

To delete a business object, proceed as follows:

1. In the context menu of the business object, click "Delete".
2. Click "Yes" to confirm the deletion.

7.1.3 Suspend a Business Object

Through suspension, the life cycle of the business object is frozen, meaning that all system-controlled actions in accordance with the retention rules are suppressed. The modification and deletion of objects in the "Suspended" state are not possible either. The suspension can be linked to a period. Once this period has elapsed, the business object is reset to the original initial state.

To suspend a business object, proceed as follows:

1. Navigate to the business object you want to suspend.
2. In the context menu of the business object, click “Set State to” > “Suspended”.
3. Enter your password if necessary (depending on the configuration of the system).

Note: The suspension of the *Record* overwrites the “In Process” and “Closed” state of the *Cases* contained within it.

7.1.4 Close a Business Object

Closed business objects can no longer be deleted or edited, but are subject to the document life cycle.

To close a business object, proceed as follows:

1. Navigate to the business object you want to close.
2. In the context menu of the business object, click “Set State to” > “Closed”.
3. Enter your password if necessary (depending on the configuration of the system).

Note:

- A *Record* can only be closed if it contains no suspended *Case*.
- A canceled *Case* remains canceled, even if the associated *Record* is closed.

7.1.5 Cancel a Business Object

If recorded business objects no longer need to be integrated into the business process, they can be canceled. If a business object is canceled, it can no longer be edited.

To cancel a business object, proceed as follows:

1. Navigate to the business object you want to cancel.
2. In the context menu of the business object, click “Set State to” > “Canceled”.
3. Enter your password if necessary (depending on the configuration of the system).

Note: A *Record* can only be canceled if all *Cases* contained within it are “In Process”. They are then likewise canceled.

7.1.6 Set the State of a Business Object to “In Process”

Business objects (recorded or not recorded) that are going to be edited again can be set to the “In Process” state.

To set a business object to the “In Process” state, proceed as follows:

1. Navigate to the business object that should be edited again.
2. In the context menu of the business object, click “Set State to” > “In Process”.
3. Enter your password if necessary (depending on the configuration of the system).

7.1.7 Define Retention Rules for a Business Object

In principle, retention is defined for the category, but can be individually overridden for a business object (i.e., if a retention is entered for the business object, then this entry will apply; otherwise that of the assigned category).

To define retention rules, proceed as follows:

1. Navigate to the *Category* you want to edit.
2. In the context menu of the category, click "Properties".
3. Switch to the "Control" tab.
4. In the *Life Cycle Rules* field, click the "Add Row" button.
5. In the *Period* field, enter a time interval (*d*, *h*, *min* and *sec*) that is to pass before an action is executed.
6. In the *Event* list, click the trigger for performing the action (the time interval defined above begins at this time).
7. If necessary, enter a Fabasoft app.ducx expression in the *Condition* field (the analysis of this expression must return true in order that the action is actually performed).
8. In the *Action* list, click an action that is to be performed on business objects assigned to this category after occurrence of the specified event and after the specified time interval.
9. Click "Next" to close editing the entry.
10. Click "Next".

7.1.8 Managing Contents

A *Content* is a business object that contains a file (for example, a Microsoft Word document).

7.1.8.1 Record a File Directly by Uploading It Into an Inbox

Inboxes can be used for an automatic recording of contents. An inbox defines the object type of the incoming to be created and the category. The category defines among others the access rights and the process for the created incoming.

Contents can also be uploaded into an inbox using WebDAV.

7.1.8.2 Record and Register a File or E-Mail Directly as Incoming Using Drag and Drop

To record and register a file directly as incoming using the drag and drop feature, proceed as follows:

1. Navigate in the desired case, record, person or organization. In case of persons or organizations, open the "Records/Cases" list.
2. Locate the respective file in your operating system environment.
3. Drag the file directly from the operating system environment in the Fabasoft Folio Web Client. Alternatively, you can copy and paste the file. Whether drag-and-drop or copy and paste is working depends on the web browser.
4. To use a template for the incoming, click the category and then click one of the templates assigned to this category.
   To use no template for the incoming, click "Classes" and then click "Incoming".

5. Edit the metadata of the incoming if necessary and click “Next”.

7.1.8.3 Edit a Content

Contents (e.g. of *Microsoft Word Documents*) can be edited in the assigned third-party product.

To edit content, proceed as follows:

1. Navigate to the content you want to edit.
2. In the context menu of the content, click “Edit”.

The content will be opened in the assigned third-party product and can be edited there.

To upload a different file to a content (and thereby overwrite the original file), proceed as follows:

1. Navigate to the content you want to edit.
2. In the context menu of the content, click “Upload”.
3. Select the desired file.
4. Click “Yes”.

The file will be stored in the content and will replace the original file.

7.1.8.4 Delete a Content

Content can only be deleted insofar as it is not part of a recorded document and is itself not recorded. The deletion of content works in the same way as the deletion of other business objects (“Delete” context menu command).

7.1.8.5 Record a Content to an Existing Document

Contents can be recorded for existing documents (*Incomings*/ *Outgoings*), in other words, assigned exclusively to them.

To record a content to a document, proceed as follows:

1. Navigate to the content you want to record.
2. In the context menu of the content, click “Copy”.
3. Navigate in the desired document.
4. In the background context menu, click “Paste Shortcut”.

Note:

- Recording is also possible using the drag and drop feature.
- A content can also be created in a document. In this case, the content will be recorded to this document automatically.

7.1.8.6 Record a Content to a New Document

To register a content to a new document, proceed as follows:

1. Navigate to the content you want to register to a new document.
2. In the context menu of the content, click “Copy”.
3. Navigate in the desired case or record.

4. In the background context menu, click “Paste Shortcut”.
5. To use a template for the incoming, click the category and then click one of the templates assigned to this category.
   To use no template for the incoming, click “Classes” and then click “Incoming”.
6. Edit the metadata of the document if necessary and click “Next”.

Note: Recording can also be performed by dragging and dropping the content on the case or record.

7.1.8.7 Set as Recorded Content of a Document

To set one or more contents as recorded content of a document, proceed as follows:

1. Navigate to the content you want to set as recorded content.
2. In the context menu of the content, click “Tools” > “Set as Recorded Content”.
3. Click the “Take” button next to a document to select it.
   Note: To search for further documents, click “Research”.

The effects of this procedure are as follows:

- The current (former) version of the selected document will be automatically backed up as a version.
- The content, on which the action was invoked, will be inserted into the document.

Set as recorded content of a sending verification

Instead of a document, a *Sending Verification* can be selected. In this case, it can be specified whether it was *Successfully Delivered*.

Example: If an e-mail contains the message that a sent e-mail could not be delivered, then this reply e-mail can be set as recorded content for the respective sending verification and the *Successfully Delivered* property of the sending verification can be set to “No”, since the message obviously did not arrive.

7.2 Managing Documents in General

Fabasoft Folio differentiates between *Incomings* and *Outgoings*. Even though each of these two types of documents fulfills its own purpose, there are use scenarios that are the same for both.

7.2.1 Create a New Document

To create a new document, proceed as follows:

1. Click the “New” action.
2. Select the document type (“Incoming” or “Outgoing”) and click “Next”.
3. Edit the document metadata and click “Next”.

Note:

- If the document is created in a *Case*, the document will be given the ACL of the case.
- In addition to this explicit generation of a document, a document can be generated implicitly by registering content to *Cases* or *Records*.

7.2.2 Unique Document Number

Fabasoft Folio allocates a unique number for documents. This document number is typically incorporated into the name of the document and is set up differently for *Incomings* and *Outgoings*.

The name of the document is made up as follows:
`<document number> - <subject> - <date>`

Note: <subject> is the subject of the document and <date> is the document's creation date.

7.2.3 Display a Document (Overview)

For documents, an overview can be generated that displays the contents in PDF format.

To display a document's overview, proceed as follows:

1. Navigate to the document for which the overview should be displayed.
2. In the context menu of the document, click “Show Overview”.

7.2.4 Edit Main Content of a Document

To edit the main content of a document, proceed as follows:

1. Navigate to the desired document.
2. In the context menu of the document, click “Open”.

The content will be opened in the assigned third-party product and can be edited there.

7.2.5 Edit Contents of a Document

To edit the contents of a document, proceed as follows:

1. Navigate to the desired document.
2. In the context menu of the document of which the contents should be edited, click “Properties”.
3. Locate the content in the *Contents* field.
4. In the context menu of the content, click “Edit”.
   The content will be opened in the assigned third-party product and can be edited there.
5. Edit the content, save the modifications and close the third-party product.
6. Repeat steps 2 to 4 for each content you want to edit.
7. Click “Next”.

7.2.6 Edit the Document's Metadata

To edit document metadata, proceed as follows:

1. Navigate to the desired document.
2. In the context menu of the content, click “Properties”.
3. Edit the document's metadata. Required fields are marked with an asterisk (*).
4. Click “Next”.

7.2.7 Search for a Document

When searching for a document, the metadata and content (full text search) of the document can be searched.

To search for a document, proceed as follows:

1. Click the “Find” action.
2. Select “Incoming”, “Outgoing” or “Document” and click “Next”.
3. Enter your search criteria (case, year, main content, addressee, etc.).
4. Click “Search Now”.
5. Select the required document in order to store it in the object list in which you started the search.
6. Click “Next”.

The selected document will be stored in the object list in which you started the search.

7.2.8 Delete a Document

A document can only be deleted if it is not recorded. The deletion of a document works in the same way as the deletion of other business objects (“Delete” context menu command).

7.2.9 Cancel a Document

A canceled document can no longer be edited. The contents contained in the document cannot be edited either. The cancellation of a document works in the same way as the cancellation of other business objects (“Set State to” > “Canceled” context menu command).

7.2.10 Revoke Cancellation of a Document

If the cancellation of a document is revoked, the contents contained in the document are also reset to the earlier processing status.

To revoke the cancellation of a document, the status must be set to “In Process”.

7.2.11 Re-Register a Document

Re-registration is performed by moving a document (including its contents) to a different case. Re-registration is recorded in the metadata of the re-registered document. The document number changes as a result of re-registration. The previous number is displayed in the document's number history.

To re-register a document, proceed as follows:

1. Navigate to the document that should be re-registered.
2. In the context menu of the document, click “Cut”.
3. Navigate in the case the document should be registered to.
4. In the background context menu, click “Paste Shortcut”.

Note: Another way to re-register the document is to use the drag and drop feature.

7.2.12 Move a Document

Documents can be moved as desired within a case (i.e., within the folder structure of the case). Simply moving a document within the folder structure of a case does not result in re-registration; it simply means you are free to define your own structure.

To move a document within a case (for example, to a particular folder), proceed as follows:

1. Navigate to the document that should be moved.
2. In the context menu of the document, click “Cut”.
3. Navigate in the desired folder.
4. In the background context menu, click “Paste Shortcut”.

Note: Another way to move documents is using the drag and drop feature.

7.2.13 Version a Document

To version a document, proceed as follows:

1. Select the desired document.
2. In the „Versions” menu, click “Save Version”.
3. Enter a *Description of Version to Be Saved* and click “Next”.

Note:

- When a new version of a document is created, all contents of the document will also be versioned.
- If the metadata of a document is edited by different users in succession, the system automatically stores a version for every user change.

7.2.14 Create Recorded Version of a Document

Explicit generation of a recorded version

To create a recorded version of a document's current content, proceed as follows:

1. Select the document for which a recorded version should be created.
2. In the „Version” menu, click “Create Recorded Version”.

If the current content has not yet been recorded, it will be set to recorded.

Implicit generation of a recorded version

A recorded version is automatically created in the course of the following use scenarios:

- Document approval
- Document closure
- Confirmation of dispatch/printing (for outgoings)
- Recording an incoming (for incomings)

If a document has several recorded versions, then the most recent recorded version represents the recorded content of the document.

7.2.15 Load Recorded Content of a Document

To display the recorded content of a document that is currently valid, proceed as follows:

1. Select the document for which the currently recorded content should be read.
2. In the „Versions" menu, click "Use Recorded Version".

The most recent recorded version of the document is now available (indicated by the clock symbol). Both the content of the recorded version ("Read") and its metadata ("Properties") can be viewed.

7.2.16 Record Physical Content for a Document

To record physical content to a document, proceed as follows:

1. Navigate to the desired document.
2. In the context menu of the document, click "Properties".
3. Switch to the "Document" tab.
4. In the *Physical Location* field, enter the storage location of the physical content.
5. Click "Next".

7.2.17 Lend /Take Back a Document

To lend a document, proceed as follows:

1. Navigate to the document you want to lend.
2. In the context menu of the document, click "Tools" > "Signatures" > "Lend".
3. Enter your password.
4. In the *Remark* field type lending data (e.g. who lends, how long and why) and click "Next".

To take back a document, proceed as follows:

1. Navigate to the document you want to take back.
2. In the context menu of the document, click "Tools" > "Signatures" > "Take Back".
3. Enter your password and click "Next".

Note: The lending and taking back of a document is recorded on the "History" tab of the document.

7.3 Managing Incomings

When recording content to an *Incoming*, metadata and recipients can be defined. For incomings that are not scanned or only partially scanned, only the metadata of the incoming and the location of the physical content must be entered.

During registration, an incoming is assigned to a case or a record and, if necessary, assigned to a responsible department via workflow.

7.3.1 Create an Incoming

There are several ways to record a content to an incoming.

Using the “New” Action

To create an *Incoming* explicitly, proceed as follows:

1. Click the “New” action.
2. Select “Incoming” and click “Next”.
3. Edit the metadata of the incoming and click “Next”.

Note:

- Contents to be assigned to the incoming can be inserted or uploaded in the *Contents* field.
- If an incoming is created in a case, the incoming will be automatically registered to this case.
- Incomings can also be created using templates.

Using Drag and Drop or Copy and Paste

If you store a content or file in a person, organization, case or record, you can implicitly create an incoming that is registered in addition to the case or record.

1. Navigate to the content to be recorded.
2. Drag and drop the content on the desired person, organization, case or record. Alternatively, you can copy and paste the content in the corresponding list of the target object.
3. For persons or organizations, the content can be assigned to an existing or new record or case:
    - To assign the content to a record or a case, click the “Apply” button next to the corresponding entry.
    - To assign the content to a new record or case, click the “Create” button, select the object type to be created and click "Next". Enter the metadata of the created object and click “Next”.
4. To use a template for the incoming, click a category and then one of the templates assigned to the category.
   To not use a template for the incoming, click the “Classes” button and then the “Incoming” entry.
5. If necessary, edit the metadata of the incoming and click “Next”.

Record a file

Instead of content already in the system, a file or e-mail from the operating system environment can be used directly for the same use case. Whether drag-and-drop or copy and paste is available depends on the web browser.

7.3.2 Select a Category

During recording a content, you can assign a category (for example, application, purchase order or enquiry) to the incoming in the *Category* field. A standard process can be defined in the category, which is started automatically depending on the configuration.

7.3.3 Enter Metadata

In the course of recording an incoming, the following metadata can be defined for incomings. Depending on the context, not all fields are available.

- *Record*
  The incoming is assigned to the defined record.
- *Subject*
  Defines the subject of the incoming.
- *Category*
  Defines the category of the incoming.
  - *Short Form*
    Shows the short form based on the category.
  - *Standard Process*
    Shows the standard process based on the category.
- *Start Standard Process*
  Defines, whether the standard process is started.
- *Journal Date*
  Defines the date for the journal.
- *Addressees*
  Defines the addresses of the incoming.
- *Contents*
  Defines the contents assigned to the incoming.
- *Year*
  Defines the year to which the incoming is assigned. The current year will be proposed by default.
- *Terms*
  Defines *Terms* (keywords) of the incoming. Keywords can be used, for example, to find the incoming easier.
- *Responsibility*
  Defines how the responsible user is retrieved.

The following metadata cannot be changed once it has been entered:

- *Year*
  Is part of the unique number.
- *Category*
  Determines the short form and the standard process.

7.3.4 Assign an Addressee to an Incoming

During recording a content, you can assign addressees. The addressees of the underlying case or record are prefilled. These can still be changed if necessary.

Taken Over Proposed Addressees

During recording of a content, addressees are proposed in the following cases:

- If an e-mail is recorded, a person or organization is determined based on the sender's e-mail address.

- If content is recorded in a case, the addressees of the case are taken over as the addressees of the incoming.
- If content is recorded in a record, the addressees of the record are taken over as the addressees of the incoming.

Search for an Addressee

To assign an existing addressee to an incoming, proceed as follows:

1. In the *Addressee* field, click the “Add Row” button (plus symbol).
2. In the new line in the *Contact* field, click the “Find” button.
3. Select the object type you want to search for and click “Next”.
   Note: To search for all types of addressees, select the “Contact” entry.
4. Enter the search criteria and click “Search Now”.
5. Select the addressees you want to take over and click “Next”.

Note: In the *Contact* field, you can also perform a quick search.

Create an Addressee

To assign a new addressee to an incoming, proceed as follows:

1. In the *Addressee* field, click the “Add Row” button (plus symbol).
2. In the new line in the *Contact* field, click the “Create” button (plus symbol).
3. Select the object type to be created (for example, *Contact Person* or *Organization*) and click “Next”.
4. Edit the metadata of the addressee and click “Next”.

7.3.5 Start Process on Incoming

During recording a content, you can assign a category. A standard process can be defined in the category, which is started automatically depending on the configuration.

7.3.6 Unique Incoming Number

The system allocates a unique number for incomings. This incoming number is typically incorporated into the name of the incoming.

The name of the incoming is made up as follows:
`<document number> - <subject> - <date>`

Note: `<subject>` is the subject of the document and `<date>` is the document's generation date.

7.3.7 Register an Incoming

Incomings can be registered to *Cases* or *Records*, in other words, assigned to them.

To register an incoming, proceed as follows:

1. Navigate to the incoming to be registered.
2. Drag and drop the incoming on the desired person, organization, case or record. Alternatively, you can copy and paste the incoming in the corresponding list of the target object.

3. For persons or organizations, the incoming can be assigned to an existing or new record or case:
   - To assign the incoming to a record or a case, click the “Apply” button next to the corresponding entry.
   - To assign the incoming to a new record or case, click the “Create” button, select the object type to be created and click "Next". Enter the metadata of the created object and click “Next”.

7.4 Managing Outgoings

The content of an outgoing can be sent to the addressees defined in the outgoing.

Note: To generate personalized outgoing documents, Microsoft Office on the Fabasoft Folio Conversion Services is required.

7.4.1 Create an Outgoing

To create an outgoing following possibilities are available.

Using the “New” Action

To create an outgoing explicitly, proceed as follows:

1. Click the “New” action.
2. Select “Outgoing” and click “Next”.
3. Edit the metadata of the outgoing and click “Next”.

Note: In the *Sender* field (“Addressees” tab), the e-mail address has to be entered in the format “Arbitrary Name <email@example.com>".

Using Drag and Drop or Copy and Paste

If you store a content or file in a person, organization, case or record, you can implicitly create an outgoing that is registered in addition to the case or record.

To create an outgoing implicitly, proceed as follows:

1. Navigate to the content to be sent.
2. Drag and drop the content on the desired person, organization, case or record.
   Alternatively, you can copy and paste the content in the corresponding list of the target object.
3. For persons or organizations, the content can be assigned to an existing or new record or case:
   - To assign the content to a record or a case, click the “Apply” button next to the corresponding entry.
   - To assign the content to a new record or case, click the “Create” button, select the object type to be created and click "Next". Enter the metadata of the created object and click “Next”.
4. To use a template for the outgoing, click a category and then one of the templates assigned to the category.
   To not use a template for the outgoing, click the “Classes” button and then the “Outgoing” entry.

5. If necessary, edit the metadata of the outgoing and click “Next”.

Using Templates

Templates can be used both for implicitly and explicitly created outgoings. If a “Final Format” (for example, PDF) is specified for a template category of the relevant outgoing, the contents of the outgoing will be converted to this format in the course of sending. For this purpose, the third-party software products required to perform the conversion must be installed on the conversion server and ready for operation.

Unique Outgoing Number

The unique number of an outgoing has the following format:
`<Case number>/<Consecutive number>`

7.4.2 Define Mail Processing Type

A differentiation is made between the mail processing types “Bulk mailing” and “Serial mailing”.

- Bulk mail processing – personalized contents are not stored
  During dispatch/printing, the outgoing object is stored for every addressee in “Communication”. However, no sending verifications with personalized contents are generated.
  The dispatch types “E-Mail Dispatch (Background)” and “Mail Merge” are possible.
- Serial mail processing – personalized contents are stored
  During dispatch/printing, a sending verification is generated for every addressee and the respective sending verification is stored for every addressee in “Communication”.
  The dispatch type “E-Mail Dispatch (Interactive)” is possible.

To define the mail processing type of an outgoing, proceed as follows:

1. Navigate to the outgoing.
2. In the context menu of the outgoing, click “Properties”.
3. Switch to the “Addressees” tab.
4. In the *Type of Dispatch* field, select the desired mail processing type.
5. Click “Next”.

7.4.3 Select an Addressee for an Outgoing

To assign an existing addressee to an outgoing in the course of creating an outgoing, proceed as follows:

1. In the *Addressee* field, click the “Add Entry” button.
2. In the new line in the *Contact* field, click the “Find” button.
3. Select the object type you want to search for and click “Next”.
   Note: To search for all types of addressees, select the “Contact” entry.
4. Enter the search criteria and click “Search Now”.
5. Select the addressees you want to take over and click “Next”.

Note: In the *Contact* field, you can also perform a quick search.

To assign an existing addressee to an existing outgoing, open the properties of the outgoing and perform the specified steps on the “Addressees” tab.

7.4.4 Select an Addressee List for an Outgoing

In addition to (or instead of) individually listed addressees, an addressee list can also be assigned to an outgoing in the *Addressee List* field.

To select an *Addressee List* for an *Outgoing*, proceed as follows:

1. In the context menu of the outgoing, click “Properties”.
2. Switch to the “Addressees” tab.
3. In the *Addressee List* field, select an addressee list.
   - To perform a search, click the “Find” button.
   - To create an addressee list, click the “Create” button (plus symbol). Edit the metadata of the addressee list and click “Next”.
4. Click “Next”.

Note: The addressee lists are not re-generated in the course of the dispatch.

7.4.5 Define the Contents to be Sent for an Outgoing

Contents to be assigned to the outgoing should be inserted into (uploaded into) the *Contents* field. In principle, any content can be inserted. However, personalized mailings (in which metadata is inserted) can only be carried out based on the following file types:

- Microsoft Word (fields)

To define the contents to be sent for an outgoing, proceed as follows:

1. In the context menu of the outgoing, click “Properties”.
2. In the *Contents* field add the desired documents.
3. Click “Next”.

7.4.6 Send an Outgoing in the Background

An outgoing can be sent on the server side in the background. Personalized e-mails are generated for all addressees on the server side and sent without further user interaction. The main content and additional contents are personalized for each addressee, provided the respective content is static text, HTML or a Microsoft Word document. The main content is used as the e-mail body if it can be converted to HTML or plain text. For example, PDF documents or images are never personalized and are always sent as attachment. The subject of the outgoing is used as the subject of the e-mail.

Note: This dispatch type is available for outgoings with the mail processing type “E-Mail Dispatch (Background)”.

To send an outgoing in the background, proceed as follows:

1. Navigate to the outgoing you want to send.
2. In the context menu of the outgoing, click “E-Mail Dispatch (Background)”.

E-mails will be generated and sent automatically.

7.4.7 Test Dispatch of an Outgoing

An outgoing that should be sent in the background can be tested using the “E-Mail Test Dispatch” context menu command. In the course of the test send, e-mails will be generated and personalized for a defined number of recipients of the outgoing e-mail. However, these e-mails are sent to specially defined test recipients. In this way, the send result can be tested using just a few test recipients.

Note: “E-Mail Test Dispatch” is available for outgoings with the mail processing type “E-Mail Dispatch (Background)”.

To test send an outgoing, proceed as follows:

1. In the context menu of the outgoing, click “E-Mail Test Dispatch”.
2. Define the *Settings for Test Dispatch*:
   In the *Recipients* field, type e-mail addresses to which the test e-mails are to be sent.
   In the *Limit* field, enter how many e-mails are to be generated and personalized for test purposes. The data for personalizing the e-mails will be taken from the actual recipients; however, the e-mails will only be sent to the specified test recipients, not to the recipients defined in the outgoing.
3. Click “Next”.
4. Send progress and send statistics are displayed in a dialog window. Once the send has been completed, click “Next”.
5. Check the e-mails.

7.4.8 Create Personalized Fair Copies

Each personalized fair copy will be stored both for the outgoing on the “Transmission Log” tab in the *Sending Verifications* field and for the respective contact on the “Journal” tab in the *Communication* field. Fair copies are allocated the status “Not yet sent”.

To create personalized fair copies, proceed as follows:

1. Navigate to the outgoing for which fair copies are to be created.
2. In the context menu of the outgoing, click “Create Fair Copies”.

To send fair copies via Microsoft Outlook, proceed as follows:

1. Navigate to the outgoing that should be sent.
2. In the context menu of the outgoing, click “E-Mail Dispatch (Interactive)”.
   The e-mail is prefilled with the contents of the *Message* field of the outgoing and the contents of the outgoing are attached.

7.4.9 Send an Outgoing as Mail Merge

An outgoing can be sent as mail merge to several addressees. As using “E-Mail Dispatch (Background)”, the primary content and other convertible contents are personalized for all addressees and converted to the PDF format. The created PDF files are appended and saved in the *Content for Mail Merge* field in the outgoing.

7.5 Managing Cases

A *Case* contains documents (*Incomings* and *Outgoings*) with a limited time horizon (for example, a project or a campaign). A *Case* is therefore a folder of documents with the same context.

7.5.1 Create a New Case

To create a new *Case*, proceed as follows:

1. Click the “New” action.
2. Select “Case” and click “Next”.
3. Edit the metadata of the case and click “Next”.

Note:

- The *Short Form* is taken over from the *Category*.
- If a case is not (yet) registered, its unique number is generated as follows:
  `<short form>/<year>/<consecutive number>`
  If a case is registered for a record, its unique number is generated differently (the former unique number is added to the number history):
  `<unique number of the record>/<consecutive number>`
- The case name is generated as follows:
  `<unique number of the case> - <subject>`

7.5.2 Edit a Case

To edit a *Case*, proceed as follows:

1. In the context menu of the case, click “Properties”.
2. Edit the metadata of the case and click “Next”.

The following metadata is available:

- *Name*
  Shows the name of the case.
- *Subject*
  Defines the subject of the case.
- *Number/Category/Year*
  Shows the unique number, the category and the year of the case.
- *Terms*
  Defines *Terms* (keywords) of the case. Keywords can be used, for example, to find the case easier.
- *Addressees*
  Defines the addressees of the case.
- *Record*
  Defines the record to which the case is assigned.
  Note: If a case is registered to a *Record*, the name of the case will change.
- *Person*
  The case can be assigned to a person.

- *Organization*
  The case can be assigned to an organization.

7.5.3 Define Relationships Between Cases

Relationships between individual cases and relationships between cases and records can be established.

To create relationships between *Cases*, proceed as follows:

1. Copy the case that should be entered as reference in another case.
2. Navigate to the case in which the reference should be stored.
3. In the context menu of the case, click “Properties”.
4. Switch to the “Remarks” tab.
5. In the *Add Attachments* field, click the “Paste Shortcut” context menu command.
6. Click “Next”.

7.5.4 Re-register a Case

A *Case* already registered to a *Record* can be re-registered, i.e., assigned to a different *Record*. The name of the case will change with the new assignment, and the previous name noted in the case's number history.

To re-register a *Case*, proceed as follows:

1. Navigate to the case that should be re-registered.
2. In the context menu of the case, click “Cut”.
3. Navigate in the record the case should be registered to.
4. In the background context menu, click “Paste Shortcut”.

Note: Another way to re-register the case is to use the drag and drop feature.

7.5.5 Cancel a Case

The effects of cancelling a case are as follows:

- The workflow of the case will be interrupted; no more activities for this case will be displayed in the worklists of the respective users.
- The cancellation is passed on to the documents of the case.
- The business number remains allocated.

The procedure for cancelling a case is the same as for any other business object (“Set State to” > “Canceled” context menu command).

7.5.6 Revoke Cancellation of a Case

If the cancellation of a case is revoked, the workflow of the case will be resumed. This means that the activities are enabled again. The revocation of the cancellation is passed on to the documents of the case.

To revoke the cancellation of a case, the state must be set (“Set State to” > “In Progress” context menu command).

7.5.7 Close a Case

To close a *Case*, proceed the same as for any other business object ("Set State to" > "Closed" context menu command).

7.5.8 Version a Case

To version a *Case*, proceed as follows:

1. Select the record for which you want to save the current version.
2. In the „Versions" menu, click "Save Version".
3. Enter a *Description of Version to Be Saved* and click "Next".

Note: When a case is versioned, the documents assigned to it are not versioned.

7.5.9 Lend/Take Back a Case

To lend a *Case*, proceed as follows:

1. Navigate to the case you want to lend.
2. In the context menu of the case, click "Tools" > "Signatures" > "Lend".
3. Enter your password.
4. In the *Remark* field type lending data (e.g. who lends, how long and why) and click "Next".

To take back a *Case*, proceed as follows:

1. Navigate to the case you want to take back.
2. In the context menu of the case, click "Tools" > "Signatures" > "Take Back".
3. Enter your password and click "Next".

Note: The lending and taking back of a case is recorded on the "History" tab of the case.

7.6 Managing Records

A record comprises *Cases* and documents (*Incomings* and *Outgoings*) with a prolonged time horizon. A record is therefore a folder of documents and cases with the same context.

7.6.1 Create a New Record

To create a new *Record*, proceed as follows:

1. Click the "New" action.
2. Select "Record" and click "Next".
3. Edit the metadata of the record and click "Next".

Note:

- The *Short Form* is taken over from the *Category*.
- The unique number of the record is generated as follows:
  `<short form>/<year>/<consecutive number>`
- The name of the record is generated as follows:
  `<unique number of the record> - <subject>`

7.6.2 Edit a Record

To edit a *Record*, proceed as follows:

1. In the context menu of the record, click “Edit Properties”.
2. Edit the metadata of the record and click “Next”.

Following metadata is available:

- *Name*
  Shows the name of the record.
- *Subject*
  Defines the subject for the record.
- *Number/Category/Year*
  Shows the unique number, the category and the year of the record.
- *Addressees*
  Defines the addressees of the record.
- *Person*
  The record can be assigned to a person.
- *Organization*
  The record can be assigned to an organization.

7.6.3 Define Relationships Between Records and Other Business Objects

Records have a *References* field, in which other business objects can be stored. If a different *Record* or *Case* is entered under *References*, a cross reference is created. Similarly, this cross reference relationship will be removed if a *Record* or *Case* is removed from *References*.

To define relationships between *Records* and other business objects, proceed as follows:

1. Copy the business object that should be entered as reference in a record.
2. Navigate to the record in which the reference should be stored.
3. In the context menu of the record, click “Properties”.
4. Switch to the “Remarks” tab.
5. In the *Add Attachments* field, click the “Paste Shortcut” context menu command.
6. Click “Next”.

Note: The *References* field is used for storing informal business objects. These objects are not assigned exclusively to the record, do not change the document status, are not part of the permissions context and are not versioned together with the record.

7.6.4 Cancel a Record

The effects of cancelling a record are as follows:

- The workflow of the record will be interrupted; no more activities for this record are displayed in the worklists of the respective users.
- The cancellation is passed on to the documents or cases of the record.
- The business number remains allocated.

The procedure for cancelling a record is the same as for any other business object ("Set State to" > "Canceled" context menu command).

7.6.5 Revoke Cancellation of a Record

If the cancellation of a record is revoked, the workflow of the record will be resumed. This means that the activities are enabled again. The revocation of the cancellation is passed on to the documents or cases of the record.

To revoke the cancellation of a record, the status must be set ("Set State to" > "In Process" context menu command).

7.6.6 Close a Record

If a record is closed and there are cases in the record that are not yet closed, a corresponding message appears. If closing the record is resumed, an automatic attempt will be made to close all cases in the record. If this attempt fails in respect of one of the cases or the user cancels the process, the entire transaction will be cancelled.

To close a *Record*, proceed as for any other business object ("Set State to" > "Closed" context menu command).

7.6.7 Version a Record

To version a *Record*, proceed as follows:

1. Select the record for which you want to save the current version.
2. In the „Versions" menu, click "Save Version".
3. Enter a *Description of Version to Be Saved* and click "Next".

7.6.8 Lend/Take Back a Record

To lend a *Record*, proceed as follows:

1. Navigate to the record you want to lend.
2. In the context menu of the record, click "Tools" > "Signatures" > "Lend".
3. Enter your password.
4. In the *Remark* field type lending data (e.g. who lends, how long and why) and click "Next".

To take back a *Record*, proceed as follows:

1. Navigate to the record you want to take back.
2. In the context menu of the record, click "Tools" > "Signatures" > "Take Back".
3. Enter your password and click "Next".

Note: The lending and taking back of a record is recorded on the "History" tab of the record.

7.6.9 Structure a Record or Case

Records and *Cases* can be structured using folders. These folders can contain business objects or further folders.

7.7 Incoming Invoice

Incoming invoices can be stored in business objects.

To create an *Incoming Invoice*, proceed as follows:

1. Navigate in the business object.
2. In the background context menu, click “New”.
3. Select “Incoming Invoice” and click “Next”.
4. Edit the metadata of the incoming invoice (for example, *Invoice Number* and *Creditor*) and click “Next”.

Approval Process for Incoming Invoices

The following activities are delivered for the approval process for incoming invoices. These activities are only available with appropriate project-specific configuration.

- Formal Check of Invoice
- Send Invoice Back
- Book Invoice
- Approve Invoice
- Finalize Invoice

7.8 Delivery Note

Delivery notes can be stored in business objects.

To create a *Delivery Note*, proceed as follows:

1. Navigate in the business object.
2. In the background context menu, click “New”.
3. Select “Delivery Note” and click “Next”.
4. Edit the metadata of the delivery note (for example, *Delivery Note ID* and *Date of Receipt*) and click “Next”.

7.9 Contract

To create a new contract, proceed as follows:

1. Click the “New” action.
2. Select “Incoming Invoice” and click “Next”.
3. Edit the metadata of the contract and click “Next”.

Meta Data

The following meta data is available for contracts:

“Contract” tab

- *Name*
  In this field the name or title of the object is typed. This value is composed as follows:
  `<Number> - <Short Description>`

- *Record*
  In this field the Record is defined to which the contract is assigned.
- *Short Description*
  In this field notes, keywords and other statements about the contract can be typed.
  Note: The Short Descriptions becomes part of the object name.
- *Number/Contract Type/Year*
  In this field the number, the contract type and the year is displayed.
  Note: The contract type cannot be changed later.
- *Own Organization*
  In this field the own organization can be selected.
- *Contracting Party*
  In this field the contracting party has to be selected. Organizations, persons or employees can be selected.
- *Object of Agreement*
  In this field the object of agreement can be defined. The product and its version can be selected as well as the amount and the price per unit.
- *Contract Value (Own Currency)*
  In this field the contract value can be defined in the own currency.
- *Contract Value*
  In this field the contract value can be defined in a foreign currency.
- *Date of Contract*
  In this field the date, on which the contract has been signed, can be defined.
- *Termination*
  In this field the date, on which the contract has been canceled or the contract will expire, can be defined.
- *Valid From*
  This field contains the date, the object is valid from.
- *Valid Until*
  This field contains the date, the object is valid from.
- *Contract Identifier*
  This field contains the contract identifier.
- *ERP Identification*
  In this field the ERP Identification can be entered.
- *Comment*
  In this field a comment concerning the contract can be typed.
- *Contact Persons*
  In this field the contact persons of the contracting party can be defined. Only persons belonging to the contracting party can be selected.
- *Terms*
  In this field terms can be assigned to the contract as key words.
- *Addressees*
  In this field contacts (people and organizations) belonging to this contract can be defined including their contact data.

“Periods” tab

- *Minimum Duration to*
  Until this date, the contract has to run. This value is calculated automatically. This is the earliest cancelation date.
- *Cancelation in Due Time Until*
  In this field the date, on which the cancelation has to be made, to comply with the next cancelation appointed date, is defined.
  For example: If a contract should be terminated with September 30, 2009 and a cancelation period of three months has to be met, the cancelation has to be made on June, 30 2009.
  This value is newly calculated when changing the cancelation appointed date or the cancelation period.
- *Cancelation Appointed Date*
  In this field the date, to which the next cancelation can be made is defined.
  For example: An employment status can be canceled on the last day of a month. If you want to terminate in the middle of the month, you have to wait for the last day of the month (the cancelation appointed date).
- *Automatic Prolongation*
  The Cancelation Appointed Date is delayed about this period, if the date for the cancelation in due time or the appointed date of the cancelation is exceeded.
  For example: The Automatic Prolongation is two years. A contract ends on December, 31 2009. In case of a cancelation period of three months, a cancelation in due time has to be made until September, 30 2009. If this date has been passed over, the contract is extended until December, 31 2011 and the date for the cancelation in due time is automatically set to September, 30 2011.
- *Cancelation Period*
  In this field the period between the cancelation date and the termination of the contract can be defined.

7.10 Legal Hold

A legal hold can be defined for all objects of a user that must be retained, for example, in the course of legal proceedings.

Objects with a defined legal hold cannot be deleted until the legal hold has been removed.

7.10.1 Creating a Legal Hold

Legal holds can only be created by specially authorized users.

To create a legal hold, proceed as follows:

1. Click the “New” action.
2. Select “Legal Hold” and click “Next”.
3. Enter a name for the legal hold.
4. In the "Objects for Legal Hold" field, specify the objects to be put on legal hold.
   Note: The legal hold only becomes active when you execute the “Apply Legal Hold” context menu command.
5. The "Objects Changed After" and "Objects Changed Before" fields allow you to restrict the legal hold to objects that have been changed within the specified period.
6. Click "Next".

7.10.2 Applying a Legal Hold

To apply a legal hold, proceed as follows:

1. Navigate to the legal hold that should be applied.
2. In the context menu of the legal hold click "Tools" > "Apply Legal Hold".

The legal hold will be propagated to the contained objects based on the propagation settings defined in the *Configuration for Legal Hold*.

Objects that could not be put on legal hold due to an error (e.g. because of locking issues) will be displayed on the "Pending Objects" tab of the legal hold. The "Tools" > "Roll Forward" context menu command can be used to retry applying the legal hold to these objects.

Once an object is put on legal hold, it cannot be deleted anymore.

Active legal holds of an object are displayed on the "Retention" tab, in the *Legal Holds* field.

7.10.3 Removing a Legal Hold

Only a "Compliance Manager" is allowed to remove legal holds.

1. Navigate to the legal hold that should be removed.
2. In the context menu of the legal hold click "Tools" > "Remove Legal Hold".

The legal hold will be removed from all objects it was applied to. The objects defined in the "Objects for Legal Hold" field are not taken into account.

If the legal hold could not be removed from an object due to an error (e.g. because of locking issues), the object will be displayed on the "Pending Objects" tab. The "Tools" > "Roll Forward" context menu command can be used to retry removing the legal hold from these objects.

8 Online Archiving

Fabasoft Folio provides online archiving of objects, contents and versions. On the one hand, rarely used data can be transferred from a production system to an archive system and on the other hand, a revision safe long-term archiving system can be realized.

8.1 Archive Contents

To archive contents of an object, proceed as follows:

1. Select the desired object.
2. In the „Archive" menu, click "Archive Contents".
3. Click "Yes".

Note:

- All contents of the object are archived.
- The contents can only be accessed in read-only mode. Meta data still may be edited based on the access rights.
- Possibilities for full-text search in archived contents depend on the configuration.

8.2 Archive Contents and Versions

To archive contents and versions of an object, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Archive Contents and Versions”.
3. Click “Yes”.

Note:

- All contents and versions of the object are archived.
- The contents can only be accessed in read-only mode. Meta data still may be edited based on the access rights.
- Archived versions cannot be accessed anymore unless the version is explicitly loaded.
- Possibilities for full-text search in archived contents depend on the configuration.

8.3 Archive an Object Completely

To archive an object completely, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Archive Object”.
3. Click “Yes”.

Note:

- If an object is completely archived, meta data, contents and versions are archived.
- In Fabasoft Folio only common meta data (e.g. Name, Created on/at) are visible.
- The object can only be accessed in read-only mode.
- Possibilities for search and full-text search depend on the configuration.

8.4 Archive a Version

To archive a version of an object, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Archive Version”.
3. Click on the desired version.

8.5 Archive a Copy of a Version

To archive a version, copy of an object, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Archive Version Copy”.
3. Click on the desired version.

8.6 Load an Object From the Archive

To load an object from the archive, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Load Object”.

Note: The behavior concerning access rights and search possibilities does not change.

8.7 Unload an Archived Object

To unload an archived object, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Unload”.

8.8 Restore an Archived Object

To restore an archived object, proceed as follows:

1. Select the desired object.
2. In the „Archive” menu, click “Restore”.

Note:

- A new version is started.
- The archive marker is removed and the object can again be edited and searched.

8.9 Search for an Object in the Archive

To search for an object in the archive the standard search can be used (“Find” action).

Note: Which meta data and contents are taken into account for the search depends on the configuration.

9 Customizing

You can adapt Fabasoft Folio to your requirements by means of model-based customizing.

Here you will find a brief overview of the customization options available to you. All options are described in detail in the following chapters.

- Templates
  Nearly all objects and especially documents can be defined as templates. In this way new objects or documents based on a template can be created.
- Text Modules
  You can use text modules to insert predefined standard texts into Microsoft Word documents.
- Insight Apps
  Insight apps provide aggregated access to information customized to your needs.
- Forms
  User-defined forms can be used to add fields to objects for storing application-specific data. To apply logic or specific behaviors to the fields, Fabasoft app.ducx expressions can be used.
- Categories
  Categories can be assigned to objects and thus influence the behavior of the objects.

- Processes
  Processes can be individually defined reflecting your business and organizational structure. BPMN process diagrams are used to design executable business processes. Beside predefined BPMN processes, ad hoc processes can be started as needed.
- Display Settings
  Display settings can be provided to users who need special views on lists.
- Search Forms
  Search forms can be provided to users who need an overview of currently existing objects based on defined search criteria.
- Time Intervals
  Time intervals can be selected for a follow-up, for example.

Note: To enable the customizing solution, an administrator must add the app to a group, the primary domain or a tenant on the “Apps” tab, in the *Licensed Apps* field. After applying the changes, a corresponding configuration is automatically added to the *App Configurations* field or in the “App License Configuration” object. Users who should administer the app can be added as *App Administrator* to the configuration.

9.1 General Information

In order to use customizing objects, on the one hand the users must be authorized in the corresponding room and on the other hand the customizing objects must be released for usage depending on the context.

Customizing Levels

Customizations are managed at different levels:

- Global
  Global customization is done by defining customization collections in the “Templates and Presettings” dashboard. See the following chapters for more information.
  Note: Global BPMN process diagrams, forms and categories are not available in an app context by default. If these customizing objects have to be available in an app context, they must be explicitly referenced in the app configuration or in the app room.
- App
  In apps, such as contact management, you can make customizations in the app configuration that are only valid within the app configuration context.
- Room
  In rooms (e.g. app rooms or Teamrooms), customizations can be made that are only valid within the room context.
- Personal
  Personal customizations can only be used by the users themselves. The following customizing objects can be managed at the personal level: templates, ad hoc process templates, display settings, search forms and time intervals.

Release for Usage

In order to use customizing objects, they must be released for usage depending on the context.

Rules

- Customizing objects must be released if they are assigned to a customizing collection or an app configuration.
- Forms and BPMN process diagrams must also be released if they are assigned to a room.
- Personal customizing objects do not have to be released.

Actions and Context Menu Commands

The actions are available to administrators and processors of a customizing collection (global level) or app administrators (app level).

- Release for Usage
  You can create a release version using the “Release for Usage” action.
- Re-Release
  Changes can be released using the “Re-Release” action.
  Note: A corresponding status symbol is displayed for changed customizing objects. In the case of compound customizing objects, a status symbol is only displayed if the root object has changed.
- Navigate to Release Version/Navigate to draft Version
  You can view the draft or release version.
- Compare With Release Version/Compare With Draft Version
  You can compare the metadata of the draft version with the release version (except forms). For Microsoft Word documents, content comparison is also possible.
- Withdraw Release
  You can use the “Withdraw Release” action to withdraw the release.

Release Process

In app configurations or customizing collections, you can define a release process in the settings, on the “Default Values” tab, in the *Release Process for Templates and Presettings* field. Release processes must contain the “Release for Usage” activity.

If a release process is defined, the following actions or context menu commands are offered:

- Start Release Process
  Starts the defined release process.
- Open Current Release Process
  Opens the release process that is not yet completed.
- Start Release Process Again
  Restarts the release process (is only displayed when the current release process is completed).

Structuring Folders

In order to structure customizing objects logically or hierarchically, corresponding folders (e.g. template folders or text module folders) are available, which can be created via the respective action.

9.2 Dashboard

The “Templates and Presettings” dashboard provides your access point to the customizing.

When you are added to a customizing configuration as an app user, a dashboard is automatically created and placed on “Home”. When you are removed as an app user, the dashboard is also removed.

The “Templates and Presettings” dashboard is divided into the following areas:

- *Collections for Templates and Presettings*
  Shows the collections you are allowed to read or edit.
- *Personal Templates*
  Shows the templates you created for yourself.
- *Personal Processes*
  Shows the ad hoc process templates you created for yourself.
- *Personal Presettings*
  Shows the presettings you created for yourself.

You can perform the following actions:

- Create Collection
  With the “Create Collection” action you can create a new collection for templates and presettings as app administrator.
- Switch to Configuration
  With the “Switch to Configuration” action you can view the configuration.
- Settings
  With the “Settings” action you can define common properties of the dashboard like the logo or notification setting. Notifications are disabled by default.

9.3 Configuration

In the customizing configuration, you can manage the collections, artifacts and general settings as an app administrator.

Areas

The configuration is divided into the following areas:

- *Collections for Templates and Presettings*
  Shows the available collections.
- *Template Categories*
  Shows the available template categories. Template categories are used to group the templates in the create dialog.
- *Text Module Categories*
  Shows the available text module categories. Text module categories are used to display text modules hierarchically when inserting them into a Word document.
- *Insight Apps*
  Shows the available insight apps.
- *Forms and Categories*
  Shows the available forms and categories.
- *Processes*
  Shows the available custom processes.

- *Thesauri*
  Shows the available thesauri that allow indexing.
- *Failed Background Tasks*
  Shows failed background tasks (only visible if at least one failed background task is available). You can perform following manual actions: “Define Next Execution”, “Send Link” and “Delete”.

Note:

- To be able to store objects from a different context, you must adjust the *Restrict Shortcuts Within Teamroom* field in the configuration settings accordingly.
- In the default use case, you only need the “Collections for Templates and presettings”, “Template Categories” and “Text Module Categories” areas.

Actions

You can perform the following actions:

- Create Collection
  With the “Create Template Collection” action you can create a new collection for templates and presettings.
- Create Template Category
  With the “Create Template Category” action you can define a new template category.
- Create Text Module Category
  With the “Create Text Module Category” action you can define a new text module category.
- Translations
  The “Translations” action can be used to export or import a CSV file containing the multilingual names of the customizing objects of the configuration. This enables an external translation.
- Settings
  With the “Settings” action you can make advanced configuration settings.

9.4 Collections for Templates and Presettings

Collections are used to manage templates, text modules, insight apps, forms, categories, processes, presettings and to define access rights (“Permissions” action). Collections can be created by app administrators.

Areas

The collection for templates and presettings is divided into the following areas:

- *Templates*
  Shows the available templates.
- *Text Modules*
  Shows the available text modules.
- *Insight Apps*
  Shows the available insight apps.
- *Forms and Categories*
  Shows the available forms and categories.

- *Processes*
  Shows the available processes.
- *Presettings*
  Shows the available presettings.

Actions

You can perform the following actions:

- Create Template
  With the “Create Template” action you can define any object as a new template.
- Create Text Module
  With the “Create Text Module” action you can define a new text module.
- Create Insight App
  With the “Create Insight App” action you can define a new insight app.
- Create Category
  With the “Create Category” action you can create categories.
- Create Form
  With the “Create Form” action you can create user-defined forms.
- Create Process
  With the “Create Process” action you can define an ad hoc process template or a BPMN process diagram.
- Create Presettings
  With the “Create Presettings” action you can define a search form or time interval.
- Upload
  With the “Upload” action you can create a template, text module, BPMN process or form from a file.
- Create Escalation Definition
  With the “Create Escalation Definition” action you can create escalation definitions.

Note: Alternatively, you can use the “Tools” > “Add to Templates” context menu command on an existing object to define a copy of the object as a template in “Customizing”.

Settings

“Template Collection” tab

- *Template Categories*
  In the create dialog the templates with the template categories as additional text are displayed in the “Templates” area.
- *Text Module Categories*
  Defines in which categories the text modules can be found when they are inserted into a document.

Access Rights

- Full Control
  Users with full control can create, edit and delete templates and presettings.
- Change Access
  Users with change access can create and edit templates and presettings.

- Read Access
  Users with read access can only use templates and presettings if they are explicitly referenced, for example, in the context of an app room. Thus, templates can be defined in the collection that are not generally offered.
- User
  Users can use templates and presettings in general.
  Note:
  - Only users are offered the templates and presettings. If you are a user with change access and want to use the templates, you must also be defined as a user.
  - BPMN process diagrams, forms and categories are not available in an app context by default. If these customizing objects have to be available in an app context, they must be explicitly referenced in the app configuration or in the app room.

9.5 Defining Templates

Almost every object type can be used as template. Adjust the metadata or content of the objects accordingly.

Note: When you define a Teamroom as a template, the objects defined in the Teamroom's templates and presettings are copied to the Teamroom instance as shortcuts.

In addition, you can make additional settings on the "Template" tab of the object, which are particularly relevant when using fields in Word templates.

- *Template Categories*
  In the create dialog the template with the template categories as additional text is displayed in the "Templates" area (in addition to the template categories defined in the template collection).
- *Template Language*
  The language of the template can be used to determine text modules in the corresponding language.
- *Security Settings and Permissions Must Be Taken From the Template*
  Defines whether the user can select whether to apply the security settings and permissions (team members) when instantiating the template. This setting is only available for rooms.
- *Category*
  The category is copied to the object created from the template.
  Note: If applicable, lists can programmatically allow objects only with certain categories. In this way, the category can also restrict where the template can be used.
- *Contained in*
  Defines the folder types in which the template can be used. This can either be done using the object class or the category of the folder. If object classes and categories are specified together, the folder must have a defined object class and a defined category.
- *Files*
  Defines the type of files in which the template can be used. You can do this using either the object class or the category of the file. If object classes and categories are specified together, the file must have a defined object class and a defined category.
- *Available Fields (Category)*
  Shows the fields that are available in the Word document based on the category.

- *Available Fields (Contained in)*
  Shows the fields that are available in the Word document based on the definition in the *Contained in* field. This creates an intersection of all available fields of the object classes and an intersection of all available fields of the categories. This ensures that the properties actually exist in each object class category combination.
- *Available Fields (Files)*
  Shows the fields that are available based on the definition in the *Files* field in the Word document. This creates an intersection of all available fields of the object classes and an intersection of all available fields of the categories. This ensures that the properties actually exist in each object class category combination.
- *Additional Restrictions*
  The template is only offered for selection in the create dialog if the defined expression returns `true`.

When you edit the Word document, you will find the “Insert Field” button on the “Fabasoft Folio” tab. In the submenu you will find the available fields according to your definitions.

Note: The formatting of fields in Microsoft Word can usually be considered when instantiating templates and in the PDF preview if a style is set for the field including the surrounding text after the field has been inserted.

Text Module Placeholders

Text module placeholders can also be inserted in Word templates, which are replaced by the content of the text module when the template is instantiated. The command “Insert Text” > “Text Module Placeholder” is available in Microsoft Word on the “Fabasoft Folio” tab.

The placeholder is displayed as a hyperlink to the text module. Thus, the text can also be easily viewed via the template.

Make sure to insert the placeholder as a separate paragraph (the placeholder must not be part of another paragraph). This forms a single template paragraph which acts as a surrogate for the paragraphs of the text module. Those text module paragraphs will replace the single placeholder paragraph as part of the template instantiation procedure.

For a text module, all templates in which the text module is used are displayed on the “Templates” tab.

If a template (for example, a file) contains several Word documents, the text module placeholders in all Word documents are considered during instantiation.

9.6 Using Templates

In the create dialog (e.g. “New” context menu command in a Teamroom) the templates with the template category as additional text are displayed in the “Templates” area. For templates without a template category, “Miscellaneous” is used as additional text. During creation, a copy of the template is created, which you can edit independently of the template.

9.7 Defining Text Modules

There are two types of text modules:

- Static Text Module (Text)
  Allows you to enter unformatted text.

- Static Text Module (Word)
  Allows you to enter formatted text in a Word document.

Note: Text module placeholders can also be inserted in text modules. Thus, a multi-level dynamic text module hierarchy can be defined.

Metadata

The following metadata can also be defined:

“Static Text Module” tab

- *Name*
  The name of the text module.
- *Text Module Categories*
  The text module is offered within the specified categories when you insert it into a Word document.
- *Text Module Language*
  Defines the language of the text module. When inserting text modules into Word templates, only text modules are displayed that correspond to the language of the template or have no language defined.
- *Keep Text Module Placeholders in Document*
  Defines whether text module placeholders inserted in a Word template are replaced when a document based on the template is created. Text module placeholders that have not been replaced can be replaced afterwards in Microsoft Word using the “Replace Text Module Placeholder” button.

“Usage” tab

- *Current Document*
  Defines the categories and object classes of documents in which the text module can be used.
  Note: If a base form category is entered, the text module is also available for documents that have been assigned a derived form category.
- *Contained in*
  Defines the folder types in which the document can be stored in which the text module can be used. This can either be done using the object class or the category of the folder. If object classes and categories are specified together, the folder must have a defined object class and a defined category.
- *Files*
  Defines the type of files in which the document can be stored in which the text module can be used. You can do this using either the object class or the category of the file. If object classes and categories are specified together, the file must have a defined object class and a defined category.
  Note: If a base form category is entered, the text module is also available for files that have been assigned a derived form category.
- *Additional Restrictions*
  The text module can only be used if the defined expression returns `true`. This allows you, for example, to realize that text module placeholders are removed in certain instances instead of the corresponding text being inserted.

- *Changeability*
  The changeability of a linked text module in Microsoft Word can be restricted. A linked text module is editable by any user in Microsoft Word by default.
- *Available Fields (Current Document)*
  Shows the fields that are available in the Word document based on the definition in the *Current Document* field.
- *Available Fields (Contained in)*
  Shows the fields that are available in the Word document based on the definition in the *Contained in* field. This creates an intersection of all available fields of the object classes and an intersection of all available fields of the categories. This ensures that the properties actually exist in each object class category combination.
- *Available Fields (File)*
  Shows the fields that are available based on the definition in the *Files* field in the Word document. This creates an intersection of all available fields of the object classes and an intersection of all available fields of the categories. This ensures that the properties actually exist in each object class category combination.

"Translations" tab

Defines the translated text modules assigned to the text module.

Translations

Further text modules can be assigned to a text module as translations. To create a translation for a text module, the "Create Translation" action is available. If translations already exist, the "Translations" action can be used to navigate to the corresponding text modules or to create a new translation.

Translations receive, among other things, the text module category and settings for usage from the text module of the main language.

Each translation must be released before it can be used. When you release a text module with translations, a dialog will inform you about unreleased translations. You can release all translations at the same time. The status "Check Translations" indicates that there is at least one translation that has not been released.

When you re-release a change, you will be informed in a dialog about translations that have not yet been edited. You can decide whether no revision is required (e.g. when correcting a spelling mistake). When you click the "Translation Required" button, the text module is not yet released and all translations receive the "Revision Required" status. After a change, the status is removed from the corresponding text module.

Existing text modules can serve as translations of another text module via the "Merge as Translation" context menu command.

9.8 Using Text Modules

When you edit the Word document, you will find the "Insert Text" button on the "Fabasoft Folio" tab. In the submenu click either "Plain Text Module", "Formatted Text Module", "Linked Text Module" or "Text Module Placeholder". In the following dialog, you can select one of the text modules that you have access to and insert it into the Word document.

Text Module Placeholders

Text module placeholders inserted in a Word template are *replaced automatically* when creating a document based on that template – if the corresponding text module is not configured otherwise: a text module has a setting which defines that the corresponding placeholder should *not be replaced automatically*. In this case you can replace it subsequently using the “Replace Text Module Placeholder” button.

Placeholders have to be inserted as a separate paragraph (not as part of another paragraph). This forms a single template paragraph which acts as a surrogate for the paragraphs of the text module. Those text module paragraphs will replace (automatically or subsequently) the single placeholder paragraph as part of the template instantiation procedure.

Linked Text Modules

In Microsoft Word, linked text modules can be inserted that update automatically each time the document is opened. Depending on the user's permissions, linked text modules can be modified in the context of the currently opened document. Modified text modules are no longer updated automatically.

Following buttons are available:

- Remove Text Module
  Removes the selected text module.
- Modify Text Module
  Allows the text module to be changed in the context of the current document (if the user is authorized to do so). Text modules that are marked for modification are no longer updated automatically.
- Reset Text Modules
  Allows to reset changes of the focused text module or all text modules. The current, released content of the text modules is taken over and the text modules are automatically updated again in the future.
- Dissolve Text Modules
  Allows you to recursively dissolve the focused text module or all text modules (change rights required). The current content of the text modules, which may have been changed in the context of the document, is taken over as continuous text and the links are removed.

The status of a text module is displayed textually and in color in Microsoft Word when you focus the text module:

- Modifiable
  Modifiable text modules are highlighted in blue.
- Read-only
  Text modules that cannot be changed are highlighted in gray and “Read-only” is displayed in the title.
- With Condition
  The text module defines an expression for further restrictions of usability. “With Condition” is displayed in the title.
- Modified
  The text module was marked as changed by the user. “Modified” is displayed in the title.
- Hidden
  The text module is hidden (generally due to the expression for further restrictions of usability). The text module is grayed out and a placeholder text is displayed.

- Broken
  The text module returns an error (e.g. if it is in the wastebasket). The text module is highlighted in red and “Broken” is displayed in the title.

Note:

- Linked text modules will replace text module placeholders in the future. The two functionalities cannot be used together in one document.
- In templates, the linked text modules are always displayed with content, regardless of the condition. In documents, the linked text modules remain available, but the content is displayed depending on the condition.
- Linked text modules are also considered on the server side (e.g. PDF overview). Make sure that the *Update PDF Content on Metadata Change* option is enabled on the Microsoft Word document.
- Text modules or linked text modules may only be inserted in normal continuous text (e.g. not in tables, headers and footers).
- Text modules or linked text modules may only contain continuous text with bulleted lists or numbered lists and tables (e.g. no cross-references, footers, comments and shapes). The style sheets of the linked text module must match those of the Word document containing the text module or linked text module.
- Text modules must not start with a table.
- Linked text modules must not contain tables that reference the properties of a form category and that are updated using the “Update Tables” context menu command.
- Linked text modules that contain a table must not contain any other linked text modules with tables.
- Deleted linked text modules are automatically removed from the document.
- Linked text modules (Word) can contain other linked text modules.

9.9 Defining and Using Insight Apps

Insight apps provide aggregated access to information in Fabasoft Folio, customized to your needs. You can use insight apps to display and highlight important information without users having to explicitly search for it.

9.10 Defining and Using Forms and Categories

User-defined forms can be used to add fields to objects for storing application-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.

More information can be found in the chapters 3.15.6 “Forms” and 3.15.7 “Categories”.

9.11 Defining Processes

There are two types of process templates:

- Ad Hoc Process Template
- BPMN Process Diagram

Ad Hoc Process Template

To create an ad hoc process template, proceed as follows:

1. Navigate in the desired collection.
2. Click the “Create Process” action and select the “Ad Hoc Process Template” entry.
3. Enter a name and click “Next”.
4. Click “Open” on the context menu of the ad hoc process template.
5. Enter the activity and the participant for the first task in the process.
6. Click “Next” if you do not want to add another activity.
   Otherwise, click “Apply”. You can add further activities by selecting an activity and participants and clicking “Apply” again. The last activity with a defined participant will be considered even if you do not click “Apply”.
7. Click “Next” to complete the editing.
8. Click “Release for Usage” on the context menu of the ad hoc process template.

BPMN Process Diagram

To create a BPMN process diagram, proceed as follows:

1. Navigate in the desired collection.
2. Click the “Create Process” action and select the “BPMN Process Diagram” entry.
3. Enter a name and click “Next”.
4. Click “Open” on the context menu of the BPMN process diagram.
5. Model the desired process.
6. Click “Next” to complete the editing.
7. Click “Release for Usage” on the context menu of the BPMN process diagram.

9.12 Using Processes

The defined processes are offered for selection when using processes (e.g. “Tools” > “Start New Process”).

9.13 Defining Presettings

There are three types of presettings:

- Display Settings
- Search Form
- Time Interval

Display Settings

Display settings can be defined directly in a list via the “View” > “Display Settings” > “Save” menu command (thereby the storing location can be selected).

Search Form

To create a search form, proceed as follows:

1. Navigate in the desired collection.
2. Click the “Create Presettings” action and select the “Search Form” entry.

3. Enter a name and click “Next”.
4. Specify what you want to search for and click “Next”.
5. Specify the search criteria.
6. Click “Save Query”.
7. Click “Release for Usage” on the context menu of the search form.

Time Interval

1. Navigate in the desired collection.
2. Click the “Create Presettings” action and select the “Time Interval” entry.
3. Enter a multilingual name, time interval, and unit and click “Next”.
4. Click “Release for Usage” on the context menu of the time interval.

9.14 Using Presettings

You can use the presettings as follows:

- You can apply the display settings in lists via the “View” > “Display Settings” > “Load” menu command. You can also save display settings (thereby the storing location can be selected).
- Search forms can be selected during a search (e.g. in a search folder).
- Time intervals can be selected for a follow-up, for example.

9.15 Personal Templates, Processes and Presettings

Each user can define his own templates, processes and presettings in the “Personal Templates", “Personal Processes” and “Personal Presettings” areas of the dashboard.

10 General Settings in Configurations and Shelves

The following applications provide the general settings described here:

- Customizing Solution
- Contact Management Solution

10.1 Configurations

The configurations provide the following general configuration settings.

10.1.1 General Configuration Areas

In the configurations you will find the following general areas.

Note:

- To be able to store objects from a different context, you must adjust the *Restrict Shortcuts Within Teamroom* field in the configuration settings accordingly.
- The areas differ in “Customizing”.

Insight Apps

Insight apps provide aggregated access to information, customized to your needs. You can use insight apps to display and highlight important information without users having to explicitly search for it.

Forms and Categories

This area shows the forms and categories provided by the configuration. For example, custom forms can be used to add fields to objects for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.

Processes

This area shows the processes provided by the configuration. Users can be involved in the processing of business objects via workflow by starting a process that can be processed in the worklist. Typical processes are approval and release processes.

Templates

This area shows the templates provided by the configuration. The templates are displayed in the create dialog (e.g. “New” context menu command).

Defining Template Categories for Templates

In the “Create” dialog the templates can be filtered according to the template category.

To define a template category for templates, proceed as follows:

1. In the configuration, navigate in the “Templates” area.
2. Click the “Define Template Categories” action.
3. In the *Template Categories* field, enter the desired name for the template category and click “Click here to create the entered template category”.
4. Click “Define”.

The template category can be assigned in templates, on the “Template” tab, in the *Template Categories* field.

Defining Templates

To define a new template, proceed as follows:

1. In the configuration, navigate in the “Templates” area.
2. Click the “New” action and then click the desired entry.
3. Define the name and click “Next”.
4. Define the content or the metadata of the template.
5. Click “Properties” on the context menu of the template.
6. Switch to the “Template” tab.
7. Select an existing template category in the *Template Categories* field.
   Note: If no template category is defined for a template, the template category “Teamroom Templates” is assigned to the template in the “Create” dialog.
8. Click “Next”.
9. Click “Release for Usage” on the context menu of the template.

Note: A template can only be used after it has been released for usage via the "Release for Usage" context menu command. Changes must be released using the "Re-release" context menu command. The release can also be withdrawn.

Text Modules

This area shows the text modules provided by the configuration that can be inserted into Word documents.

Defining Text Module Categories for Text Modules

Text module categories define the categories under which the text module can be found when it is inserted into a document.

To define a text module category for text modules, proceed as follows:

1. In the configuration, navigate in the "Text Modules" area.
2. Click the "Define Text Module Categories" action.
3. In the *Text Module Categories* field, enter the desired name for the text module category and click "Click here to create the entered text module category".
4. Click "Define".

The text module category can be assigned in text modules in the *Text Module Category* field.

Defining Text Modules

To define a text module, proceed as follows:

1. In the contract manager configuration, navigate in the "Text Modules" area.
2. Click the "Create Text Module" action.
3. Select "Static Text Module (Text)" or "Static Text Module (Word)" and click "Next".
4. Enter the desired name for the "Static Text Module" in the *Name* field.
5. In the *Text Module Categories* field, select the desired text module category under which the text module is to be made available for insertion into the Word document.
6. To make the text module available only for documents in a specific language, select this language in the *Text Module Language* field.
7. When you create a static text module (text), you can enter the desired unformatted text in the *Text* field.
8. Click "Next".
9. If you have selected a text module (Word), you can enter the required text using the "Edit" or "Upload" context menu command.
10. Click "Release for Usage" on the context menu of the text module.

Note:

- A text module can only be used after it has been released for usage via the "Release for Usage" context menu command. Changes must be released via the "Re-release" context menu command. The release can also be withdrawn.
- Text modules can be inserted into document templates both directly and as placeholders. If a text module is inserted into a template as a placeholder, this placeholder is only replaced by the content of the text module in question when the template is instantiated. on the "Usage" tab, in the *Expression for Further Restrictions of Usability* field of the text module, you can specify an expression that is evaluated when a template is instantiated to decide

whether a placeholder is to be replaced by the content of the text module or ignored and removed.

- You can create a hierarchy of text module folders ("Create Text Module Folder" action) to improve the structure of your text modules.

Thesauri

This area shows the thesauri provided by the configuration, which allow keywording.

Presettings

This area shows the presettings (view settings, search patterns, time intervals) provided by the configuration.

App administrators can create search templates and time intervals. In addition, it is possible to store view settings in the configuration via the "View" > "Display Settings" > "Save" menu command of lists.

Failed Background Tasks

This area shows failed background tasks (only visible if there is at least one failed background task). You can perform following manual actions: "Define Next Execution", "Send Link" and "Delete".

10.1.2 General Configuration Settings

You can define the following values in the configuration settings.

"General Settings" tab

- *Name*
  The name of the configuration.
- *Subject*
  A description of the configuration.
- *Restrict Shortcuts Within Teamroom*
  Defines which type of shortcuts may be stored in the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows to restrict team members who can open or download content at the device.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which permissions a team member must have in order to open or download content at the device.
- *All Team Members May Add Members*
  Defines whether all team members can add users to the team or only team members with "Full Control".
  Members with change access may grant or revoke change access or read access to other members. Members with read access may grant or revoke read access to other members.
- *Restrict Team Members*
  Defines the groups and organizational units whose members may be added to the configuration. If the list does not contain any entries, members can be added without restriction.
- *Main Administrator*
  Defines the user who will receive the automatically generated e-mail messages concerning

the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as contact in case of missing permissions.

- *Support Coordinator*
  The support coordinator team has access to all support requests in the corresponding context and can perform the same actions as the support request initiators.
- *Enable Advanced Mode*
  Advanced mode includes, for example, working with multiple shelves, as well as managing templates and presettings.
- *Activate Trace Output*
  For example, as a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

“Logos” tab

The defined logos and the background image are used for the configuration and for all personal dashboards.

“Default Values” tab

- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during tagging.
- *Default Categories*
  When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
  Note: The default categories are also applied to shelves if they have been explicitly defined for shelves. This also applies to Teamrooms and other rooms contained in shelves.
- *Default Processes*
  When an object is created, the specified process is assigned according to the defined object class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
  Note: The default processes are also applied to shelves if they have been explicitly defined for shelves. This also applies to Teamrooms and other rooms contained in shelves.
- *Default Background Tasks*
  When an object is created, the specified background tasks are assigned.
- *Release Process for Templates and Presettings*
  In order to use templates, text modules, forms and categories, processes and presettings, they must be released. If a process is to be used for the release, a BPMN process diagram can be defined here. Release processes must contain the “Release for Usage” activity.

“Content Settings” tab

- *Allow Comments*
  Defines whether PDF comments can be applied to documents.
- *Allowed Types for Comments*
  Defines the allowed types of comments (public or private).
- *Preferred Type for Comments*
  Defines the type of comment initially selected when commenting (overrides the setting in the user's basic settings).

- *Users With Read Access Are Allowed to Comment Publicly*
  Defines whether users with read access are allowed to add public comments.
- *Allow Public Links*
  Defines whether public links may be published.
- *Generate Cover Sheet for PDF Overviews of Documents*
  Defines whether a cover sheet is generated for PDF overviews of documents.

10.1.3 General Actions

Following general action is available:

- Translations
  The "Translations" action can be used to export or import a CSV file containing the multilingual names of the customizing objects of the configuration. This enables an external translation.

10.2 Shelves

The shelves offer the following general settings. When evaluating the settings, the shelf hierarchy is considered in addition to the configuration.

10.2.1 General Shelf Settings

You can define the following values in the clipboard settings.

"General Settings" tab

- *Name*
  The name of the configuration.
- *Subject*
  A description of the configuration.
- *Restrict Shortcuts Within Teamroom*
  Defines which type of shortcuts may be stored in the shelf.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows to restrict team members who can open or download content at the device.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which permissions a team member must have in order to open or download content at the device.
- *Team Members Visible to All Members*
  Defines whether all members are allowed to see the team members. Note that disabling this setting also restricts other use cases.
  Note: Team members with change access can be eventually seen by all members, since changes are logged in log properties such as *Last Change by*.
  - Only team members with "Full Control" have access to the "Permissions" action, can start processes, duplicate objects, use templates and release templates and presettings.
  - Only team members with "Full Control" see the events by default. The display of events can also be enabled for team members who are not allowed to view the team. However, only events that could not lead to conclusions about team members with read access will be displayed.

- Team members with read access cannot use remarks, public comments, signatures, processes or comment on news feeds.
    - Team members with read access cannot use the time travel.
    - Team members with read access cannot be selected as participants in processes.
    - Team members with read access cannot create public links.
    - Team members with read access cannot view the "Processes" and "Activities" tabs of assigned objects.
- *Display Events for Team Members Who Are Not Allowed to View the Team*
  Only team members with "Full Control" see the events by default. The display of events can also be enabled for team members who are not allowed to view the team. However, only events that could not lead to conclusions about team members with read access will be displayed.
- *All Team Members May Add Members*
  Defines whether all team members can add users to the team or only team members with "Full Control".
  Members with change access may grant or revoke change access or read access to other members. Members with read access may grant or revoke read access to other members.
- *Restrict Team Members*
  Defines the groups and organizational units whose members may be added to the configuration. If the list does not contain any entries, members can be added without restriction.
- *Main Administrator*
  Defines the user who will receive the automatically generated e-mail messages concerning the shelf. Otherwise, all shelf administrators receive the e-mail messages. The user is also listed as contact in case of missing permissions.
- *Support Coordinator*
  The support coordinator team has access to all support requests in the corresponding context and can perform the same actions as the support request initiators.
- *Activate Trace Output*
  For example, as a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

"Logos" tab

The defined logos are used for the shelf.

"Default Values" tab

- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during tagging.
- *Default Categories*
  When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Default Processes*
  When an object is created, the specified process is assigned according to the defined object

class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.

- *Additional Default Background Tasks*
  When an object is created, the specified background tasks are assigned.

Note: The default properties overwrite or extend the settings in the configuration.

"Content Settings" tab

- *Allow Comments*
  Defines whether PDF comments can be applied to documents.
- *Allowed Types for Comments*
  Defines the allowed types of comments (public or private).
- *Preferred Type for Comments*
  Defines the type of comment initially selected when commenting (overrides the setting in the configuration or user's basic settings).
- *Users With Read Access Are Allowed to Comment Publicly*
  Defines whether users with read access are allowed to add public comments (overrides the setting in the configuration).
- *Allow Public Links*
  Defines whether public links may be published.
- *Generate Cover Sheet for PDF Overviews of Documents*
  Defines whether a cover sheet is generated for PDF overviews of documents.

Note: The content settings overwrite the settings in the configuration.

10.2.2 Templates and Presettings

Via the "Templates and Presettings" action, you can access the following areas.

Insight Apps

Insight apps provide aggregated access to information. customized to your needs. You can use insight apps to display and highlight important information without users having to explicitly search for it.

Forms and Categories

This area shows the forms and categories provided by the shelf. For example, custom forms can be used to add fields to objects for storing customer-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.

Process Templates

This area shows the processes provided by the shelf. Users can be involved in the processing of business objects via workflow by starting a process that can be processed in the worklist. Typical processes are approval and release processes.

Templates

This area shows the templates provided by the shelf. The templates are displayed in the create dialog (e.g. "New" context menu command).

Text Modules

This area shows the text modules provided by the shelf that can be inserted into Word documents.

Presettings

This area shows the presettings (view settings, search patterns, time intervals) provided by the shelf.

App administrators can create search templates and time intervals. In addition, it is possible to store view settings in the configuration via the “View” > “Display Settings” > “Save” menu command of lists.

Thesauri

This area shows the thesauri provided by the shelf, which allow keywording.

For objects, corresponding terms can be selected directly in the *Terms* field. Alternatively, the “Choose Terms” button allows a structured selection using the thesaurus hierarchies.

10.2.3 Unstructured Shelves

If you want to manage a large number of objects in a shelf, an unstructured shelf is a good option, which allows each user to individually specify which objects are to be displayed using search criteria.

Using the “Tools” > “Display Entries in Flat List” context menu command, users with full control can convert a shelf into an unstructured shelf. Note that in general this will delete all existing folders.

The following options are now available to you:

- Search or Adapt Search
  If no manual search criteria are currently defined, you can use the “Search” action to specify what and with which search criteria you want to search. The result is displayed directly in the shelf.
  - If search criteria have already been defined, you can change them accordingly using the “Adapt Search” action.
  - To change what you want to search for, first execute the “Reset Search” action. This will display the “Search” action again.
  - The list is not updated automatically and can be customized manually. So, for example, objects you have created will be displayed even if they do not match the current search criteria.
- Refresh
  Updates the list based on the current search criteria. This will undo any changes you have made to the list (e.g. cut or move objects) and display objects that have been created in the meantime and match the search criteria.
- Further Search Functions
  The following additional search functions are available.
  - Reset Search
    Resets the current search criteria. An empty list is displayed.
  - Save Search Form
    If manual search criteria are defined, they can be saved for reuse.

- Load Search Form
  Loads a saved search form. Only search forms that make sense in the context of the shelf are offered. The entries in the list are updated accordingly.

Using the “Tools” > “Structure List Entries in Folders" context menu command, you can convert an unstructured shelf back into a structured one. In doing so, in general the objects are stored in folders.

Note:

- A maximum of 10000 objects will be returned as search result. When the maximum is reached, a corresponding dialog is displayed.
- The origin of objects is the unstructured shelf.
- “Open Origin” opens the unstructured shelf.
  Note: The object is only possibly visible in the query-based list.
- Objects in query-based lists of the shelf have no link state (unless the object is assigned to another shelf).
- Unstructured shelves do not have orphaned objects.
- Automatic change of shelf assignment is not applied. The shelf assignment can be done manually using the corresponding context menu command.
  Note: For structured shelves, the assignment is changed when an object is cut and located in exactly one other shelf.
- Unstructured shelves cannot be converted into folders.
- Time travel is not available in unstructured shelves in the query-based list.
- Unstructured shelves cannot be kept up-to-date in the mobile app or in the Fabasoft Cloud Folder.

11 Accessibility

Accessibility is an elementary concept of Fabasoft Folio. Users with visual impairment are supported with entry and visual display.

11.1 Notes on Keyboard Operations

Fabasoft Folio offers full access for users who work with the keyboard instead of the mouse. As you use shortcuts on your operation system, you can use default key operations as for example `Ctrl + C` in Fabasoft Folio. The supported shortcuts can be found in chapter 12 “Keyboard Operations”.

Users who only use the keyboard should define following settings:

1. Open the account menu (your user name) and choose “Basic Settings”.
2. Switch to the “Accessibility” tab.
3. Enable the *Use Advanced Mode for Prescriptions per Default* option because the default displayed graphical process editor is not suitable for keyboard operation.
4. If you do not see colors or see colors badly, enable the *Show Alternative Text for Highlighted Fields* option.
5. If you find background images disturbing, disable the *Show Background Images in Dashboards and Home* option.

6. If you need an increased contrast, enable the *Increase Contrast* option.
7. In the *Highlight Active Element (Focus)* field, select either "When Using the Keyboard" or "Always Emphasize Especially".
8. Save the settings.

11.2 Enhanced Highlighting of the Focus

Under the account menu (your user name), in the "Basic Settings", on the "Accessibility" tab, in the *Highlight Active Element (Focus)* field specify when an active field should be highlighted with a yellow border:

- When using the keyboard
  Pressing keys or key combinations (e.g. `Tab` or `Shift + Tab`) that set the focus on an element in the user interface enables the enhanced highlighting. A mouse click disables the enhanced highlighting.
- Always emphasize especially
- Never emphasize especially

11.3 Zooming

You can zoom text and graphics. The layout adapts itself optimally to the size. Use the web browser functionality for this.

Shortcuts	Actions
`Ctrl + Plus` (Edge/Firefox/Chrome) `Apple key + Plus` (Safari)	Zoom in
`Ctrl + Minus` (Edge/Firefox/Chrome) `Apple key + Minus` (Safari)	Zoom out
`Ctrl + 0` (Edge/Firefox/Chrome) `Apple key + 0` (Safari)	Reset to normal size

If you enable the *Use Simplified Resizer* option (account menu (your user name) > "Basic Settings" > "Accessibility" tab), for example, when registering a flap is displayed at the dividing line of the areas which provides a larger area for positioning the mouse pointer in order to enlarge or reduce the areas.

11.4 Design in High Contrast

Under the account menu (your user name), in the "Basic Settings", on the "Accessibility" tab, you can enable the *Increase Contrast* option to obtain a design with high contrast.

11.5 Notes on Using Screen Readers

Fabasoft Folio supports the WAI-ARIA standard (Accessible Rich Internet Applications). WAI-ARIA is not fully supported by all screen reader programs.

The following screen reader programs are recommended for the use with Fabasoft Folio:

- NVDA (NonVisual Desktop Access)
- JAWS

Users who use a screen reader should define following settings:

1. Open the account menu (your user name) and choose “Basic Settings”.
2. Switch to the “Accessibility” tab.
3. Activate the *Include All Fields in Tab Order* option to include also read-only fields in the tab order.
   Note: If you are using Apple Safari, you additionally have to activate following option in the web browser: “Safari” > “Preferences” > “Advanced” > *Press Tab to highlight each item on a webpage*.
4. Enable the *Use Advanced Mode for Prescriptions per Default* option because the default displayed graphical process editor is not suitable for keyboard operation.
5. Activate the *Show Alternative Text for Highlighted Fields* option.
6. Activate the *Prepare Foreign Language Expressions for Speech Output* option. This way you can specify that well-known English terms are specially tagged to ensure correct pronunciation
7. Save the settings.

Note:

- The web client customizes itself automatically of the browser windows size. That means that some areas are blanked temporarily, if the space is not sufficient. When using screen reader programs the web browser window should be maximized (`Windows key + Up`), so that all elements are in the tabulator order.
- If your screen reader offers a reading mode in the web browser (e.g. if you can use buttons for the quick navigation in the web), it might be possible that you have to switch the mode off and on again. Whether your screen reader requires your manual intervention, notice whether the keyboard shortcuts of Fabasoft Folio work or not.
- If the Braille output of your screen reader makes a distinction between a level one and a structured representation, you must set the structured one.

Useful JAWS Settings

The following JAWS settings permit an optimum work with Fabasoft Folio. If these settings do not correspond to your habits, use personalized web settings for Fabasoft Folio.

Perform the steps below:

1. Open Fabasoft Folio in your preferred web browser.
2. Open the JAWS quick settings with the `JAWS-key + V`. All the necessary settings can be found in the last category “Personalize Web Settings”. This means that the settings only apply for Fabasoft Folio.
3. Deactivate the setting “Document automatically reads”.
4. Select for the setting “Document presentation mode” the value “Simple layout”
5. If you have changed any other general JAWS web settings, you may have to restore the default settings.

11.6 Accessibility Exceptions

The following functionality is restricted or not accessible:

- BPMN Editor
- Document View
- Content of Widgets
- New Events in Teamrooms
- Adjusting Images
- Adjusting Screenshots (Support Button)

BPMN Editor

The BPMN editor is used to graphically model business processes that can be executed directly. The BPMN editor is displayed when you open a BPMN process diagram, BPMN choreography diagram or BPMN conversation diagram.

Keyboard operation and screen readers are not supported (graphical modeling is only possible using the mouse).

Document View

The document view is used for the integrated PDF preview of documents. The document view is displayed in the content area when you navigate in a document.

Screen readers are not supported (document structure and navigation are not accessible).

Alternatively, documents can be opened in the corresponding third-party product (if permitted).

Content of Widgets

Widgets show preview lists or graphics and serve in dashboards as access points to the corresponding areas. For example, widgets are displayed directly on "Home" in the content view.

Keyboard operation and screen readers are not supported (access to preview lists is not possible and there are no text alternatives for graphics).

Alternatively, you can navigate into the widget to access the complete, accessible information.

New Events in Teamrooms

The new events are used to display changes in the Teamroom. The events are shown on tabs with different filter criteria. The events are displayed when you execute the "Show New Events" command.

Screen readers are not supported on the "New Events" tab.

Alternatively, the "History", "By Objects", "By Category", and "By User" tabs can be used.

Adjusting Images

Images can be scaled and cropped. The integrated image processing is possible, for example, when defining logos or user images.

Screen readers are not supported (the image size cannot be determined when scaling via the slider).

Adjusting Screenshots (Support Button)

For support requests, a screenshot can be edited and transmitted. The support request opens when you use the “Support” button.

Keyboard operation and screen readers are not supported (cropping, highlighting and blackening is only possible with the mouse).

12 Keyboard Operations

Besides working with the mouse also keyboard operation is supported. In this chapter, the available keyboard shortcuts are grouped according to the application areas.

Note:

- On Apple macOS, the `Cmd` key is treated the same as the `Ctrl` key on Microsoft Windows.
- On Apple macOS, the keyboard shortcuts `Ctrl + [0-9]` are used instead of `Alt + [0-9]`.

12.1 Common Keyboard Operations

Shortcuts	Action
`Tab`	Focusses the next control.
`Shift + Tab`	Focusses the previous control.
`Enter`	Executes the corresponding action on the selected element (e.g. press a button or execute a menu command and open an object).
`Space Bar`	Activates the selected element.
`Menu Key` or `Shift + F10`	Opens the context menu of the selected element (if existing).
`Left, Right, Up, Down` `Home, End`	Navigates in symbol bars, object lists and structures. **Note:** In a search result list, press the `End` key to select the last object currently visible. If there are further results, the reload is started automatically.

12.2 Global Navigation

All controls are located in tab order. This means you can move from one control to other forward and back.

Shortcuts	Action
`Tab`	Navigates to next menu command.
`Shift + Tab`	Navigates to previous menu command.

`Ctrl + F6, Ctrl + Shift + F6`	Navigates circular between the areas: • Home (logo) • search field • tool menu • actions • right tool area (if opened) • content area
`Alt + 0`	Activates to *Support* button.
`Alt + 1`	Navigates to „Home“
`Alt + 2`	Navigates to the object list in the content area.
`Alt + 3`	Navigates to the actions.
`Alt + 4`	Navigates in the search field.
`Alt + 5`	Navigates in the opened context-independent tool or in the tool selection if no context-independent tool is opened.
`Alt + 6`	Navigates in the “Options” tool bar.
`Alt + 9`	Activates to “Quick Access” button.

Within individual complex controls (e.g. menus or tree view), you can use the arrow keys to navigate in sub-menus or tree branches.

12.3 Top Bar

In the top bar, the following shortcuts are available.

Shortcuts	Action
`Right, Down`	Navigates to next menu command. If the last menu command is selected, it navigates to the first one.
`Left, Up`	Navigates back. If the first menu command is selected, it navigates to the last one.
`End`	Navigates to first menu command.
`Home`	Navigates to last menu command.
`Enter or Space Bar`	Activates the selected element.

12.4 Menus

The following menus are available:

- Menu Bar (of the object list)
  The menu bar can be activated via the basic settings and is located above the content area.
- Tools
  Is used for displaying and reverse clipping of tools.
- Actions
  Provides the most important actions for the displayed list or object.
- Account Menu
  The account menu with your name is located in the top bar and is used to define basic settings.
- Sorting
  The sorting menu is located right above the content area. It can be reached by pressing `Alt + F9`, if the focus is within the object list.
- Column Menu
  Can be opened via the columns in the content area.
- Context Menu
  Offers commands for the selected objects. Can be opened via the `menu key` or `Shift + F10`.

Shortcuts	Action
`Down`	In the menu bar: Opens the selected menu and selects the first entry. In an open menu: Select the previous entry. If the last first is selected, it steps to the last entry.
`Up`	In the menu bar: Opens the selected menu and selects the first entry. In an open menu: Select the next entry. If the last entry is selected, it steps to the first entry.
`Right`	In the menu bar: Selects the next entry. If the last entry is selected, it steps to the first entry. In an open menu: Opens the submenu if selected. Otherwise opens the next menu and selects the first entry.
`Left`	In the menu bar: Selects the previous entry. If the first entry is selected, it steps to the last entry. In an open menu: Opens the previous menu and selects the first entry. In a submenu: Closes the submenu and selects the first entry in the menu.

`Enter` or `Space Bar`	`Enter` or `Space Bar` executes the selected menu command or the assigned submenu is opened.
`Esc`	`Esc` closes the opened submenus and/or menus hierarchically. On top-level either nothing happens (actions, tools) or it will navigated in the content area (menu of the object list)

12.5 Content Area

The most important control in the content area is the object list. It includes the title bar and the menu bar, positioned directly above it.

Object lists provide in general the following different views:

- Details
- Thumbnails
- Cards
- Content
- Preview

Single objects are displayed in the so-called *Document View*.

12.5.1 Overview of Currently Available Shortcuts

In general, you can customize the display of object lists. The view can be changed via the "Change View" menu or context menu command.

Selecting, Copying and Pasting

Shortcuts	Action
`Arrow keys`, `Home` or `End`	Focusses and selects only one entry.
`Ctrl + Arrow keys`, `Ctrl + Home`, `Ctrl + End`	Navigates to an entry without selecting. All selected entries are still selected.
`Page Up`, `Page Down`	Scrolls up or down (web browser functionality) and sets the focus on the first or last entry on the displayed list part.
`Character string`	The input of the first or from initial letters of the object name selects the suitable object, if available.
`Space Bar`	Selects the focused entry. This is especially useful directly after navigating in a list. The focus is initially on the first entry that has not yet been selected.
`Ctrl + Space Bar`	Places or removes the selection from the focused entry, if the focus is in the first cell.
`Shift + Arrow Keys`	Extends the selection.

	The extension passes differently in all views (see below).
`Shift + Home`	Extends the selection to the beginning of the list.
`Shift + End`	Extends the selection to the end of the list
`Ctrl + A`	Selects all entries in an object list
`Ctrl + C`	Copies the selected objects to the clipboard
`Ctrl + X`	Cuts the selected objects
`Ctrl + V`	Pastes objects from the clipboard

Actions

Shortcuts	Action
`Enter`	Opens the selected object
`Del`	Moves the selected Teamroom objects to the wastebasket or removes them from the object list, if they are pointers.
`Backspace`	Navigates one page back in the web browser history.
`Ctrl + Enter`	Opens the attribute editor.
`F2`	Switches selected cell between editor and navigation mode.
`Alt + F9`	Navigates to the column header, if the detail view is shown, otherwise to the sorting button.
`Alt + F10`	Navigates to the menu of the object list.

12.5.2 Shortcuts for the Card View

The card view, for example, is used by default in the personal folder.

Shortcuts	Action
`Down`	Navigates to the card directly below the currently selected card. If no such card is available, it navigates to the last card in the row.
`Up`	Navigates to the card directly above the currently selected card.
`Left`	Navigates to the next card in read order.
`Right`	Navigates to the card before in read order.

`End`	Navigates to last card in object list.
`Home`	Navigates to first card in object list.
`Shift + Down`	Selects all cards below the current card in read order.
`Shift + Up`	Selects all cards above the current card in read order.
`Shift + Right`	Extends the selection to the next card.
`Shift + Left`	Extends the selection to the card before.
`Shift + Home`	Extends the selection to the first card.
`Shift + End`	Extends the selection to the last card.

12.5.3 Shortcuts for the Content View

Shortcuts	Action
`Down`	Navigates to next object.
`Up`	Navigates to previous object.
`End`	Navigates to last object.
`Home`	Navigates to first object-
`Shift + Down`	Extends the selection to the next object.
`Shift + Up`	Extends the selection to the previous object.
`Shift + Home`	Extends the selection to the first object.
`Shift + End`	Extends the selection to the last object.
`Alt + F9`	Navigates to sorting button.
`Alt + F10`	Navigates in the menu bar of the object list, if the menu bar is enabled.

12.5.4 Shortcuts for the Details View

Shortcuts	Action
`Down`	One cell down within the current column.
`Up`	One cell up within the current column.

`Left`	One cell left within the current row.
`Right`	One cell right within the current row.
`Home`	First cell of the current column.
`End`	Last cell of the current column.
`Ctrl + Down`	Next cell within the current column without selecting it.
`Ctrl + Up`	Previous cell within the current column without selecting it.
`Ctrl + Left`	Selects the current row and additionally focusses the first cell.
`Ctrl + Right`	Focusses the last cell of the current row.
`Shift + Down`	Selects an additional cell below the current cell. If the focus is in the first cell, the entire rows are selected.
`Shift + Up`	Selects an additional cell above the current cell. If the focus is in the first cell, the entire rows are selected.

`Shift + Left`
or
`Shift + Right`
	Selects the whole row without changing the current focus.

`Shift + Home`	Selects all lines above the current line and the current line. If the focus is in the first cell, the entire rows are selected.
`Shift + End`	Selects all lines below the current line and the current line. If the focus is in the first cell, the entire rows are selected.
`Alt + F9`	Navigates to the column header.
`Alt + F10`	Navigates in the menu bar of the object list, if the menu bar is enabled.

The column filters can be accessed via the column header. The values filter for date values is represented by a tree structure. Only one tree element ever has a `tabindex`. The `arrow keys`, `Pos 1` and `End` can be used to navigate between the tree elements. Screen readers can determine whether an element is expanded via the `aria-expanded` attribute. If subordinate tree elements have only been partially selected (for example, only one day of several in a month), then the superordinate tree elements have the status "partially selected". This is made clear when using screen readers with the attribute `aria-checked="mixed"`. When a partially selected element is selected, all subordinate elements are selected.

12.5.5 Shortcuts for Table Handling

In the detail view, the table handling can be activated via the button “Table Handling” in the column header (`Alt + F2`) as an alternative editing mode. Thus, the controls work similarly to a spreadsheet program.

Note: When switching to the table editing mode, a warning is displayed that entering text in table cells can in some cases open a dialog and set the focus to this dialog. You can disable the warning directly. In the basic settings on the "Accessibility" tab, the warning can be enabled again using the *Warn About Context Changes* field.

Shortcuts	Action
`F2`	Enables editing the marked cell or saves the changes if editing already in progress. **Note:** • In text fields, the cursor is at the end of the text. • The cell remains marked after editing is finished.
`Typing letters or numbers`	Enables editing of the marked cell. **Note:** In text fields, the current value is deleted.
`Tab`	• Marks the next editable cell to the right. **Note**: This depends on the setting "Include all Fields in Tab Order". • Navigates from the last cell of a row to the first cell of the next row. • Navigates from the last cell of the last row to the next tab stop on the page and leaves the table. • If the current cell is being edited, its content is saved.
`Shift + Tab`	• Marks the next editable cell to the left. **Note**: This depends on the setting "Include all Fields in Tab Order". • Navigates from the first cell of a row to the last cell of the previous row. • Navigates from the first cell of the row to the previous tab stop and leaves the table. • If the current cell is being edited, its content is saved.
`Enter`	• If the current cell is being edited, its content is saved. • Marks the next editable cell below. **Note**: This depends on the setting "Include all Fields in Tab Order". • In the last row, the mark stays in the current cell.
`Shift + Enter`	• If the current cell is being edited, its content is saved. • Marks the next editable cell above. **Note**: This depends on the setting "Include all Fields in Tab Order". • In the first row, the mark stays in the current cell.
`Right`	• Marks the next cell to the right.

	• In the last column, the mark stays on the current cell.
	• If the current cell is being edited, navigation within the cell moves to the right.
	• Group header:
	  o Opens a collapsed group.
	  o Navigates from an expanded group header to the first cell of the first row of the group.

`Left`	• Marks the next cell to the left.
	• In the first column, the mark stays on the current cell.
	• If the current cell is being edited, navigation within the cell moves to the left.
	• Group header:
	  o Closes an expanded group.
	  o Navigates from a collapsed group header to the first cell of the last row above (or to the group header above)

`Up`	• Marks the cell above. • Upon reaching the first row, the mark stays there. • If the current cell is being edited, navigation within the cell moves upwards.
`Down`	• Marks the cell below. • Upon reaching the last row, the mark stays there. • If the current cell is being edited, navigation within the cell moves downwards.
`Esc`	• Ends editing without saving the changes (the focus remains). • If the current cell is not being edited, the selection is removed (the focus remains).
`Space Bar`	Enables editing of the marked cell (e.g. text field, drop-down menu, dialog). **Note:** In text fields, the current value is deleted.
`End`	Navigates to the last cell of the column.
`Pos1`	Navigates to the first cell of the column.
`Ctrl + Right`	Navigates to the last cell of the row and marks it.
`Ctrl + Links`	Navigates to the first cell of the row and marks it.
`Ctrl + Up`	Focusses the cell above (without selection).
`Ctrl + Down`	Focusses the cell below (without selection).

`Ctrl + Space Bar`	Activates or deactivates the selection.
`Shift + Arrow Keys`	Extends the selection.
`Alt + F9`	Navigates into the column header.
`Alt + F10`	Navigates into the menu bar of the object list if it is displayed.

12.5.6 Shortcuts for the Document View

If you navigate in a document, a preview of the document is shown in the content area.

Shortcuts	Action
`Ctrl + Shift + Right`	Opens the preview of the next element in the list.
`Ctrl + Shift + Left`	Opens the preview of the previous element in the list.
`Menu Key, Shift + F10`	Opens the context menu for the object displayed in the preview.

12.6 Tools

The “Tools” are displayed on the left side and can be directly opened via shortcuts (see chapter 12.2 “Global Navigation”). Thereby the focus is set in the tool.

12.6.1 Navigation (Tree View)

The tree view allows the navigation in folder hierarchies.

Shortcuts	Action
`Down`	Navigates to the next visible entry.
`Up`	Navigates to the previous visible entry.
`Right`	Expands the tree node or navigates to the first entry of the open node.
`Left`	Navigates to the parent node if an entry is selected in an open path. If an expanded node is selected it will be closed.
`End`	Navigates to the last entry.
`Home`	Navigates to the first entry.

`First Letter`	Navigates to the entry that starts with the letter (if existing).
`Menu Key, Shift + F10`	Opens the context menu of the selected object.
`Enter, Space Bar`	Opens the selected object and focuses the first entry.

12.6.2 Permissions

The “Permissions” tool for managing team members is very similar to the “Navigation” tool in terms of keyboard operation. The only difference is that the main nodes are always open. To speed up the navigation of many members the arrow keys navigate up and down at the top level directly between the highest nodes not to the next or previous entry. The deeper levels behave identically to the tree navigation.

12.7 Forms

Fabasoft Folio uses forms to display properties and settings.

Note: Screen reader users should activate the *Include All Fields in Tab Order* option in the *Basic Settings*. This way also read-only fields are included in the tab order.

Shortcuts	Actions
`Tab`	Navigates to the next field.
`Shift + Tab`	Navigates to the previous field.
`Enter`	Saves and closes the form.
`Esc`	Closes the form without saving.
`Ctrl + F1`	Navigates to the help text of the field, if exists. With `Esc` the focus switches back to the field. **Note for screen reader users:** The help area is marked as “document”. When moving the focus to the help, the screen reader should read the help text. It might be possible that you have to switch the screen reader in read mode. For JAWS press `Ctrl + Y` followed by the `Plus` key on the number pad.
`Ctrl + F6`	Navigates to the next form area.
`Ctrl + Shift + F6`	Navigates to the previous form area.
`Alt + 0`	Activates the “Support” button.
`Alt + 2`	Navigates in the first or previously focused field, if the focus is on a form button or on a tab.

`Alt + 7`	Navigates to the tabs (if present).
`Alt + 8`	Navigates to the form buttons.

Note: In aggregate lists, generally the same key combinations apply as for the details view of lists. However, the difference is that F2 in aggregate lists toggles the entire list between edit and navigation mode and not just a cell.

12.8 Process View

The process view, as it can be found on the "Processes" tab, for example, has been implemented as an open, horizontal tree view. The difference to a standard tree view, however, is that the nodes cannot be collapsed and the main sequence of entries is not from top to bottom, but from left to right.

Shortcuts	Actions
`Right`	Navigates to the next element.
`Left`	Navigates to the previous element.
`Down`	Navigates to the below element.
`Up`	Navigates to the above element.
`Home`	Navigates to the first element.
`End`	Navigates to the last element.
`Ctrl + Right`	Navigates to the next element on the same level.
`Ctrl + Left`	Navigates to the previous element on the same level.
`Ctrl + Shift + Left`	Navigates to the superordinate element.
`Context Menu Key,` `Shift + F10`	Opens the context menu of the selection.
`Alt + M`	Marks the currently focused element.
`Alt + P`	Navigates to the marked element.
`Alt + G`	Navigates to the first element with "Startable" state.

12.9 HTML Editor

The HTML editor for formatting text supports almost the same keyboard shortcuts in the text area as Microsoft Word.

Some of the most important shortcuts are listed below.

Shortcuts	Actions
`Alt + F10`	Enters the editor toolbar.
`Tab`	Moves to the next editor toolbar button group.
`Shift + Tab`	Moves to the previous editor toolbar button group.
`Right`	Moves to the next editor toolbar button within the group.
`Left`	Moves to the previous editor toolbar button within the group.
`Enter` or `Space Bar`	Activated the action of the selected button and moves the focus from the editor toolbar back to the text area.
`Esc`	Moves the focus from the editor toolbar back to the text area without any action.
`Ctrl + B`	Applies bold formatting to a text fragment.
`Ctrl + I`	Applies italic formatting to a text fragment.
`Ctrl + U`	Applies underline formatting to a text fragment.
`Ctrl + L`	Opens the link dialog window.

13 Open Source Licenses

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