



PIRS

Content

1	Welcome to the PIRS Guide	9
1.1	How to - Video Tutorials	9
2	PIRS Basics	10
2.1	What is PIRS?	10
2.2	Advantages.....	11
2.3	Some interesting facts about PIRS Web	12
2.4	System Requirements	13
2.5	Help & Privacy Statements.....	14
3	Navigation & Personalization	15
3.1	Login and select a Project	15
3.2	User Interface and Navigation.....	17
3.3	Dashboard	21
3.3.1	Customize your global dashboard	21
3.3.2	Customize your project dashboard	22
3.4	Favorites	25
3.4.1	Favor Projects.....	26
3.4.2	Favor Folders.....	28
3.4.3	Favor Entries.....	30
3.5	Customize a grid.....	32
3.6	User Preferences and Set-up.....	33
3.7	PIRS Views.....	38
3.7.1	Global Views	39
3.7.2	Project Views	39
3.8	PIRS Folder Structure	43
3.8.1	PIRS without folders	45
4	Correspondence & Documents & Events	46
4.1	Correspondence	47
4.1.1	Create and send an email.....	47
4.1.2	Create a library item.....	55
4.1.3	Create and send a letter	58
4.1.4	Forward & reply to messages	62
4.1.5	File incoming emails	64

- 4.1.5.1 Personal Mailbox..... 65
 - 4.1.5.1.1 File Emails using the Mailbox Views 68
- 4.1.5.2 Project Mailbox..... 69
- 4.1.5.3 Prevent duplicates..... 69
- 4.1.5.4 File via Drag & Drop..... 70
- 4.1.5.5 Autofiling 74
- 4.1.6 Correspondence Thread 75
- 4.1.7 Correspondence Preview Pane 76
- 4.1.8 Correspondence received via Distribution Lists 78
- 4.1.9 Sending encrypted E-Mails 79
- 4.1.10 Correspondence Follow Up 80
- 4.2 Documents 81
 - 4.2.1 Create new document..... 82
 - 4.2.1.1 The document header 83
 - 4.2.1.2 Select a document number 85
 - 4.2.1.2.1 Select a document number using the Document Numbering Wizard 85
 - 4.2.1.2.2 Generate Automated Document Number..... 87
 - 4.2.1.3 The document content 87
 - 4.2.1.3.1 Upload your files to PIRS 87
 - 4.2.1.3.2 Add detailed information..... 89
 - 4.2.1.3.3 Document Follow up information..... 90
 - 4.2.1.3.4 Document Revisions and Correspondence tab..... 91
 - 4.2.2 Check-out & check-in..... 92
 - 4.2.2.1 Check out/in a document from within a view 92
 - 4.2.2.2 Check out/in a document directly within a document..... 94
 - 4.2.2.3 View "My Checked-out Documents" 96
 - 4.2.3 Submit documents - Transmittal Slip 97
 - 4.2.3.1 Adjust documents within TS..... 98
 - 4.2.3.2 Select additional document information and files 99
 - 4.2.3.3 Fill grid for all documents 101
 - 4.2.3.4 Download attachments 102
 - 4.2.3.5 Bulk Change..... 102
 - 4.2.3.6 Body, attachment and access tab..... 103

4.2.3.7	Transmittal Slip send options.....	103
4.2.3.8	What happens if a document has not received final approval	104
4.2.3.9	Cover Letter	105
4.2.4	Receive/Access Transmittal Slips.....	106
4.2.5	Create new revision	106
4.2.6	Create an internal or file external comments	109
4.2.6.1	Create a Comment using a sent Transmittal Slip	114
4.2.7	Import Documents.....	116
4.2.8	PIRS File Viewer.....	124
4.2.9	Read Mode vs Edit Mode	141
4.2.10	Use Templates to send Transmittals & Comments	143
4.2.11	Comment Review Sheet (CRS).....	143
4.2.11.1	Why you should work with CRS.....	143
4.2.11.2	How does it work.....	144
4.2.11.3	Revision Management	145
4.2.11.4	Share CRS Items with externals	146
4.2.11.5	CRS exchange with Portal	147
4.2.12	Interfaces with CAD, PDM or ERP systems	148
4.3	Events.....	149
4.3.1	Create new Event	149
4.3.1.1	Use Office Templates.....	153
4.3.2	Send Notice	154
4.3.3	PIRS Event App	156
5	General Actions	165
5.1	Search & Filter Functions	166
5.1.1	Filter data	167
5.1.1.1	Save Filters	171
5.1.2	Search documents with full-text search	173
5.1.2.1	The PIRS full text search options.....	174
5.1.3	Full-text search field names	176
5.1.4	Use Full Text Search within Mailbox Views	178
5.2	PIRS Tool Bar Actions.....	179
5.2.1	Distribution List	180
5.2.2	Organise	182

5.2.2.1	Action Items	183
5.2.2.1.1	Create an Action Item from within a PIRS item.....	183
5.2.2.1.2	Manage and Create an Action Item within the Action Items View	186
5.2.2.1.3	Inform responsible & other users about new task	186
5.2.2.1.4	Use Bulk change to edit several Action Item in one go.....	187
5.2.2.1.5	Linking or Unlinking Action Items	189
5.2.2.2	Set Cross References.....	190
5.2.2.3	Tags	191
5.2.3	More	194
5.2.3.1	Predefined Document Actions	199
5.2.3.2	Bulk Change.....	202
5.2.3.3	Create & Print using PDF templates	203
5.2.3.4	Print without print template	204
5.2.3.5	Update date.....	205
5.2.3.6	Export grid to MS Excel	207
5.2.3.7	Show document URL	208
5.2.3.8	Show access rights	209
5.2.3.9	Document log.....	211
5.2.3.10	Download Attachments	212
5.2.3.10.1	Download attachments from Cross References.....	215
5.2.3.11	Deletion concept	216
5.2.3.12	Create file from template.....	218
5.3	Manage Attachments.....	219
5.3.1	Add attachments to any PIRS entity	219
5.3.2	Rename Attachments	221
5.4	Manage Access Rights.....	222
5.5	Use text templates.....	225
5.5.1	Filter for the right template	226
5.6	Activity Stream.....	227
5.7	Posts.....	230
5.8	View Files within your Browser.....	232
5.9	PIRS Downloads	234
5.10	Rich Text Editor	234
5.11	External Link Tab.....	236

5.12	Workflow	238
5.12.1	Workflow Views and Widgets	240
5.12.2	Workflow actions within the PIRS tool bar	241
5.13	Image Viewer.....	242
6	Controlling and Reporting Area	244
6.1	Document controlling.....	244
6.1.1	Distribution to Customer	245
6.1.2	Distribution to Customer Forecast	247
6.1.3	Customer Response	247
6.1.4	Transmittal Follow Up	248
6.1.5	Comment Follow Up	249
6.2	Reports	250
6.3	Reports based on templates	252
7	Address Book	253
7.1	Create & Edit Contacts	254
7.1.1	Bulk Change	256
7.2	Create a new Contact Group.....	258
7.3	Add a new Company	259
7.4	Import Contacts based on Excel Sheet	260
7.4.1	How to import new contacts.....	260
8	Tips & Tricks	262
8.1	Tutorial Videos.....	262
8.1.1	Main PIRS features and important processes	263
8.1.1.1	File e-mails from your personal mail box in PIRS:	263
8.1.1.2	Use PIRS Filter to search for information:	263
8.2	How to clear your browser cache	263
8.2.1	Step-by-step guide for clearing a IE 9/10/11 browser cache.....	264
8.2.2	Step-by-step guide for clearing a Firefox browser cache	265
8.3	How to install spell check in your browser.....	268
8.3.1	Firefox	269
8.4	Manage your Content Tabs	274
8.5	Visit our PIRS Blog	276
9	PIRS Project Administration	276
9.1	Manage Project Keywords.....	277

- 9.1.1 General Actions 278
 - 9.1.1.1 Delete, Soft-Delete and Restore 279
- 9.1.2 Sort keywords 281
- 9.1.3 Action Item Keywords 282
- 9.1.4 Contact Keywords 283
- 9.1.5 Correspondence Keywords 283
 - 9.1.5.1 Correspondence Codes 284
 - 9.1.5.1.1 Use Filter 285
- 9.1.6 Document Numbering Keywords 286
 - 9.1.6.1 Add new document numbers manually 287
 - 9.1.6.2 Add new document numbers via excel import 288
- 9.1.7 Document Keywords 289
- 9.1.8 Manage Project Tags 291
- 9.2 Administration of Document Controlling 291
 - 9.2.1 Management of data for your Controlling Area 292
 - 9.2.2 Management of data for project specific reports and grid reports 294
- 9.3 Folder Administration 295
 - 9.3.1 Rename, relocate and manage access rights to existing folders 295
 - 9.3.2 Create new folder(s) 297
 - 9.3.3 Delete folder(s) 299
- 9.4 Manage Predefined Document Actions 302
 - 9.4.1 Create new PDA 302
 - 9.4.2 Creating other PDA Types 305
 - 9.4.3 Use Filters to find specific PDA 305
 - 9.4.4 Optional Features 305
- 9.5 Project Settings 306
 - 9.5.1 Create or edit Text Templates 307
 - 9.5.2 PDF Templates 309
 - 9.5.3 Project Mailbox Setting 309
- 9.6 Approval Workflows 309
 - 9.6.1 Sequential / Parallel Workflow Configurations 310
 - 9.6.1.1 Approval Process Definition 310
 - 9.6.2 Set Due Dates 311
 - 9.6.2.1 Set Workflow Due Date 311
 - 9.6.2.2 Overdue 312
 - 9.6.2.2.1 Overall Overdue and Single Step Overdue 313

9.7	Activity Stream.....	313
9.8	Administrative Tasks	314
9.9	Recycle Bin.....	314
9.9.1	Restore deleted PIRS entity	314
9.9.2	Restore deleted folder.....	315
9.10	Set up new projects	316
9.10.1	How to fill out the Project Import Sheet	316
9.10.1.1	Folder Tab.....	317
9.10.1.2	Correspondence Codes Tab.....	318
9.10.1.3	Companies Tab.....	319
9.10.1.4	Contacts Tab.....	320
9.10.1.5	Document Settings Tab	320
9.10.1.6	Action Item Settings Tab.....	322
9.10.1.7	Tag Labels Tab	323
10	Release Notes	324
11	Templates	348

1 Welcome to the PIRS Guide

This user manual will guide you through the features of PIRS.

PIRS, which is an abbreviation for „Project Information Retrieval System“, is a project management tool for the administration and tracking of information that accumulates in the course of a project.

The application acts as a central project communication platform for filing and retrieving project related information (emails, letters, contracts, engineering drawings,...). Documents are stored in a clear folder structure and receive a unique number. Due to the integrated search and filtering mechanisms it is easy to recover documents and especially documents subject to revision management can be optimally administered in PIRS.

The following pages include a description of the system functions and capabilities, contingencies and alternate modes of operation, and step-by-step procedures for system access and use.

1.1 How to - Video Tutorials

For the quick and easy introduction to PIRS mail features, take a look at our chapter [Tutorial Videos](#).



Do you have questions to PIRS? Then contact us now!

Email: servicedesk@sobis.com

Telephone: +49 621 1228 5656

Website: www.sobis.com

PIRS-Website: <http://www.project-information-management.com/>



Get the latest PIRS News by following PIRS on twitter or check out our other fan pages!



2 PIRS Basics

The following chapter will give you an overview of the general features and functionality of PIRS in order to provide you with all basic information to get to know the application. After a brief introduction and the presentation of the advantages PIRS is able to offer you, the user interface as well as the general navigation will be explained.

2.1 What is PIRS?

The **Project Information Retrieval System (PIRS)** is a web based document management system that gives the user the possibility to manage, organize, distribute as well as monitor all information, correspondence and documents (e.g. drawings, technical records) that are incurred in the course of a project.

Main features are:

- Creating, customizing and managing of project correspondences including e-mails, fax messages as well as letters
- Serves as an communication platform for all project related activities
- Storage of all project information, e.g. contracts, specifications, schedules or reports and being able to track all revisions of documents
- Controlled and purposeful distribution of all documents created and/or revised in the course of the project
- Monitoring, tracing and supervising the latest status of drawings and technical documents/records (workflows)
- Information confidentiality maintained at the project, folder and document level
- Extensive search, filter and Excel export features
- Personalizing options for each user individually with the means of personal dashboards, choosing favorite folders and views and the integration of different mail files e.g. Outlook, Google mail, Yahoo etc.

PIRS as a tool to support project management has the following objectives:

- Avoiding decentralized storage of project relevant information such as storing information in a personal mailbox or on a local drive
- The distribution as well as updating of project information should take place via a central database

- All project information and documents should be accessible via one's browser of choice without the installation of other applications or tools
- A project based folder structure should allow a decrease of document storage as well as an easy retrieval
- All documents should have a unique document number to make the retrieval faster and easier
- The evaluation (searching, sorting, categorizing) of project information should be optimized
- All project information as well as documents should be accessible regardless of the location of a project team member or other users and therefore enable a persistent exchange of information between headquarters, different locations (e.g. building sites) and contracting partners.

Instead of filing paper copies of project information and documents in centrally stored project folders, distributing them to other project members via fax or mail and therefore automatically creating other decentralized information storage, PIRS allows all information to be stored in one central database where documents as well as project relevant information can be created, recorded, distributed, monitored and archived in one single application in only a few quick steps.

Furthermore, PIRS enables users provided with the necessary access rights to access the database regardless of location, country or company. Each team member can, according to his/her access rights, view, analyze and edit all project information.

2.2 Advantages

Working with PIRS offers you and your company the following advantages:

- Creating, distributing and filing project information in one step - without even leaving your workstation
- Easy handling of project-specific correspondence (e-mails, fax messages, letters etc.), providing customized forms as well as project relevant addresses
- Quick distribution of information to partners, customers and the project site
- Well-structured access rights for project information which along with the roles defined in the project organization provide a high level of information security at all times
- Well-defined processes and folder structures, determined by e.g. criteria for filing such as pre-named folders, automatically assigned correspondence numbers or pre-defined options
- Easy searching and analyzing within many different views, providing various possibilities to sort or categorize data

- Full text search function for individual, customized queries
- Transparency of progresses of current activities as well as the latest status of drawings or technical documentation by using one central, continuously updated database
- High level of mobility thanks to the easy access over a browser - all users provided with internet connection can access PIRS not just in the office, but also at home, in a hotel room or on an airplane.

2.3 Some interesting facts about PIRS Web

In General

- ...PIRS Web is a central application, with the areas [Correspondence](#) and [Documents](#)
- ...you can access your project information easily from your mobile phone or tablet at any time
- ...you can use [PIRS Portal](#) to integrate your external parties – collaboration using a secure and separated environment
- ...you can change your password, language and other settings under “My Settings”
- ...every user has its own [Recycle Bin](#) to restore unintentionally deleted documents
- ...the [Controlling Area](#) offers different views of your data by graphical support
- ...[Reporting](#) via PDF, Excel and Word is available to every user
- ...PIRS Web has a project address book with all project contacts, usergroups and companies

Correspondence & Documents

- ...you can send a document link via [Distribution List](#) instead of sending the full document to reduce the data traffic
- ...PIRS Web has a special document number generator, which assigns a unique number for each document
- ...you can upload multiple documents or move items to another folder via Drag & Drop
- ...you can create a [Cross Reference](#) between documents, add a document to [Favorites](#), assign Tags and create a new [Action Item](#) via the [Organize-Button](#)
- ...an overview of all open tasks shows you your to dues ([Action Items](#))
- ...you can modify the values of multiple Documents in one step by using the [Bulk Change](#) action in your views and folders

- ...you can use the [Predefined Actions](#) function that allows you to use customized templates with predefined field values and document actions
- ...e-mails from the [Personal Mailbox](#) can be filed easily into PIRS Web

Social Functions

- ...PIRS Web offers social features
- ...you can get a quick overview with the Activity Stream
- ...you can create Posts to discuss an important issue
- ...the Social Functions reduce the number of e-mails and save time within your project

Organization & Overview

- ...you can view and annotate your documents within your browser – it significantly reduce the time for document approval process, because you do not need to download the documents
- ...every user can customize his [Dashboard](#) individually
- ...you can have individual [Search and Filter functions](#)
- ...you can [favor](#) your projects, folders and documents
- ...PIRS Web provides the cross-project search and reporting

2.4 System Requirements

Requirements for users (workstations):

PIRS is a web application that runs with all modern web browsers.

Requirements for the environment:

As operating system PIRS supports **Windows Server and Linux (e.g. Ubuntu/Debian)** and as mail server (IMAP, SMTP) you can work with Servers such as MS Exchange, Lotus Domino, Google Mail, Postfix, Courier.

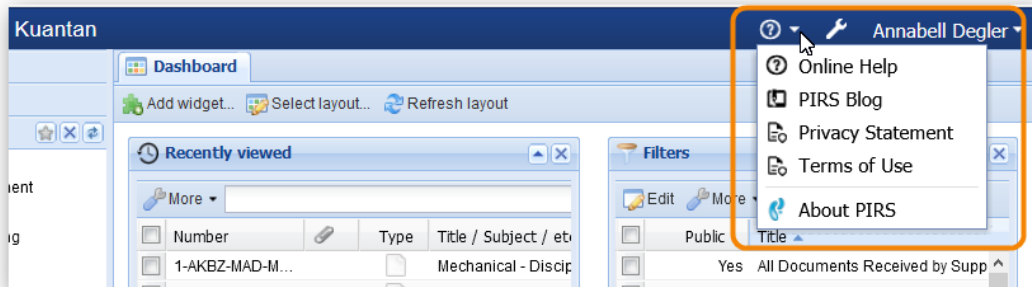
The technology behind the applied database is a relational system. Therefore a relational database system which can either be **MySQL Server, Maria DB or Microsoft SQL Server**, is required. Furthermore the web application server **Apache Tomcat** must be installed prior to the implementation of PIRS.

PIRS Private Cloud:

SOBIS also offers a cloud alternative, where PIRS is hosted and administered on servers within the SOBIS server system.

2.5 Help & Privacy Statements

Within your PIRS tool bar you will find a section that allows you to access the PIRS manual as well as your company's privacy statements and the terms of use.



By default the option "Online Help" will offer a direct link to the PIRS manual. Alternatively, your company can also choose to offer a link to your company specific PIRS guide.

"Privacy Statement" as well as "Terms of Use" can also be company specific. In addition to showing your company privacy statement and terms of use within the help section, it can also be visible on your start screen as well as within your PIRS mobile app. Please contact your PM for further information.

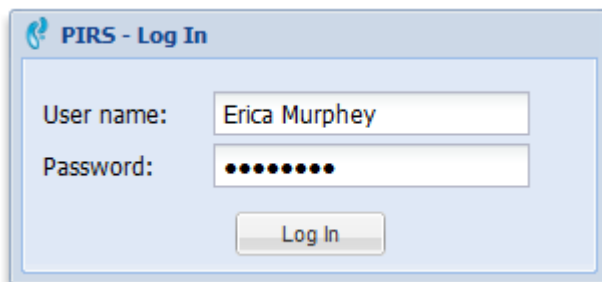
The "About PIRS" option will give you current information about the PIRS release you are working with, when PIRS was last updated and provide our copyright information.



3 Navigation & Personalization

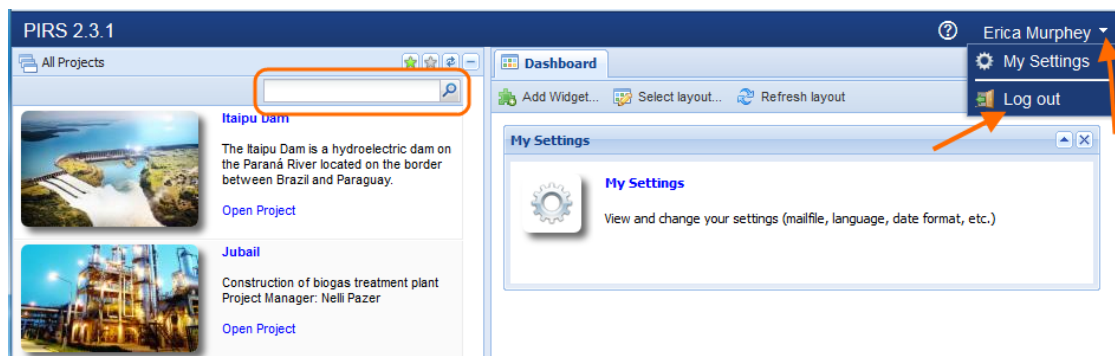
PIRS offers many different ways to save time. It helps you to find and open projects as well as folders and files quickly and easily and supports you at your work on a daily basis. Not the least of these features are the many possibilities to personalize your PIRS account and your individual project navigation. The following chapters will show you how and in how many ways you are able to personalize PIRS.

3.1 Login and select a Project



After opening the company specific PIRS application link in your browser, a white screen with a log-in window will appear. As indicated by the image you will now be required to enter your user name / ID as well as your personal password.

As soon as you have entered your personal data correctly and either clicked the "Log in" button or simply hit the enter key on your keyboard, the PIRS global page will open in your browser window. As shown in the following screenshot the global page is divided into two sections. On the left hand side all company projects are listed while on the right hand side a number of widgets are offered in a dashboard. The number and type of widgets can be altered to fit your needs (for further information on this subject refer to chapter [Customize your global dashboard](#)). Standardized the widget which allows you to view and change your settings (mail file, language, date format, etc.) is included.



Projects, for which you were given the necessary access rights, are displayed in blue and will indicate existing links when you hover the cursor over them. You will be able to open those projects by simply clicking the respective stroke "Open Project" or the project tile. Since each

selected project will automatically be opened in a new tab you can choose to open and work on as many projects as you need simultaneously.

If you have difficulties finding a specific project you can use the search box (indicated in the screenshot by the outline) that enables you to quickly locate and access the project of your choice. The "Log out" action pointed out in the screenshot by the arrows enables you to quickly leave the application. If you simply close the global window while you are working on projects in another window or tab without having log-out first, you will not be logged out of those projects and they will not close automatically. To insure that no one else can work with your account against your will, please always log out of PIRS before closing the respective windows.

Map your own contact

There are two things a user needs in order to access a project, the access rights and the user must be mapped to the project. The basic condition without which the user won't be able to enter a project at all is obviously that he or she holds the required access rights to the respective project. But even though you have the access rights to a project, there is a possibility that the project won't be displayed right away, because your user profile is not mapped to a contact in the project address book. If this is the case you will be faced with a message box asking to map your contact.

The thought process behind this is quite simple. For each project there is a specific project address book, which will be used by the application to gather and extract data each time a user sends or receives any kind of correspondence (email, letters, transmittal slips, distributions lists etc.). Therefore PIRS uses the mapping process in order to allocate a contact in the respective PIRS address book to your user name. When a new PIRS project is implemented for your company your user names will all be mapped by your PIRS support team, but in case your user name is added at a later point, your contact data were not included in the address book or your user name was not mapped to the project yet, PIRS will ask you to correct this as soon as you log into the PIRS project.

The process hereby is rather simple.

After opening a project, a message box will open that offers you two different options. You can either select an already existing contact from the address book (preferably your own) or, in case your contact is not included in the project address book, PIRS provides you with the possibility of creating your contact consisting of the basic information (compare the two following images).

PIRS - Map your user name to a contact

Your user name is not mapped to a contact for this project.

Project: **Jubail**

User: **Erica Murphey**

Please select a contact from the list below to map your user name to.

Contact:

Alternatively click the 'New Contact' button to create a new contact.

PIRS - Map your user name to a contact

Your user name is not mapped to a contact for this project.

Project: **Jubail**

User: **Erica Murphey**

Create a new contact to map your user name to.

First Name:

Last Name:

E-Mail:

Company:

Contact Type:

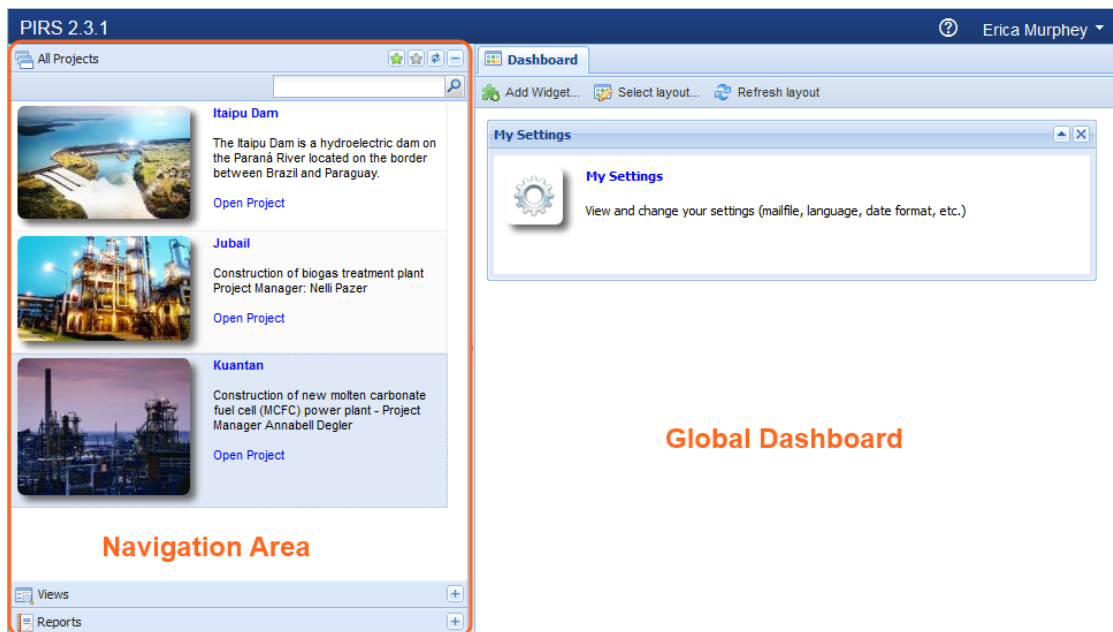
In order to add further information to your contact document such as your telephone number or your personal signature, please reopen the respective document within the PIRS address book and adjust / modify the document after the mapping process is complete.

3.2 User Interface and Navigation

PIRS Global Navigation

After you logged into your company's PIRS application its global user interface, including navigation area displaying all of the company's projects and the global dashboard, will open. Here you have the opportunity to modify your global dashboard to fit your preferences as well as change your personal settings. Furthermore you can personalize the display of projects presented to you in your global navigator by selecting favorite projects. (Please refer to the following chapters for detailed instructions.)

Next you can select and open the project you need to access by clicking on "Open Project" on the respective project tile. Your project will automatically open in a new tab within your browser. The following screenshot displays the layout of the global user interface with the navigation area on the left hand side of the screen and its dashboard on the right hand side.

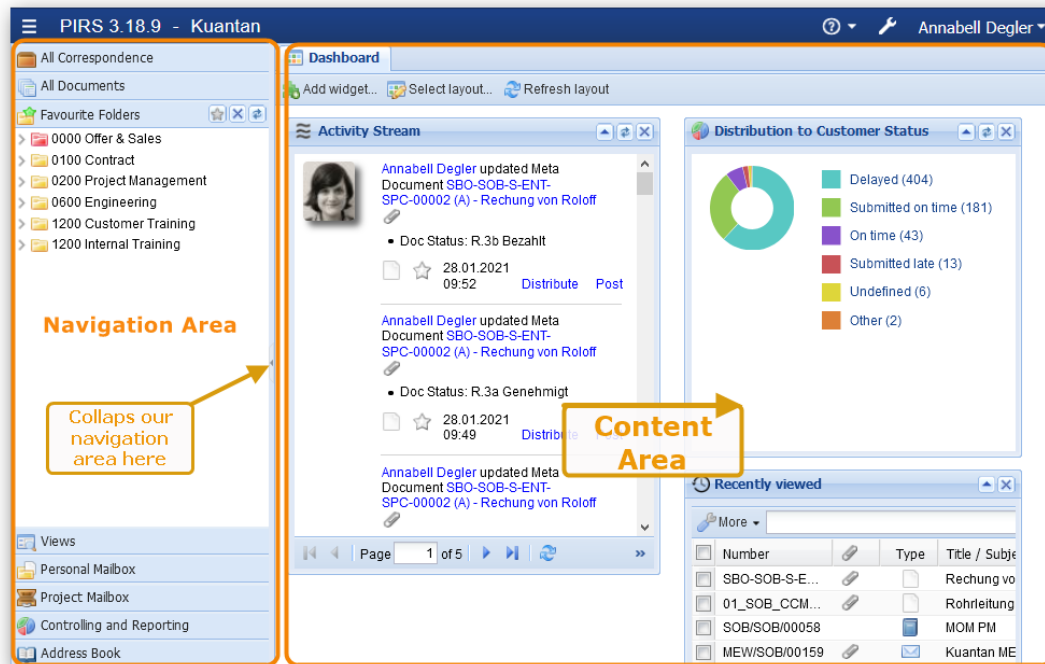



PIRS Project Navigation

On the left hand side of the project user interface of each project, you will find a navigation area.

Depending on your company set up, all sections of the navigation might be collapsed, the folder section might be expanded or another default display will be presented to you. The navigation can be adjusted to your company requirements and therefore it might differ from the screenshots you will see below. For example, your project might not have any folders but instead displays several options to access e.g. specific project views and your open tasks. To learn more about how to adjust the navigation, please contact your SOBIS Service Desk.

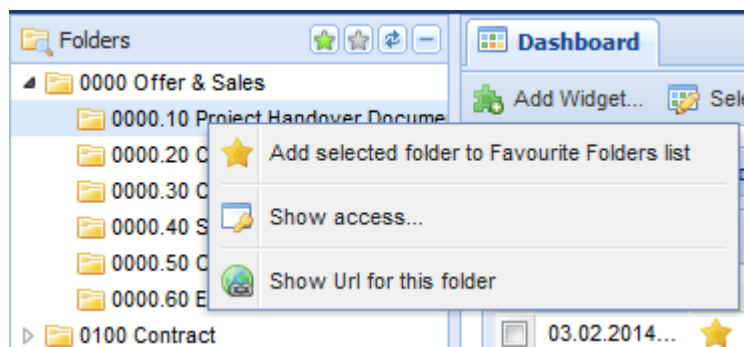
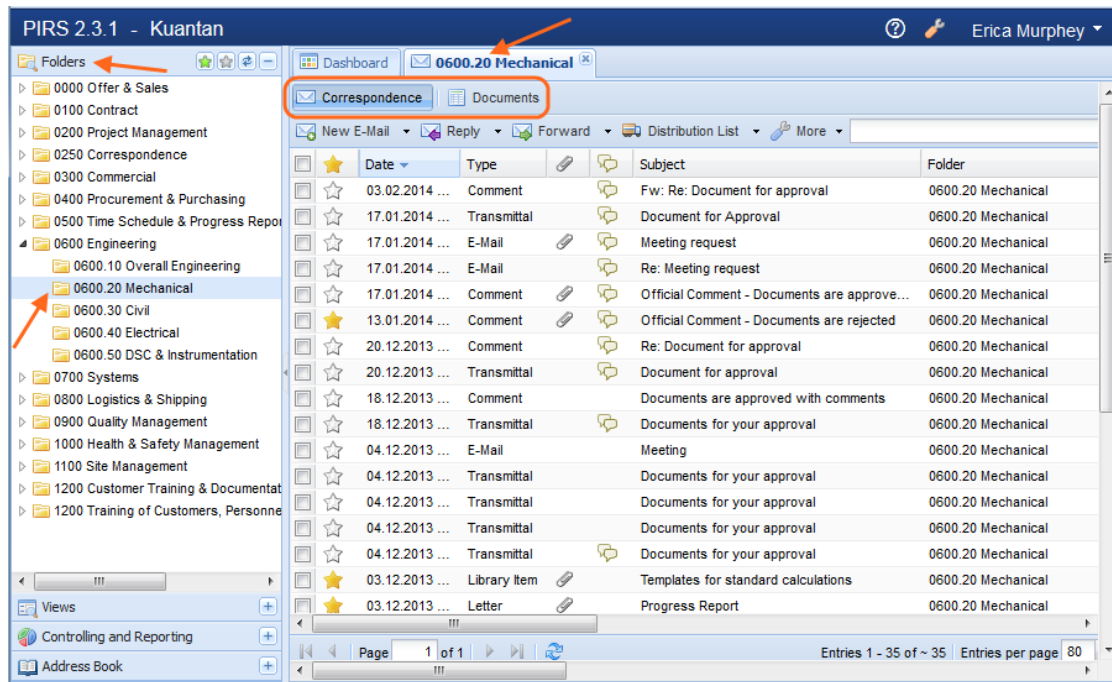
In case you prefer to use your entire browser screen to display your selected views the navigator can be folded to the side by clicking the small blue arrow head pointed out by the orange arrow in the image below.



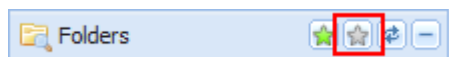
Your navigation column is structured into various sections, most of them including several subsections which can be easily expanded by clicking the  button.


Generally, the navigation area can be adapted to your needs, meaning that you can add and remove views and choose the order of display. By default, there will be a section showing the all correspondence views and one the all documents view. In addition, there is a section which will give you a quick access to your personal and your project mailbox in case a project mailbox is set up for your project. Other views will be listed within the section views. For more details on the different views, please refer to the respective chapter.

The folder section as demonstrated in the following screenshot displays the company specific folder and sub folder structure. Each document as well as all correspondence within PIRS must be assigned to a specific folder (parent or child) and therefore can be tracked and found within the folder structure. The files (correspondence and documents respectively) that are stored within a folder will be displayed in the content page on the right hand side. As indicated by the orange box in the screenshot below you can switch between the display of correspondence and document files within each folder.



In addition, the folder section has a special feature that allows you to create and display a selection of folders you work the most with or that you regularly need to open and therefore that you would like to access as quickly and easily as possible. You can create your own list by separately selecting your favorite folders and then clicking the star button beside the green star in your folder selection (



). As a second option you can also choose to select your favorite folders via right mouse click as displayed in the image. You can switch between the regular folder structure presentation and your favorite folders by clicking the button with the green star icon. The  button will refresh the page. (For detailed information on favorite folder please refer to the chapter [Favorite Folders](#).)

By right-clicking any folder it is also possible to ask the system to show you who has access to the respective folder and what kind of access rights you and / or your team members have to

the particular folder. Furthermore you can have PIRS present you with the unique URL to the selected folder which can then in turn be copied and send to other PIRS users.

If you find yourself unable to locate certain correspondence or documentation or are maybe uncertain in which folder you might have to look for the information you need, you are able to select different views within the section "Views" according to your current need for specific information.

For the correspondence there are the general areas "My Correspondence" and "Mailbox" which contents can be further divided in three (received, drafts, sent) respective two (project and personal mailbox) sub views. Furthermore, there are two views for documents. You can choose to open the view "My Documents" that will present you with all the documents you have either created, currently own or are responsible for. You can also select the view "All Correspondence" or "All Documents" which will include all correspondence respectively documents within the project regardless of your degree of involvement or responsibility.

You can also access a search option within the project or open the project recycle bin in case you need to restore a file. The features presented to you in each view will be further explained in the following chapters.

The sections "Controlling" and "Address Book" allow you to open different views within the respective topics. For further explanation and instructions please refer to the according chapters. ([PIRS Views](#), [Document controlling](#), [Address Book](#))

3.3 Dashboard

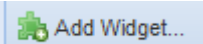
PIRS offers two different types of dashboards. First of all you have one global dashboard that will allow you to adjust your global settings and widgets. Second of all you will be able to maintain a project dashboard for each of your projects individually.

3.3.1 Customize your global dashboard

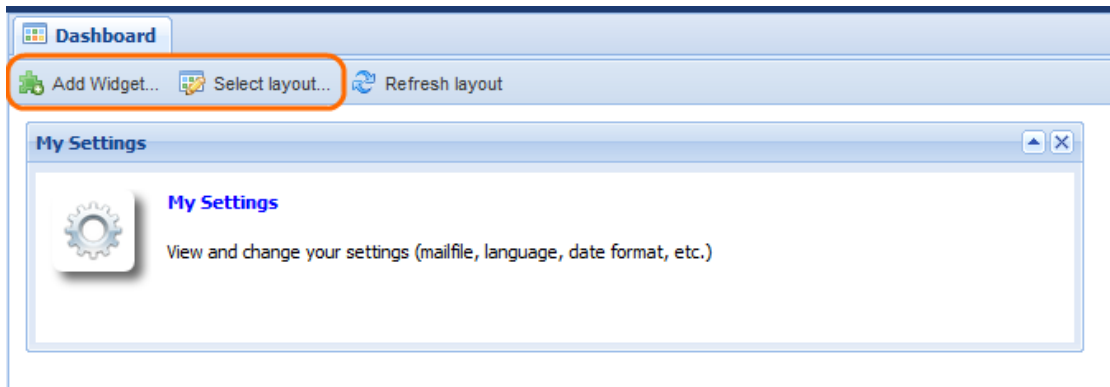
PIRS offers you two types of dashboards, the global and the project dashboard, and both can be customized to reflect your preferences.

The global dashboard is a user specific dashboard that is displayed on the right hand side of the global PIRS company webpage after you logged into the application. (Compare with the image in the chapter [User Interface and Navigation](#).)

The dashboard offers a selection of widgets that have different functions. The default view includes initially only the widget "My Settings" which allows you to adjust or modify settings such as the date/time format, the application language or your location or change your password. (For further information on how to modify your setting please refer to the chapter [User preferences](#).) More widgets e.g. a widget for your global reports can be selected by

clicking the  button in the left upper corner of the dashboard. Widgets can just as easily be removed by clicking the X-button in the right upper corner of the widget. Each

selected and added widget will initially appear following the previously chosen widget but you can rearrange the order via drag and drop.

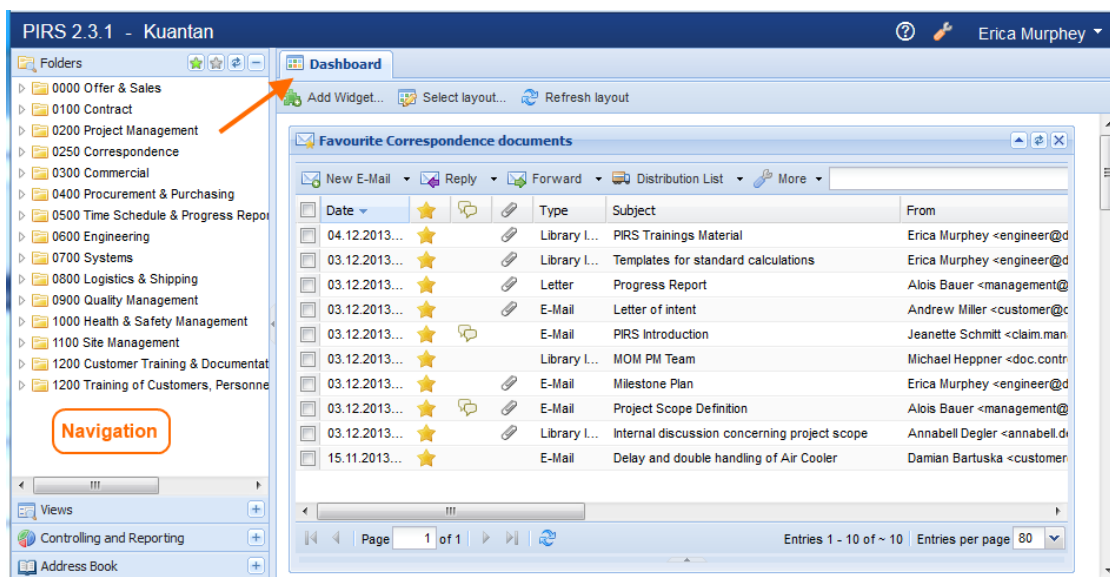


In addition PIRS also gives you the opportunity to customize the layout of your global dashboard beyond the rearranging of widgets. You can adjust your layout setting by clicking the "Select layout" action. (For a detailed explanation on how to personalize your layout refer to the chapter [Customize your project dashboard.](#))

3.3.2 Customize your project dashboard

In addition of being user specific, the project dashboard is also project specific. This means that one user can have one global dashboard while maintaining several project dashboards. Each project dashboard can be customized according to the user's project specific preferences.

After selecting and opening a project, the project will open in a separate tab in your browser. As it is custom, the left hand side displays the navigation area with the project specific folder structure as well as other options (compare chapter [User Interface and Navigation](#)). On the right hand side the project dashboard is displayed as main view and first tab, as indicated by the following image.



Default Dashboard

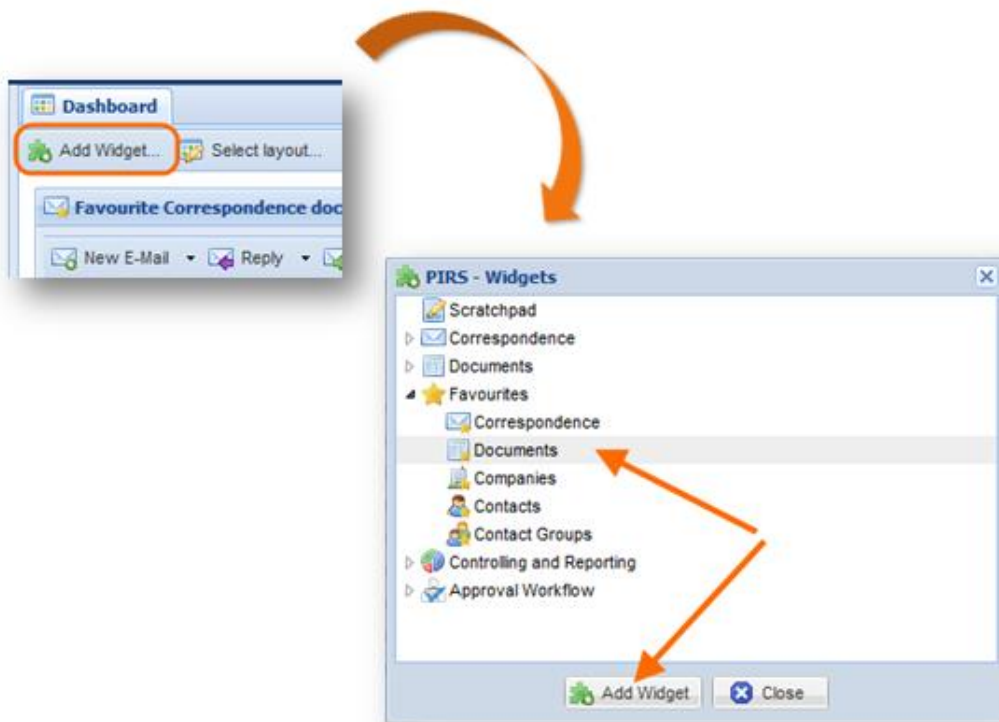
Depending on your company setting, your dashboard will already carry a set of different widgets and be presented to you with a certain layout. This is your companies default set up which can be defined and administered by your PIRS responsible. In case your dashboard is empty, there hasn't been a default dashboard defined so far. If you like to learn more about default dashboards, please contact your Service Desk.

How to adjust your widgets:

As default setting the widget "My Correspondence/Received" is displayed and while the upper part shows all your received correspondence in a table, the lower part provides you with a preview of the correspondence you selected out of your above displayed files.

Similar to the global dashboard the action "Add Widget" located in the upper left corner of the dashboard gives you the opportunity to open a window which offers a variety of different widgets. By adding widgets you can modify, adjust and personalize your dashboard settings.

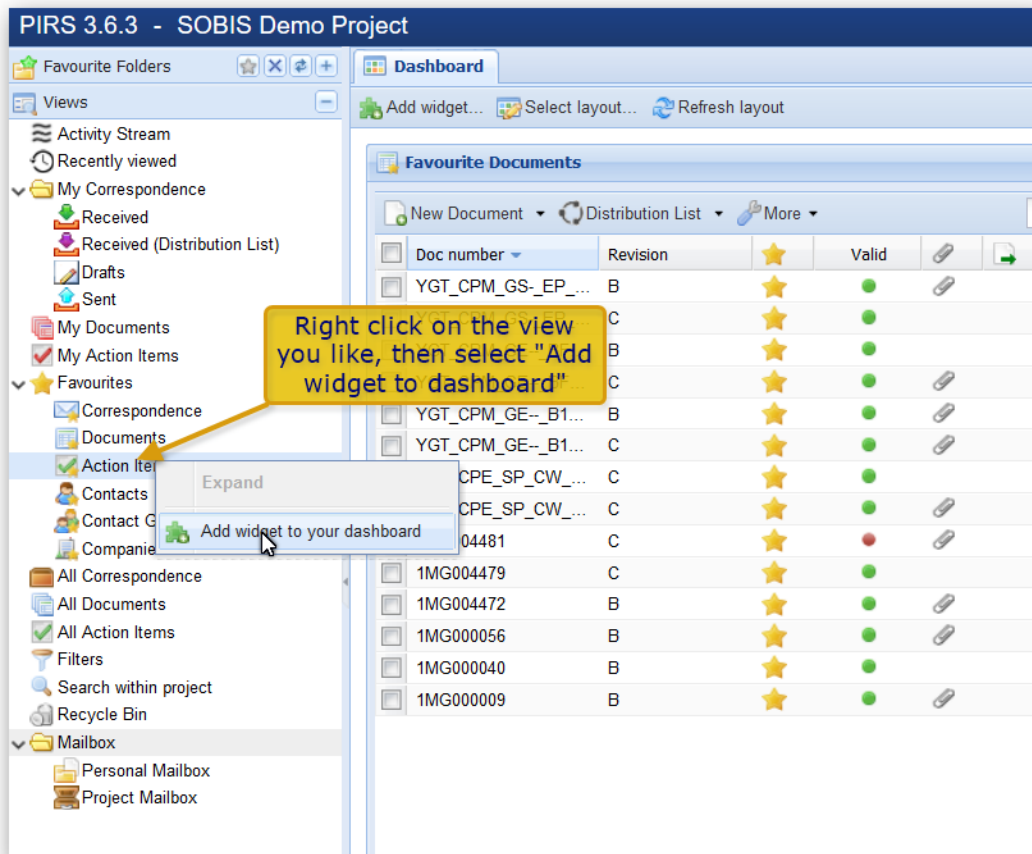
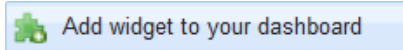
You simply select the widget you would like to add to your dashboard and confirm by clicking the "Add Widget" button, compare with the following image.



For your project dashboard you can choose between categories of widgets. Most of the widgets that you can attach to your dashboard co-insight with various PIRS views or charts form the controlling area. An exception is the option of the scratchpad which is a special feature of the dashboard that allows you to take quick notes, write project specific reminders to

yourself for the next time(s) you open the respective PIRS project or you can use the blank area in any other way you might see fit.

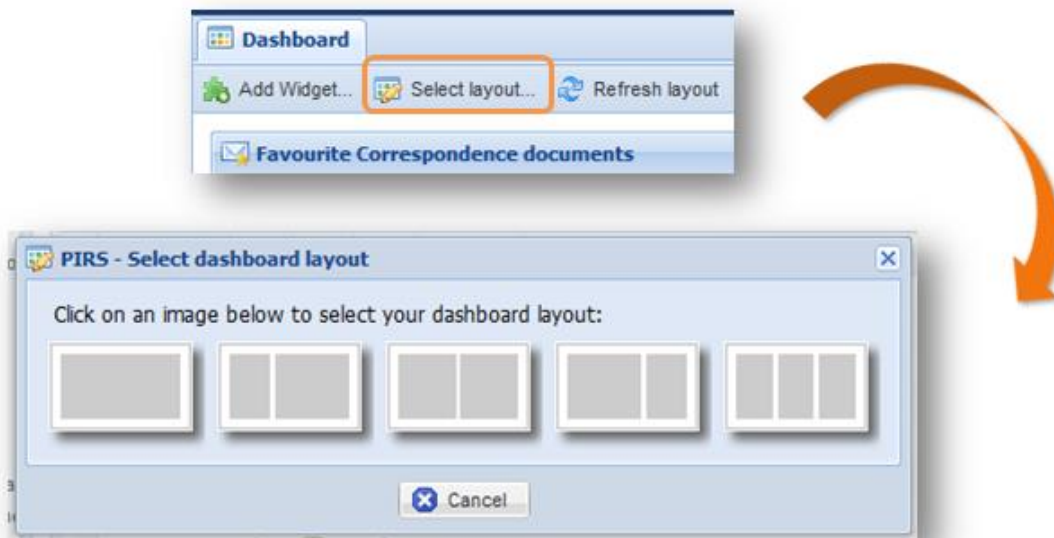
As a second option you can also select widgets directly within the View area of your navigation. Right click the view you would like to add as a widget then select the option



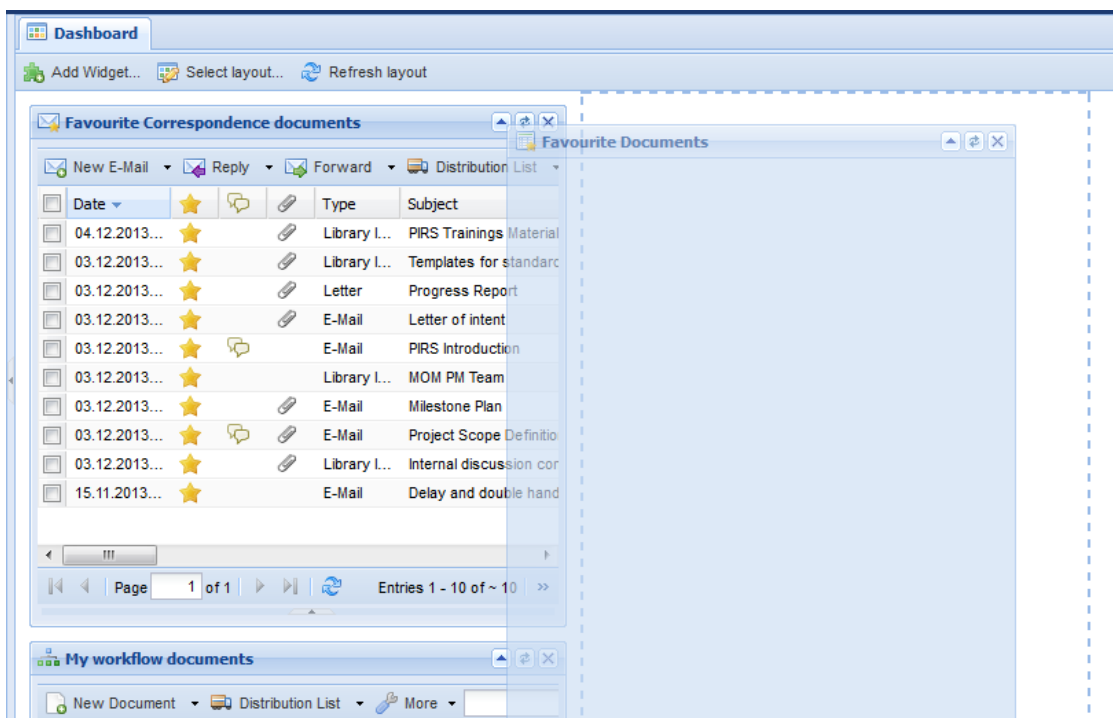
To learn more about all the functions of the widgets offered for controlling please read the chapter "[Document controlling](#)". The category, the Approval Workflow, will only be presented to you if your PIRS project supports the PIRS Workflow Module. For further information about the workflow module please refer to "[The Document Workflow Module](#)" and "[The PIRS Views](#)".

How to adjust your layout:

PIRS lets you define the way your selected widgets will be arranged and positioned on the dashboard. By clicking the "Edit Layout" action which is located at the upper left hand side of your dashboard (outlined in red on the following image) you will open a window that offers five different layout styles.



After having selected the widgets you like to display on your dashboard as well as your preferred dashboard layout you can arrange the widgets by simply using "drag & drop" as indicated in the following image.



3.4 Favorites

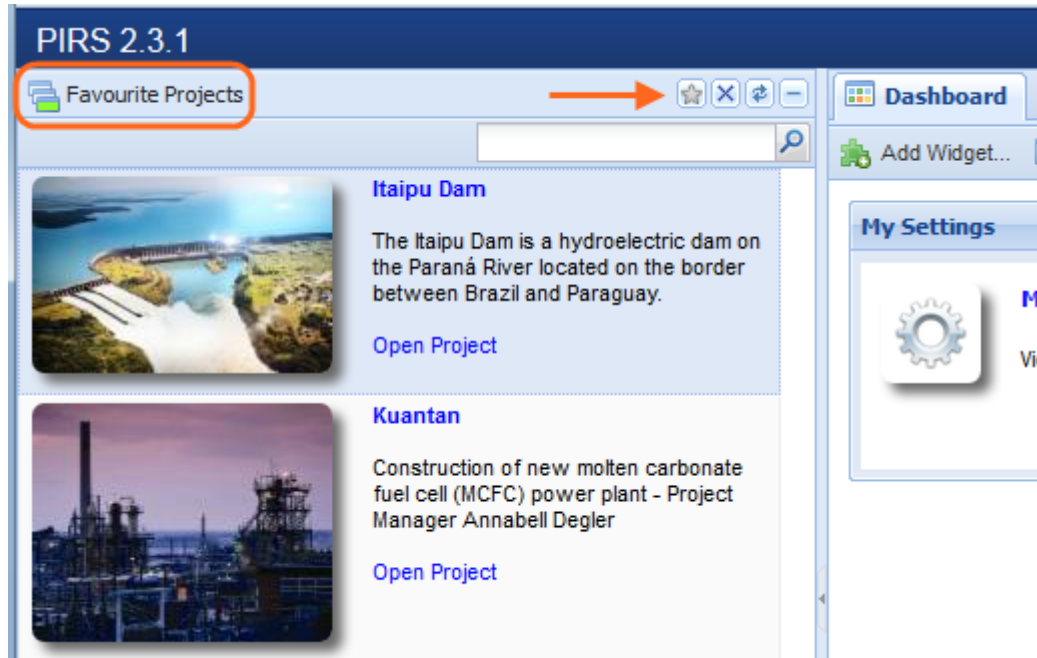
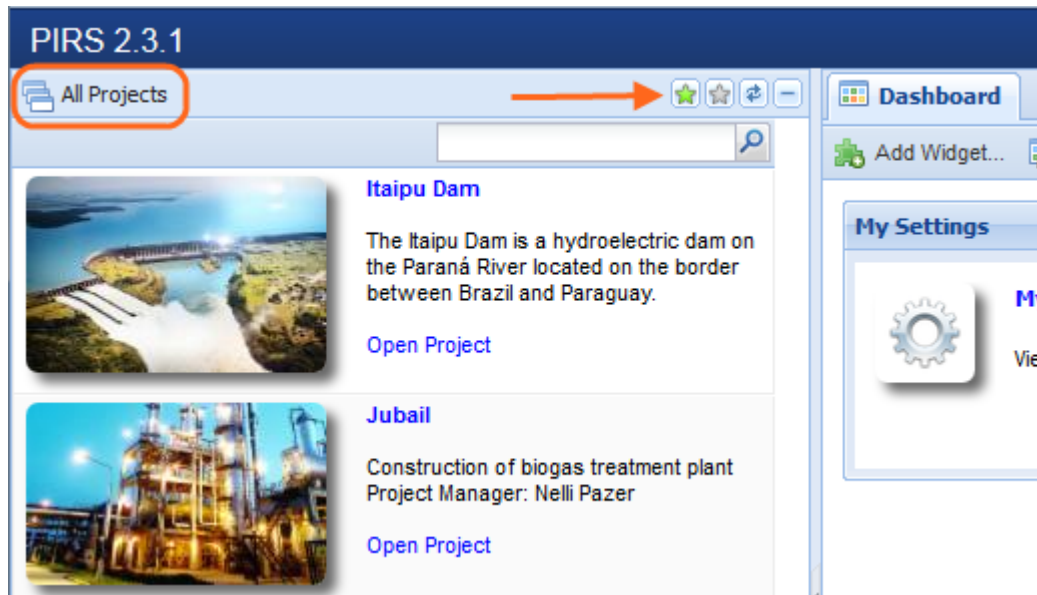
As described above, PIRS offers many different features that help customize and personalize your own user interface as well as your navigation segment. PIRS enables you to create a list of favorite projects as well as favorite folders, that allows you to select and individually display only those projects and those folders that you are involved in or that you need to access on a day to day basis. By favoring projects you are able to quickly and easily find and open projects

you need to access. Within each project you can then also favor the folders you regularly work with.

As a third layer you are also able to favor documents that you are working with or that you need to access quickly for each of your projects individually.

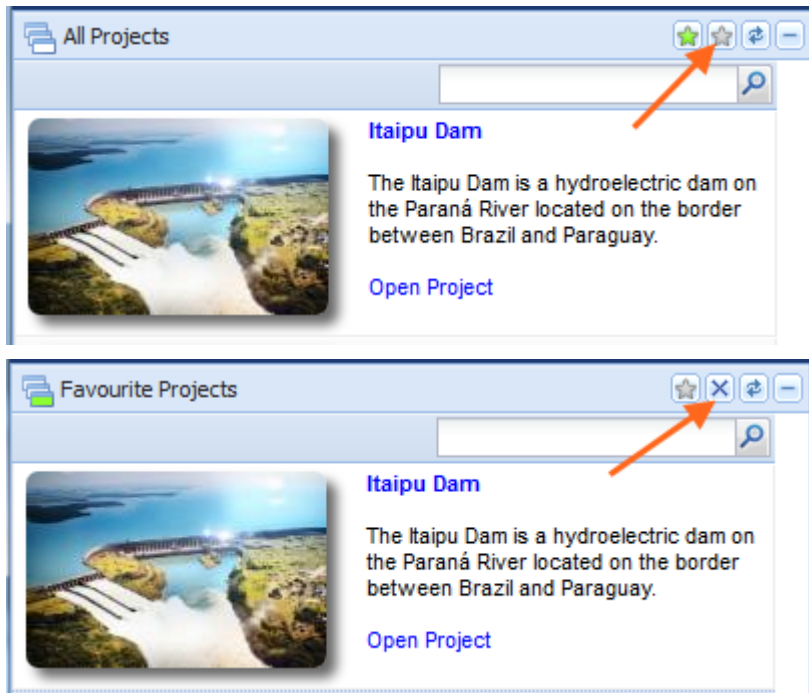
3.4.1 Favor Projects

After having logged into PIRS your company's global PIRS user interface that displays **all** the company's projects, is presented in your browser window. If you have already chosen favorite projects however the application will list only your favorite projects by default. Should you need to access a project that has not or not yet been added to your favorite folders you can easily switch between the display of your favorite projects and all projects by clicking the star button in the left upper corner of your navigator. The star will be colored green in the "all projects" navigation view indicating that the display of your favorite projects is deactivated and the color will take on a shade of grey if only your favorite projects are presented in the navigator. It is therefore easy to differentiate between both displays. The following two images illustrate the described effect.



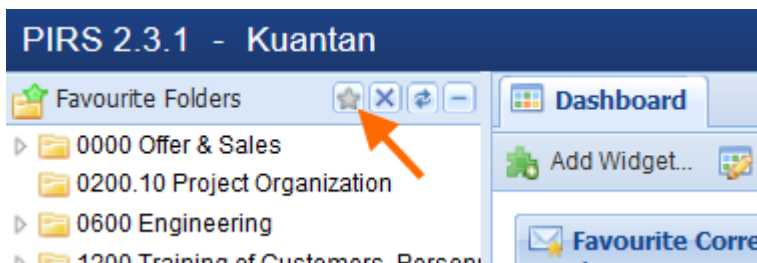
Selecting and removing favorite projects

There are two easy ways to select or remove projects from your favorite list. Your first option is to simply click on the project's tile thereby selecting it and next click the second button of your navigator action bar displayed in the upper right corner. As illustrated by the following screenshots, the button will either bear the image of a yellow star (all projects navigation view) or the symbol for deletion "x" (favorite projects navigation view).



As a second option you also have the opportunity to directly select / remove a project by right clicking the project of your choice. A small message box will appear informing you about the possibility to add or remove the selected project to / from your favorite projects.

3.4.2 Favor Folders

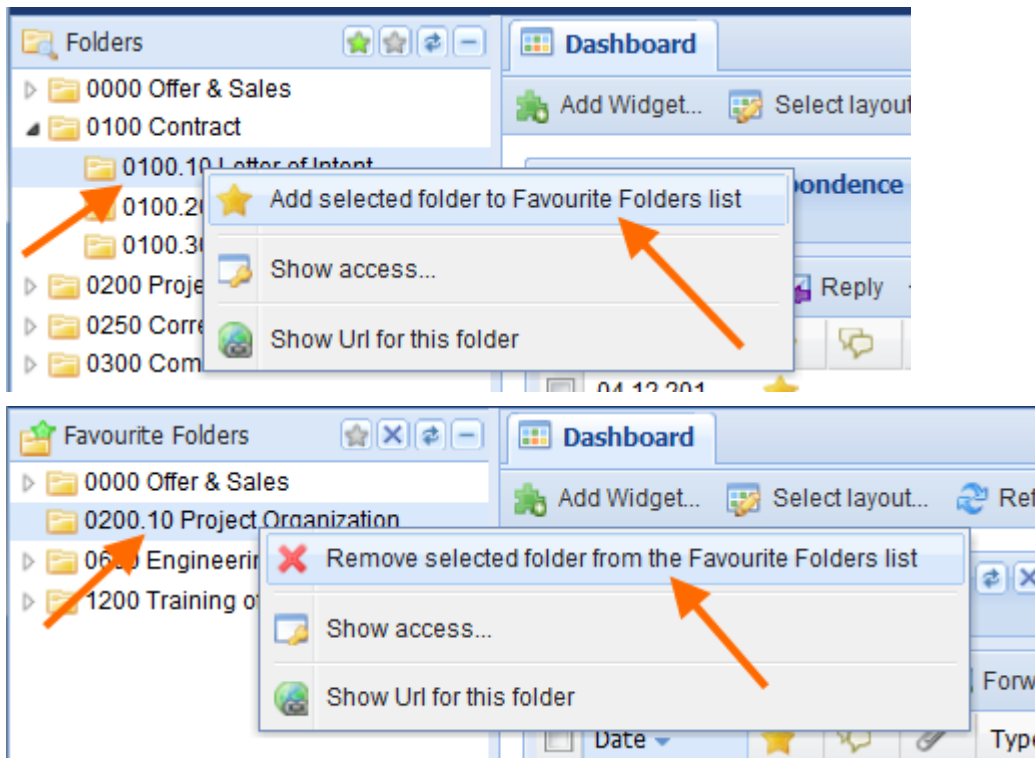



PIRS gives you the opportunity to customize and personalize your project user interface in many different ways. One of the features is the favorite folder feature. As already mentioned in the chapter about the PIRS navigation, this feature lets you select and modify a list of folders within the folder structure of each project individually. Therefore allowing you to customize and personalize your own folder display according to your preferences for every single project.

The default project window will display your favorite folders in the navigator. If you haven't chosen any favorite folders, all project folders will be visible. In case you need to access a certain folder that is not or not yet within your favorite folder list, the application enables you to switch views to the display of all folders. Simply click the pale grey star in the corner of the navigator. (Compare with the image.) The same star button which will be colored green in the "Folders" display can be used to switch back to the favorite folder navigation.

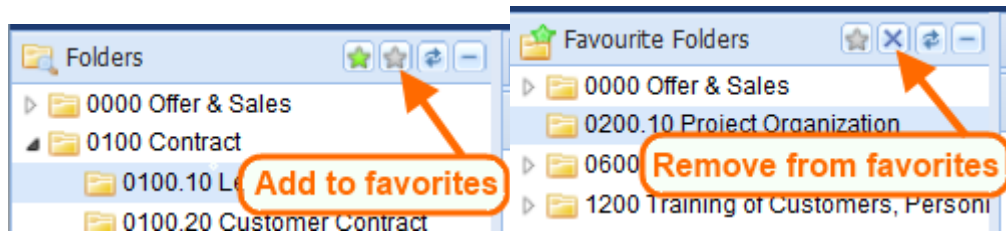
Selecting and removing favorite folders

There are two options to select favorite folders as well as to remove them from your list. First you can right click the folder you like to add / remove to / from your favorite folders, upon which a small message box will appear asking you if you like to add / remove this folder to / from your favorite folders. If you now click on the message box, the selected action will be executed and yet another message box will inform you about the successfully implemented adjustment. Please note that as indicated by the following two images, folders can only be added in the "Folders" navigation view and removed in the "Favorite Folders" navigation.



The second way to modify your favorite folders is being provided by the second button from the left in the right corner of the navigator that will carry the image of a light yellow star in the "Folders" navigation and will display an "x" in the "Favorite Folders" navigation. After you have selected a folder and then clicked this button as displayed in the following two images, the folder will be added / removed from your personal favorite folder list. If you now click the refresh button () your changes will be visible within your folder navigation.

By right-clicking any folder, regardless if you are currently within the favorite folder display or not, it is also possible to ask the system to show you who has access to the respective folder and what kind of access rights you and / or your team members have to the particular folder. Furthermore you can have PIRS present you with the unique URL to the selected folder which can then in turn be copied and send to other PIRS users.



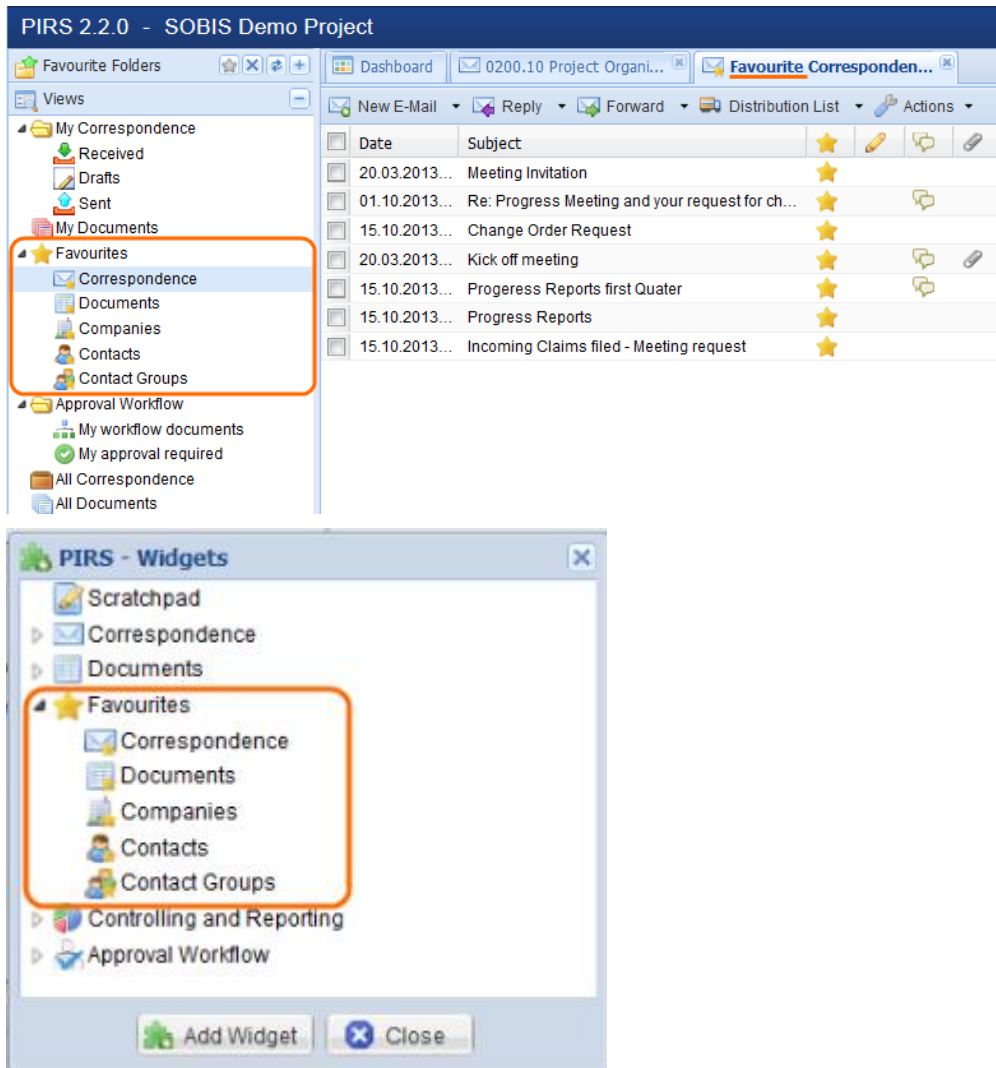
3.4.3 Favor Entries

For each project there might be certain documents, correspondences or contacts that you need to access on a regular basis. In order to open them as quickly and time efficient as possible, PIRS allows you to mark any correspondence, any document, contact or company sheet that you have access to, as one of your favorites.

The process of selecting your favorites is very simple. No matter if you are currently working in a folder or a specific view e.g. the "All Documents" view, there will be a column in the content grid that is headed by a yellow star. By default all items in the grid will show a white star in this column indicating that this is not one of your favorites. In order to select a certain grid item as one of your favorites you now only need to click the white star which will then turn yellow. The yellow star now shows you that this particular item can also be found listed in your favorites.

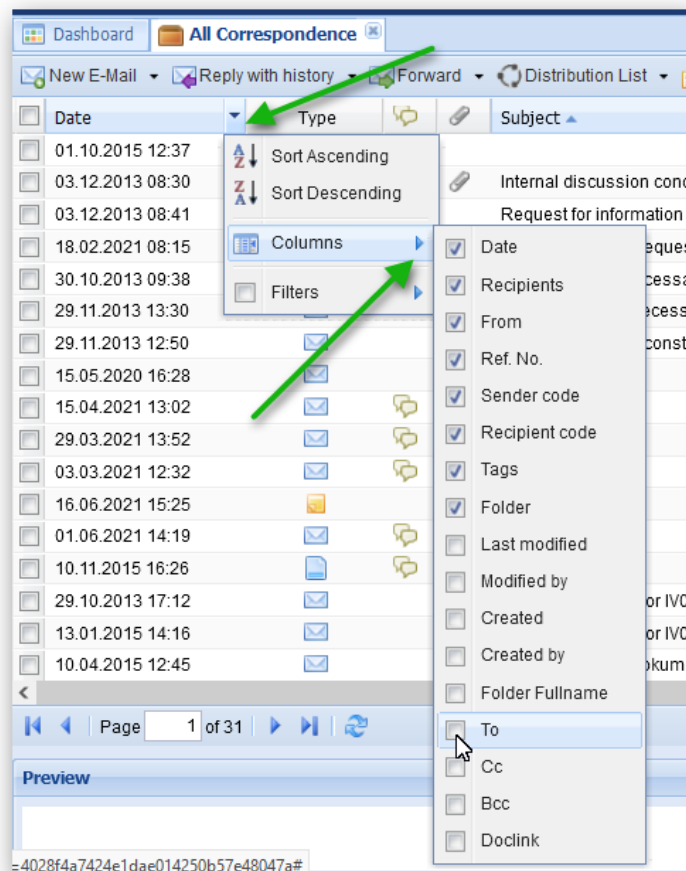
<input type="checkbox"/>	★	Title	●	Revision	Doc number	Type	Status
<input type="checkbox"/>	☆	Turbine Filter Alpha	●	A	SOB_CCM_GEC_BF_001	Drawing	21. Customer com.
<input type="checkbox"/>	★	General outline of painting plant - plastic	●	A	SOB-17-105-001-ALL-SK-...	Specification	10. Draft
<input type="checkbox"/>	☆	General outline of plant - coating	●	A	SOB-17-105-001-ALL-SK-...	Specification	11. Waiting for inter
<input type="checkbox"/>	★	Electrical outline of plant - metal	●	A	SOB-17-105-001-ALL-SK-...	Drawing	11. Waiting for inter
<input type="checkbox"/>	☆	Filter - V9	●	A	SOB-17-105-001-ALL-SK-...	Drawing	10.1 Internally Reje
<input type="checkbox"/>	☆	Filter - V9	●	B	SOB-17-105-001-ALL-SK-...	Drawing	11. Waiting for inter
<input type="checkbox"/>	☆	Electrical line construction site	●	A	SOB-17-105-001-ALL-SK-...	Drawing	10. Draft
<input type="checkbox"/>	★	Inventory List General Electrical	●	A	SOB-17-105-001-ALL-SK-...	Drawing	10. Draft
<input type="checkbox"/>	☆	Turbine filter C250	●	A	SOB-17-105-001-ALL-SK-...	Drawing	10. Draft
<input type="checkbox"/>	☆	Turbine filter C249	●	A	SOB-17-105-001-ALL-SK-...	Offer	12. Waiting for inter
<input type="checkbox"/>	☆	Turbine filter C248	●	A	SOB-17-105-001-ALL-SK-...	Offer	10. Draft
<input type="checkbox"/>	☆	Turbine filter C247	●	A	SOB-17-105-001-ALL-SK-...	Offer	10.1 Internally Reje
<input type="checkbox"/>	★	Turbine filter C247	●	B	SOB-17-105-001-ALL-SK-...	Offer	12. Waiting for inter
<input type="checkbox"/>	☆	Turbine filter C246	●	A	SOB-17-105-001-ALL-SK-...	Offer	10. Draft
<input type="checkbox"/>	☆	Turbine filter C242	●	A	SOB-17-105-001-ALL-SK-...	Offer	10. Draft

By marking all your favorite PIRS documents, you are then able to open them quickly using either the view section "Favourites" or by adding them as widgets to your dashboard.



To enter your favorite views, open the “Views” section in your project navigation.

3.5 Customize a grid



As mentioned in the chapters above, PIRS enables you to customize the grid of your correspondence and documents display. The following chapter will illustrate how to modify a grid using the example of the view "All Correspondence".

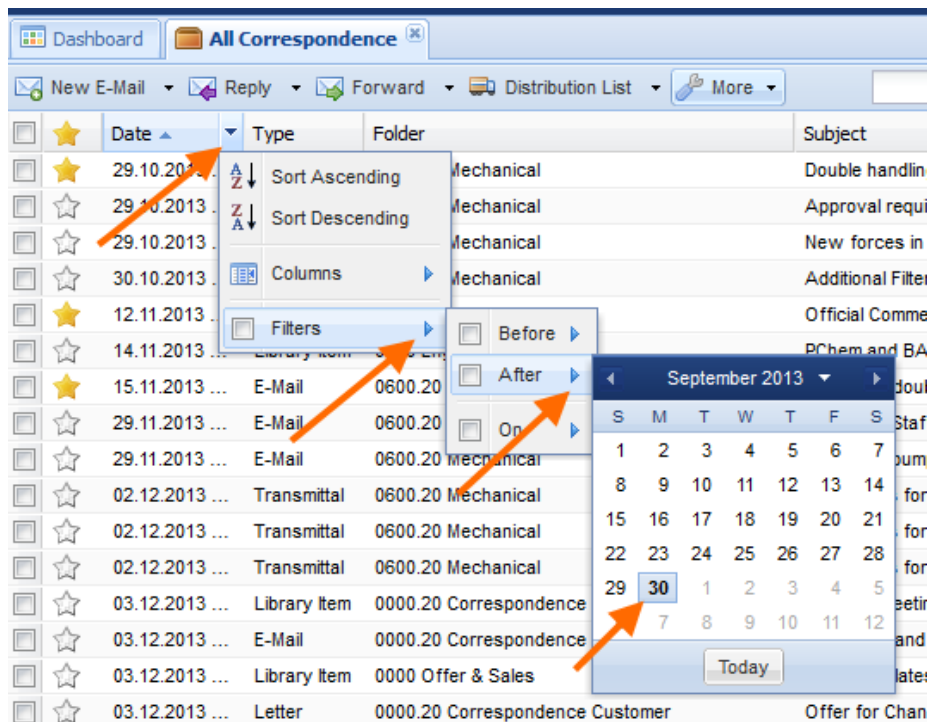
All available columns can be added or removed easily. First you need to move your cursor over any of the displayed columns. A small arrow head pointing downwards will appear in the corner of the column. As indicated by the screenshot, a window listing several options will unfold as soon as you click the arrow head. If you next select the option "Columns" a list of all available columns will be offered. Those columns currently displayed in the view are indicated by check marks. You can select additional columns and deselect those that are unnecessary to you.

In a next step you can restructure the order of the columns via drag and drop. Simply left-click the column you would like to reposition e.g. "Subject" and hold the left-click while you move the column from its initial position to the position you prefer. All your customizations will be stored and won't be lost when you close the application but will be presented to you the way

you customized it. The customizations can be undone however within your personal settings (compare [User preferences](#)).

Keep in mind that when you make changes within one correspondence grid (e.g. "All Correspondence") they will be memorized for all other correspondence grids and displayed for all your sessions. It is the same for the documents grids.

Filter selection



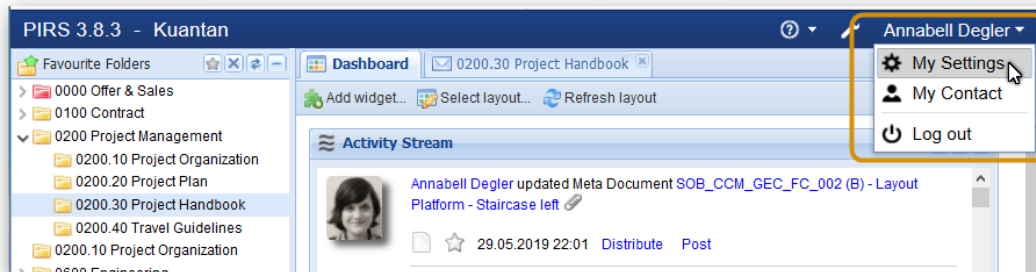
Additionally, PIRS allows you to customize each column separately to display only those files that match certain filters. To activate a filter you first need to click the arrow head in the corner of the column you would like to adjust and next hover your cursor over the filter option in the displayed selection box. As exemplary illustrated in the image, for each column there are column specific filter options from which to choose from. In the example you have the choice to select either a filter that shows all files before, after or on a specific date.

Each filter can be deactivated simply by removing the check mark in the column selection box. To remove all filters in one step, select the "Clear filters" option offered to you within the "More"-features in the view's action bar. For more detailed information about filtering files please refer to the chapter [Filter data](#)

3.6 User Preferences and Set-up

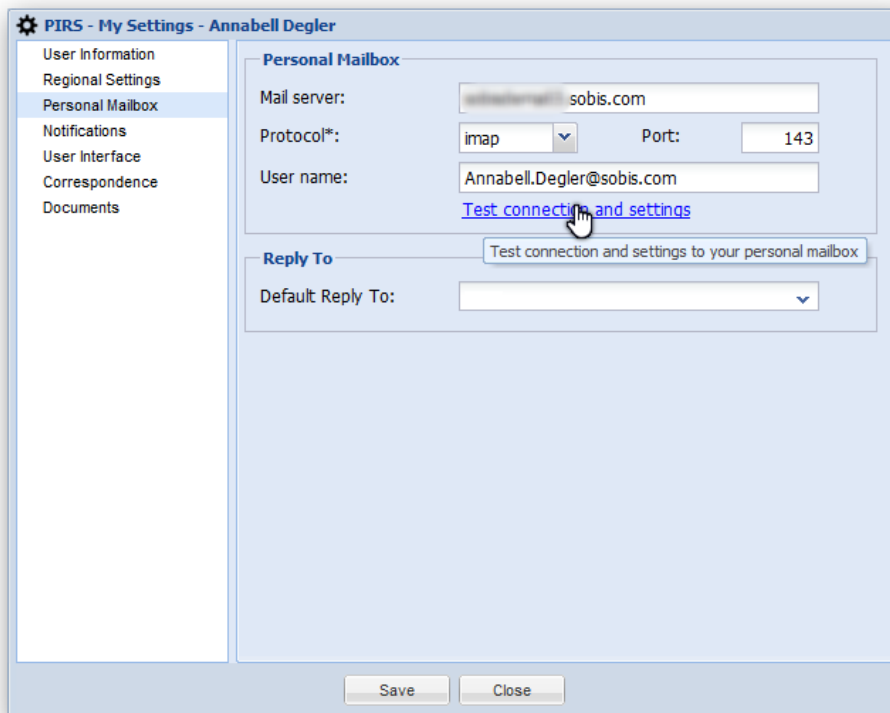
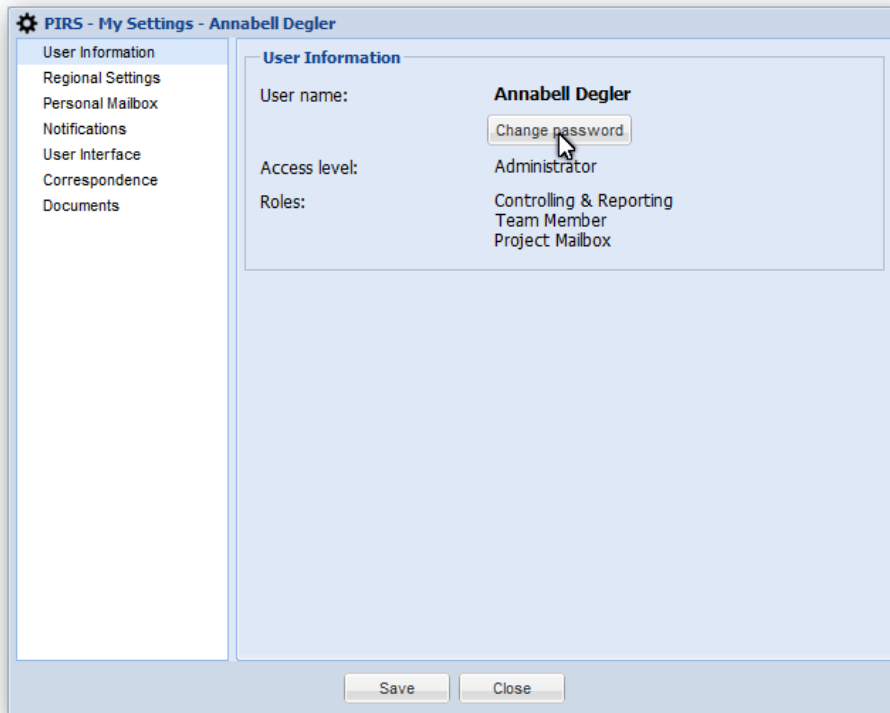
PIRS offers every user the opportunity to modify their settings in order to fit their personal preferences. There are two different ways to open the "My Settings" window where you can

adjust your settings. You can enter your settings out of the global dashboard by clicking the "My Settings" widget. In addition you can also access your settings while working within a PIRS project. As indicated by the image, there is a small arrow head in the corner of your project tool bar which will expand as soon as you click it. The action "My Settings" appears as first option.



After having selected the "My Setting", a window with a separate navigation area opens as displayed by the following screenshots. Besides providing you with information about your assigned role and your access rights the first section also allows you to change your personal password simply by entering and confirming your new password.

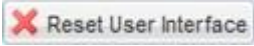
With the second section you will be able to switch between the application language (English, French or German are available) as well as the date and time format (France, Germany, United States, United Kingdom and India are available). By choosing your preferred language all existing labels will be adjusted as soon as you refresh your page.

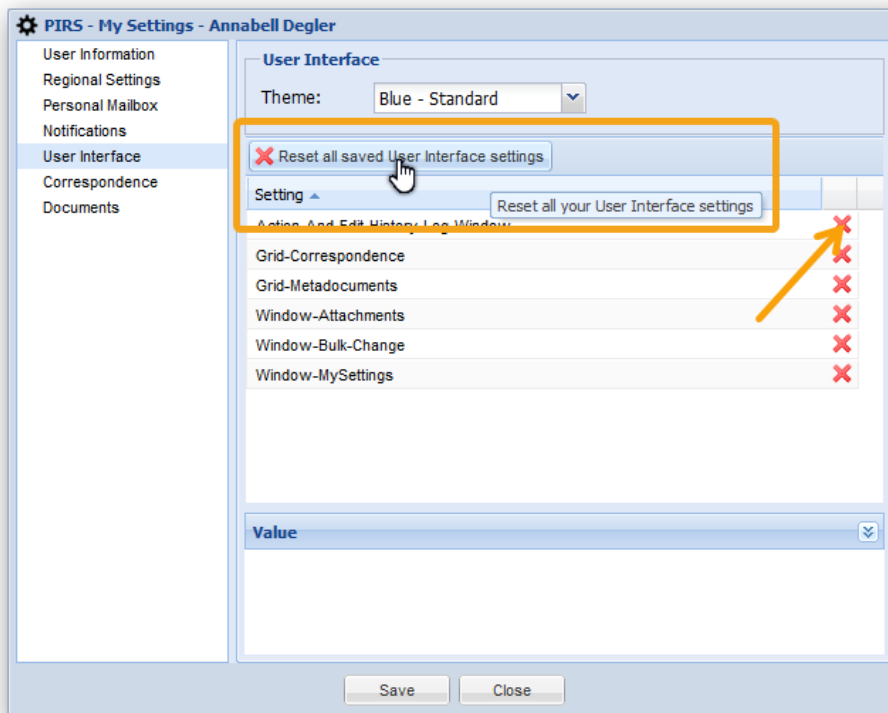


The third section gives you the possibility to integrate your personal mailbox by entering your mail server, the used port, your your email address and selecting the used protocol. In case you shouldn't know this set-up information, please contact your IT administrator.

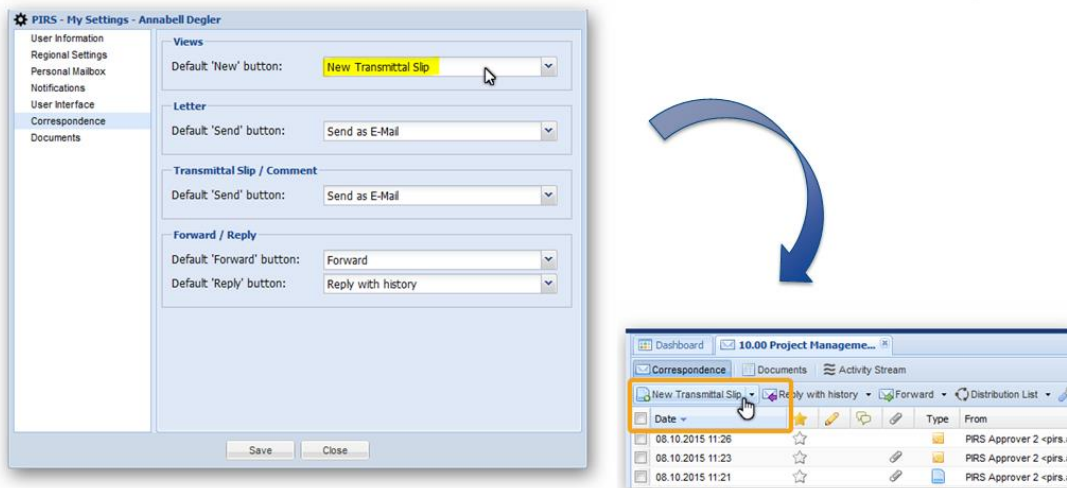
The Notification section enables you to choose whether or not you want to receive notifications e-mails when other PIRS users leave comments on your activities within the PIRS Activity

Stream. To learn more about the PIRS Activity Stream read the respective chapter in your guide.

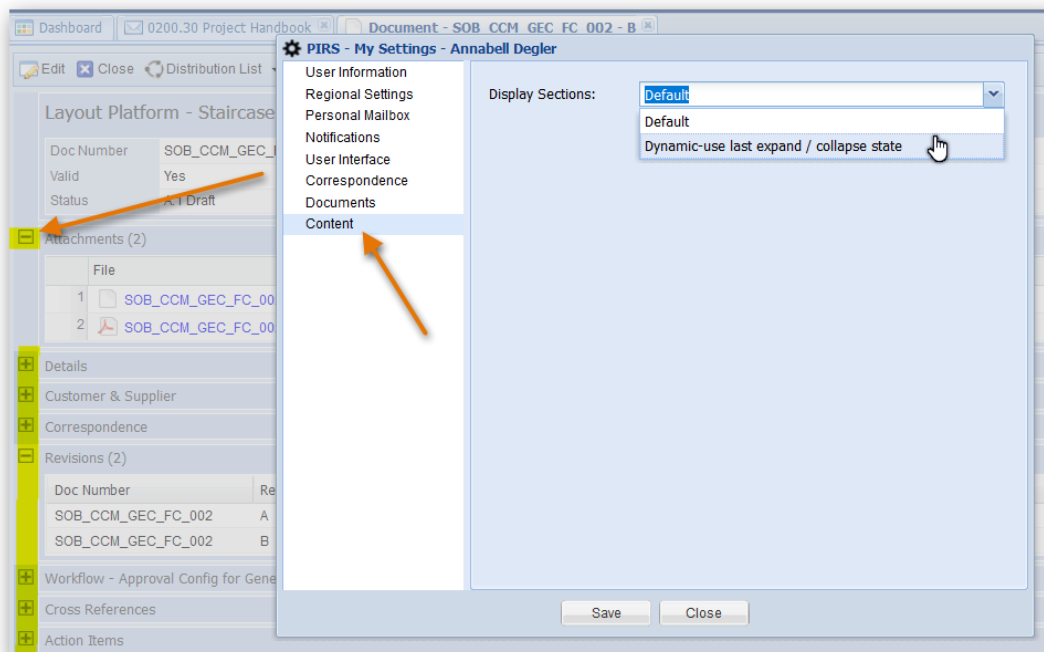
Another great feature that supports you in managing your personal settings is presented to you in the section "User Interface". As indicated by the following image, you are able to reset all the personal settings and changes that you have selected or put in place for your personal user interface. These setting could for example be the grid structure in your Correspondence views. Simply click the red cross of the respective setting. Please be aware that if you click the button  outlined in the image below all personal customizations will be reset to default.



With our PIRS release 3.5. you are now also able to change certain default settings within your correspondence grids. You are for example free to pick which correspondence type is presented to you first within the New-Button. By default PIRS will show "New E-Mail". As indicated by the screenshot below, you can change to any other type such as Transmittal Slips.



Another setting you have the liberty to choose your preferences for, is whether or not you would like to have the sections in your PIRS documents and correspondence closed by default or have PIRS remember your last status and displaying the sections again as you had selected it for the last document you viewed. For example, by default PIRS will open a document in read mode with all sections collapsed except for the "Revisions". If you however, select the option "Dynamic-use last expand / collapse state" within the Content area of your personal settings and expand the section "Attachments", PIRS will remember your selection and display the next document you open in read mode also with the section "Attachments" expanded. Compare with below screenshot to illustrate the example.

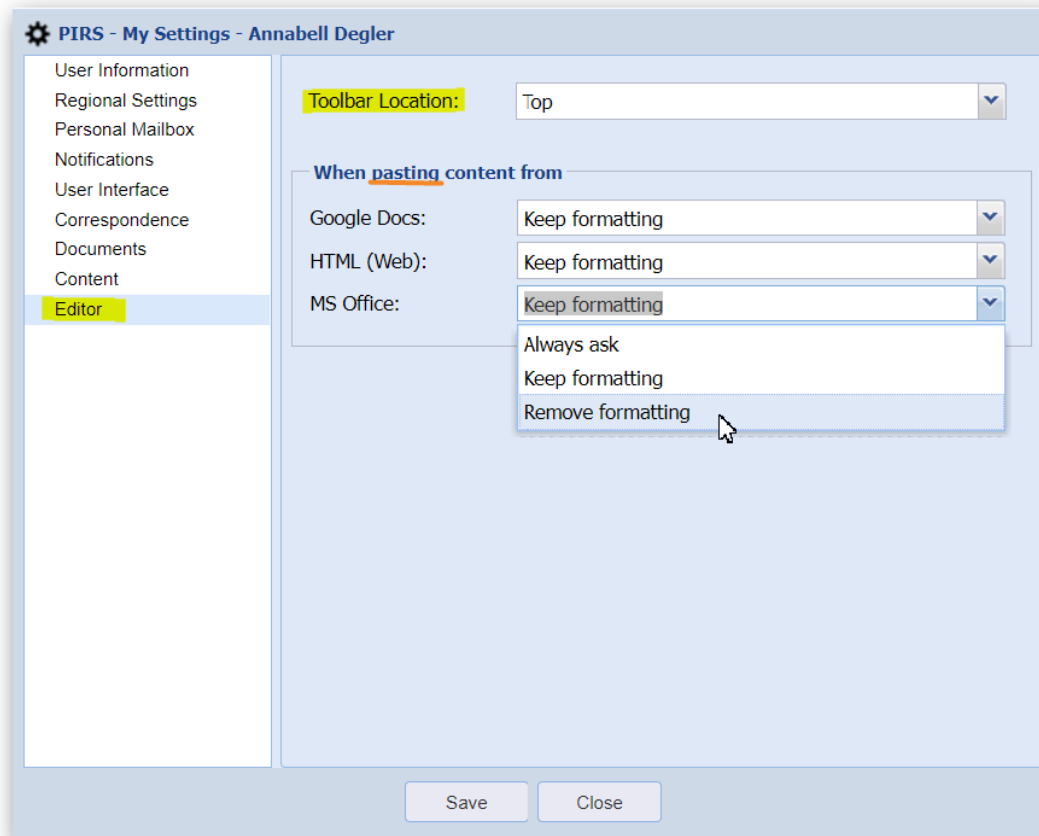


In addition to you Content display you can also decide how to work with your editor.

You have the option to display the editor on top or the bottom of your body fields. Also, you can choose how your editor reacts when you copy & paste content from another source. For

example if you copy text from a Word document in your email you can tell the editor that you always want to keep the format of the text section, or always remove the formatting or ask you every time you copy & paste content.

Here you are also able to decide how the editor reacts based on the source you are copying content from.



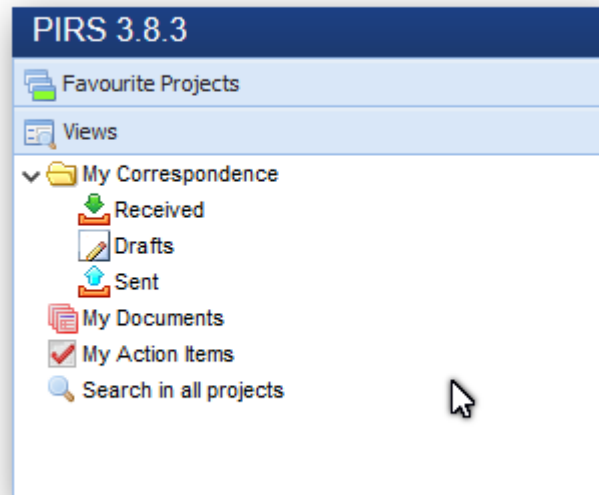
3.7 PIRS Views

PIRS offers its users various views that can be used to find specific information as well as a starting point for your regular day to day work. If you quickly need to find an email that you still need to send, you can access this mail by accessing your correspondence draft view.

There are two different levels where PIRS offers you the opportunity to display information using various views.

First of all you have the option to use the global views accessible from your global dashboard and second of all there are the project views that allow you to display the entries of each project separately according to certain criteria.

3.7.1 Global Views



The PIRS Global Views will on the one hand allow you to manage your correspondence, documents and action items on a cross-project level and on the other hand help you to quickly find PIRS entries regardless of the project they were stored within.

There are three different correspondence views, displaying all your received, your draft and your sent correspondence from all projects that you are involved with. The "My Documents" view will show a list of all documents the you have created or the you have modified regardless of the project they belong to. Within the "My Action Items" you will have a list of all open tasks assigned to you for all PIRS projects.

The "Search in all projects" view offers you an empty canvas with a search box. Here you can run any type of full text search and you can use all search options described in the chapter "Search and filter functions". The search result will contain found entries from all of your projects that match your search query.

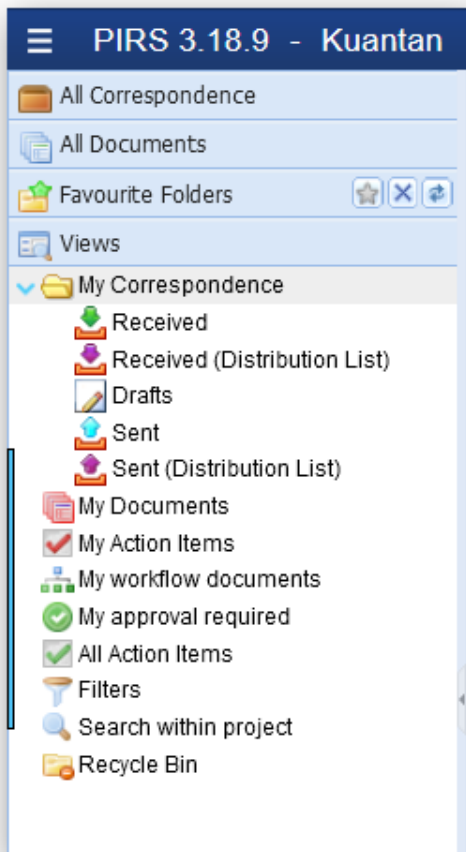
3.7.2 Project Views

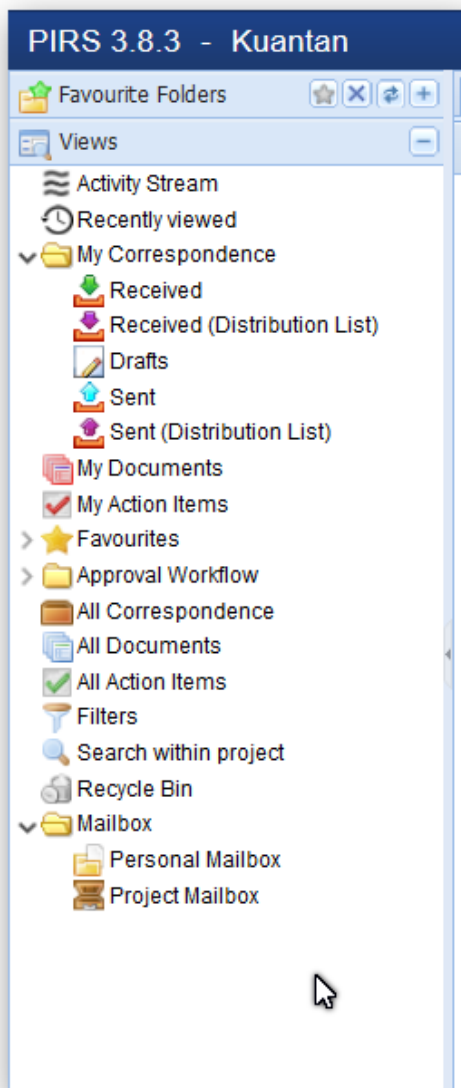
PIRS provides you with several different views to look for or display the content of your PIRS project.

Generally, you should know that the views can be customized to reflect your needs. Views can be hidden, displayed or reordered based on your company requirements. You could for example want to have the views "All Documents" or "All Correspondence" or "All Action Items" listed as separate entries within the navigation, in order to access those views as quickly as possible.

If you want to learn more about customizing views, please contact your Service Desk.

The following image shows the PIRS default set up as well as a set up displaying all available views.





For example, you have one view called "Activity Stream" displaying all activities. This view will show you all actions you and your team members have last carried out in PIRS. For example, the "Activity Stream" will show when a document was created by whom and include a link to the new document.

Furthermore there are several views that reflect your personal access to the project, displaying your correspondence, your received or sent correspondence as well as your drafts. The "My Documents" view shows all the documents you have either created yourself or that you are involved in otherwise.

There is also one view that displays all action items you are responsible for as well as those you have created for another responsible within your team.

Right underneath your personal correspondence, documents and action items views, you will find all views displaying your favourite entries within this project (correspondence, documents, companies, contacts and groups).

Should your PIRS project support the PIRS Workflow Module you will also see two views that present you with all your workflow documents as well as with all the documents that currently require your approval.

In addition, there are those views that display all general information such as a view showing all correspondence regardless of the sender, recipient or modifier or a view containing all existing documents. In our default setting, as you can see in the screenshot above, the views "All Correspondence" and "All Documents" are displayed on the top level of the navigation. This allows you to access them more quickly. Both these views offer great options to search for specific information by using PIRS filter and sort functions described in the chapter [Search & Filter Functions](#).

You could e.g. use the "All Correspondence" view to search for and then export all correspondence sent from your company to one specific customer/supplier over a certain period of time.

The general views also consist of several more views, e.g. "Filters", "Search within project" and "Recycle Bin". The filter view shows all filters you have save for your personal use as well as filters that were created for public use. While the recycle bin enables you to view and restore all deleted correspondence and documents, the search view displays an empty content which allows you to use the search box visible in the upper right corner. Here you can enter any search phrase or partial search keyword e.g. meeting or meet*, after which you can proceed to use the filter and sort functions in order to further narrow down your search.

There are also views allowing you to access your personal mailbox as well as your project mailbox, if it has been set up. By default, the mailbox views will also be available on your top level navigation. Using these views, you can enter your personal mailbox and, just as if you were directly within your Outlook, Google, Thunderbird etc, you will be able to switch between your inbox and any other existing mail file folder of your mail account. The project mailbox represents a specific project mail account that can be set up and integrated especially for each PIRS project.

All PIRS views with the exception of the mailbox views, the search view and the recycle bin can be displayed as widgets on your project dashboard.

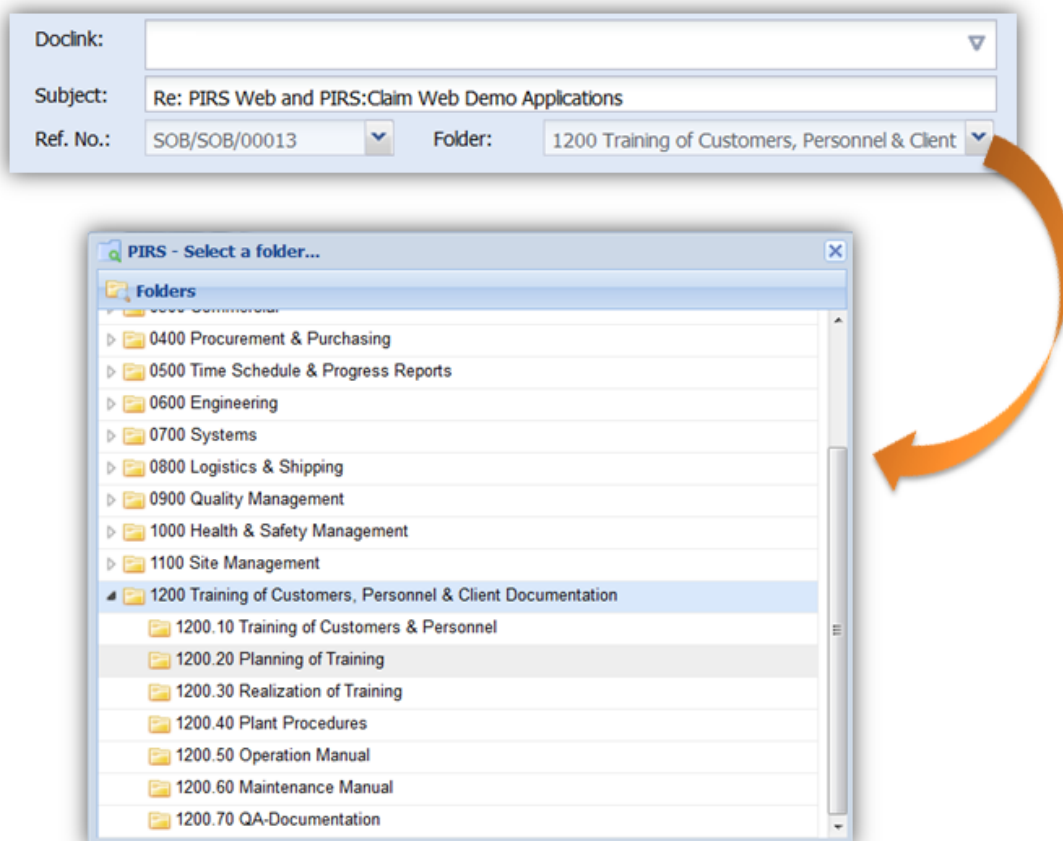
For further information on the various view content please refer to the matching chapters above or below.

3.8 PIRS Folder Structure

The PIRS folder structure can be defined individually and separately for each project. PIRS users with administrator rights are able to change, adjust or add to the existing folders even after a project has been set up and at any point during the course of the project. Should you be missing a folder that is important for your daily work or your team and you don't have administrator rights, please contact your administrator or your PIRS support team.

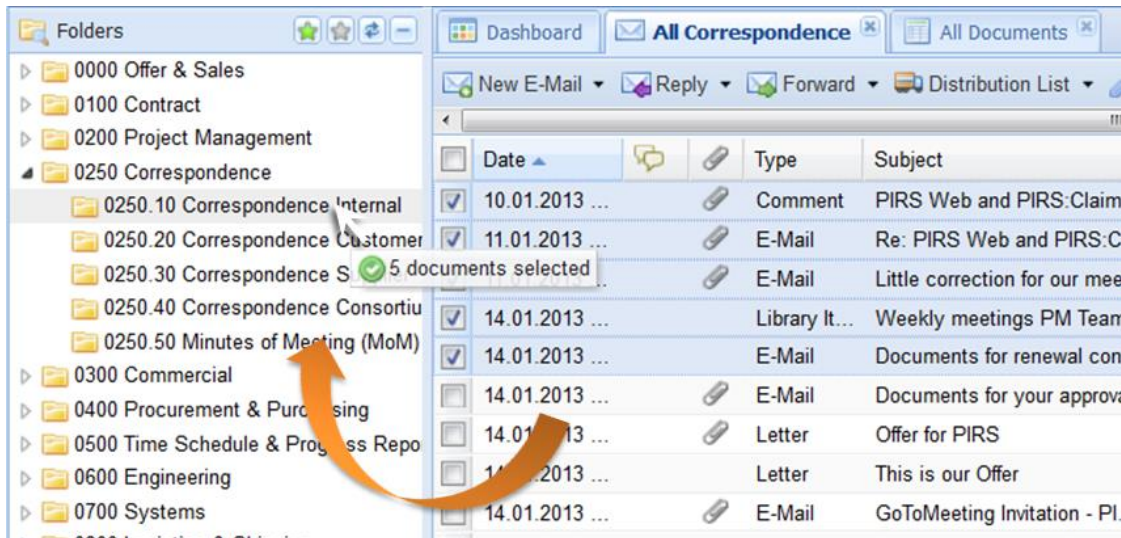
It is necessary for you to keep in mind, that in PIRS each correspondence and each document that you create directly in PIRS or that you import from your mail file or your computer must be stored in a folder. You can however, given that you have the necessary access rights, change the folder for each correspondence or document at a later point if required.

Hereby, PIRS supports two different possible ways of modification. First of all, you can enter each document in edit mode and change the folder manually (compare following image).



Clicking the arrow head located in the right corner of the folder field of each PIRS correspondence and document will open a separate selection box where you can pick a new folder from the current project folder structure.

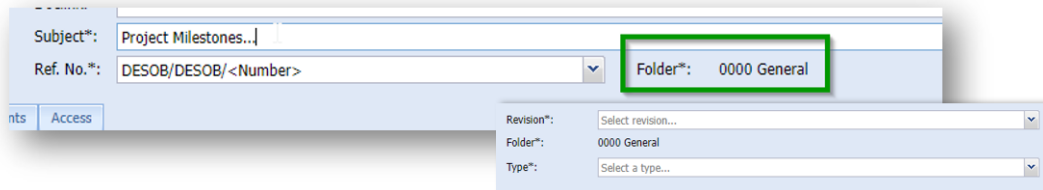
As a second option, you are also able to select all correspondence / documents that you need to assign to another folder in your content display and move them via drag & drop to the desired new folder location in your navigation area (compare with the image below).



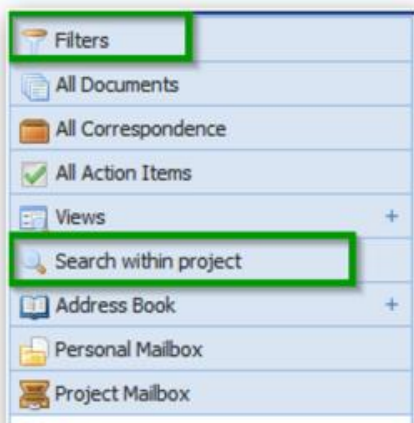
3.8.1 PIRS without folders

Folders are useful but not necessary and might some times even be an issue because one tends to focus more on a complex structure rather than the content and information he seeks.

PIRS therefore also offers the option to work without folders.



In this case there will be only one root folder where all items are being stored and the section "Folders" within the navigation is hidden.



Users can then focus on personal and general views, their dashboard as well as personal and company filters to quickly find and access information.

Here it is also possible so adjust your navigation to display e.g. Filters and the general search directly within the main navigation.

You are able to decide on application as well as project level if you would like to work with folders or hide them. Also, the navigation can be adjusted for each project individually.

If you like to learn more about this adjustment, please get in touch with your Service Desk.

4 Correspondence & Documents & Events

There are three different general modules within PIRS, the communication / correspondence module, the document module and the event/change/claim module. Depending on the set up of your project, not all modules will be displayed or are generally available. Also all modules are connected which means that there is a direct link e.g. between events and correspondence where you need to send a notice to an external or between documents and correspondence, where you will submit documents using the correspondence type "Transmittal Slip".

The correspondence module features are:

- the storing of unstructured project information
- the sending, storing and tracking of all relevant project correspondence
- the administration of all project parameters

The documents module features are:

- the storing of all project relevant drawings and technical documents
- the generating of transmittal slips to distribute documents
- the monitoring of the document distribution
- the tracking of document status
- the option to create comments for documents, for internal use as well as for the inclusion of customer/supplier comments

The event module features are:

- Systematic recording, classification and measurement of events / deviations
- Automatic notifications -> prompt response to claim-related events
- Integration of commercial reactions - follow up documentation (Change Order, Claim, Non-Conformity)
- Links to project-related correspondence & documents

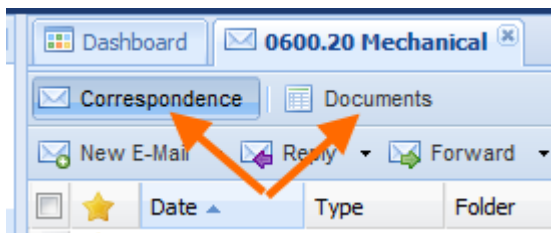
Following, the modules will be explained in detail, emphasizing all their features step by step. Further more this chapter will introduce the PIRS folder structure and views as well as all the additional features such as the search and filter functions or the document controlling area.

Keep in mind

PIRS is 100% flexible! In one project the Event area might be activated, in another not. In one project the correspondence type "Comment" is used, while in another it is not part of the process and hidden in your UI. Each project navigation might differ and also the modules that are displayed. If you like to learn more on the option to display or hide features, views or modules, please contact your PIRS responsible or you Service Desk.

4.1 Correspondence

For each correspondence or document that is created or imported into PIRS a folder must be chosen to locate it. Therefore each folder is divided into two sections. As illustrated by the following screenshot there are two buttons at the upper left corner of each folder, one titled "Correspondence" and one titled "Document".



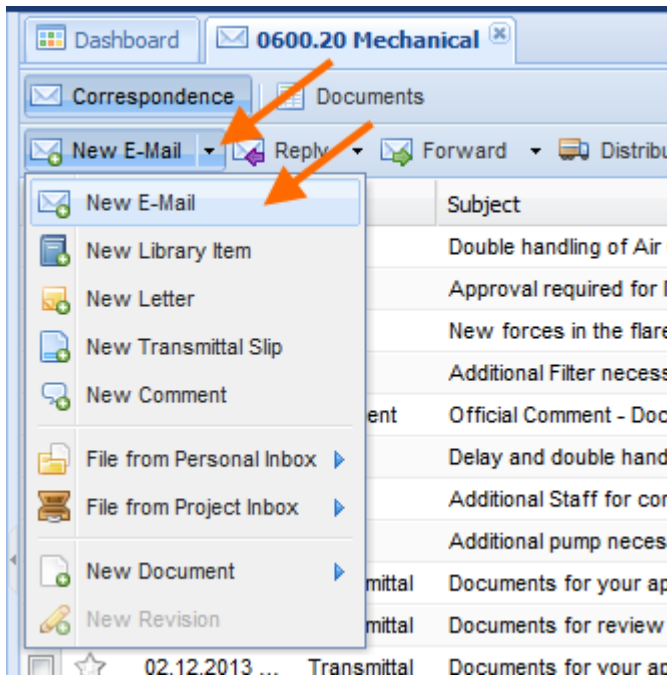
In order to switch between the display of the correspondence and document content, you can simply click the respective button. The type of the currently presented content is indicated by a darker blue background and outline.

4.1.1 Create and send an email

The Correspondence Views Action Bar

Each view that can be chosen to categorize and present the different correspondence offers a similar action bar that includes all possible features available within the respective view. In order to facilitate the operation of the action bar, its general layout has been mostly based on the features offered in any regular email account. All functions and features offered by the actions within the correspondence action bar will be addressed in the course of this chapter.

Create a new email

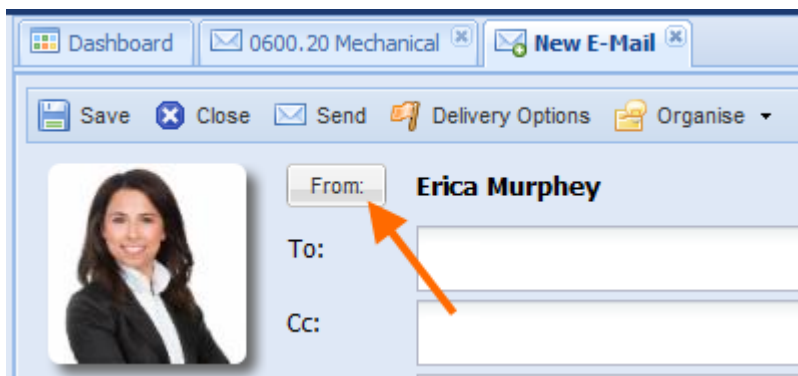


To create a new email either click directly the "New E-Mail" button (the first button in your correspondence action bar) or use the small arrow in the corner of the button to expand all your options to create new items of different types and select "New E-Mail". The new email will now open in another tab in your content screen.

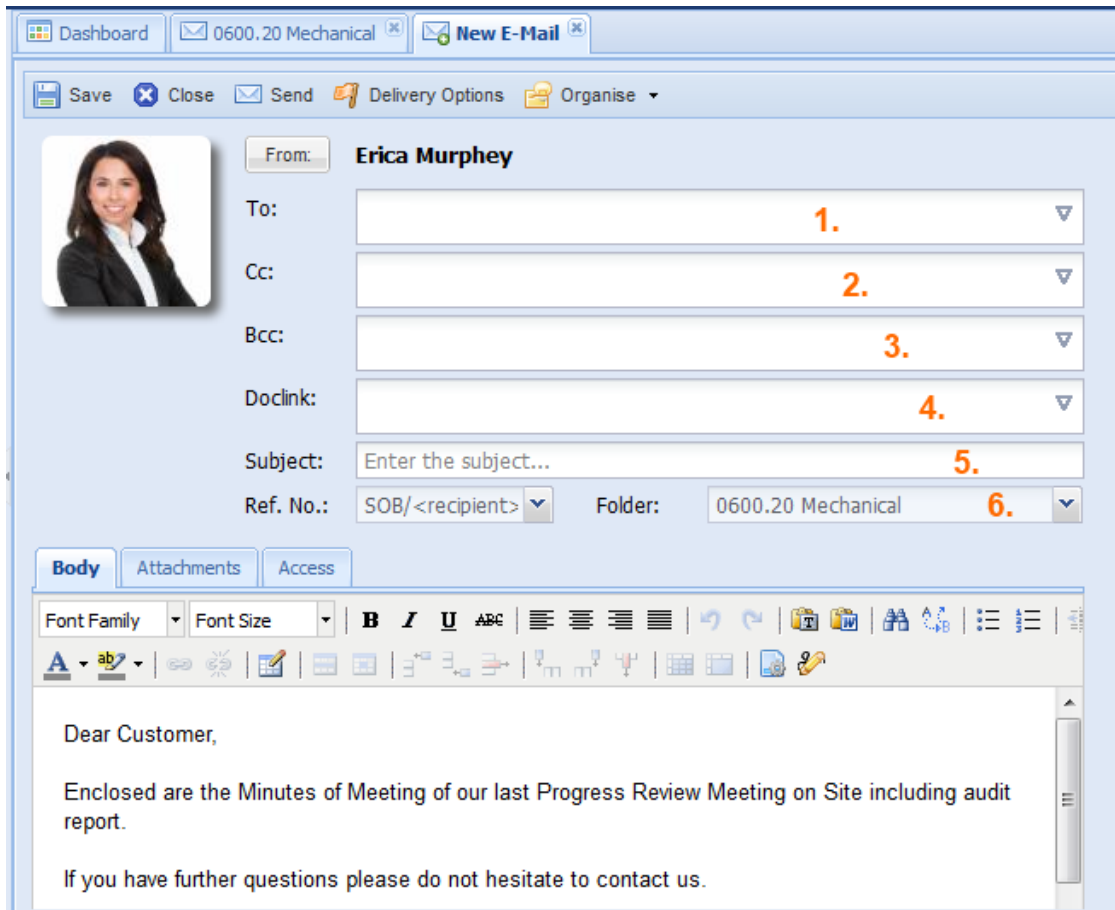
Any action bar regardless of the view you currently display, will have a "New...." button in the far left of their action bar. It is therefore not necessary to switch to a correspondence view to create a new correspondence document.

Email fields and options

The new email document will already include your data as author of the email which also means that your picture will be displayed if one is attached to your contact form within the project. In case you have entered your personal company signature within your contact settings, it will also be inserted into the body field. (For information on how to upload your personal image and adjust your contact settings, please refer to the chapter [Address Book](#).)



As indicated by the image, PIRS enables you to change the sender of the email prior to sending the email by clicking "From" which as result will present you with all the contacts from the address book. This function can be used e.g. to support or represent your team members while they are on vacation or out sick. It should be mentioned at this point however that as soon as you create any type of correspondence or document a log file will record all modification from each PIRS user individually. The log file feature will be introduced more closely in a later section of this chapter.



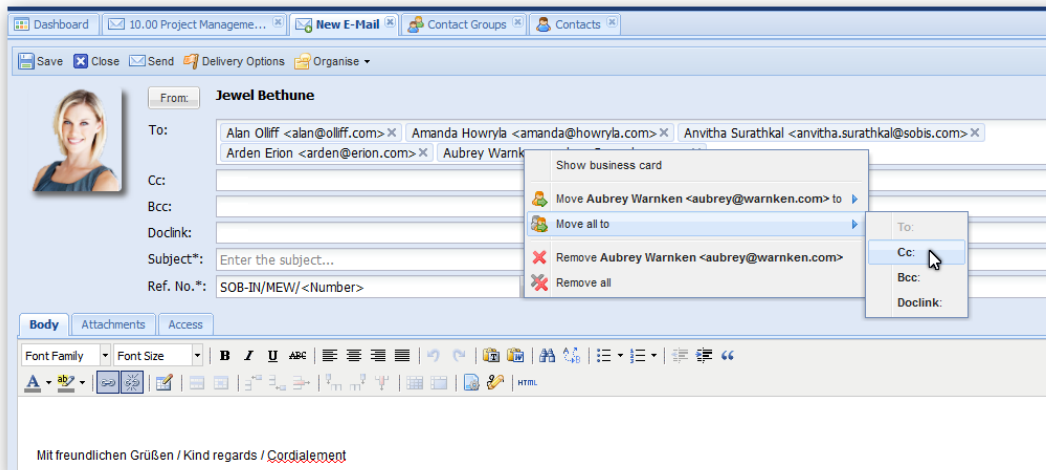
Most of the fields in the header of the email document equal those used in the various email account providers. To ensure that all functions and features within your email correspondence template can be used to its full scope of operations, all value fields will be explained separately in the following table.

#	Field name	Description
1.	To	Here you enter email address of the recipient(s) of your email. They can either be typed in manually or selected directly from the project address book. To select contacts from the address book you need to click the small arrow positioned at the end of the field which will expand a table containing all stored contacts. If the contact is filed in the project address book you also have the possibility to enter only parts of the recipient name and the application will offer

	you a small list of contacts that fit your entered letter combination for you to choose from. You are able to either remove contacts individually or remove all added contacts at once by clicking the X in the right corner of the field.
2. Cc	Similar to the "To" field you can add or remove recipients that you wish to send the correspondence to in form of a copy without directly addressing them.
3. Bcc	As with the two fields above you can add or remove recipients. Those recipients will receive a copy of the correspondence but their contact will stay hidden to all other recipients.
4. DocLink	The DocLink feature is a special option offered within PIRS. All contacts that are added in this field will receive an email that contains a standard text and a link leading to the correspondence document within PIRS. Please remember that recipients that you send a DocLink to need to be able to access PIRS in order to be able to open the link within their browser.
5. Subject	This field offers you the opportunity to assign a subject to your correspondence. Depending on your company's configuration this entry will either unaltered or in combination with the reference number be displayed as subject matter in your sent email.
6. Folder	As mentioned before each correspondence as well as document must be filed in one specific folder. If you choose to create a new email within the correspondence view of a folder, this folder will automatically be the assigned folder. In any view however you have the possibility to alter the folder

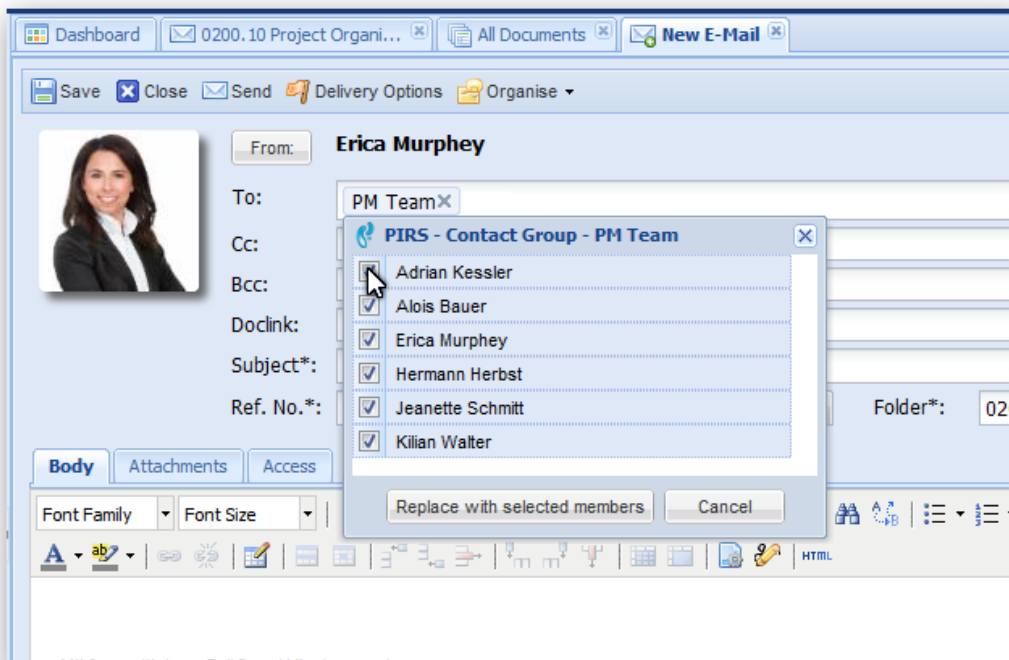
Move or quickly delete recipients

Since Release 3.5. you can easily change or move recipients from one field to the other which comes in handy especially when your recipient lists are a bit longer.



As indicated by the screenshot, PIRS will offer you several options once you right click on one recipient within your list. You can move or delete one recipient or delete all in one go.

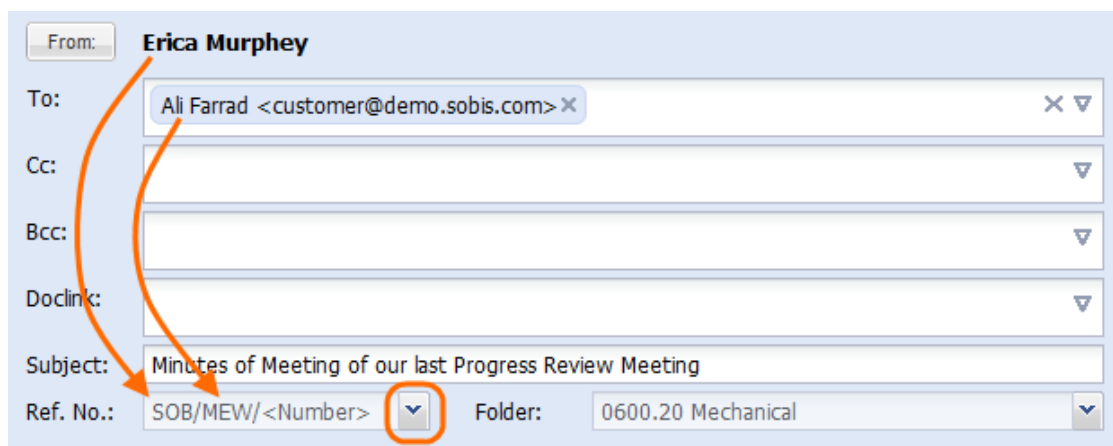
Edit recipients from a PIRS group



Within your PIRS Project address book you are able to create and manage contact groups. Groups can be used to quickly enter all recipients of an email without having to enter or select each one manually. Should you however need to edit the recipient list of the group, simply click on the group entry in your recipient field. The list of group members will be displayed. Deselect the users that should not receive this email and click "Replace with selected members".

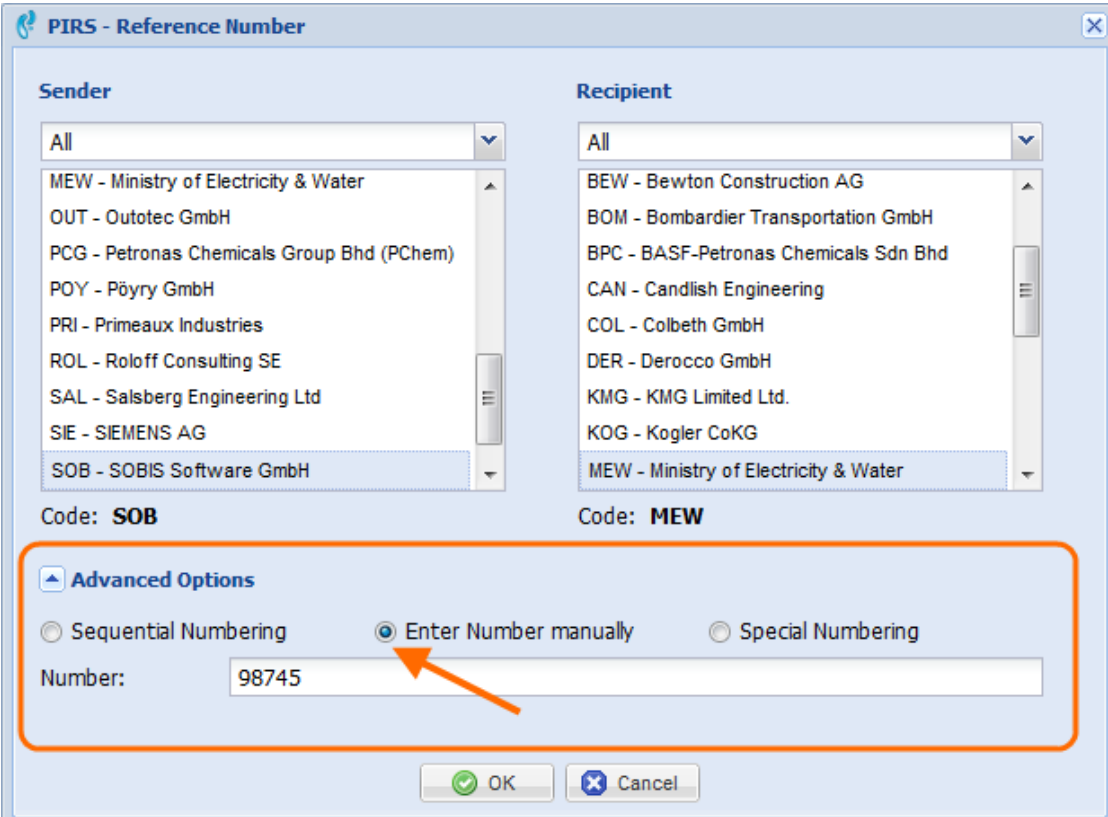
The reference number

One very important field within the header of a new email file is the reference number ("Ref. No"). Each correspondence file has an individual reference number.



By default, the reference number is composed of a sender code, a recipient code and a consecutive sequential number. The sender as well as the recipient code will be entered automatically according to the selected sender and recipient(s).

A sequential number will be assigned as soon as the mail is either saved or sent. As illustrated by the following screenshots you also have the possibility to adjust or modify both codes as well as the sequential number. You open the modification box by clicking the small arrow positioned in the right corner of the reference number field.




By expanding the "Advanced Options" you will be able to choose between either having a sequential number assigned to the end of your reference number, entering the number manually or entering a special reference number.

In case you want for example enter a number specified e.g. by your company's configuration regulations, you can select "Enter Number manually". At the current configurations within PIRS the manually entered number must consist of exactly 5 digits.

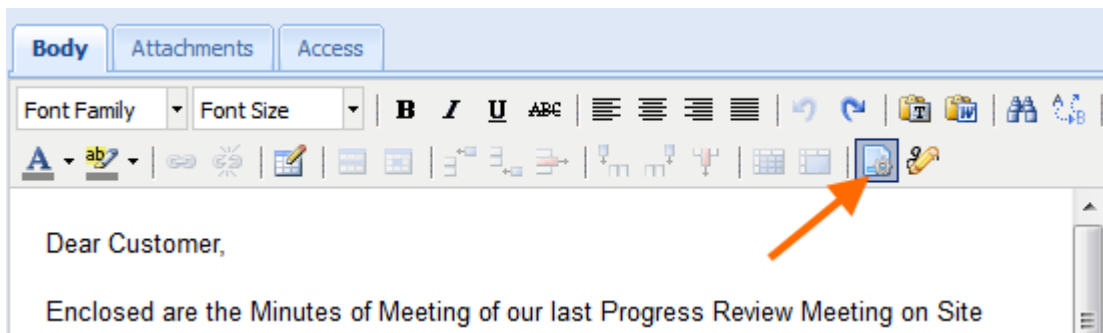
After confirming by clicking "Create new Reference Number" your selected information will be inserted into the respective field.

The option "Special Numbering" allows you to not only select the third part of your final reference number but to create a sequence of letters, numbers and / or symbols that will represent the entire reference number regardless of the sender and / or recipients. To allow users to easily determine sender and recipient information without having to open each file, the sender and recipient code will still be visible in brackets.


Ref. No.: IWS-CE-PVG-98745 (SOB/MEW) 

Email Body and Attachments

Similar to other well know email applications such as MS Outlook, PIRS offers standard formatting features in an action bar on top of the email body field. However as you can gather from the following images, there are two features that differ from the standards and will therefore be explained in detail.



First of all you are presented with an option to insert different text template that can be individually altered, added and amplified by your PIRS administrator to fit your company's preferences. By clicking the symbol in the action bar, outlined in red in the screenshot below, you open a new selection window where all existing text templates are displayed in a table. A preview of the selected template will be presented to you in a separate field.

Another useful feature, represented by the  - symbol, gives you the opportunity to insert your signature which you can store within your contact document in the project address book. By clicking the symbol your signature will be added to your body entry.

Attachments

Within the second tab of your email content tab structure you are able to add or delete attachments regardless of their format. As long as you haven't saved or sent the email the left upper corners of the rows of the attached files will be marked red.

Setting Access Right

The screenshot shows the 'Access' tab of a document configuration interface. It is divided into two sections:

- Who can read this document ?**: This section has two radio button options: 'All' and 'Following contacts/groups'. The 'Following contacts/groups' option is selected. Below this option is a text input field. An orange arrow points to this field, and a dropdown arrow icon on the right side of the field is circled in orange.
- Who can edit this document ?**: This section has two radio button options: 'Document author only' and 'Document author and following contacts/groups'. The 'Document author only' option is selected.

For each email that you create PIRS allows you to set individual access rights. To modify who can read and who can edit your correspondence enter the third tab as illustrated in the screenshot below.

By default the right to read a document is given to all application users while the right to edit a document remains with the author. Both settings can be modified to include or exclude certain contacts or groups. To select or remove contacts from either list you are offered the contacts / group selection options from the address book.

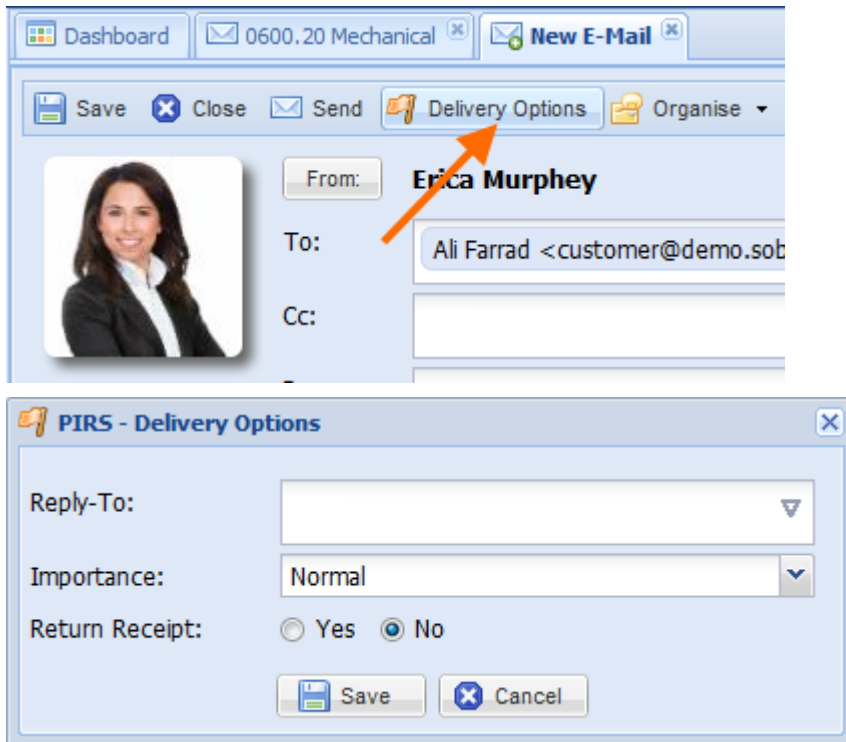
Please be aware that it is possible that access rights concerning certain folders may be predefined by the owner or the application administrators. In this particular case you will not have the default selection options or they might be restricted.

Sending an email

If you have entered values into all the required fields you can send your email by hitting the "Send"- button in your action bar. This operation will also automatically save the correspondence file within your previously selected folder.

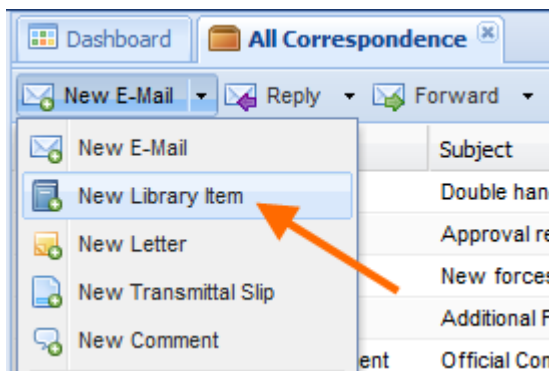
Prior to sending an email you have the possibility to select different delivery options as indicated by the following two screenshots. You can select different contacts the possible reply would be send to besides you own. Here it could for example be possible to select the project mailbox as reply address which would insure that the answer will automatically be stored within PIRS.

It is also possible to assign a degree of importance (high, normal, low) and you could choose to receive an information notice as soon as the recipient has obtained the email.



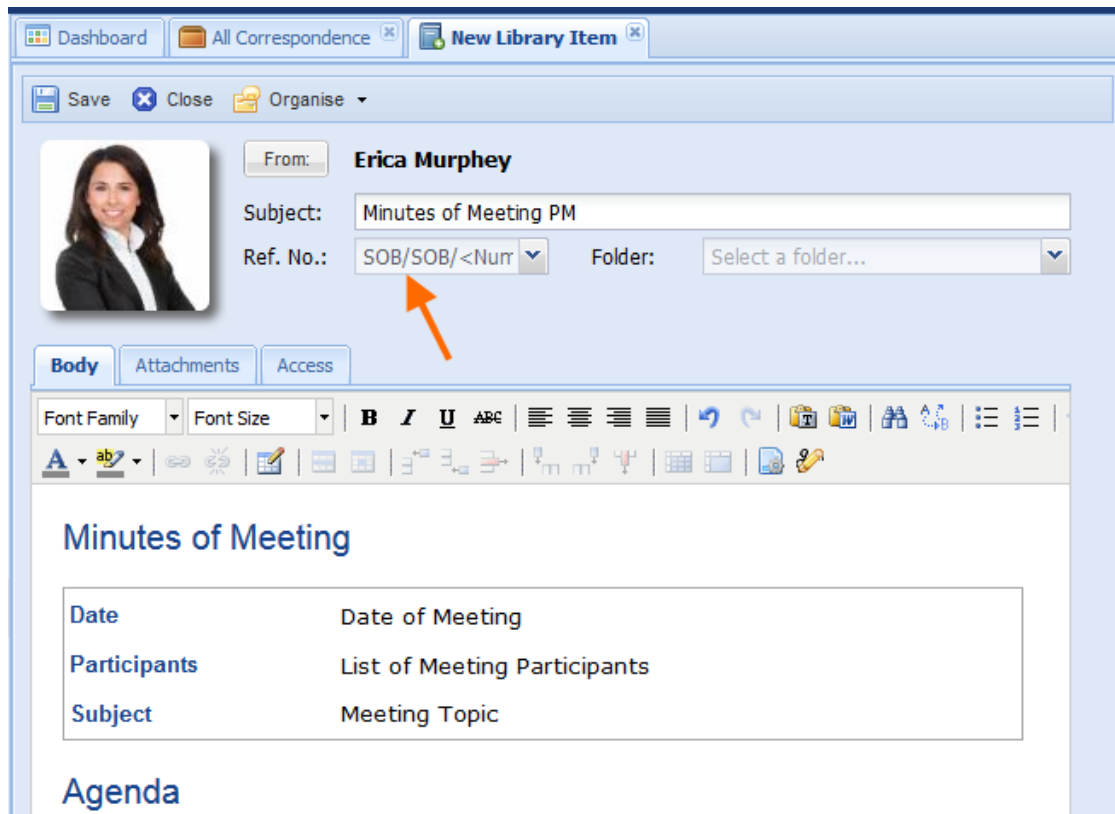
In addition, you have the choice to save the mail as draft and hereby enabling you to modify the email further at another time. After saving the document you will notice that there are more options in you action bar. You now also have the option to distribute the file to e.g. your project team members who can in turn give you feat back before you send a certain important email to your customer (for detailed information on the distribution of documents please refer to the chapter [Distribution List](#)). All additional options such as "Create PDF" and all the different selection options within "Actions" will be explained in detail in the course of the following chapters.

4.1.2 Create a library item

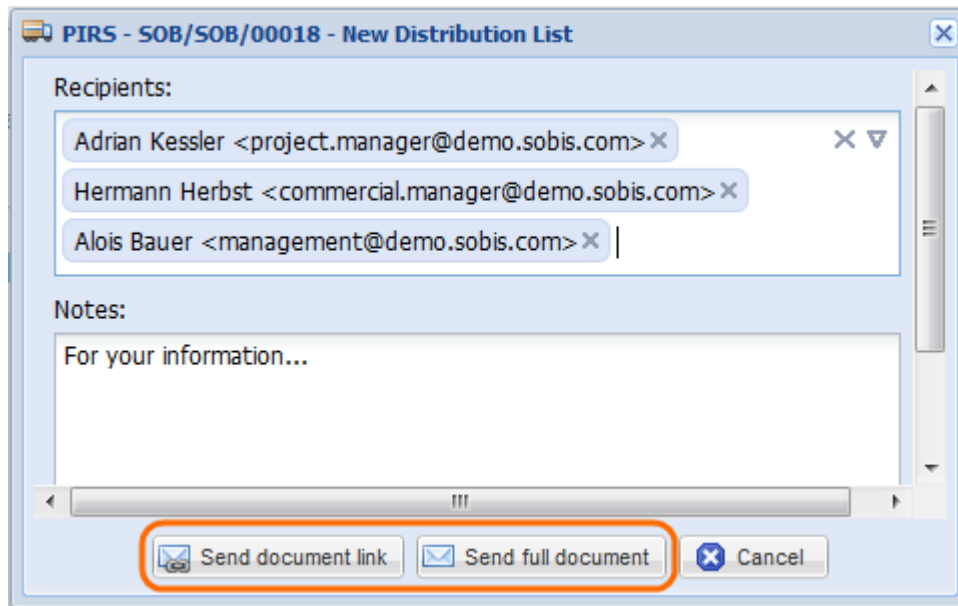


To store project correspondence such as minutes of meetings (MOM), team notes, mind-maps, original texts, correspondence templates etc. another correspondence format can be used, called library item.

To open a library item click the respective option within the "New Email"-action indicated by the screenshot. A new library item will then be displayed. The layout is again oriented on the email layout.



As visible in the screenshot above, a subject must be entered and a reference number as well as a folder has to be selected. By default the sender and recipient code of the reference number will consist of the author's company code. It should be pointed out that certain fields namely the entire recipient fields (To/CC/BCC) that you are used to from emails, don't exist in the header of the library item. A library item is not supposed to be send to recipients in the form of an email or letter but rather distributed via a distribution list. Since notification via distribution lists will not create any new correspondence files within the project, this special form of correspondence is a big advantage. The author and / or distributor of library items can easily provide a large number of recipients with the whole document or also simply with the document link without creating a large number of new additional correspondence documents by sending either one or multiple distribution lists.

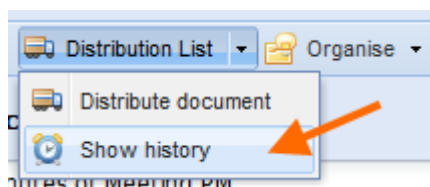


Within the distribution list box you are now able to select the recipients that you like to inform about the library item in the same manner that has already been described in prior chapters (refer to chapter [Create and send an email](#)).

The lower field "Notes" allows you to add a note to the recipients. This field value is not required and can therefore be left empty.

As indicated by the red outline you now have the choice of either sending the library item as a document link or as a full document. The latter is recommended if all or some of the recipients won't have access to PIRS since they will not be able to open a PIRS document link. In both cases the recipients will receive a new mail in their respective company mail file. Please keep in mind that as mentioned above those emails will not be stored as separate email documents within PIRS.

To ensure that no information is lost during the course of a project however, PIRS offers you a different way to store and follow information about document distributions.



By selecting the action "Show history" which is the second feature presented to you within the distribution list options, you will open a separate window where in the upper field you can see and select all distribution lists that have been sent. Furthermore the sending date, the sender, the recipients and the note that was sent alongside the distribution list will be displayed. By default the order of the columns will be date - sender - recipients - notes, but it can be

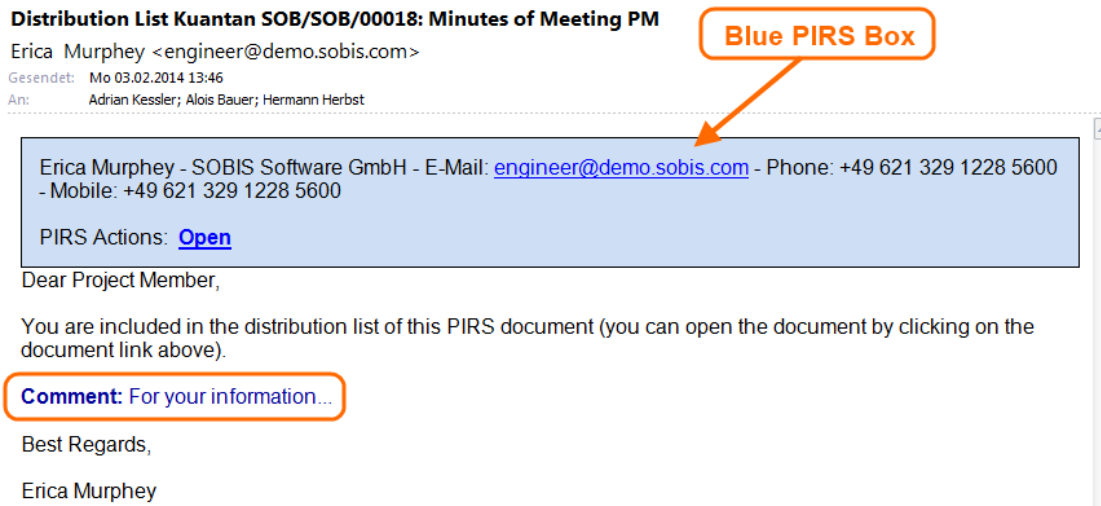
rearranged via drag and drop. In addition, by clicking a column header, the table content will be restructured in an ascending/descending manner.

If an entry is selected, its content will be displayed in the lower part of the window.

How to send distribution lists

After you have created and save a library item, therefore providing the file with a unique reference number, three additional features will appear in your library item action bar ("Distribution List", "Create PDF", "Actions"). By clicking the action distribution list you open the above illustrated "New Distribution List" window. You can also create a new distribution list within a correspondence view e.g. "All correspondence" or within the respective folder view by first selecting the document you want to distribute and then clicking the distribution list action which will also be available within those views.

The following image will show you how the layout of the library item will be presented to the recipients who received a distribution list as document link. Please note that both versions, the full document as well as the link, will include the document link presented in a blue box as well as the written comment together with a standardized message, but that only the full document will also display the original library item. Please be informed that it is also possible to create a PDF file form a library item and refer for further information concerning this topic to the chapter [Creation of PDF](#).



Distribution List Kuantan SOB/SOB/00018: Minutes of Meeting PM

Erica Murphey <engineer@demo.sobis.com>
 Gesendet: Mo 03.02.2014 13:46
 An: Adrian Kessler; Alois Bauer; Hermann Herbst

Erica Murphey - SOBIS Software GmbH - E-Mail: engineer@demo.sobis.com - Phone: +49 621 329 1228 5600
 - Mobile: +49 621 329 1228 5600

PIRS Actions: [Open](#)

Dear Project Member,

You are included in the distribution list of this PIRS document (you can open the document by clicking on the document link above).

Comment: For your information...

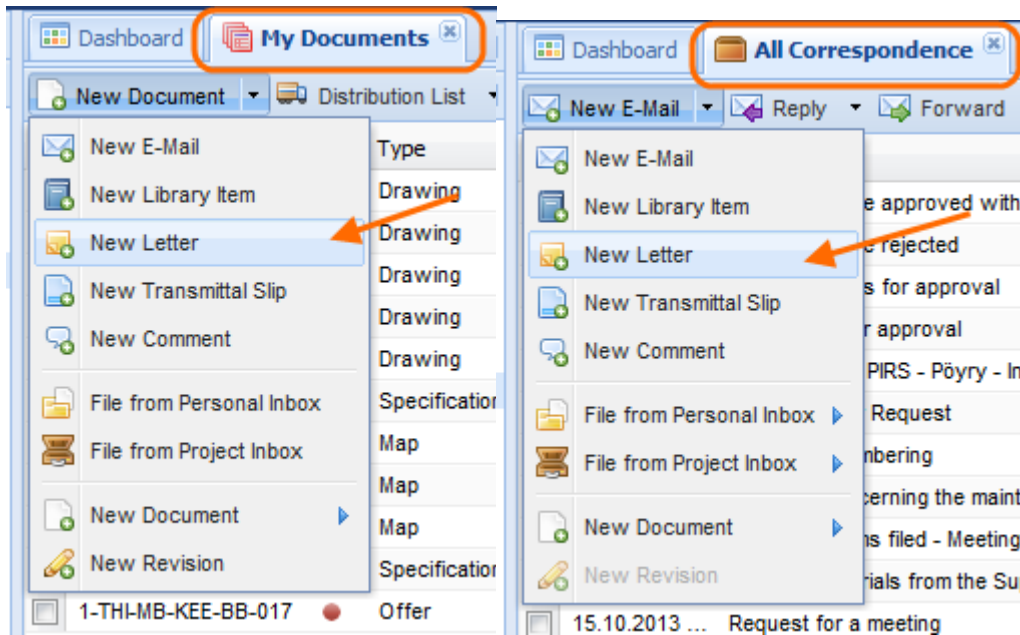
Best Regards,
 Erica Murphey

4.1.3 Create and send a letter

Even though it is the goal of most companies to enable a paperless office, it is still necessary from time to time to send letters or fax a document to customers and partners. Nevertheless it is important to have the opportunity to store this correspondence together with all project related and relevant information. Therefore PIRS offers to create, print and store letters within the application which in turn also makes it possible to send or distribute letters in digital form if needed.

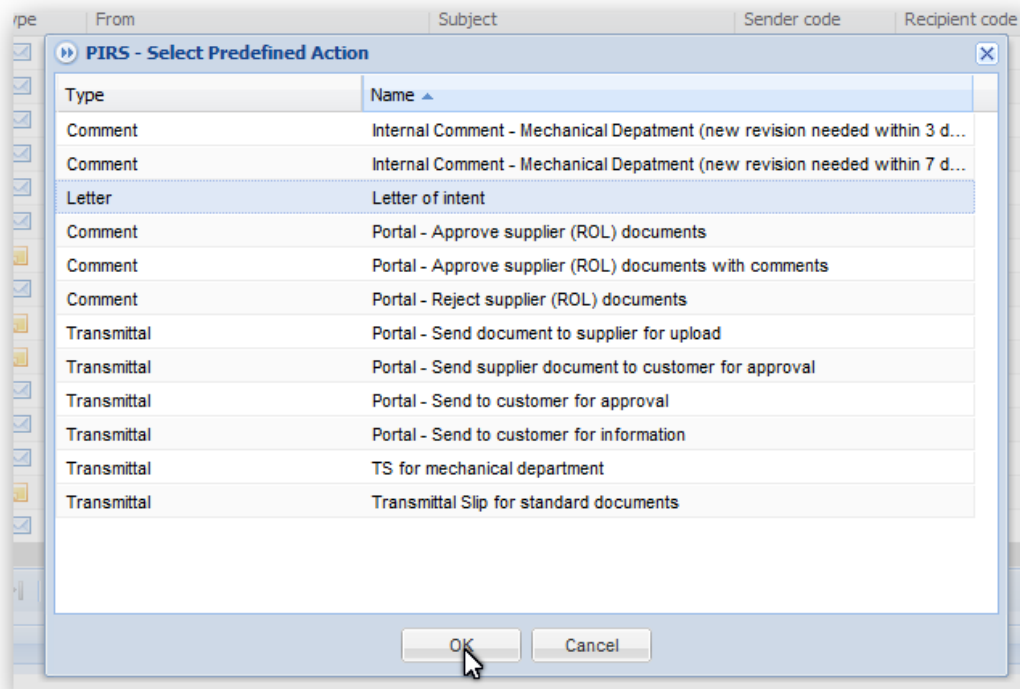
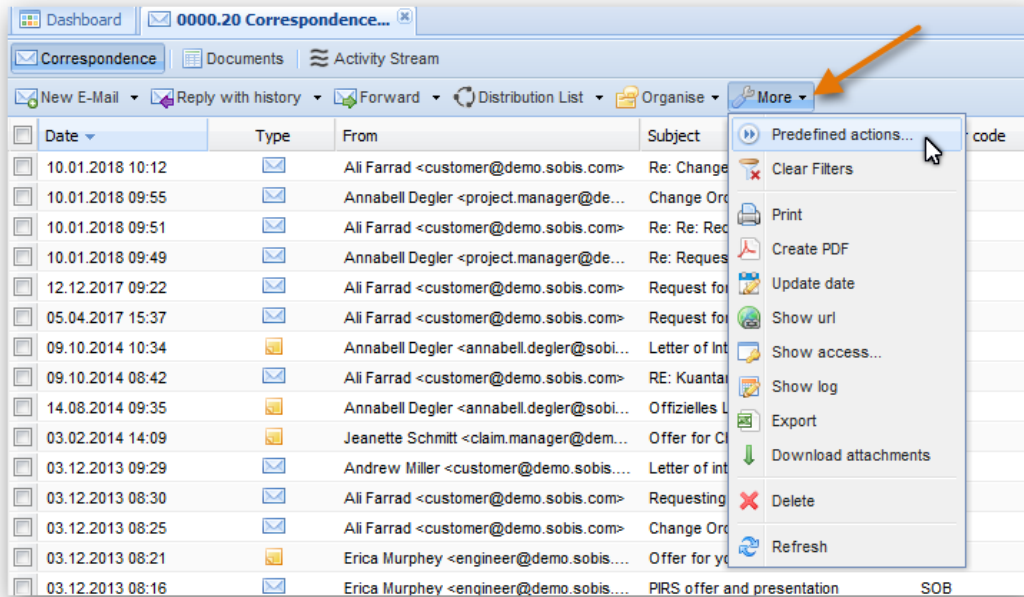
Create a letter

There are two options to open a new letter document. First option lets you create a plain letter document without any predefined settings or content. The second option allows you to create a letter based on one of your company templates which will have preset setting and content. To create a plain new letter document, you need to select the action "New Letter" listed in you "New..." options.



In case your company has included templates for letter you will be able to create letters with predefined content.

Open the "More" options available in your PIRS tool bar and select "Predefined actions..."



Select the template you require and click "OK".

The new letter will open in a new tab.

A new letter document will open in your content screen. The layout of a letter document is similar to that of an email document.

The only exceptions in the document header are the two additional fields "Your reference." and "Your reference dated". The first allows you to enter the reference number of a letter or correspondence you are answering to. Meaning that in case your letter is sent as reply to a letter or other correspondence you have received, you can enter its reference number here. The field "Your reference date:" enables you to record the date the letter/correspondence, you are answering to, was received.

Furthermore there is a slight difference at the content tab structure. Instead of the regular body field presented to you in an email document there are two separate tabs "Letter" and "E-Mail Text". This function allows you to create a letter by entering your letter text in the letter field and at the same time you are able to send the same text or a variation of it via email by entering it in the email text field.

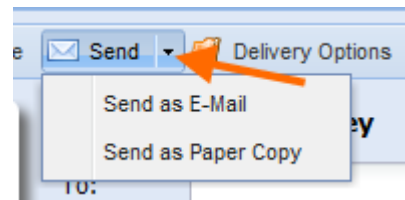
The content that you have entered into the letter text field can be transformed into a PDF file using your company template. The template can be adjusted to fit your company standard and the company logo can be inserted as well. This official letter can then be printed and signed by the officials.

If you now choose to send the letter as an email, you will be asked if you would like to attach the signed letter to the email. This quick PIRS reminder ensures that the official signed letter document is included in the attachments along with any other attachments you might have added to your letter document before it is send as email.

The sent email body consists of the text entered in the "E-Mail Text" tab. You will find that if you maintain a signature in your contact form it will be inserted into the email body field automatically.

The other tabs "Attachments" and "Access" don't differ from those within an email document and will therefore not addressed again.

Sending a letter



As mentioned above PIRS offers two different options to send a letter. If a letter is sent as a paper copy, the text entered into the body of the "Letter" field will be inserted into your company letter template automatically. Then a PDF file will be created and opened in a new window allowing you to print the letter. The system will mark the letter as sent even-though it hasn't sent it electronically. In order to ensure that all information is available to all team members you should always check that all attachments that you are going to send with the physical letter is also stored within the PIRS letter.

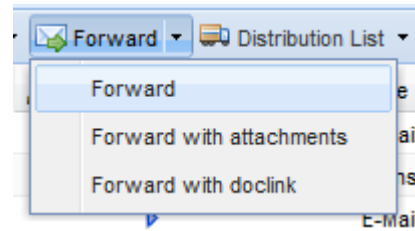
If you choose to send the letter as paper copy the body field for the email is not send in any way and in both cases the entry will be stored and displayed as a letter document.

4.1.4 Forward & reply to messages

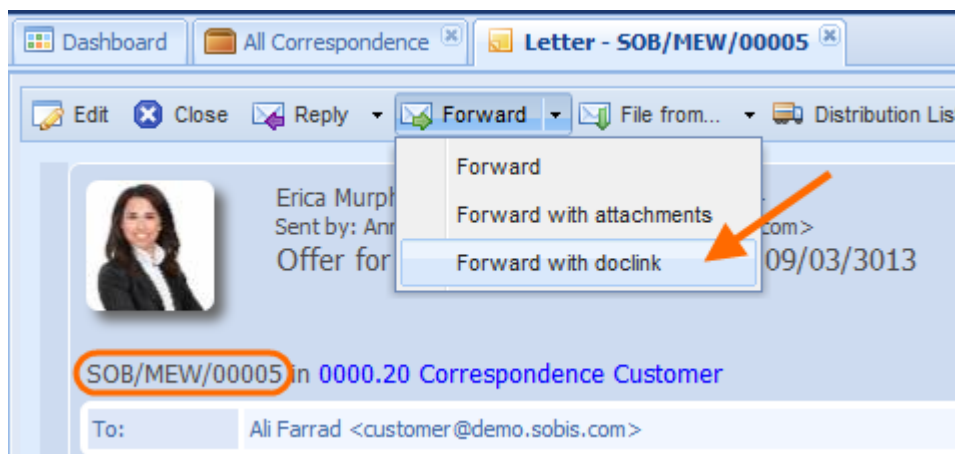
Within PIRS all correspondence types can be forwarded or replied to, even those types that are not supposed to be distributed in such a manner like library items.

Documents however can neither be forwarded nor replied to since the only way to distribute them has to be via transmittal slip. To allow the intuitive use of both functions the forward as well as the reply structure are mostly oriented on the known standards of regular email applications.

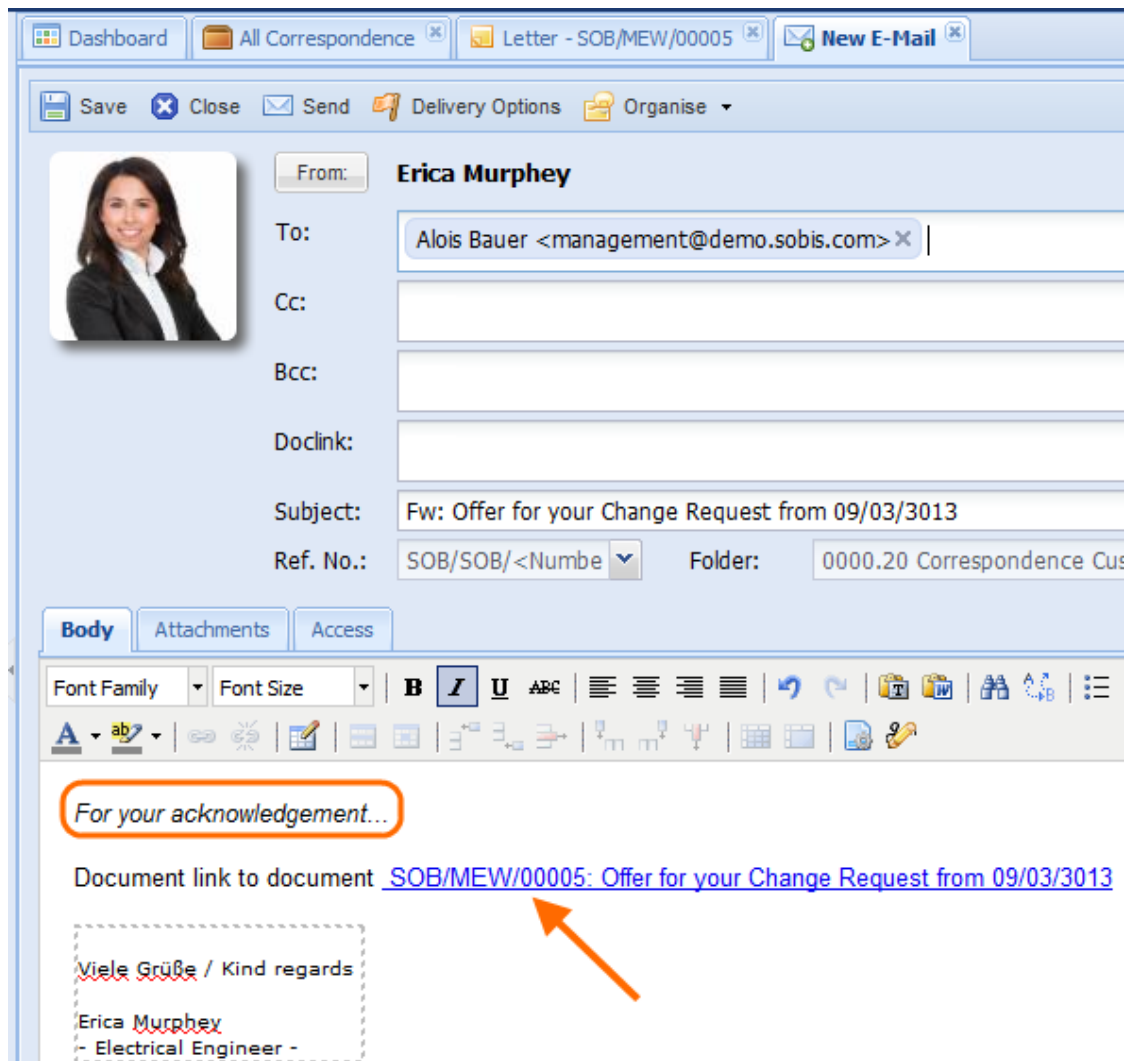
Forward messages




There are three different options to forward a message. The first and second which either forward the selected document without or with attachments, reflect the standard email application features given in any of the well-known email account solutions and will therefore not be explained in detail at this point. The option to forward a correspondence via document link is a new feature however. The functions of a "doclink" is mentioned throughout this user manual, but will be explained again since it is one of PIRS great time as well as storage saving features.



You can either select the correspondence document within the respective view and start the forwarding process from there or open the document in read or edit mode and select the forward option within the document itself. In the displayed example a letter document has been opened in read mode and the forward process was started from there. After having selected the third forward option, a new tab will open within the application content screen allowing you to enter all input information (e.g. recipients) as it is common in a regular email. The text "Document link to document" together with a blue colored and underlined link was inserted into the body field. After having selected the recipient(s) you can send the email without any further delay, but you could also choose to enter an additional note into the body field explaining the email to the recipient(s). A note outlined in the screenshot below, has been entered in this example. The email will be forwarded according to the entered specifications. Additionally the standardized blue PIRS box including the senders contact information and the different possible PIRS actions is included in the email.



Please be aware that regardless if you send a forward with or without attachments or as document link, the correspondence will be listed in the correspondence thread of the respective original document. The correspondence thread of each PIRS document can be opened by clicking the speech bubble symbol display in the table row ().

Reply to messages out of PIRS

Correspondence documents can be replied to using different options as well. You can either reply with history, with history and attachments or again by using the document link option which is exactly equivalent to the doclink function described above for the forward options. The fourth option also allows you to reply with an originally plain email body in which case neither the history nor the attachments of the original document would be included in the reply. Similar to the forward documents, all replies will be included in the display of correspondence threads.

4.1.5 File incoming emails

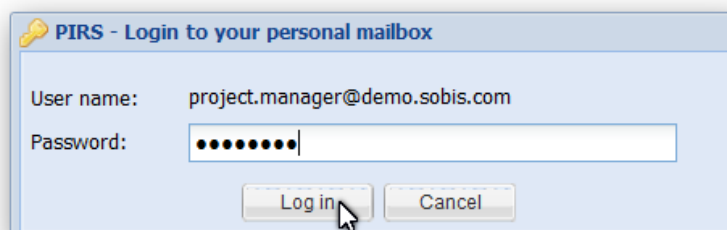
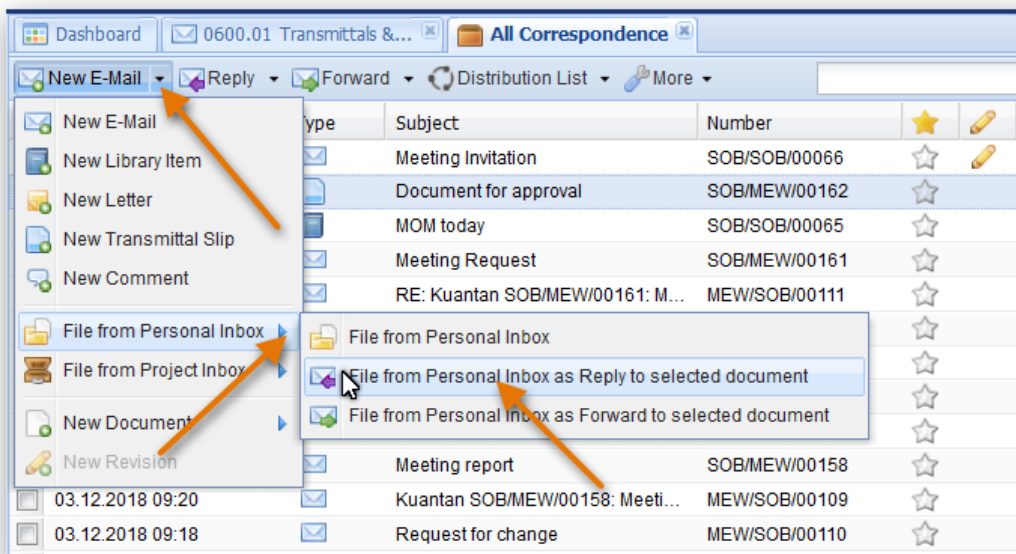
All incoming emails that are project related should be filed in order to guarantee a high degree of centralized storage of all project information and documentation. This reduces the risk of

information and document loses as well as ensures the possibility to access all project information and documentation regardless of time or location and supports the independence from any employee fluctuation. Therefore, it is highly recommended to file all incoming project emails regardless if they are received in a private or the project mailbox.

PIRS enables you to maintain a project specific mailbox. It is not required to work with a project mailbox but it might come in handy e.g. in case some of your customers or suppliers find it inconvenient to have to address their correspondence to various different recipients throughout the course of a project and prefer to send it to a general project email address.

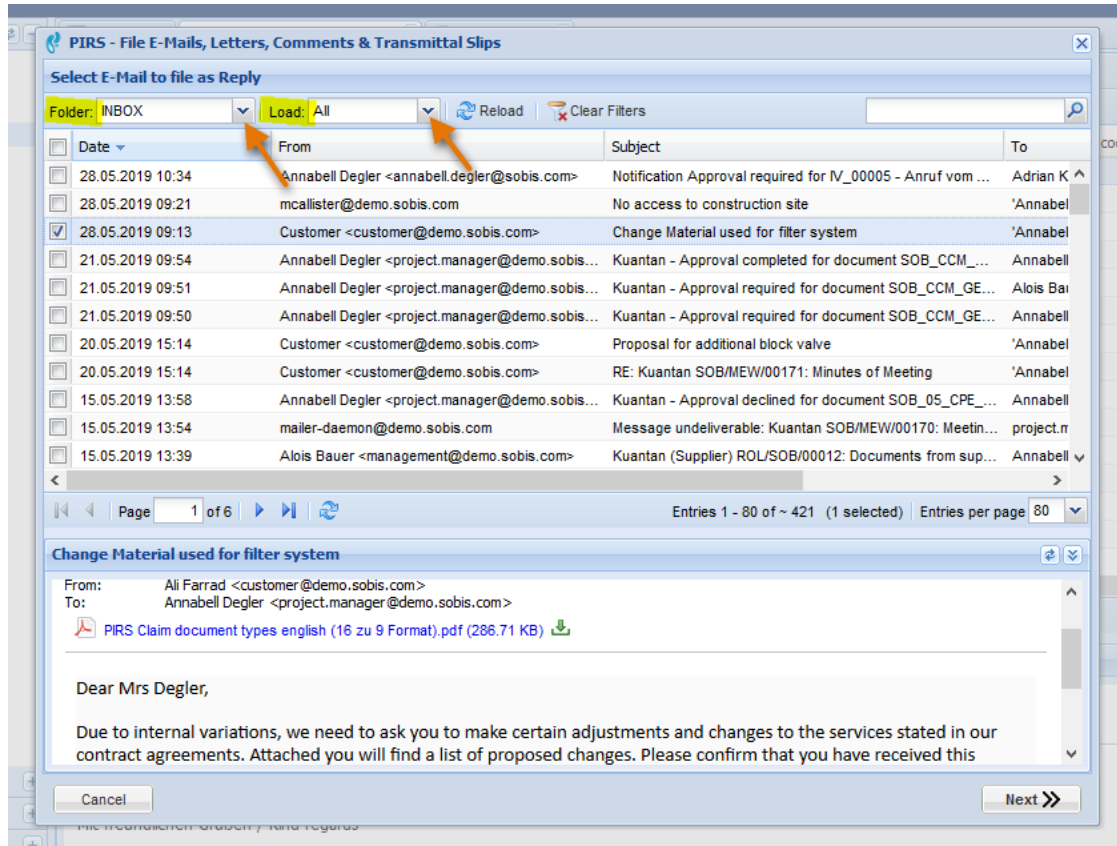
4.1.5.1 Personal Mailbox

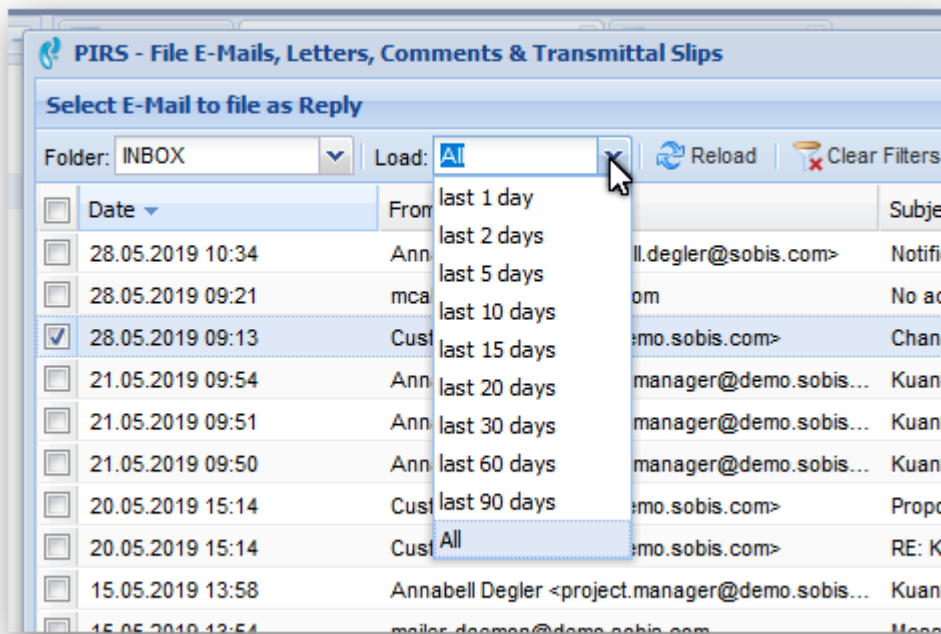
PIRS offers three different options to file emails from your personal mailbox. You can simply file an email as a new document or you can link it with another PIRS correspondence or document. The relation to the other PIRS document which must be selected prior to filing the email can be a reply or a forward. The following screenshots exemplary display the filing of an email as reply. Please be aware that when you file an email for the first time after having opened the application you will be asked to enter your password. Your email specifications are applied according to your input entered in your "My Settings".



By default the content of your inbox folder will be displayed, but you also have the option to switch to any other of your additional email folders within your personal mailbox. This also includes subfolders.

To reduce the time PIRS will take to load mails from your mail file you can select a time frame going back the last days or displaying all entries. Click "Reload" to refresh the view and list any emails that you might have received only seconds ago.






Additionally, you will be offered a preview of the email you have selected in a preview box. Since all listed mails are not yet filed and therefore available in PIRS the preview will not be displayed automatically but need to be loaded separately by clicking the link in the preview panel. After having selected the email to be filed within PIRS, click "Next" to continue the filing process.

After the next window within which you will have to assign the email you wish to file to a specific folder, you will be asked to select a reference number for the new email file. This window's layout is similar to the regular reference number selection window of all other PIRS correspondence and documents. You can manually select the sender and recipient code. In case they are already stored within the PIRS address book, the codes will be preselected to fit the respective contact information. You will also have the additional numbering choices. In the lower area of the selection window you are able to choose the correspondence type. This allows you not only to store email files as emails, letters or library items but also gives you the opportunity to add them as customer comments to a document or as transmittal slip from a customer.

If you now click the next button again, the window will present you with a preview on how the document you are about to file will be stored in PIRS. This window is optional and can be deactivated, so don't be irritated if it is not shown for your project.

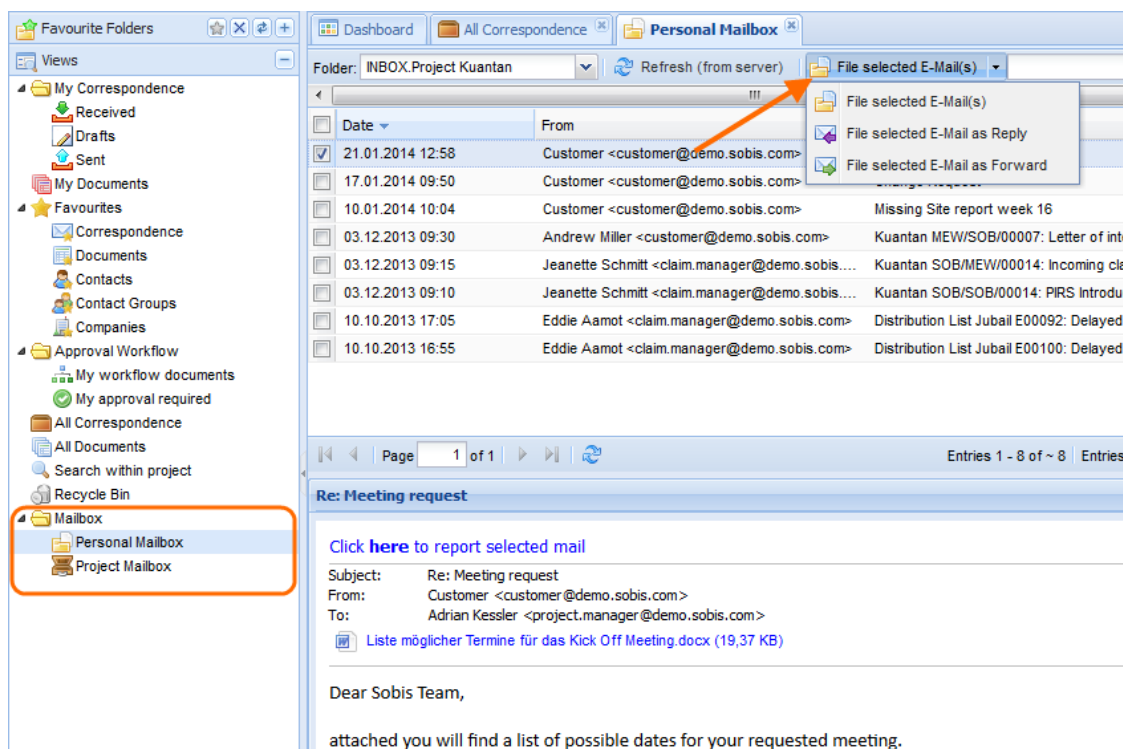
As soon as you have confirmed this last window by clicking the "Finish" button your email will be filed according to selected input.

The filed email will then be added to the PIRS correspondence as a reply to the previously selected email. By default every standard view as well as folder view will include a column (

 that will indicate if the listed correspondence or document is linked to other files. By clicking the respective symbol the content thread will open in a new tab. All correspondence and documents that are listed in a content thread can also be opened out of the displayed thread.

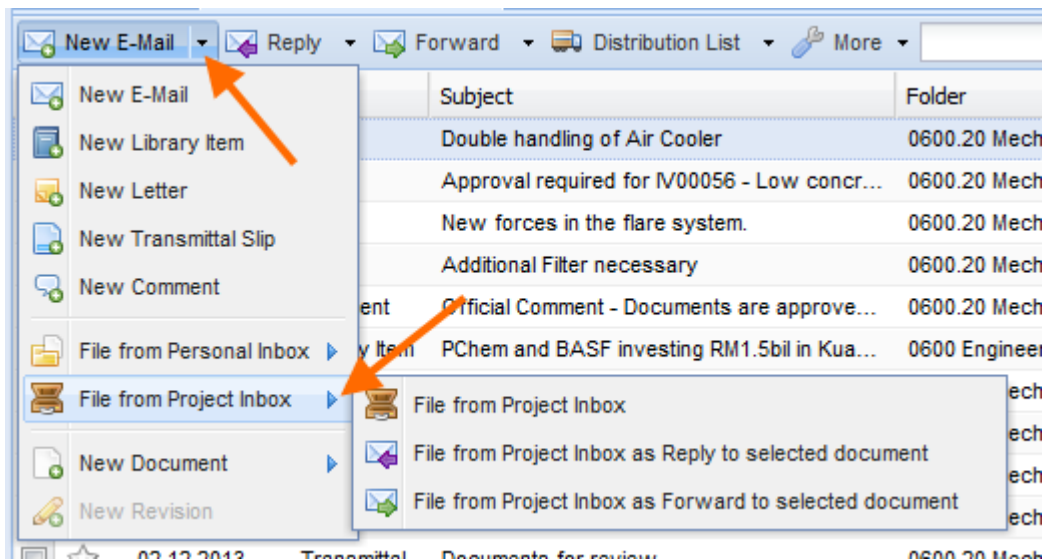
4.1.5.1.1 File Emails using the Mailbox Views

It is also possible to open the project mailbox as well as the personal mailbox in a separate view and file documents from there. As illustrated in the following image incoming mail will be displayed in the respective mailbox view where it can be filed into the correct folder. Following this action, the email can be distributed to the appropriate project members who would be responsible for next actions to be taken.



Once an email is filed from the mailbox it will no longer be listed in the inbox folder, neither in your personal nor in the project mailbox. In both cases a new folder will be created automatically, titled "Moved to PIRS + *project name*" and all filed emails will be moved into this new folder.

4.1.5.2 Project Mailbox

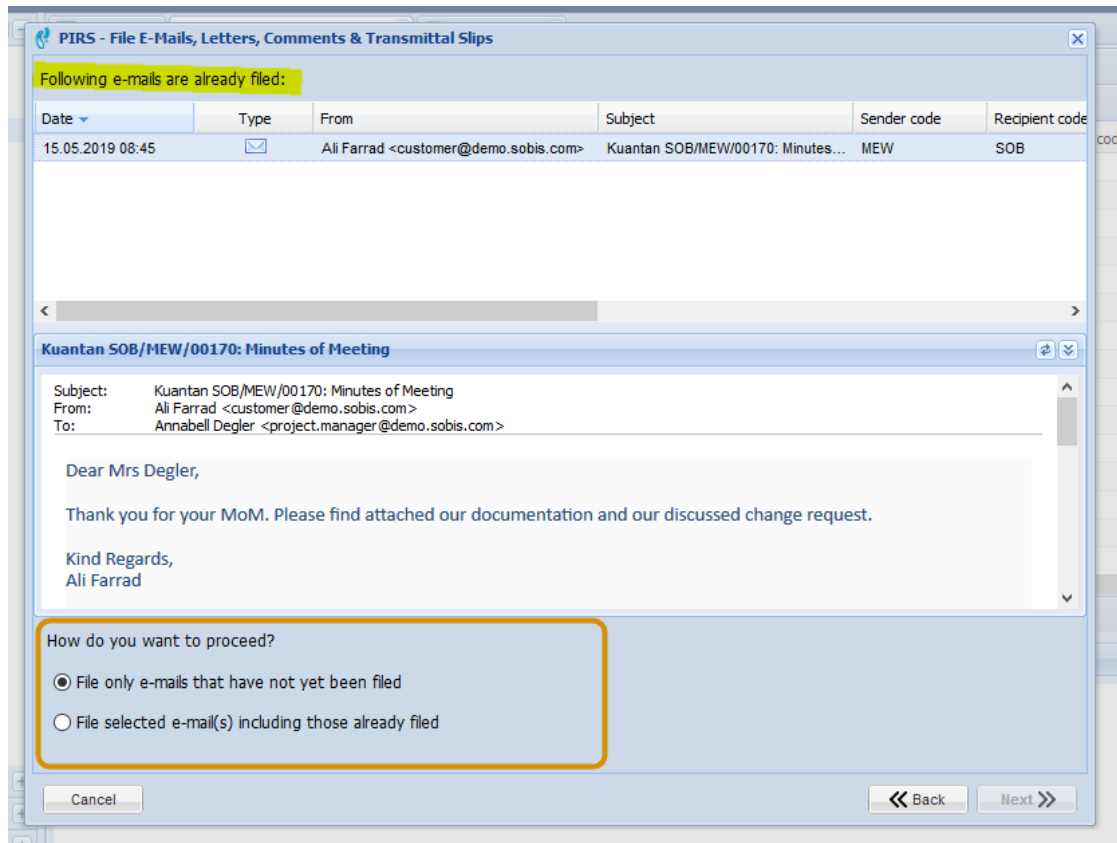


Emails can also be filed from the project mailbox provided that a project email account has been set up. They can be filed either as single document that is not linked to other correspondence e.g. if a new request from a customer was sent to the project mail address or they can be filed as reply or as forward to another correspondence file. The filing process equals the process described in the previous chapter about filing emails out of your personal mailbox; therefore it will not be presented step by step again. (Refer to [Personal Mailbox](#))

4.1.5.3 Prevent duplicates

In order to prevent that mails are filed multiple times, e.g. several PIRS user have received the same mail from an external party and wish to file it in PIRS, there is a mechanism that checks whether a mail with the same content, subject and recipients has already been uploaded.

If you are filing one or multiple mails and one or several mails are already available in PIRS, you will receive a notice during the filing process informing you about the potential duplicates.

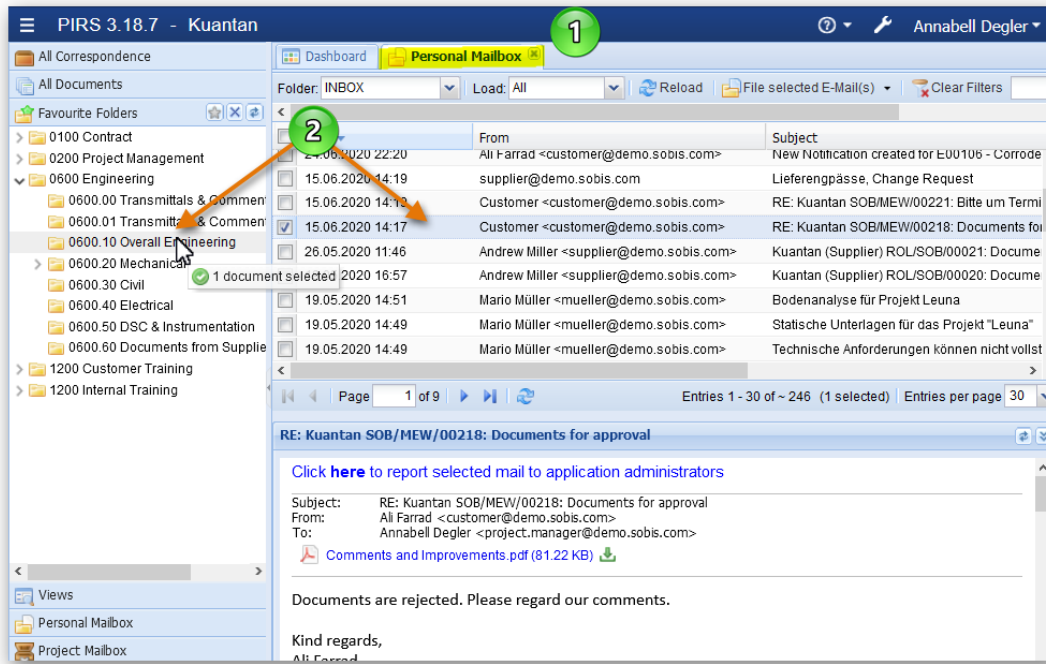


You are then able to decide whether you want to go ahead and file all mails regardless of potential duplicates or file only those mails that have not been filed yet.

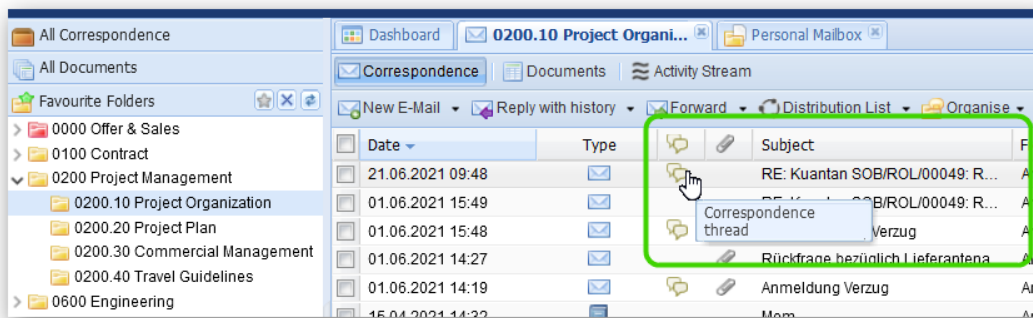
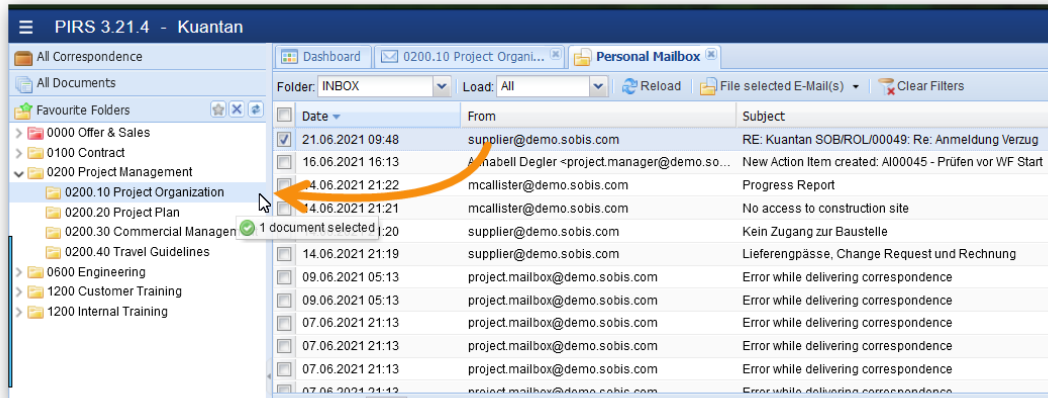
4.1.5.4 File via Drag & Drop

In order to lower the amount of clicks, therefore the time spent to file an email, PIRS offers a drag & drop filing option on top of the above described filing with the wizard.

To file an email via drag & drop, first open your person mailbox or project mailbox view in your PIRS project (step one in below screenshot). Next, simply drag and drop the mail in question directly from your inbox to the correct folder in PIRS. The folder structure will unfold itself once you move the cursor over it, allowing you to select parent as well as child folders.



During the filing process PIRS detects whether or not the e-mail that you are filing is a response to an e-mail sent from PIRS. This means that if an external replies to an e-mail that was sent from PIRS and you are then filing this reply in PIRS via Drag & Drop, PIRS will recognize the relation and file the mail accordingly. This is also reflected in the then available correspondence thread, compare with the following screenshots.



Please be aware that an email can only be filed this way, if the sender as well as the recipient contact is listed within the PIRS address book **with** a correspondence code. Otherwise PIRS will not be able to create a unique correspondence code, which is one of the mandatory requirements to file and store an email in PIRS.

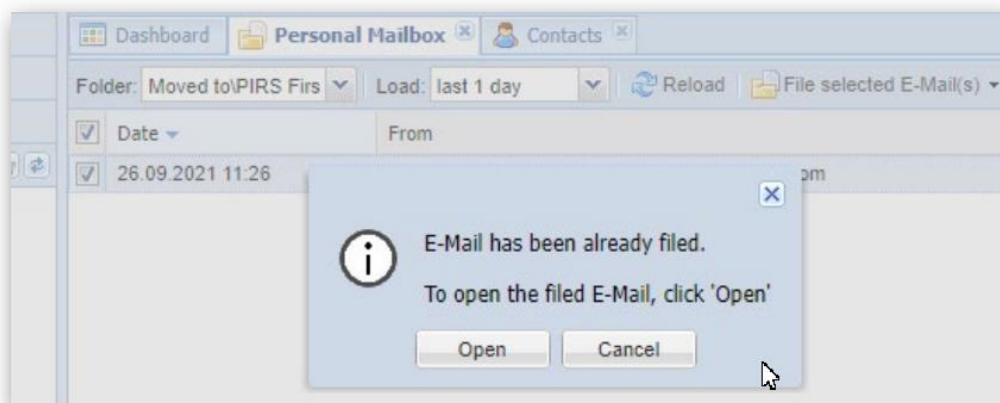
If PIRS is not able to assign a correspondence code to the sender or the recipient, either because the sender or recipient is not known to PIRS, the email address is used for several

different contacts within the PIRS address book or the contact within the PIRS address book does not carry a correspondence code, you will receive a notification which might look like this:



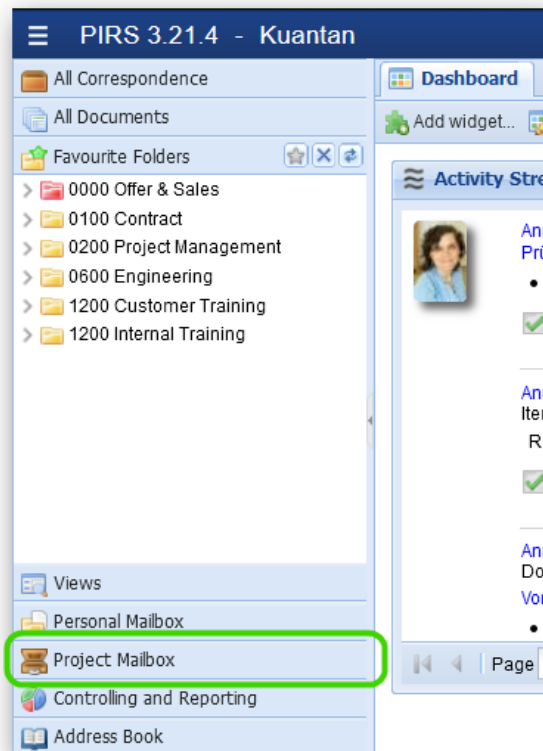
Prevent Duplicates

Every mail files via drag & drop will also be checked regarding its subject and content to ensure that the same mail has not been filed already. In case there is a conflict, meaning that the mail has already been filed, you will be notified about a possible duplicate.



You will still be able to file the mail.

4.1.5.5 Autofiling



PIRS offers the option to auto-file mails that are sent to the project mailbox. As described in previous chapters, a general mail account (e.g. a project mail account or a mail address used for receiving invoices) can be integrated in every PIRS project.

For this mail account, you are also able to set up auto-filing rules.

Mails received in your project mailbox can e.g. be filed to specific folders based on the subject, sender or content of the mail.

In addition, these rules can also cover the sending of a notification. So, if for example set up a rule that all mails containing the reference "invoice" should be files in the folder "Invoices" and then the project secretary should be informed, the mail rule can cover all steps.

The notification content can of course be defined by you. It could look like this:



During the auto-filing process PIRS detects whether or not an e-mail that will be filed is a response to an e-mail sent from PIRS. This means that if an external replies to an e-mail that was sent from PIRS, the autofiling process will recognize the link and file the mail accordingly. This is also reflected in the then available correspondence thread.

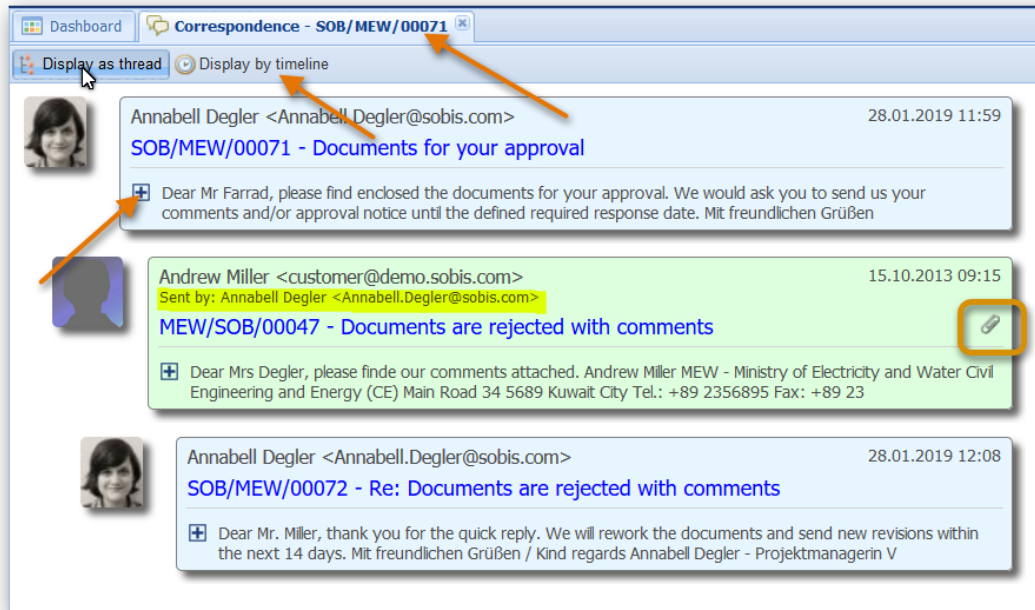
Please contact your PIRS Service Desk to learn more and to activate, as well as set up PIRS autofiling.


4.1.6 Correspondence Thread

In all correspondence views there is a column headed with a speech bubble symbol (). If a correspondence document is marked with this symbol, it indicates that there is a correspondence thread. This means that there are other correspondence documents that are linked to this document e.g. as a reply or a forward.

	Date	Type		Subject	Folder
<input type="checkbox"/>	03.02.2014 ...	E-Mail		Fw: Offer for your Change Request from 0...	0000.20 Correspondence Customer
<input type="checkbox"/>	03.02.2014 ...	Letter		Offer for Change Request A32	0000.20 Correspondence Customer
<input type="checkbox"/>	03.02.2014 ...	Library Item		Minutes of Meeting PM	0200.10 Project Organization
<input type="checkbox"/>	17.01.2014 ...	Transmittal		Document for Approval	0600.20 Mechanical
<input type="checkbox"/>	17.01.2014 ...	E-Mail		Meeting request	0600.20 Mechanical
<input type="checkbox"/>	17.01.2014 ...	E-Mail		Re: Meeting request	0600.20 Mechanical
<input type="checkbox"/>	17.01.2014 ...	Comment		Official Comment - Documents are approve...	0600.20 Mechanical
<input type="checkbox"/>	13.01.2014 ...	Comment		Official Comment - Documents are rejected	0600.20 Mechanical
<input type="checkbox"/>	10.01.2014 ...	E-Mail		Redundand Pump for max. availability	0200.10 Project Organization
<input type="checkbox"/>	20.12.2013 ...	Comment		Re: Document for approval	0600.20 Mechanical

In order to display the whole correspondence thread you simply need to click the speech bubble displayed in the row of the respective PIRS document. A new tab will open, showing the entire correspondence linked to the selected document. By default the view will display an illustration of the correspondence as a thread but, as indicated in the following screenshot, you also have the option to display the documents according to the timeline that they were created in.

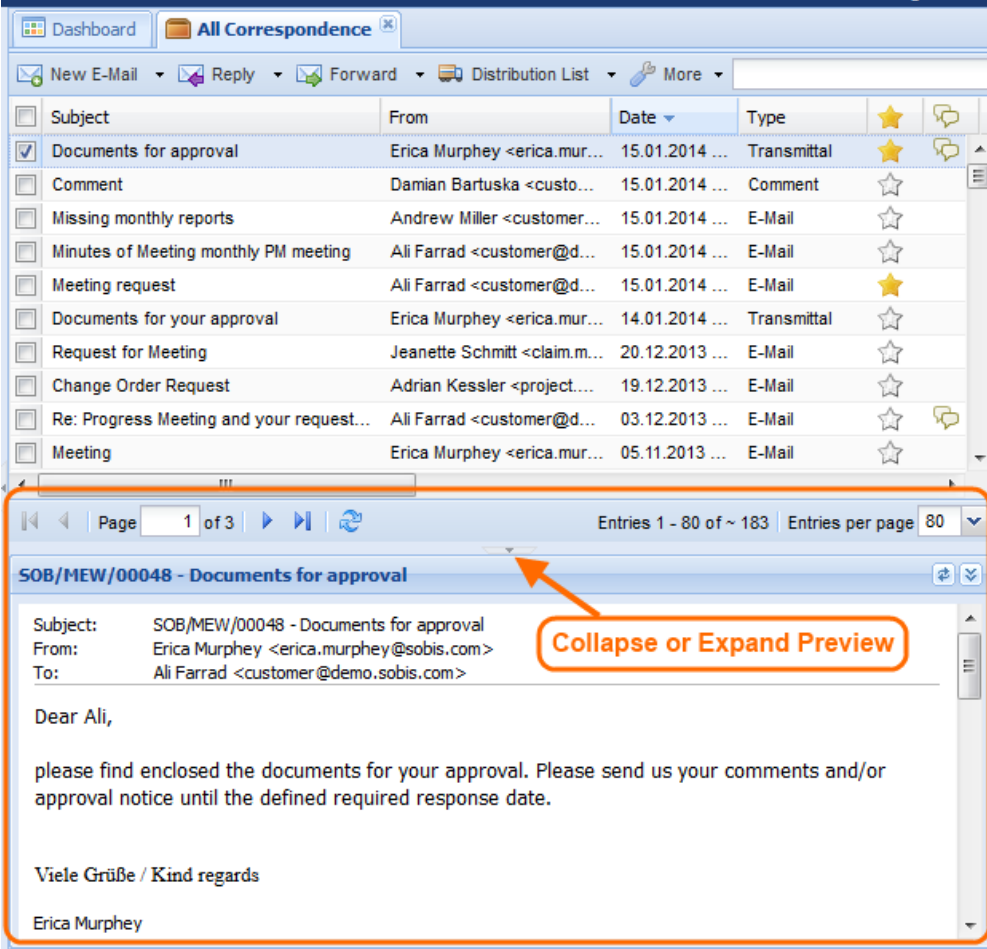


Furthermore you will have the opportunity to access the content of each listed document by extending the respective content field included in the display of each document. The attached files can also be open out of this view by simply clicking the attachment symbol  .

In case a correspondence was sent by someone else and not the author himself, you will also be able to track that information within the correspondence thread (regard the marked area in the screenshot above as example).

4.1.7 Correspondence Preview Pane

For each PIRS correspondence view and correspondence module on folder level, PIRS offers the option to preview the listed emails, library items, comments, transmittal silps or letters. The preview can be collapse, if it is not need and expanded again at a later time.



The screenshot shows the SOBIS PIRS interface. At the top, there is a navigation bar with 'Dashboard' and 'All Correspondence'. Below this is a toolbar with options like 'New E-Mail', 'Reply', 'Forward', 'Distribution List', and 'More'. The main area displays a list of emails with columns for 'Subject', 'From', 'Date', and 'Type'. The first email, 'Documents for approval', is selected. Below the list is a preview pane for the selected email, titled 'SOB/MEW/00048 - Documents for approval'. The preview pane shows the email's subject, from, and to fields, followed by the body text. A callout box with an orange border and the text 'Collapse or Expand Preview' points to a small icon above the subject line in the preview pane.

Subject	From	Date	Type
<input checked="" type="checkbox"/> Documents for approval	Erica Murphey <erica.mur...>	15.01.2014 ...	Transmittal
<input type="checkbox"/> Comment	Damian Bartuska <custo...>	15.01.2014 ...	Comment
<input type="checkbox"/> Missing monthly reports	Andrew Miller <customer...>	15.01.2014 ...	E-Mail
<input type="checkbox"/> Minutes of Meeting monthly PM meeting	Ali Farrad <customer@d...>	15.01.2014 ...	E-Mail
<input type="checkbox"/> Meeting request	Ali Farrad <customer@d...>	15.01.2014 ...	E-Mail
<input type="checkbox"/> Documents for your approval	Erica Murphey <erica.mur...>	14.01.2014 ...	Transmittal
<input type="checkbox"/> Request for Meeting	Jeanette Schmitt <claim.m...>	20.12.2013 ...	E-Mail
<input type="checkbox"/> Change Order Request	Adrian Kessler <project...>	19.12.2013 ...	E-Mail
<input type="checkbox"/> Re: Progress Meeting and your request...	Ali Farrad <customer@d...>	03.12.2013 ...	E-Mail
<input type="checkbox"/> Meeting	Erica Murphey <erica.mur...>	05.11.2013 ...	E-Mail

Page 1 of 3 | Entries 1 - 80 of ~ 183 | Entries per page 80

SOB/MEW/00048 - Documents for approval

Subject: SOB/MEW/00048 - Documents for approval
 From: Erica Murphey <erica.murphey@sobis.com>
 To: Ali Farrad <customer@demo.sobis.com>

Dear Ali,

please find enclosed the documents for your approval. Please send us your comments and/or approval notice until the defined required response date.

Viele Grüße / Kind regards

Erica Murphey

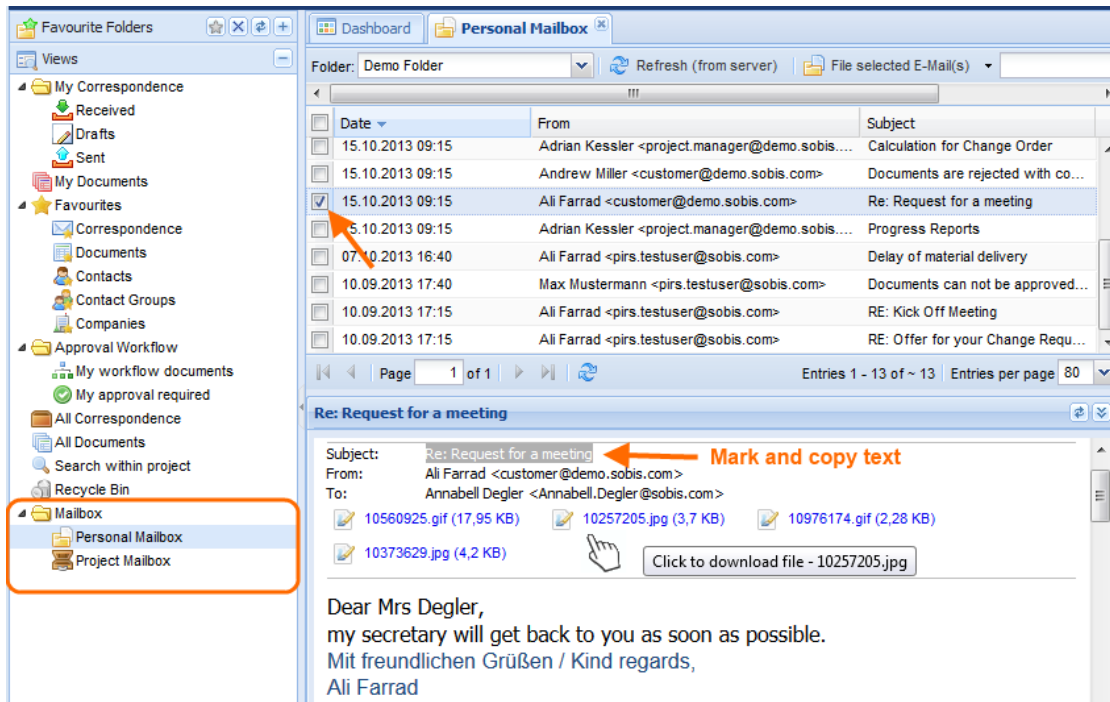
All text seen in the preview can be marked and copied.

Preview pane in personal and project mailbox

Besides the preview function for the PIRS correspondence, you have also the option to preview your personal and the project mail that hasn't been uploaded to PIRS yet.

With the views "Personal Mailbox" and "Project Mailbox" you are able to enter your personal mail-file or the project mail file in case your project has a general mailbox. These views allow you to access all the folders in your mailbox, therefore giving you full access to all your emails.

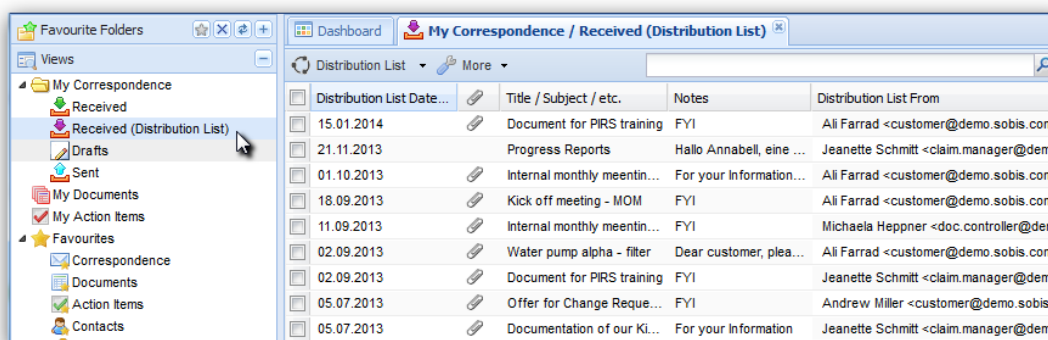
The preview pane in the bottom of the view enables you to take a look at the content of each mail you select in the grid. Since the PIRS release 2.3, you are able to mark and copy any text shown in the preview pane such as the subject of the mail. Furthermore you are now able to open any attachment of the selected mail from the preview pane. Therefore you won't have to upload an email to PIRS or enter your personal (or project) mailbox before you are able to access the files in the attachment.



4.1.8 Correspondence received via Distribution Lists

As described in the chapters above you are always able to send or receive a PIRS correspondence or document using the distribution list feature. When you create a distribution list PIRS sends the link to the selected PIRS item (correspondence, document, contact or company file) alongside with your comment to the recipients. With the Distribution List History you can track and trace all sent distributions, the recipients and the made comments.

Since the PIRS release 2.4 you are also able to take a look at all the distribution lists you received and quickly access the PIRS items that were distributed to you.



The view "Received (Distribution List)" displays all the PIRS correspondence, documents or other items that were sent to you using a distribution list. The grid also shows you the sender and the comments (Notes) that were included. All listed PIRS items and their attachments can be opened from this view.

4.1.9 Sending encrypted E-Mails

Starting with Release 3.0 it is possible to encrypt e-mails that are sent from, or received in PIRS.

The standard used to encrypt e-mails is "**S/MIME**". If you like to send an receive encrypted e-mails you first need to ensure that all involved parties have a S/MIME public key infrastructure available. It is required that all e-mail recipients own S/MIME certifications and all e-mail clients support S/MIME encryption. Contact your IT administrator or check with your project manager to ensure those requirements are met.

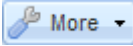
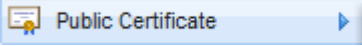
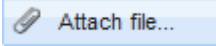
Send encrypted e-mails

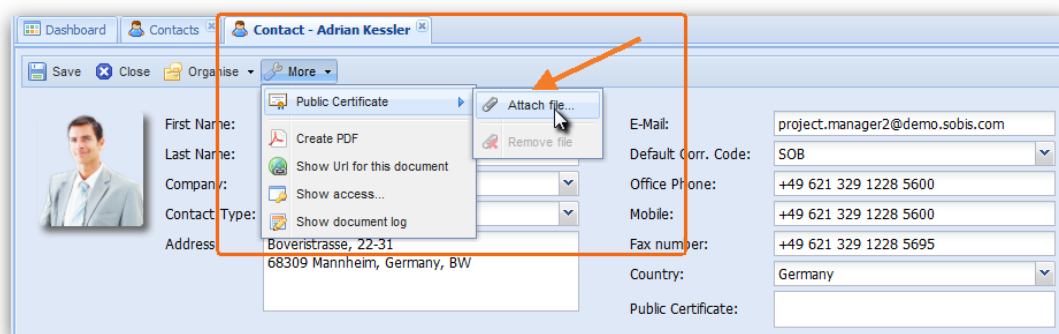
In order to encrypt an e-mail sent from PIRS, the system will use the public key of the recipient(s) which must be stored in the contact record(s) within the PIRS project address book.

The encryption is performed during the sending process. The PIRS e-mail which is stored within PIRS is not filed as encrypted document since the access to PIRS is secured and all PIRS users should be able to read e-mails they have access to in PIRS.

Should a public key for one or more of your recipients not be available (no public key stored in their PIRS contact), the e-mail will not be encrypted for any of the recipients.

Upload a public key to contact records

To store the public key of your recipients open the respective contact in the PIRS address book and select the  **More** option in your tool bar. Go to  **Public Certificate** and click  **Attach file...**. You are now able to select the public key file of the recipient from your local disk or the respective server within your IT infrastructure. The file format must be consistent with a ".cer" file.



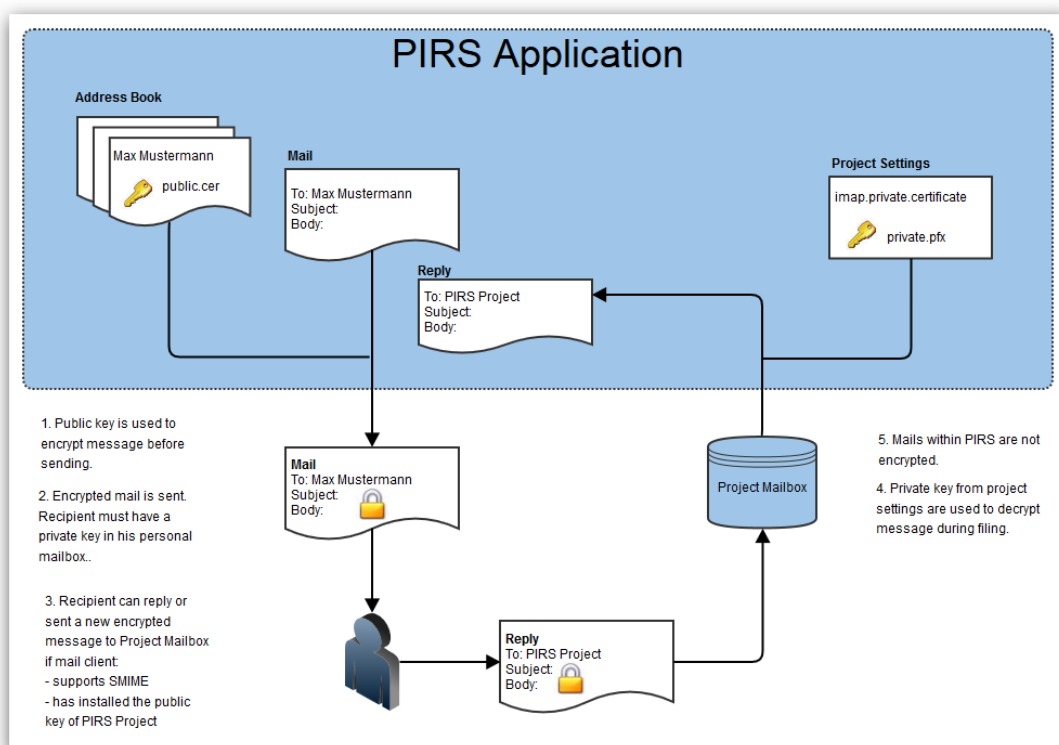
Receive encrypted e-mails

An encrypted e-mail received in your personal mailbox can not be decrypted during the import process into PIRS. Only encrypted e-mail received in your project mailbox can be decrypted during the filing process.

Therefore, all incoming encrypted mails must be sent to the official project mailbox, otherwise they cannot be decrypted if filed.

During the filing, the received e-mail is decrypted using the private key of the project mailbox and is then stored in PIRS without encryption.

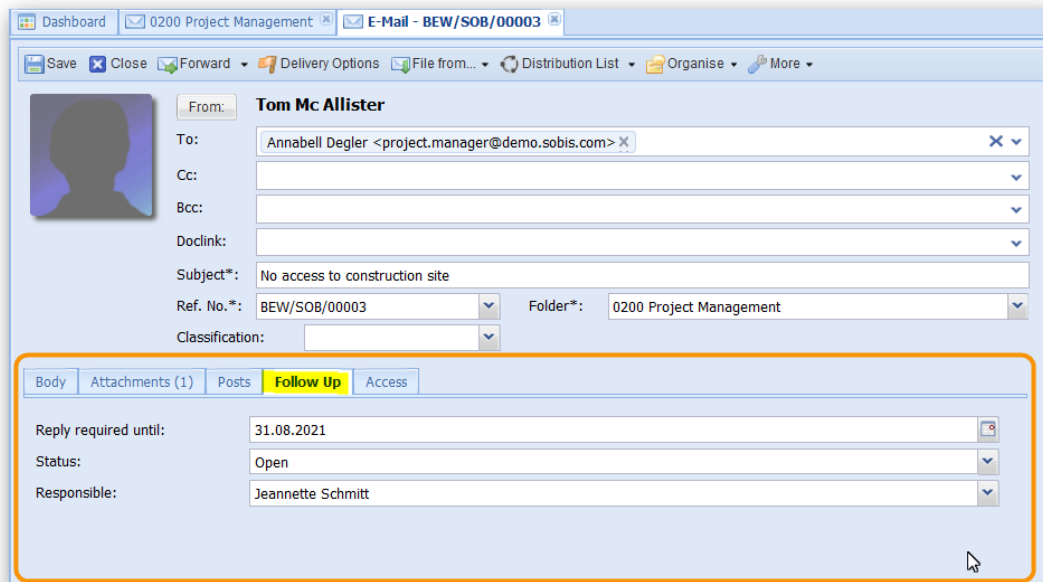
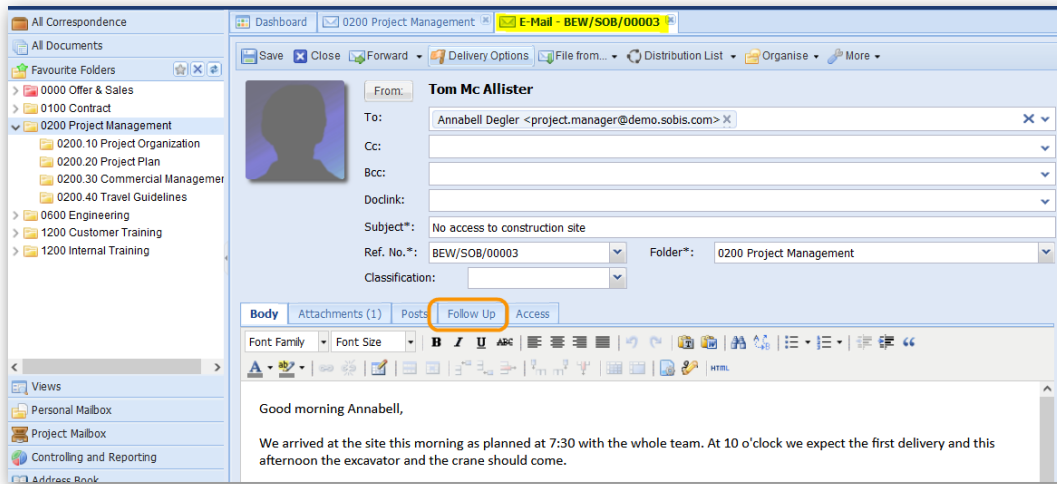
Encryption cycle with PIRS



4.1.10 Correspondence Follow Up

In certain cases, e.g. when receiving an e-mail with an attached invoice or claim or a customer request and so on, it might be important to have a system supported follow up option, which will allow you to define a responsible, a follow up date and maybe also a status.

For these cases we offer the optional follow up tab. This tab can be activated on demand and if required, you can also change label names and/or add additional fields within the tab.



Field values are selected in edit mode and maintained within the PIRS administration.

Don't hesitate to get in touch with your PIRS responsible or the SOBIS service desk to learn more about your options to use custom fields within PIRS correspondence.

4.2 Documents

All Meta Data about a document such as the document number, document title, status or revisions can be stored in PIRS documents together with the respective documents (e.g. technical drawing, specifications, maps etc.). In addition and to prevent any loss of information during the various processes of a project, the original document e.g. a technical drawing can be attached to the each revision of the PIRS document.

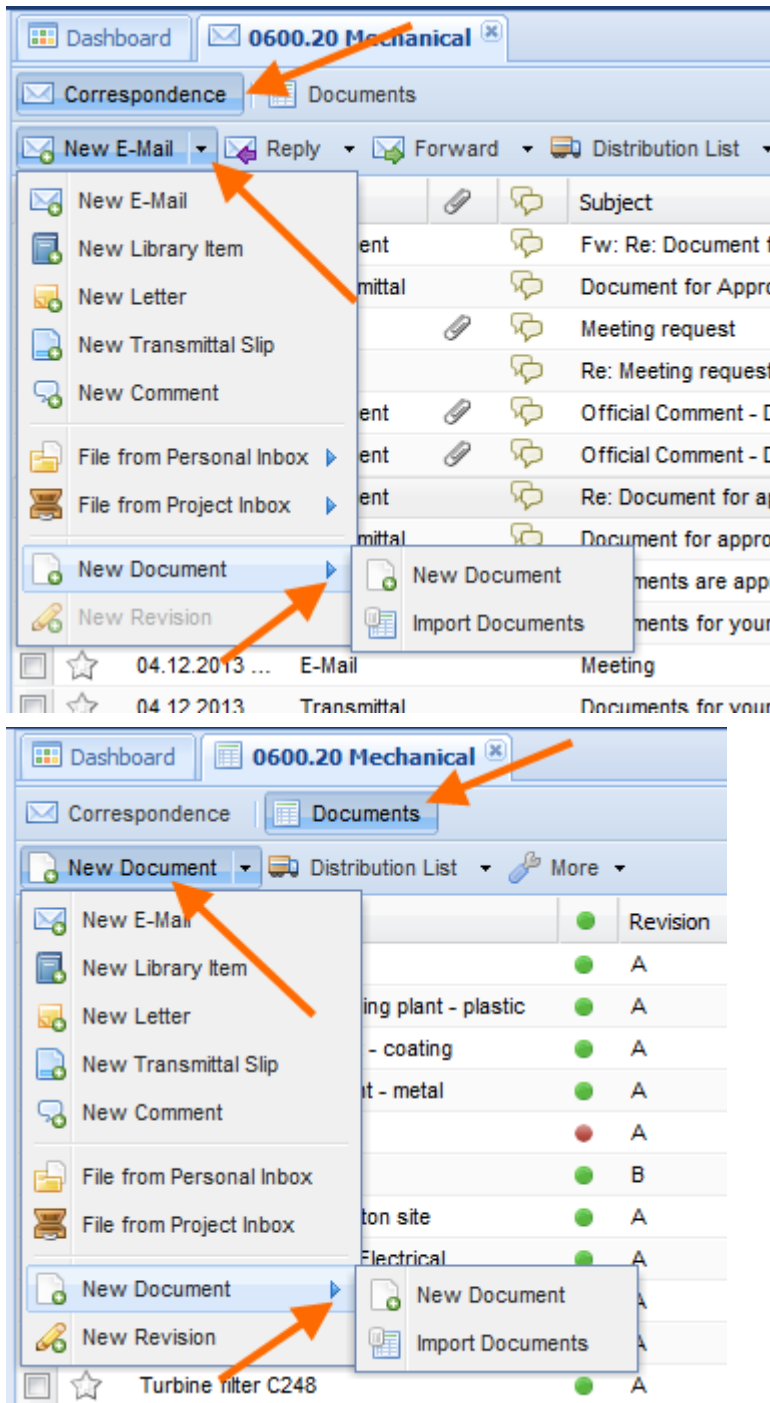
Depending on the kind of document you would like to store within PIRS, you can choose the appropriate document type which is one of the value fields within the PIRS document header. The document types to choose from can be modified and extended by your PIRS

Administrator. Following, the creation process of a PIRS document as well as the transmitting, commenting and revising of PIRS documents will be explained in detail.

4.2.1 Create new document

There are two different options to create a new document depending on the view you are currently working in. If you are currently within a correspondence view e.g. the correspondence view within a certain folder as illustrated in the first image below, you first need to click the small arrow head on the right hand side of the new e-mail action and then select the option "New Document".

Should you however already be working within a documents view you will be able to directly click the "New Document" option as indicated in the second of the following images.



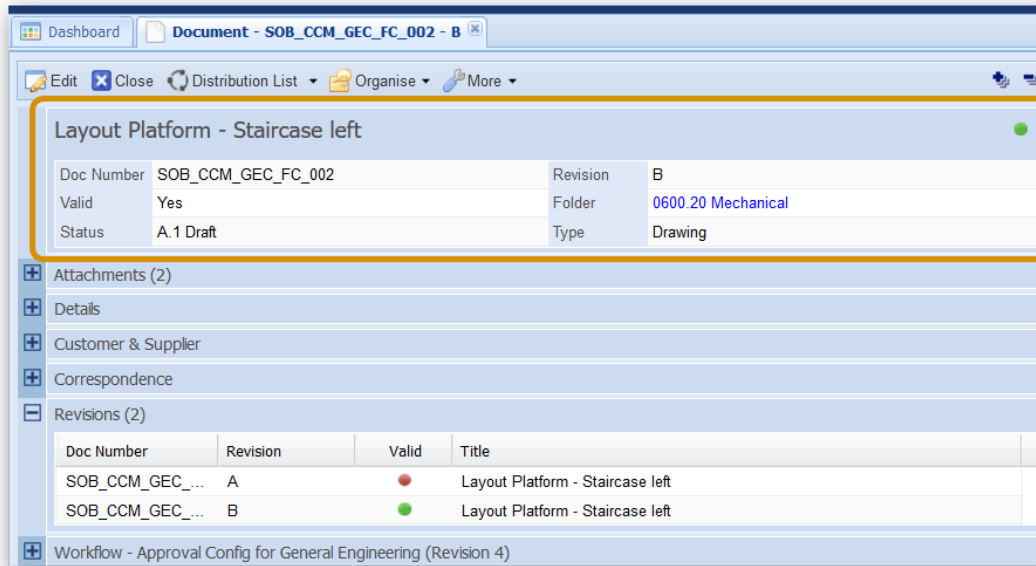
In both cases, you can also choose to upload documents using an excel file. To learn how to upload documents refer to the chapter [Import Documents](#).

4.2.1.1 The document header

The layout of the new document is similar to the layout of correspondence files. The header bears all important general document information such as its title, type and folder while the content tab structured underneath contains all document details. Following table will briefly explain all header fields and their supposed values.

#	Field-Name	Description
1.	Title	The title field allows you to allot a short subject matter to the document that will help to grasp the purpose of a document without having to open its content.
2.	Doc number	Unlike the reference number which is created automatically the document number can be entered manually, chosen from a list that offers company specific code combinations or created with a step by step selection.
3.	Valid	The valid field is set on yes by default since it is most likely that no new document will be created that would already be invalid. Of course the document can be set on invalid at any point, but usually it is custom that a document becomes invalid as soon as a new revision of the document is created. For more information on the validation process of a document and its revisions please refer to the chapter "Create new revision".
4.	Status	Generally a document will pass through various statuses during the course of a project, e.g. "Draft", "Send to customer", "Approved by PM" etc. The number and values of the statuses provided as selection in this field is set by your company and therefore customized to fit your needs.
5.	Revision	It is custom that a document runs through more than one revision. Customers might have change requests or, due to changes in the project, a document might have to be adjusted. To insure that all changes can be traced, tracked and if necessary reversed with each modification a new revision must be created. The numbering (e.g. from 1 to 99) or lettering (e.g. from A to H) standard is also set by your company to reflect your customs.
6.	Folder	As mention in earlier chapters each file stored or created within PIRS must be allocated to a specific folder. In case you have created a new document out of a folder, this folder will be automatically selected as allocation; otherwise you need to select a folder manually.
7.	Type	Similar to the status field the type field value is being provided by your company. The type value will help you categorize the different documents and later also to filter the documents more easily. Type can be for example "Drawing", "Offer", "Order", "Specifications" etc.


Since the document header contains the most important and essential information, its content will be displayed centrally in read mode as well.



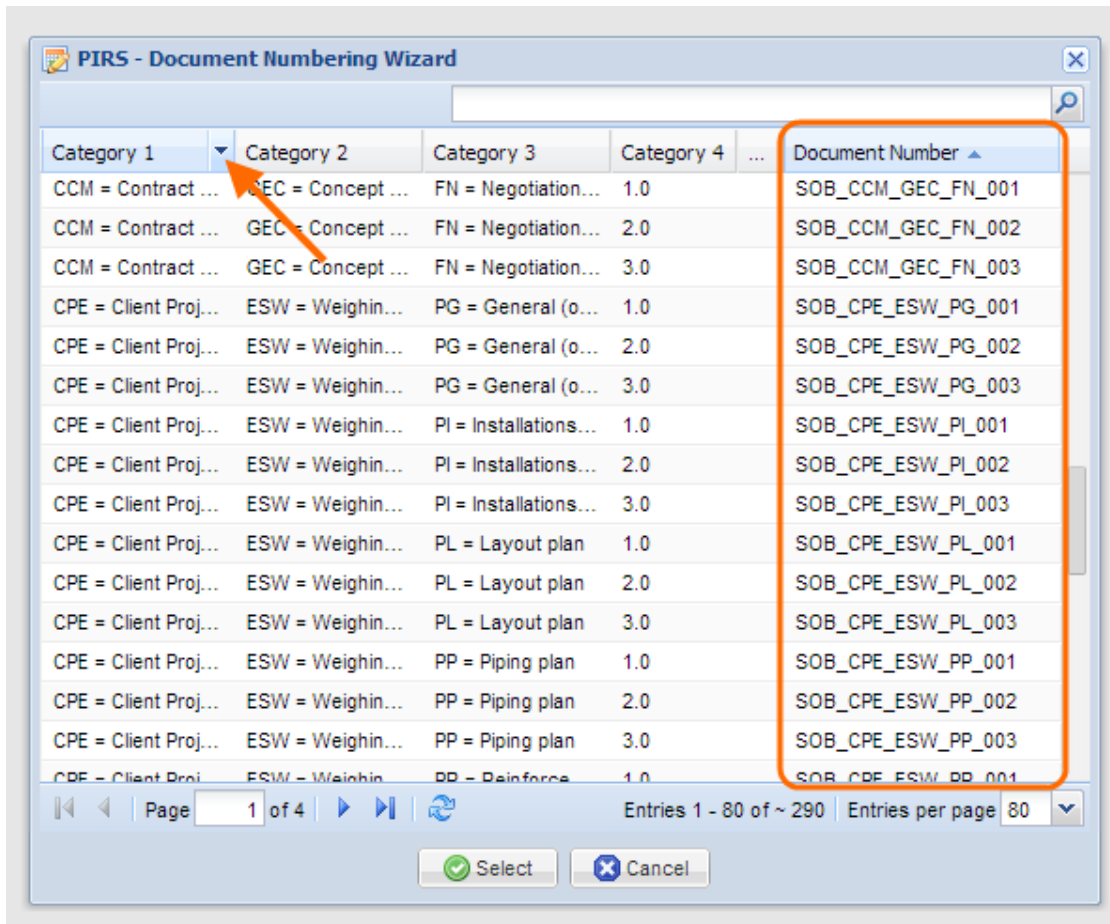
4.2.1.2 Select a document number

As mentioned above PIRS offers different options to select a document number. Depending on the PIRS settings chosen by your company you will either have the option to enter a document number manually, select a document number or have it generated automatically based on other field values that you are required to enter. When entering the number manually you are able to assign a special document number. If you use the PIRS document numbering wizard you can pick a code combination that is predefined as a standard within your company.

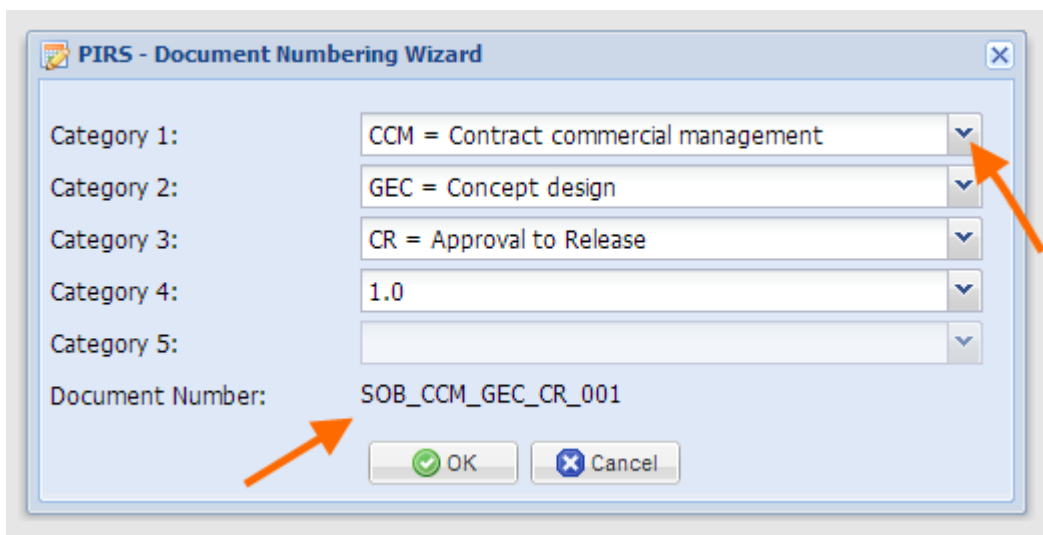
4.2.1.2.1 Select a document number using the Document Numbering Wizard

In order to select a document number click the arrow head symbol . Depending on your company setting one of the two possible selection windows will appear.

The first option will display all code combinations available to you. By clicking the category columns you can sort the content of the respective column and as you can see in the following image, the doc number that will be entered will be presented to you in a preview. The categories are company specific and can represent your different departments, teams, geographical regions etc.



As a second option, the numbering wizard will display the categories as a separate pick lists. Here you can select a value for each category, step by step. The final document number is also shown in a preview.



In both selection options, the Document Number used by the Document Numbering Wizard will be based on the category combination that you select. The number can consist of the code combination indicated by the categories and it is also possible to include a general prefix as displayed in the examples above where the prefix "SOB-" has been set up. But the number could also have no visible connection to the chosen category combination and consist of any

number and/or letter combination used by your company. For both options all available document numbers must be uploaded and stored in PIRS.

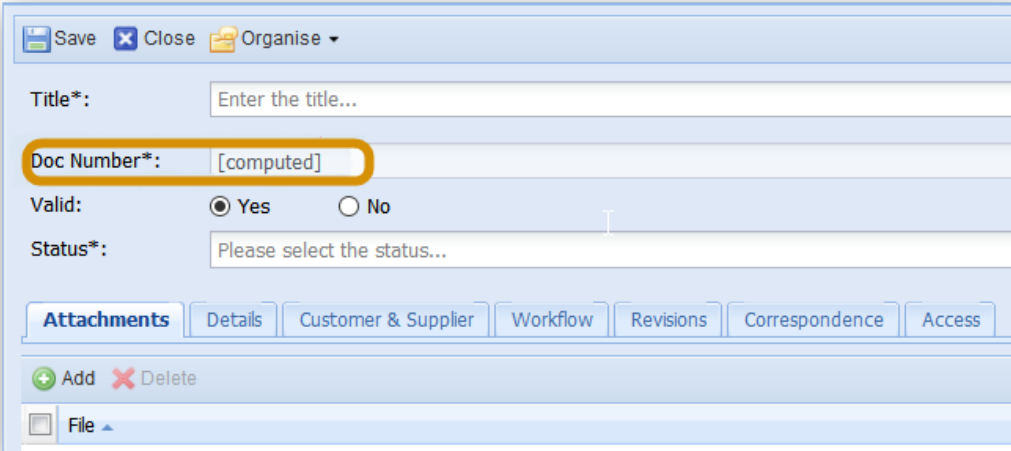
The number of categories offered to choose from depends on your company specific requirements. Should the code combination that you require not be within the displayed options, please contact your project manager or our PIRS service desk.

Furthermore, there is a third option, which is very similar to the step by step selection. Here, you will also pick the categories according to the respected document requirements. The wizard will generate the document number based on the selected categories plus an automatically generated sequential number. For this selection option it is not necessary to store all available document numbers because they are generated according to the category selection and distinguished by the sequential number.

4.2.1.2.2 Generate Automated Document Number

PIRS can generate a document number based on meta information you are required to enter prior to saving a new document.

In case your company has decided to have document numbers generated automatically, the field "Doc Number" will not be editable (regard the following screenshot).



The screenshot shows a software interface for document creation. At the top, there are menu options: 'Save', 'Close', and 'Organise'. Below this, there are several input fields: 'Title*' with a placeholder 'Enter the title...', 'Doc Number*' with the value '[computed]' (highlighted by a yellow border), 'Valid:' with radio buttons for 'Yes' (selected) and 'No', and 'Status*' with a placeholder 'Please select the status...'. Below the form fields is a row of tabs: 'Attachments', 'Details', 'Customer & Supplier', 'Workflow', 'Revisions', 'Correspondence', and 'Access'. At the bottom left, there are 'Add' and 'Delete' buttons, and a 'File' dropdown menu.

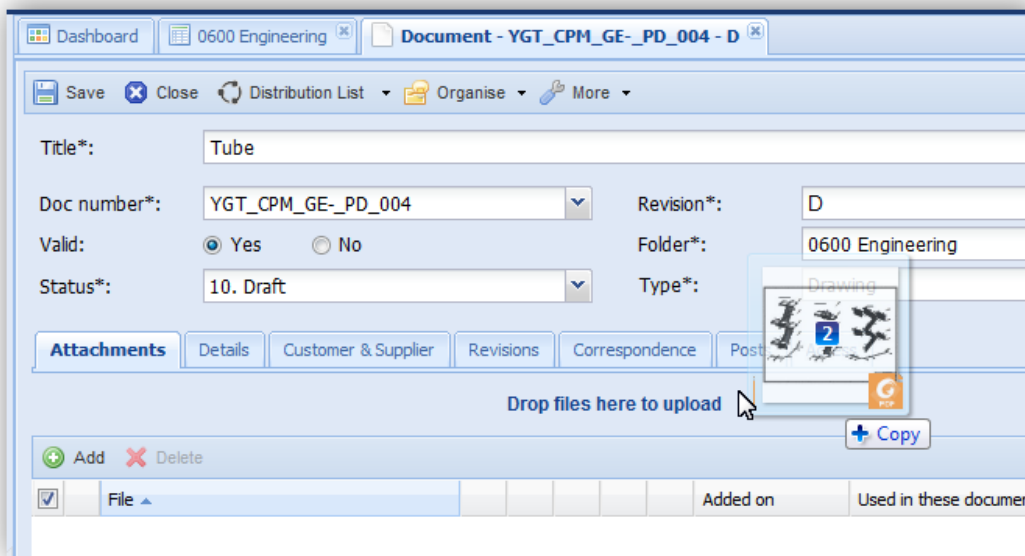
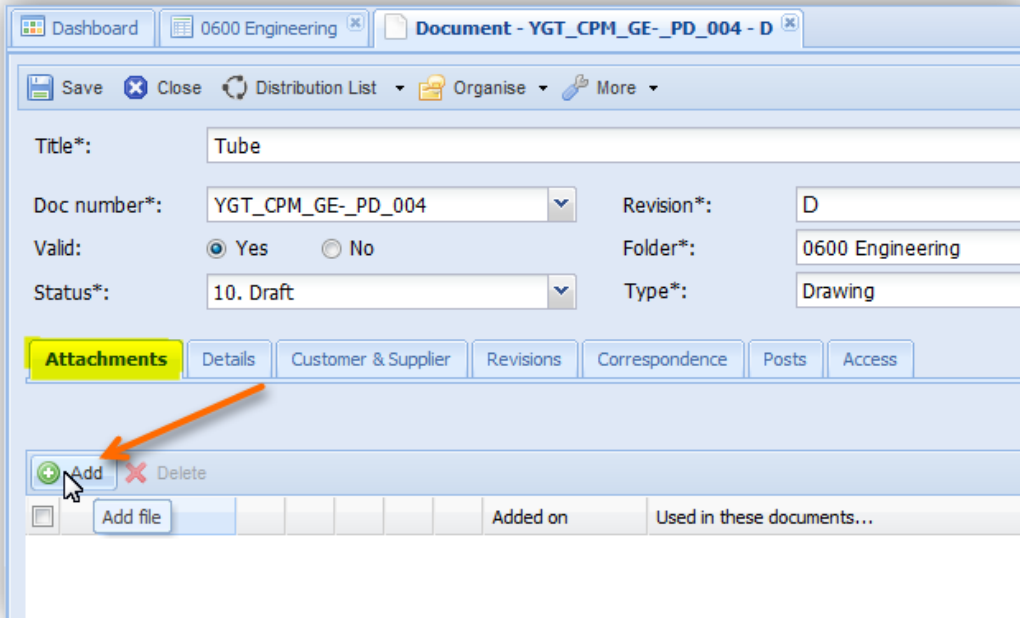
All mandatory fields marked with * symbol need to be filled. Some or all mandatory fields will be used to compute a unique document number.

Once all mandatory fields contain a value, you can save the document. During the saving process the document number will be generated and assigned to your document.

4.2.1.3 The document content

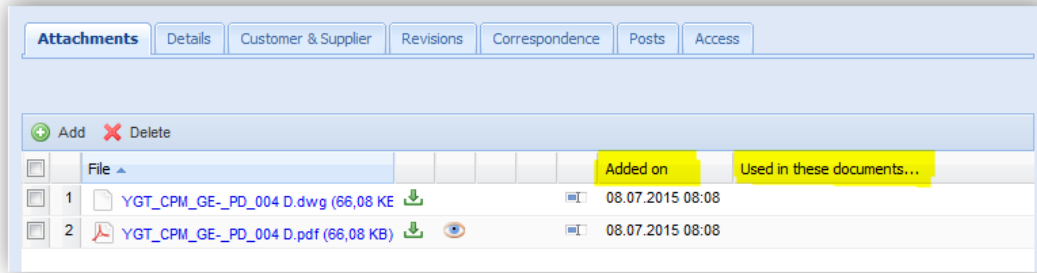
4.2.1.3.1 Upload your files to PIRS

The actual document (e.g. a technical drawing, once in PDF format to send to the customer and once in CAD format to continuously edit the drawing) can be attached to the PIRS document either by using the "add" button in the attachment content tab or via drag and drop.

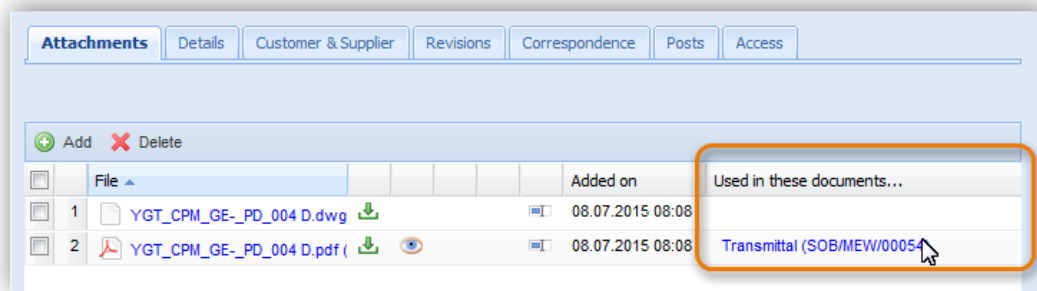


In both cases the selected files will be uploaded to PIRS from your local server or your local PC.

Besides the column "File" that will show the names of the uploaded files there are two more columns that provide you with additional information. The column "Added on" will display the date and time when the individual file was uploaded to this PIRS document (compare with screenshot below).



The column "Used in these documents..." shows you if a file was distributed with a transmittal slip or commented on with a PIRS comment. In case one file was transmitted but the other wasn't the respective transmittal slip will be displayed in only one row.




This additional information allows you to keep track of the individual distribution of each file attached to a PIRS document because it shows all transmittal slips and comments related to each file individually. By clicking on the displayed transmittal it will open in a new PIRS tab.

4.2.1.3.2 Add detailed information

The second tab allows you to enter detailed information about the attached document (compare with the image to the left). None of the fields have to necessarily be filled with a value however. All field descriptions are listed in the following table.

Issue Date:	1.	System:	7.
Total Pages:	2.	Reference:	8.
Format:	3.	WBS:	9.
Language:	4.	Activity ID:	10.
Application Code:	5.	Producer:	11.
Notes:	6.	Responsible:	12.
		Owner:	13.

#	Field name	Description

1. Issue Date	<p>Within this field you can enter the original issue (creation) date of the document attached to the PIRS document. The issue date can but must not necessarily vary from the creation data of the PIRS document. You can either enter the date manually or select it from the calendar that will open</p> <p>as soon as you click the calendar symbol () in the corner of the value field.</p>
2. Total Paper	Here you can enter the number of pages the attached document has.
3. Format	Within this field you can store information about the document format that might be important e.g. in case a project member chooses to print the file and needs to know if the document has a DIN A 4 (the German regular paper standard) or a DIN A 5 format
4. Language	This field lets you enter information about the language in which the document has been composed.
5. Application Code	Here your company can lodge a list of keywords for certain required components e.g. construction components.
6. Notes	The notes field is a free text field which allows you to enter any information that might be of importance to other project members and that is not provided by any of the other fields.
7. System	Similar to the Application Code field, the system field can be used to lodge a list of keywords.
8. Reference	Here also reference keyword lists from your company can be stored for you to choose from.
9. WBS	WBS stands for Work Breakdown Structure. Here you are able to define which WBS should be applied if there are different standards specified in your company or you can enter your own specifications.
10. Activity ID	In this field identification keys e.g. for different sites, locations etc. can be lodged.
11. Producer	The producer is the creator of the attached document. He or she can be internal as well as external depending on the type of document and your company's internal and external structure.
12. Responsible	The responsible is the internal project member who has to approve the document and insure its quality as well as its flawlessness.
13. Owner	The owner of the document represents the interface to external parties. He is responsible for the quality and flawlessness of the document towards the customer/supplier/partner.

4.2.1.3.3 Document Follow up information

The third tab allows you to handle, process and store follow up customer and supplier information, which is especially interesting for the controlling department and the top management since based on its information, performances can be evaluated.

#	Field name	Description
1.	Customer / Supplier	Within this value field you can select your customer / supplier who will receive / provide the technical document form the project address book.
2.	Doc number	Your customers/suppliers document number is seldom the same that your company uses. But since your customer/supplier will be more likely to refer to documents using his own numbering system, these fields enable you to also store customer and supplier document numbers. It therefore becomes possible to search a document by its customer/supplier number if necessary.
3.	Revision	A document that is marked as revision A within your company can easily be stored by your customers/suppliers under a different revision or using another numbering system. To keep track on your customers/suppliers development PIRS also allows you to follow your customer and suppliers revisions.
4.	Status	Similar to the revision, the status of a document may vary out of the respective of your customers/suppliers. A document listed within PIRS in the status "Send to customer" might for example be listed still as a "Draft" or your customer/suppliers might work with a different number and values of statuses. This field lets you follow your customer/suppliers activities.
5.	Category	Within the category field a list of values or keywords matching e.g. your customer/suppliers internal department structure or their document types, can be lodged and displayed in the option list.
6.	Scheduled Submission Date	This field enables you to enter the date when you have to transmit the technical document to your customer/supplier.
7.	Penalty	The Penalty field shows if according to your contract with the customer/supplier a penalty is to be expected.
8.	Notes	Similar to any other "Notes" field you are able to enter any additional information about customer/supplier settings that were not addressed with the fields above.

4.2.1.3.4 Document Revisions and Correspondence tab

The revisions tab will present you with a list of all the existing revisions for this document which can also be accessed out of this tab. If a document has just been created there are not yet any other revisions listed, but a newly created revision document will be visible within this view as soon as you save the file. For more information on revisions please refer to [Create new revision](#).

The correspondence tab will show you correspondence files like transmittal slips and comments that have been sent and that are linked to this document. Since this exemplary document has not yet been send via transmittal slip this tab would be empty at this point. In the following [chapter](#) however, all the steps of creating a transmittal slip to send documents will be explained in detail and at that point the correspondence tab functions will also be presented. For information on the setting of access rights available in the last content tab please refer to [Manage access rights](#).

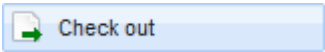
4.2.2 Check-out & check-in

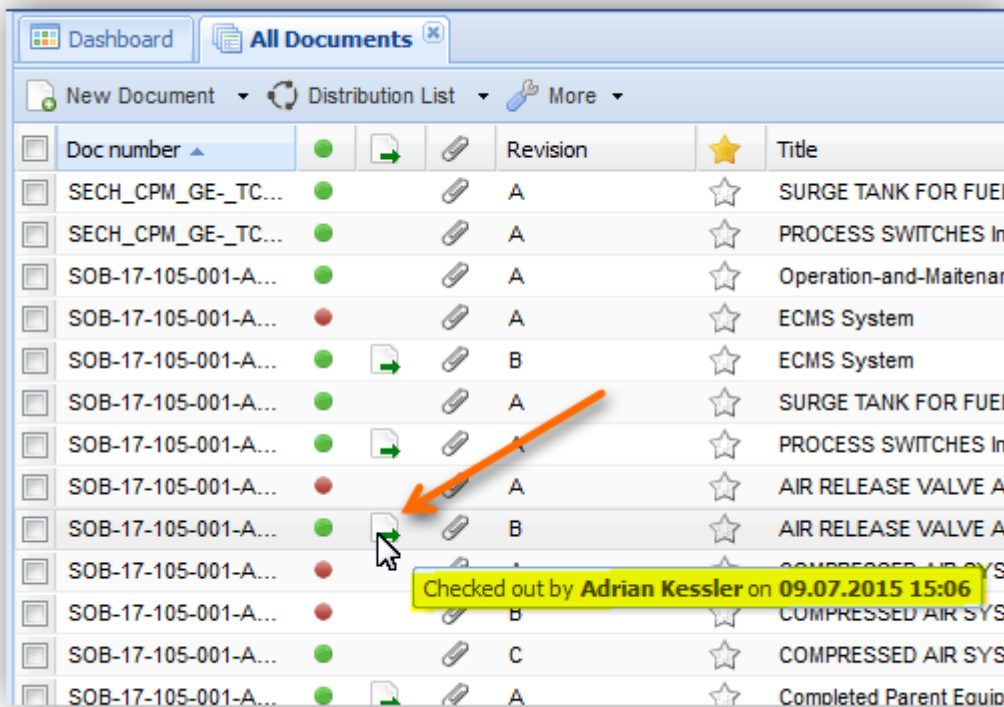
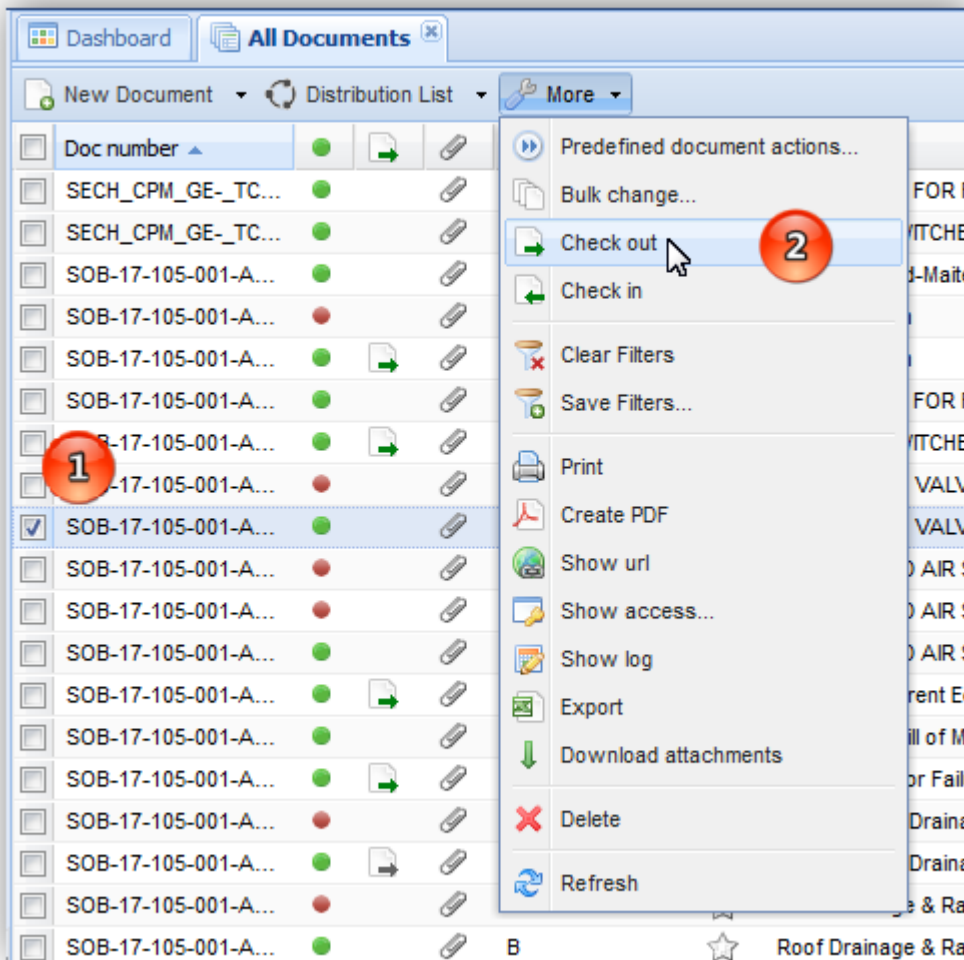
Document check-out and check-in is a feature that allows you to block documents you are currently working on, in order to prevent other team members from making chances to these documents while you are editing them.

There are two different ways to check out a document. Given that you have editor rights to the document you like to check out, you can either check out the document:

- from within a document view
- or directly within the opened document


4.2.2.1 Check out/in a document from within a view

To check out a document from within a view, first select the document you wish to check out, then open the "More" options and select .



Once you have checked out a document it will be frozen and cannot be edited by other team members. All documents that are checked out, are marked with the "check-out" symbol within the view. If you like to know who checked out a document and since when it is blocked hover with your cursor over the "checked-out" symbol.

To unblock the document, first select the document within the view, then open the "More"

options and select .

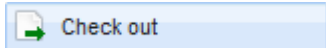
Tipp

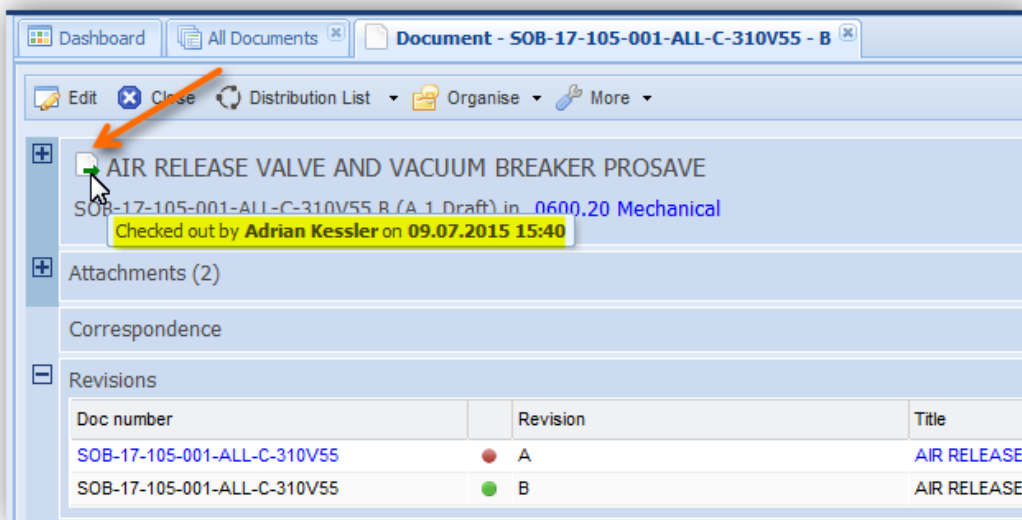
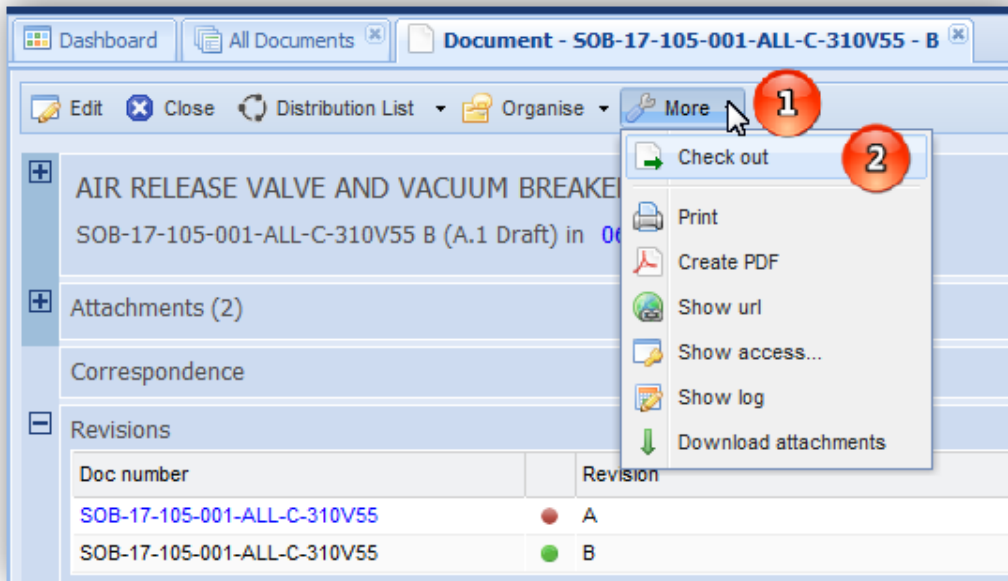
You can also mark several documents in one go and check in/out multiple documents at once!

4.2.2.2 Check out/in a document directly within a document

Documents can be checked out and checked regardless whether you have opened them in read mode or in edit mode.

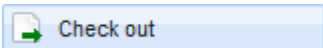
To check out an open document first open the "More" options, then click





After selecting the document check out option, the document will be frozen and cannot be edited by other team members. To indicate that the document is blocked by a user, the "check-out" symbol will be displayed when it is opened in read mode. When hovering your cursor over the symbol, PIRS will inform you who checked out the document and when it was check out.

In order to allow your team members to edit the document again, first open the "More" options,

then click .

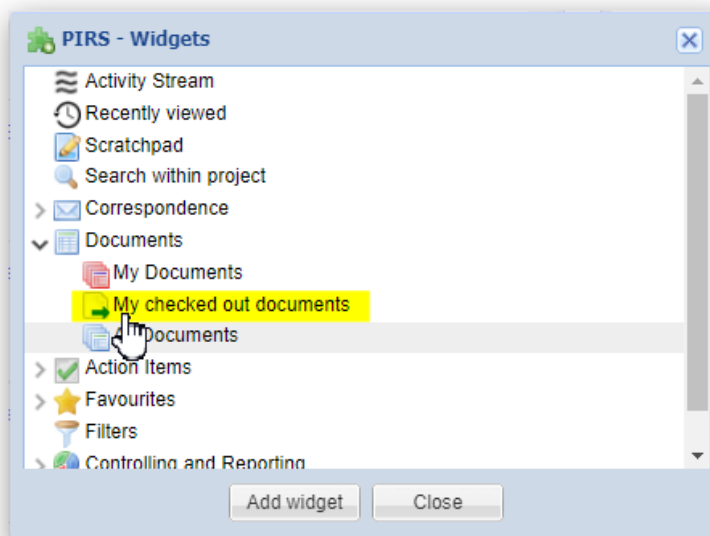
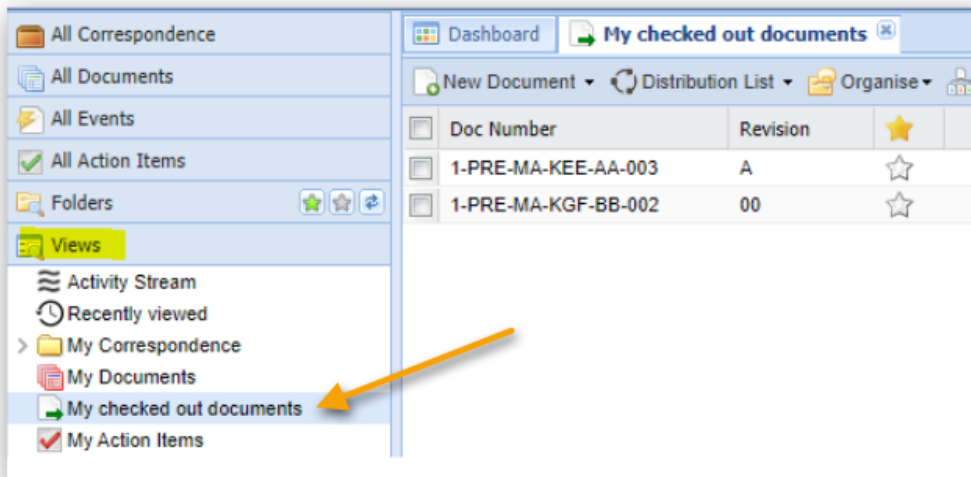
Access Rights

All team members can check-out documents to which they have at least editor access.

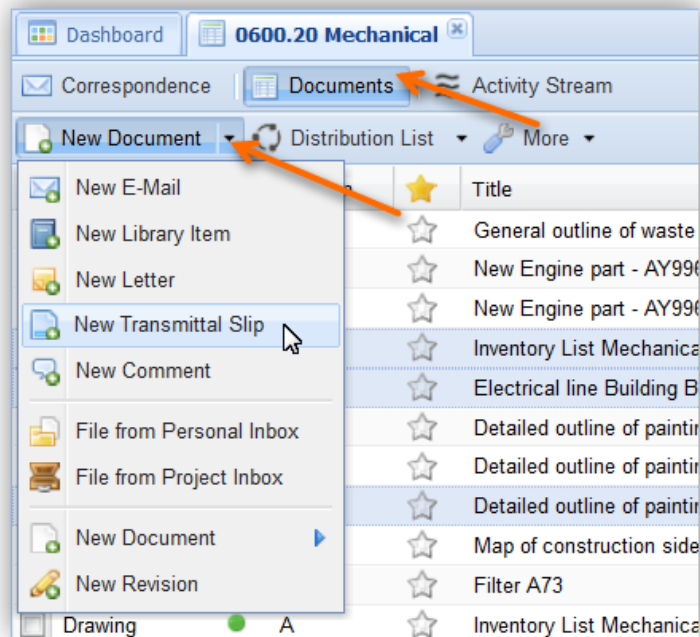
Project managers can check-out all documents. In addition they can also check-in documents of other team members. So should a document for example be blocked by a team member who is currently not available because he is away on a business trip or on vacation, your project manager can remove the block by checking in the document. All document check out and check in are documented in the document log which can be access from within your "More" options.

4.2.2.3 View "My Checked-out Documents"

To access and follow up on all your currently checked out documents, you can open the view "My check-out documents" that is always available to you within the widget selection of your dashboard. This view can also be added to the view section. Please contact your PIRS responsible or service desk in case the view is missing and you would like to have it displayed within the views.



4.2.3 Submit documents - Transmittal Slip



In order to distribute document(s) or new revision(s) to your customers, suppliers, partners or co-workers, PIRS offers a special form of correspondence document called transmittal slip.

A transmittal slip provides you with many document specific features which allow you to better maintain, monitor and process documents in collaboration with your team, throughout the course of a project.

Following the different options of creating a transmittal slip and the features it offers will be explained.

There are three options to create a TS:

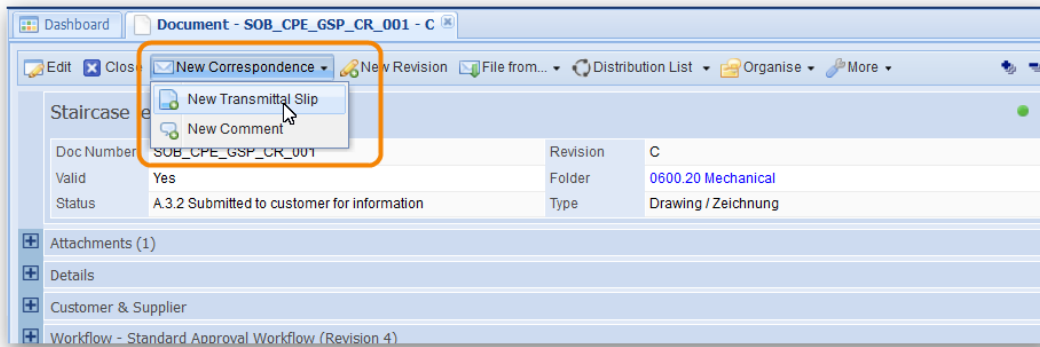
- Create it out of a view from scratch using the "New..." actions
- Create it directly out of a document opened in read mode
- Create it out of a view using a template

Option 1:

First, mark the document(s) that you wish to send in a document view, then click the "New Transmittal Slip" option which is presented to you as soon as you click the arrow head in the corner of the "New Document" button, highlighted in the screenshot to the right.

Option 2:

Select the action "New Correspondence" listed in your document action bar and click "New Transmittal Slip" as shown in the screenshot below.

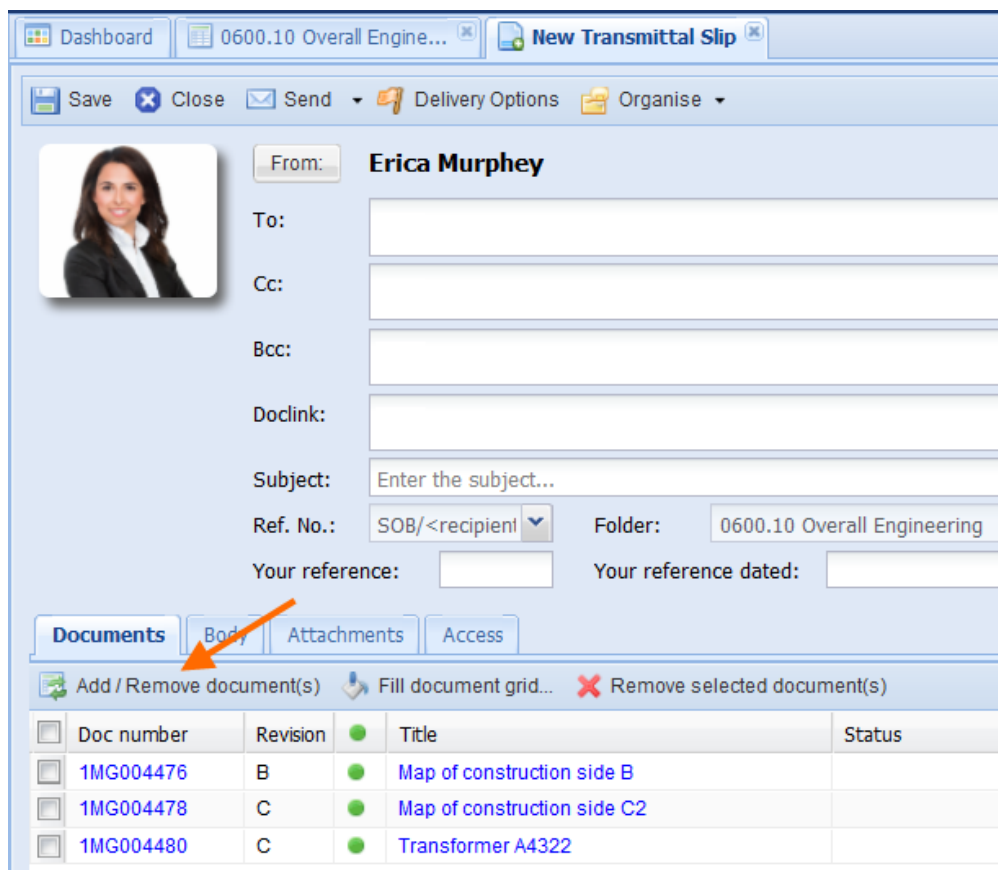


Please be aware that this action will only be available in documents open in **read mode**, but not in edit mode.

Option 3:

If it has been set up for your project, you can also use a template to create a transmittal slip. To learn more about this option, please refer to the chapter [Predefined Document Actions](#).

4.2.3.1 Adjust documents within TS

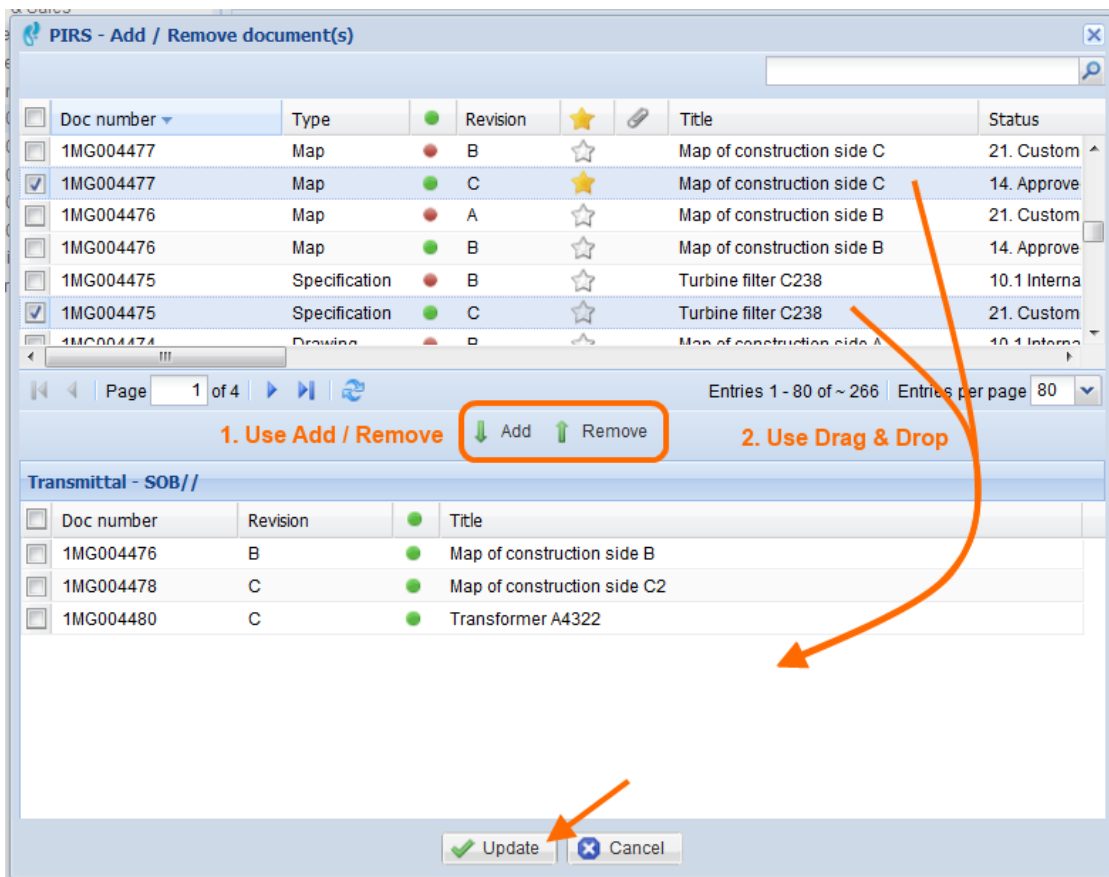


A new transmittal slip that follows the same layout principals as the above introduced correspondence files will open in a PIRS new tab.

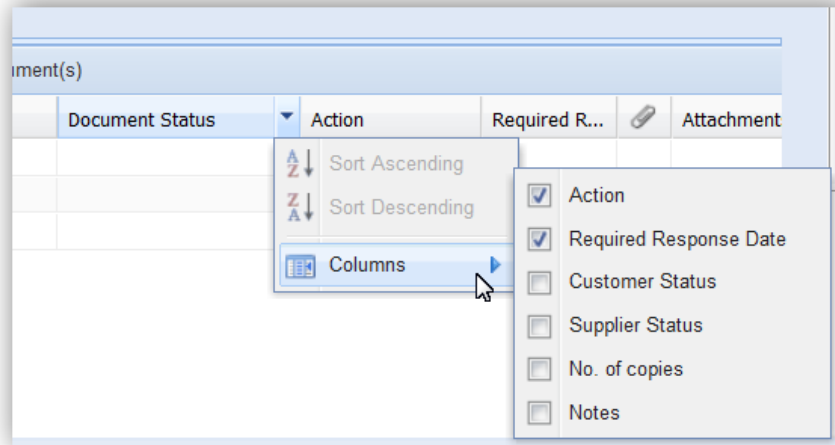
As illustrated by the image, the previously selected document(s) are already attached to the new correspondence file. In case you missed to select all documents that you wish to send with this transmittal slip PIRS enables you to adjust the document list in a separate selection window which will open as soon as you click .

As indicated in the following screenshot, the document selection window lets you adjust your attached documents to fit your needs. You can either move files from one window to the other via drag and drop or mark them in one window and then transfer them to the other using the green arrows between the two windows.

In order to search the right files you are also able to use filters which are provided within this selection window just as they are in all other views. After you have selected exactly the documents you need to transmit, click . The newly added files will be inserted into your document attachments.

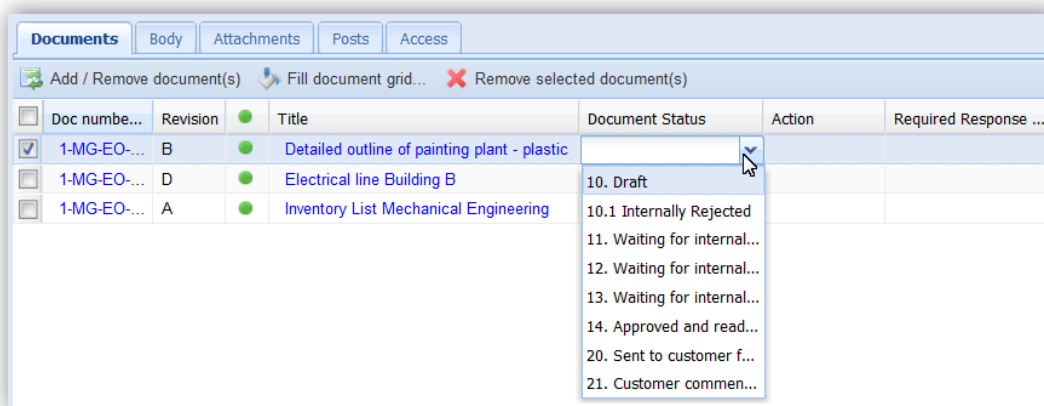


4.2.3.2 Select additional document information and files



Besides the columns "Doc number", "Revision", "Valid" and "Title", by default there are four more columns in the table of the document tab. In addition, you have the opportunity to add more columns that might be important for you (compare with screenshot).

The additional columns coincide with field values in the linked documents and will automatically be adjusted to fit the new values which you set within the transmittal slip. For example if a draft document has been approved internally the status of the individual document can be adjusted within the transmittal slip. The status of the document within PIRS will be changed to meet the new adjustments as soon as the transmittal slip is saved or sent. Furthermore, a new "Action" e.g. "For Approval" by the customer and the expected respond date can be set.



Files attached to PIRS documents

Please be aware that by default none of the attachments stored within a PIRS document will be included and have to be selected manually. This is especially useful if you generally don't plan to send all attached files of a document e.g. if you by default store a technical drawing as PDF as well as CAD file but you only wish to transmit PDF files to

the customer, this feature insures that you personally select exactly those attachments that are supposed to reach the recipient. (Compare the following two screenshots.)

Revision	Title	Document Status	Action	Required Response ...	Attachments
A	Inventory List Mechanical Engineering	20. Sent to customer ...	For Approval	22.07.2015	YGT_CPM_PD_004.pdf
B	Detailed outline of painting plant - plastic	20. Sent to customer ...	For Approval	22.07.2015	YGT_CPM_PD_004.dwg
D	Electrical line Building B				YGT_CPM_PD_004.pdf

In case you have not selected at least one file per document, PIRS will ensure that this was done on purpose. A quick check message asking you whether or not you want to send the transmittal slip even though one or more documents will be sent without any files attached.

From: Erica Murphey

To: Ali Farrad <customer@demo.sobis.com>

Subject: ...

Ref. No.*: ...

Your reference: ...

Documents

Doc numbe...	Revision	Title	Document Status	Action	Required Response ...	Attachments
1-MG-EO-...	B	Detailed outline of painting plant - plastic	20. Sent to customer ...	For Approval	22.07.2015	
1-MG-EO-...	D	Electrical line Building B	20. Sent to customer ...	For Approval	22.07.2015	
1-MG-EO-...	A	Inventory List Mechanical Engineering	20. Sent to customer ...	For Approval	22.07.2015	

Should you want to go back to the TS and select additional files before sending it click "No".

4.2.3.3 Fill grid for all documents

PIRS also offers the possibility to enter grid information for more than one document at the same time. Simply select all the documents that will receive the same grid values in the document table and then click the Fill document grid... action. A new pop up window will open where you can choose to update or clear different document grid values.

As soon as you click the "Set Values" button, all new information will be added to the grid within the transmittal slip. After saving or sending the transmittal slip the values will be inserted into the according PIRS documents as well.

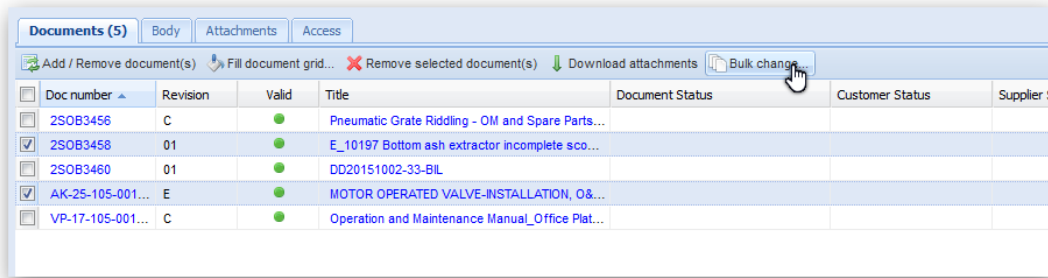
4.2.3.4 Download attachments

In order to extract all or certain files attached to documents that are sent with a transmittal, you are able to use the **Download attachments** button. Simply select the documents in question and click on the button. PIRS will start the download as a zip file. To learn more about the attachment download refer to [Download Attachments](#).

Doc number	Revision	Valid	Title	Document Status	Customer Status	Supplier Status
2SOB3456	C	●	Pneumatic Grate Riddling - OM and Spare Parts...			
2SOB3458	01	●	E_10197 Bottom ash extractor incomplete sco...			
2SOB3460	01	●	DD20151002-33-BIL			
AK-25-105-001...	E	●	MOTOR OPERATED VALVE-INSTALLATION, O&...			
VP-17-105-001...	C	●	Operation and Maintenance Manual_Office Plat...			

4.2.3.5 Bulk Change

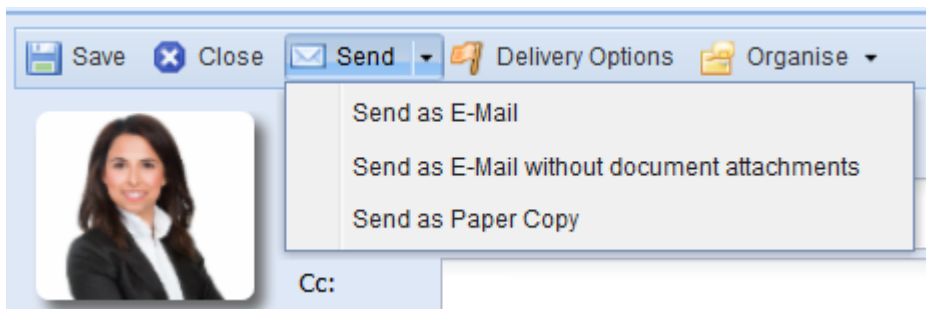
The **Bulk change...** button offers you the option a edit meta information such as document responsible, issue date, document type etc. of all listed documents in one go. Select the documents in question and start the edit process by click the button as indicated below. To learn more about the bulk change process refer to [Bulk Change](#).



4.2.3.6 Body, attachment and access tab

The tabs "Body", "Attachment" and "Access" resemble the respective fields of the regular email document. Any message that should be transmitted together with the selected documents, should be entered in the body field. If you need to include further attachments that are not stored within a PIRS document this can be done within the attachment tab. All access rights can be adjusted and modified within the access tab.

4.2.3.7 Transmittal Slip send options



As sending options PIRS enables you to choose between e-mail, paper copy and sending without document attachments. In all three cases a PDF file containing all entered transmittal slip data will be created. Should you choose to send the transmittal slip as e-mail, the PDF file will be attached to the email alongside with a zip file that will contain the selected attachments of the included documents. Furthermore the entered body text will appear in the body of the email together with the content of the document table. The familiar blue PIRS box offering different links to the transmittal slip within the application is attached on top of the email. (Compare with the image below.)

As a second option, you are able to send the transmittal slip without actually including the attachments of your selected PIRS documents. The email will contain the PDF of the transmittal slip as well as the blue box and the text you entered in the body field. Furthermore any attachments that were added to the transmittal slip will be included in the email. However, all files attached to the documents you are sending with the transmittal slip will not be transferred as zip file.

In case you choose to send the transmittal slip as paper copy together with the necessary documents in paper form, PIRS creates and automatically opens the document as PDF file according to your selected company template. The PDF file can then be printed and sent to the recipients as hard copies.

For all three options, the transmittal slip will be stored within PIRS.

Please be aware that in order to insure revision and document control, all attached files of a PIRS document are frozen as soon as a transmittal slip has been sent. After a document has been transmitted therefore the meta data can still be adjusted but the document file (e.g. a PDF or CAD file) cannot be changed anymore.

Kuantan SOB/MEW/00001: Documents for your approval

Annabell Degler <annabell.degler@sobis.com> im Auftrag von Erica Murphey <engineer@demo.sobis.com>

Gesendet: Mo 02.12.2013 14:05

An: Ali Farrad

 Nachricht  SOB-MEW-00001.zip (238 KB)  SOB-MEW-00001.pdf (4 KB)

Erica Murphey - SOBIS Software GmbH - E-Mail: engineer@demo.sobis.com - Phone: +49 621 329 1228 5600 - Mobile: +49 621 329 1228 5600

PIRS Actions: [Open](#) | [Reply](#) | [Forward](#)

Dear Mr Farrad,

please find enclosed the documents for approval. Please send us your comments until the defined required response date.

Best regards,

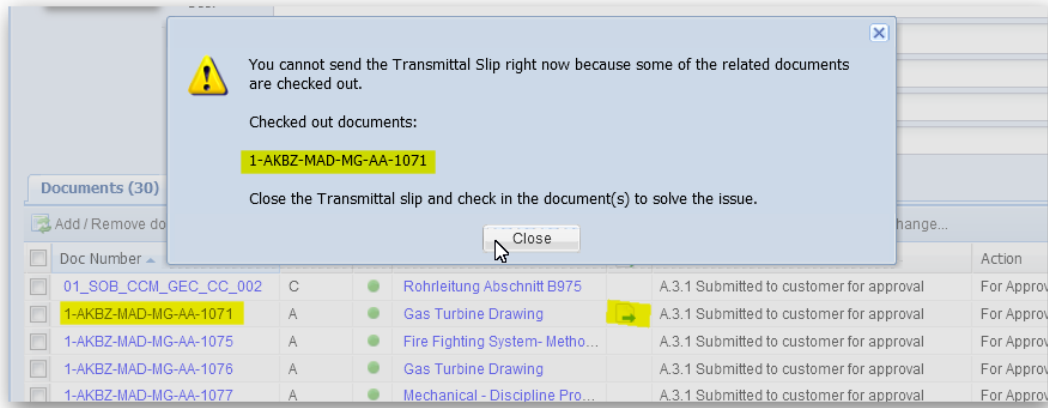
Erica Murphey

Doc Number	Title	Action	Date	Files
SOB-17-105-001-ALL-C-310V62	Ground Floor Drainage & Rain Water Piping Layout	For Approval	16.12.2013	
SOB-17-105-001-ALL-C-310V63	Roof Drainage & Rain Water Piping Layout	For Approval	16.12.2013	
SOB-17-105-001-ALL-C-310V64	Ground Floor Water Supply Layout	For Approval	16.12.2013	

4.2.3.8 What happens if a document has not received final approval

If one or more documents that you are sending via transmittal slip have not received the final approval, meaning the approval workflow has not been completed or have been rejected, the transmittal can not be sent.

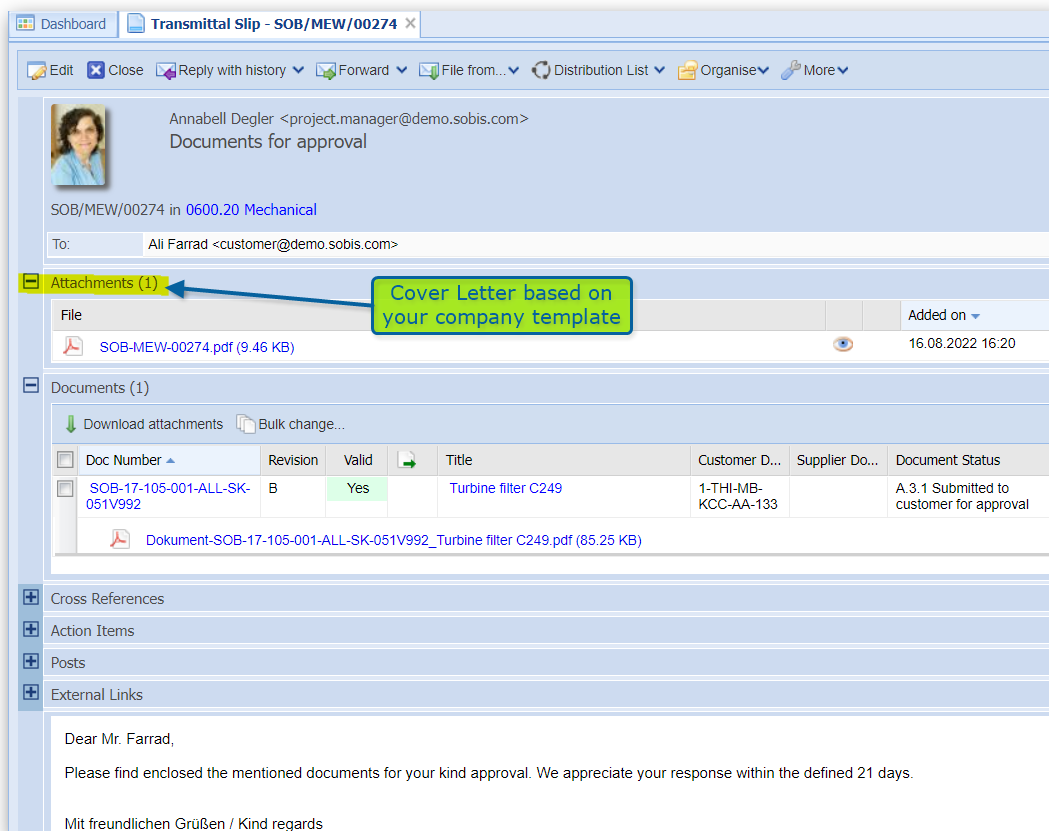
In this case you will receive a notification informing you about the issue including a list of all documents that can currently not be sent due to missing approvals.



You can now use the list to quickly find, filter and remove the documents in question or, in case you have the necessary access rights complete the workflow.

4.2.3.9 Cover Letter

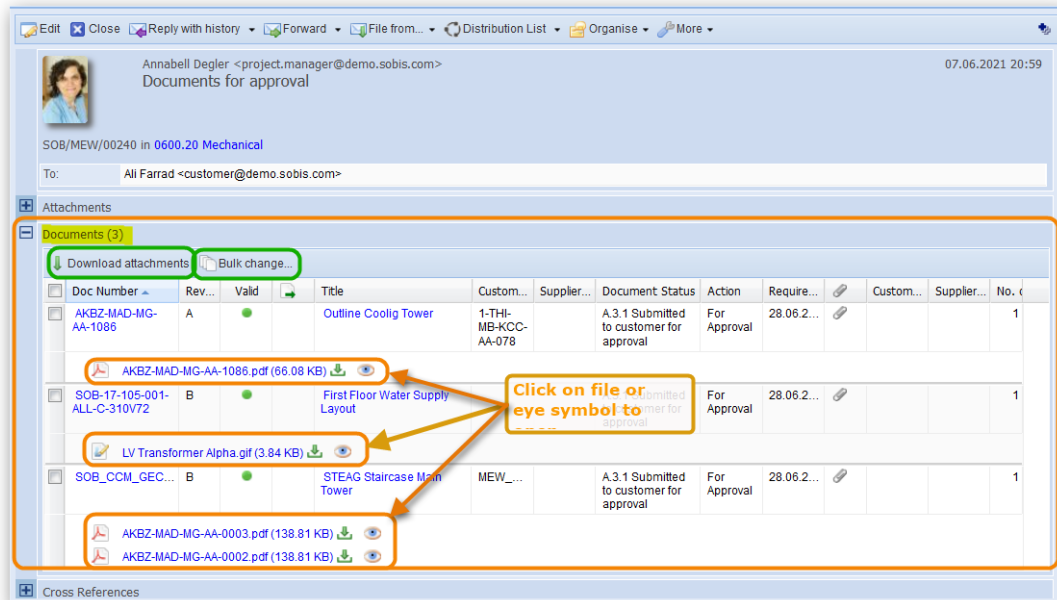
PIRS will automatically create a cover letter based on your company template. The pdf file will be attached to your transmittal and sent to the recipient together with the included document files. The cover letter is also stored in your transmittal in PIRS (see screenshot).



4.2.4 Receive/Access Transmittal Slips

Sent or received Transmittal Slips (TS) in PIRS have a section which lists all the PIRS documents that were sent with the TS.

To allow for a quick access to the sent files of the attached meta documents the section also contains all the files that were actually sent via this particular TS.



Simply click the file to download and open the file or use the eye symbol to open the file within the PIRS file viewer.

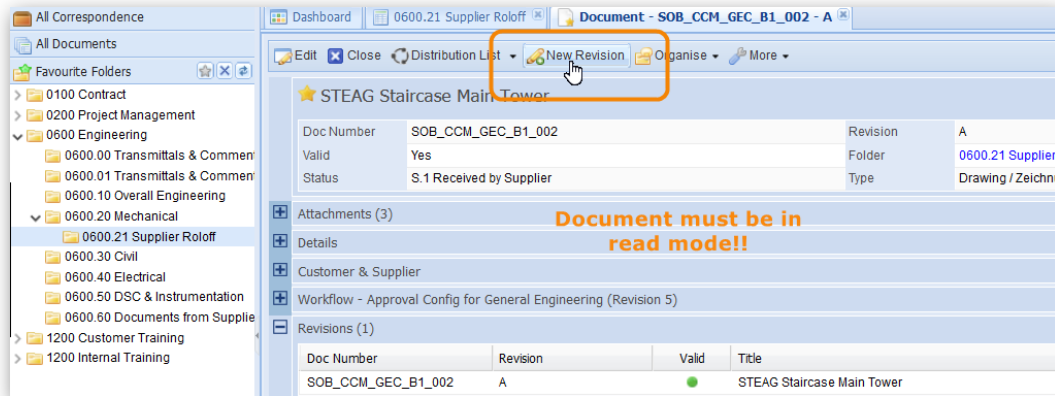
You are also able to download the files of the sent documents using the "Download attachments" option. Simply select the documents for which you would like to download the sent files then click the "Download attachments" action. Please keep in mind that only the files that were actually sent via this TS will be included in the download. The actual meta documents might list more files.

In addition you can also use a sent TS to adjust the meta data on the sent documents using the "Bulk change" option. To learn more about the bulk change feature refer to chapter [Bulk Change](#).

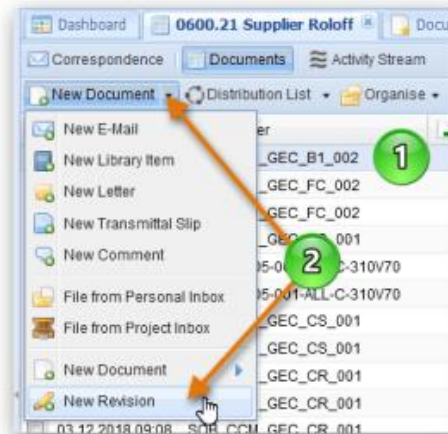
4.2.5 Create new revision

There are two options to create a new revision:

1. You can create a new revision directly within the document itself. Please be aware that it needs to be opened in read mode. Otherwise the "New Revision" action will not be available within the document tool bar as shown in below screenshot.



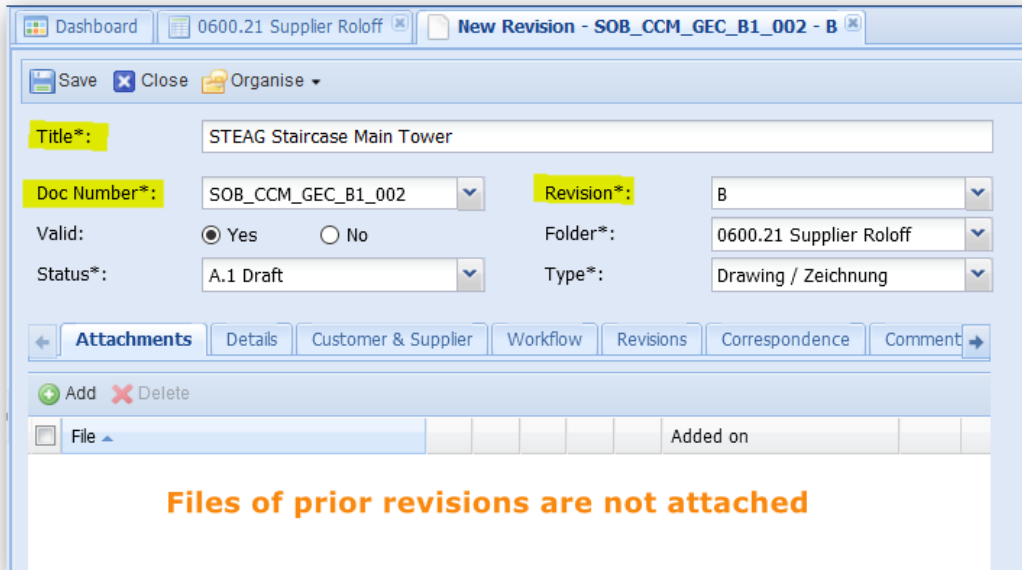
2. You c



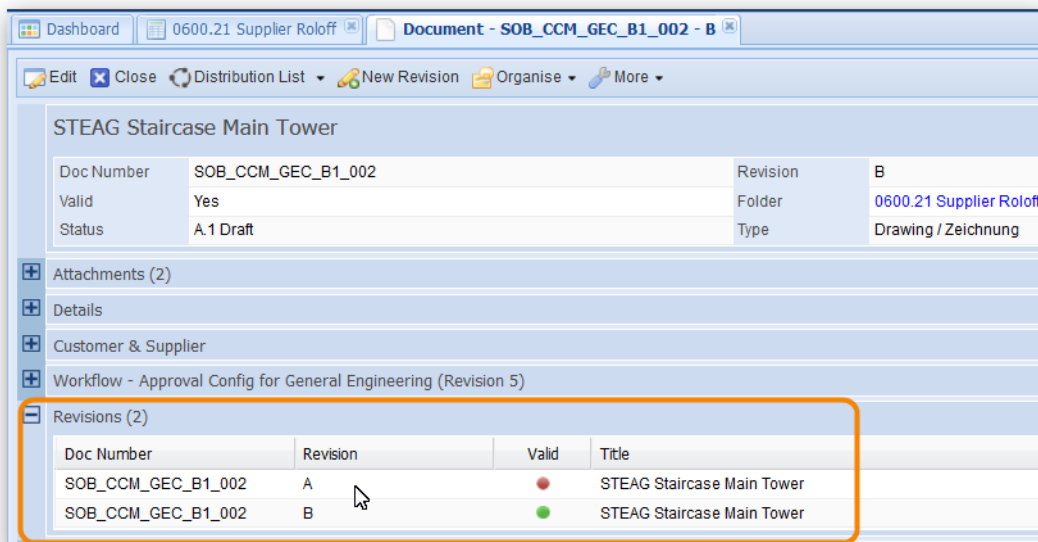
an mark the document that you would like to revise within your folder or view grid, then click the "New Revision" option which is listed in the selection options of the "New Document" action in your action bar. Compare with the screenshot to the right.

A new document will be created that automatically has the same title and document number as the document, that you created the revision for. The content fields will be empty initially, allowing you to upload the latest document versions. The revision will be automatically incremented. In case your original document was listed as revision A, the new revision document will be created as revision B. (Compare with the screenshot below.)

The document status can also be transferred from the former revision. Alternatively the status can either be left empty or set to the default value assigned to newly created documents.

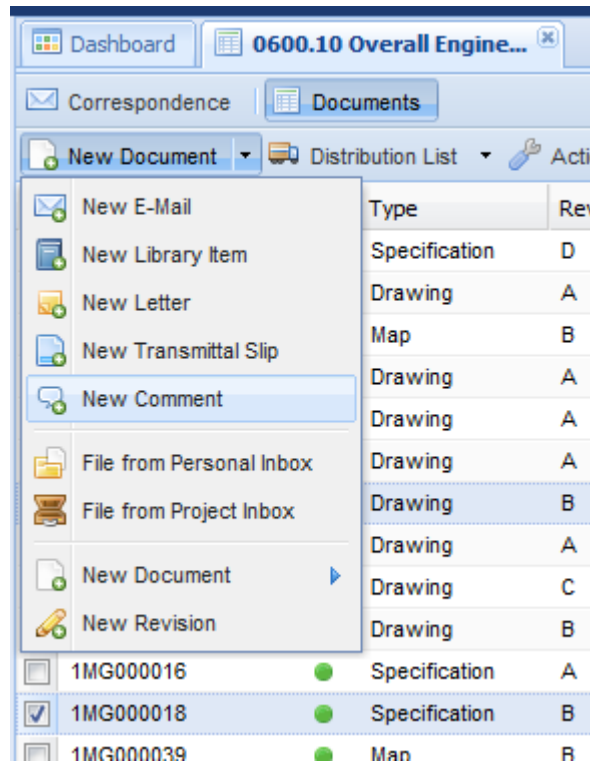


Please be aware that there can only be one valid document with the same document number. Since each new revision will automatically be marked as valid, PIRS will ask you to confirm that the new revision is supposed to be the valid one. The prior revision will be changed to invalid as soon as you proceed to save the new revision as valid document.



Both documents, the new revision as well as the original document are linked with each other and as illustrated by the screenshot; either document can be opened out of the other. This feature enables you to closely monitor the development of documents throughout the course of the project and at all times know the status and latest revision of all documents.

4.2.6 Create an internal or file external comments



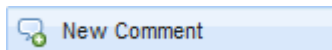
In PIRS you are always able to create comments for one or for multiple documents. The Comment allows you to make notes, remarks and documentations concerning one or multiple documents. It can be used to document internal comments or it can be a canvas to record external comments made by the customer or the supplier.

There are three options how you can create a new comment within PIRS:

- Create a new comment using the "New..." action in your view action bar
- Create a new comment from within a document opened in read mode
- Create a new comment using a template

Option 1:

First, select the document(s) in question within your view, then click the action



listed in your "New..." options.

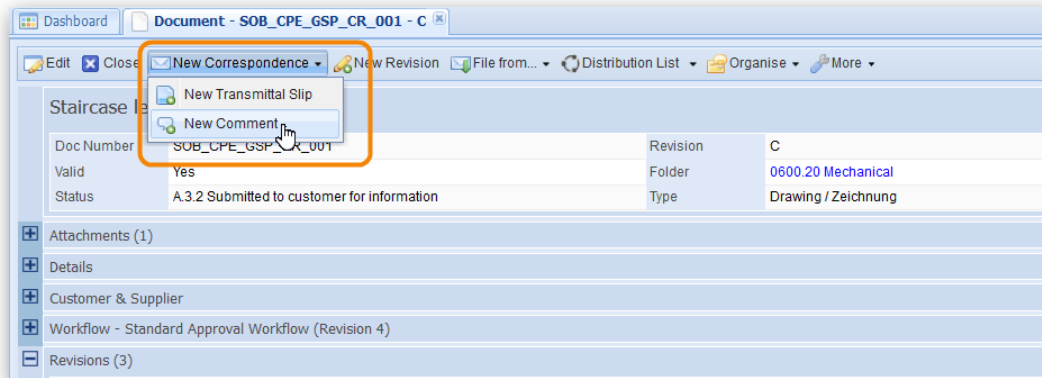
The new, empty Comment opens in a new tab. The selected documents are already linked and listed within the Document(s) tab.

Proceed to enter field values for the linked documents according to your specifications, upload your remarks as a file within the attachments tab and/or write your comments in the text field area.

Please keep in mind, the Comment behaves like an e-mail and needs a recipient, a subject and a reference number to be sent.

Option 2:

Select the action "New Correspondence" listed in your document action bar and click "New Comment" as shown in the screenshot below.



Please be aware that this action will only be available in documents open in read mode, but not in edit mode.


Option 3:

If it has been set up for your project, you can also use a template to create a comment. To learn more about this option, please refer to the chapter [Predefined Document Actions](#).

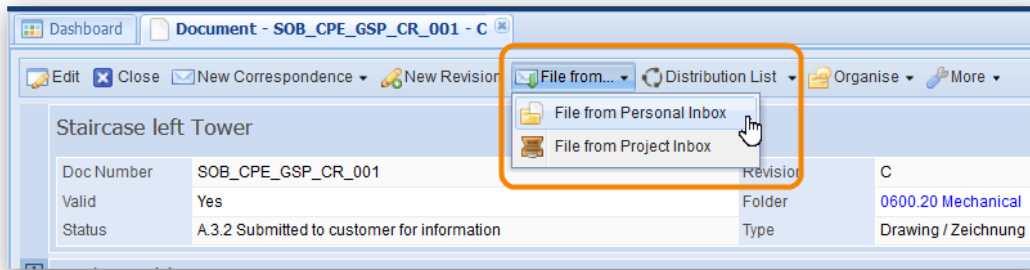
File an email as customer comment

If your customers/suppliers replies to transmittal slips via email out of their company mail accounts instead of using the PIRS Portal, the comment will not be stored within PIRS automatically. To insure that all information is available to all project members, comments sent to your private or project mailbox must be filed as such within PIRS. The process of filing a customer/supplier comment is very similar to the above described process of filing emails from your personal/project mailbox (refer to [File incoming emails](#).)

In order to file an email as a comment form your personal mailbox you first need to select the

option  **File from Personal Inbox** which you will find listed in your "New..." options.

Alternatively, you can also select this option directly within a document opened in read mode. The action "File from..." listed within the tool bar in your document allows you to directly file an e-mail received in your personal or project mailbox. It will then be linked to this document automatically. (Compare following screenshot.)



In case you haven't logged into your account within PIRS earlier you will first be asked to enter your email account password. Otherwise your personal company mailbox will be displayed forthwith in a pop-up window, from which you can firstly choose the correct email folder and secondly the correct email from your customer/supplier. By clicking the "Next" button the filing process goes to the next step and you will be presented with a folder selection window where you have to choose a folder in which the comment should be stored.

You will next have to select the reference number (this process has been described in length in previous chapters e.g. [Create and send an email](#)) and also determine the type of correspondence. By default the "E-mail" type is set in place, but in this case the comment type has to be chosen, as illustrated in the image below. If you file an email as reply to a transmittal slip, PIRS will automatically file it as a comment unless you change the type manually. So if you file an email as reply to a TS this step will also be down for you.

PIRS - File E-Mails, Letters, Comments & Transmittal Slips

Create Reference Number

<p>Sender</p> <p>All</p> <ul style="list-style-type: none"> BPC - BASF-Petronas Chemicals Sdn Bhd CAN - Candlish Engineering COL - Colbeth GmbH DER - Derocco GmbH KMG - KMG Limited Ltd. KOG - Kogler CoKG MEW - Ministry of Electricity & Water OUT - Outotec GmbH PCG - Petronas Chemicals Group Bhd (PChem) <p>Code: MEW</p>	<p>Recipient</p> <p>All</p> <ul style="list-style-type: none"> MEW - Ministry of Electricity & Water OUT - Outotec GmbH PCG - Petronas Chemicals Group Bhd (PChem) POY - Pöyry GmbH PRI - Primeaux Industries ROL - Roloff Consulting SE SAL - Salsberg Engineering Ltd SIE - SIEMENS AG SOB - SOBIS Software GmbH <p>Code: SOB</p>
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Advanced Options

Sequential Numbering
 Enter Number manually
 Special Numbering

Number:

File as:

E-Mail

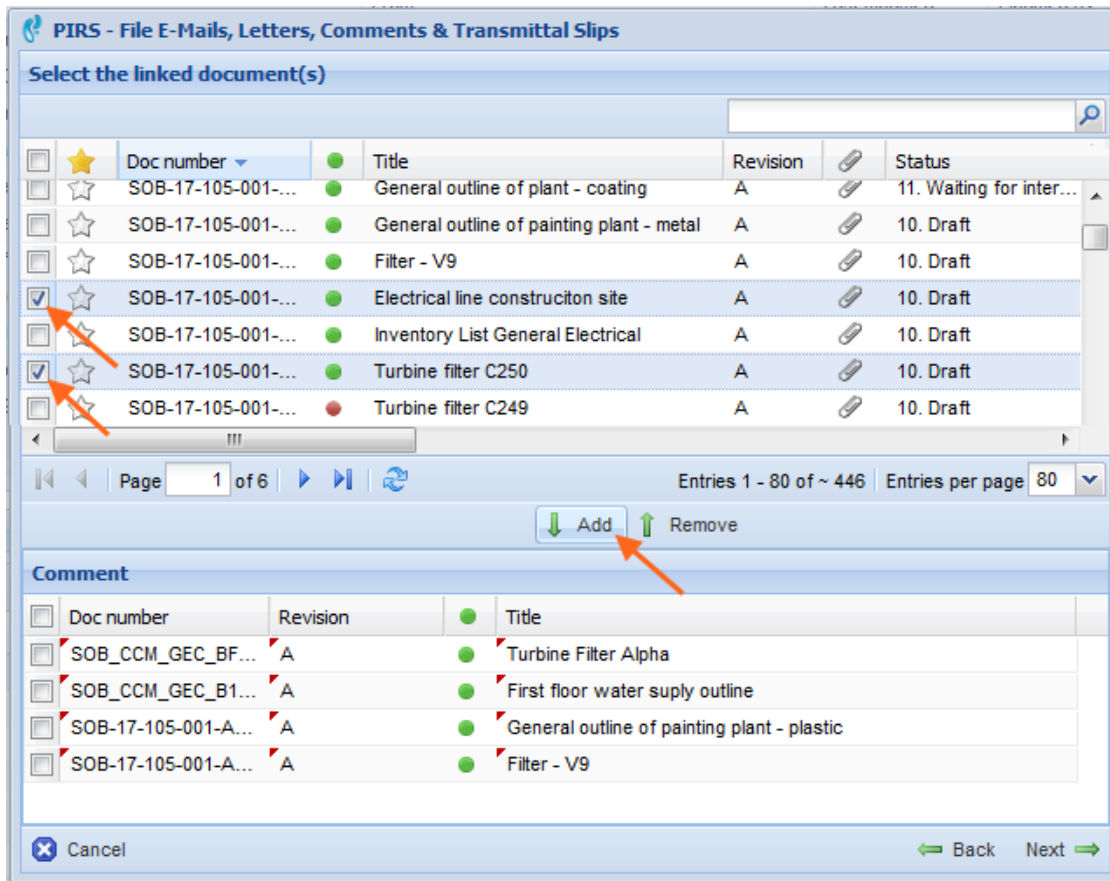
E-Mail

Letter

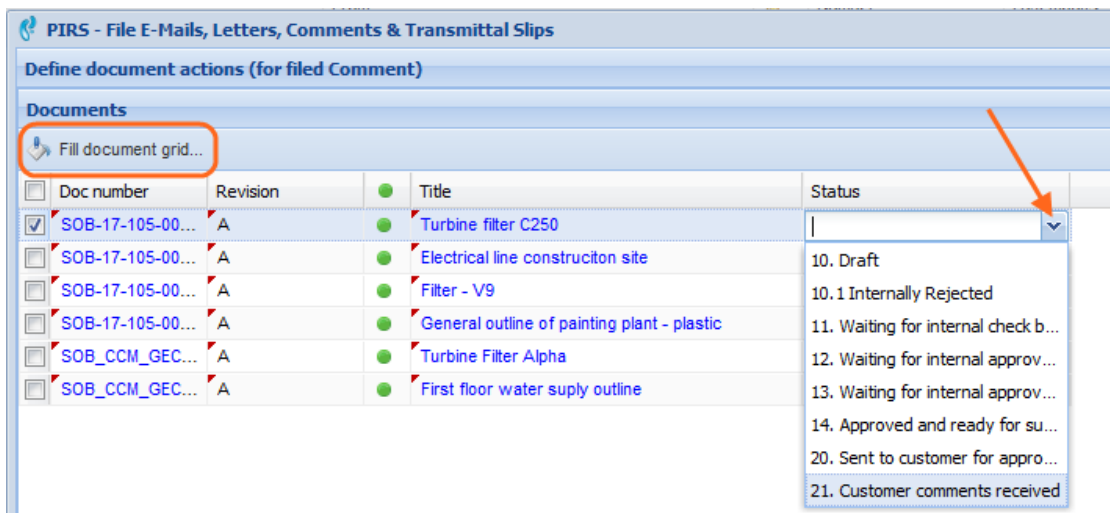
Comment

Transmittal

The next step of the filing process is unique for all correspondence files that are directly linked with documents (transmittal slips & comments). At this point of the process you need to select those PIRS documents that the comment is referring to. To select, add or remove documents simply mark them and use the green arrows in between the two selection windows in order to move the document. As a second possibility you could also work with the drag and drop function. (Compare with the screenshot below.)



As soon as you have selected the concerning documents and clicked next you will be able to adjust the status of each document individually or you can change the document values of all selected documents at once. In order to change two or multiple document grid values at once, you first need to select the documents in question, then click . By default PIRS will present you with the document status column. However, you are able to add the customer and supplier status column as well.



The next and last step in the filing process, presents you with a preview of the new PIRS Comment containing all entered information which gives you the opportunity to double check

the data. As soon as you have finished the filing process the new comment is opened in read mode in a new tab.

Changes within the commented documents

If you now reopen the PIRS document which you sent to your customer/supplier via transmittal slip and created the customer comment for, both correspondence forms will be displayed in the correspondence tab within the PIRS document and can also be opened out of the document. In read mode, transmittal slips are illustrated by a paper symbol while comments are represented by a speech bubble.

Since comments don't necessarily have to be linked to a customer email, this correspondence type can also be created without uploading a customer email. You can simply create a new Comment using the "New...." option in your action bar. All other functions equal the above described.

Are Comments not displayed?

PIRS allows to adjust which modules are used, which views are displayed and also which correspondence types are used. For some projects or companies it will not reflect your processes to use "Comments". Here it might be the case that you send & receive documents and comments always with the means of a transmittal slip. In this cases the correspondence type "Comment" is hidden.

4.2.6.1 Create a Comment using a sent Transmittal Slip

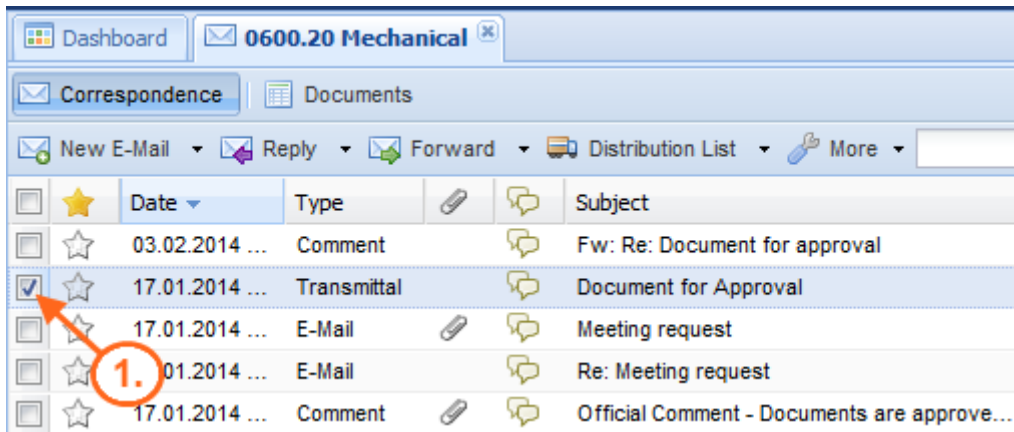
As mentioned above you always have the opportunity to store and document internal and external remarks and comments concerning one or multiple document revisions by using the [PIRS file viewer](#) or by creating a [new PIRS Comment](#). Furthermore it is also possible to upload emails from your personal mailbox or your project mailbox as a comment to one or more documents.

In general documents in PIRS are distributed using a PIRS Transmittal Slip which your customer will receive as an email. The customer will presumably reply to the received transmittal also in form of an email within which he/she will include his/her comments.

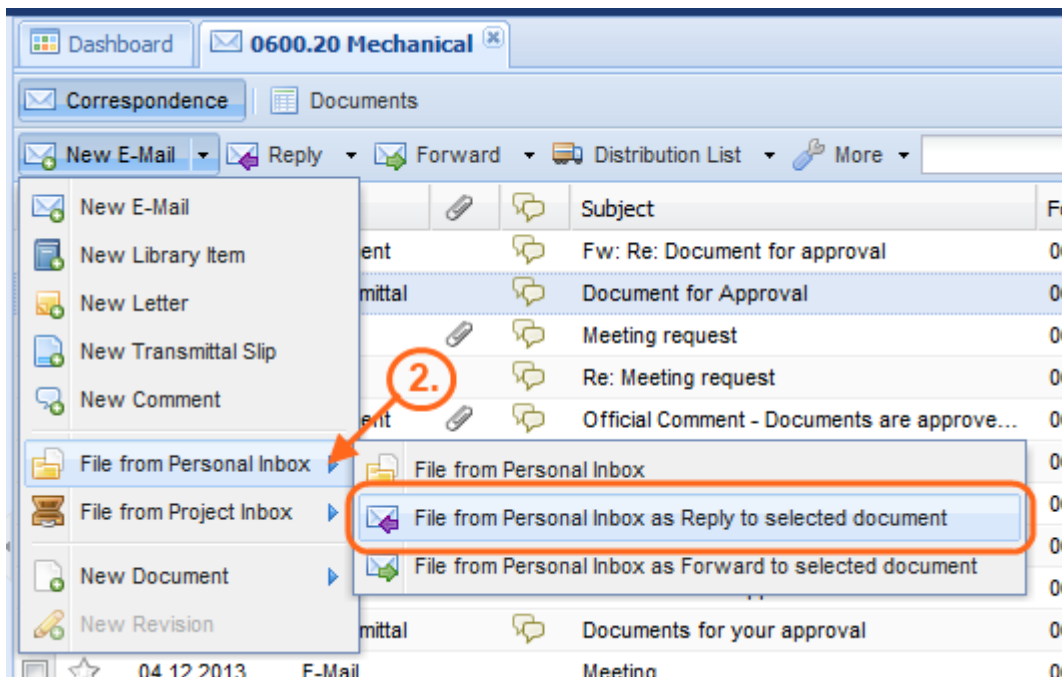
In order to save time and effort it would take to select the documents to which the comment refer to manually, PIRS offers you the option to file the customer not simply as a comment to the documents in question but rather as a reply to the originally sent Transmittal Slip (TS).

By filing an email as a reply to a sent TS, all documents that were distributed with the TS will be automatically linked to the new Comment. Also, during the filing process PIRS will recognize that the filed mail must be a comment based on the preselected TS.

So in case you have sent a TS to a customer and recipient has sent his comments in an email you can first select the TS in PIRS.



Then click the action "File from Personal Inbox as Reply to selected document". You can of course at this point also enter the project mailbox instead of your personal mail file. In both cases a connection to the mailbox will be initiated.



The filing process that follows is the same as already described in the previous chapter. However, PIRS smart pre-selection will already select the correspondence type Comment saving you the manual selection. In addition, you will find that all documents that were sent with the selected TS will be pre-selected for the new Comment. Furthermore, you will be able to adjust the status of each document individually or in a bulk, allowing you to reflect the customer status directly in each document. Compare to the following screenshots.

PIRS - File E-Mails, Letters, Comments & Transmittal Slips

Select the linked document(s)

Doc number	Type	Revision	Title	Status
1-MG-EO-KEE-BB-021	Drawing	A	Inventory List Mechanical Engineering	10. Draft
1-MG-EO-KEE-BB-022	Drawing	D	Electrical line Building B	10. Draft
1-MG-EO-KEE-BB-023	Specification	B	Filter - V345	10. Draft
1-MG-EO-KEE-BB-024	Drawing	A	Detailed outline of painting plant - metal	10. Draft
1-MG-EO-KEE-BB-025	Drawing	A	Detailed outline of painting plant - cat...	10. Draft
1-MG-EO-KEE-BB-026	Drawing	B	Detailed outline of painting plant - pla...	10. Draft
1-MG-EO-KEE-BB-027	Drawing	B	Map of construction side sector E	10. Draft
1-MG-EO-KEE-BB-028	Specification	B	Engine filter C238	10. Draft

Page 1 of 4 Entries 1 - 80 of ~ 265 Entries per page 80

Add Remove

Comment

Doc number	Revision	Title
1MG004470	B	Inventory List General Engineering
1MG004471	E	Electrical line construction site A
1MG004472	C	Oil Filter - V9
1MG004474	C	Map of construction side A
1MG004475	C	Turbine filter C238

Cancel Back Next

PIRS - File E-Mails, Letters, Comments & Transmittal Slips

Define document actions (for filed Comment)

Documents

Fill document grid... Adjust status for several or all documents at once

Doc number	Revision	Title	Status	Customer Status
1MG004470	B	Inventory List General Engineering	21. Customer commen...	Approved with ...
1MG004471	E	Electrical line construction site A	21. Customer commen...	Approved
1MG004472	C	Oil Filter - V9	21. Customer commen...	Approved with c...
1MG004474	C	Map of construction side A	21. Customer commen...	Pending
1MG004475	C	Turbine filter C238	21. Customer commen...	Rejected

Adjust status individually

PIRS Smart Pre-Selection

Please be aware that PIRS smart pre-selection also applies for replies and forwards directly created in PIRS. When you reply to a Transmittal Slip in PIRS the correspondence will automatically be a Comment. Transmittal Slips will always be forwarded as another Transmittal Slip and Comments will also be forwarded as yet another Comment.

4.2.7 Import Documents

At the beginning of a project or at any other time during the course of a project it might be important to include a list of required technical documents (e.g. technical drawings), often known as master drawing list.

PIRS offers therefore a quick and easy way to include all document information without having to manually create a PIRS document for each listed drawing. Hereby, you can either upload the documents in combination with the actual document / drawing file (e.g. the CAD and / or

PDF file) or only integrate the necessary document information also known as meta information.

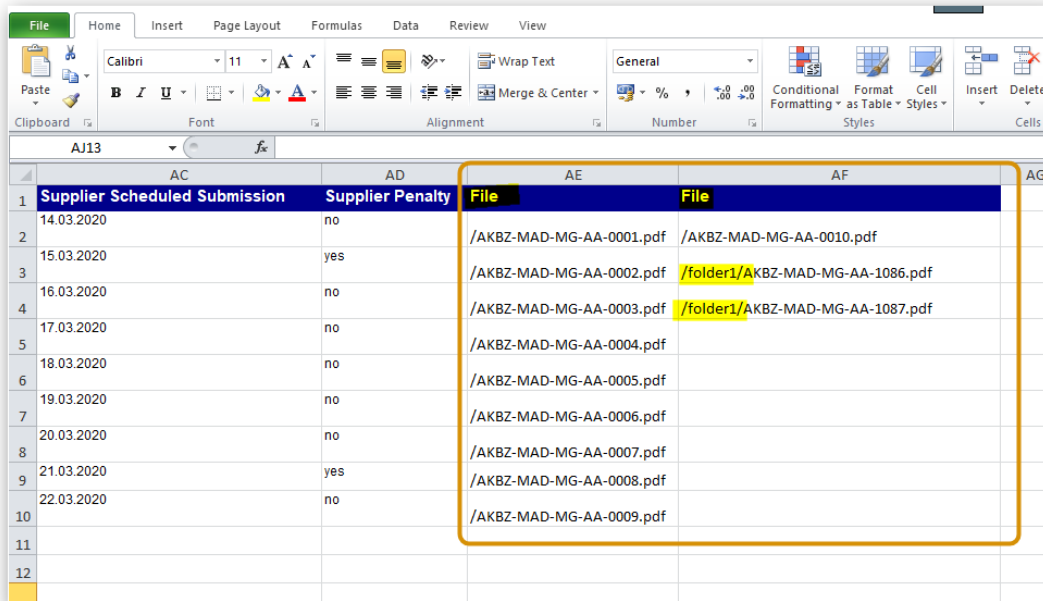
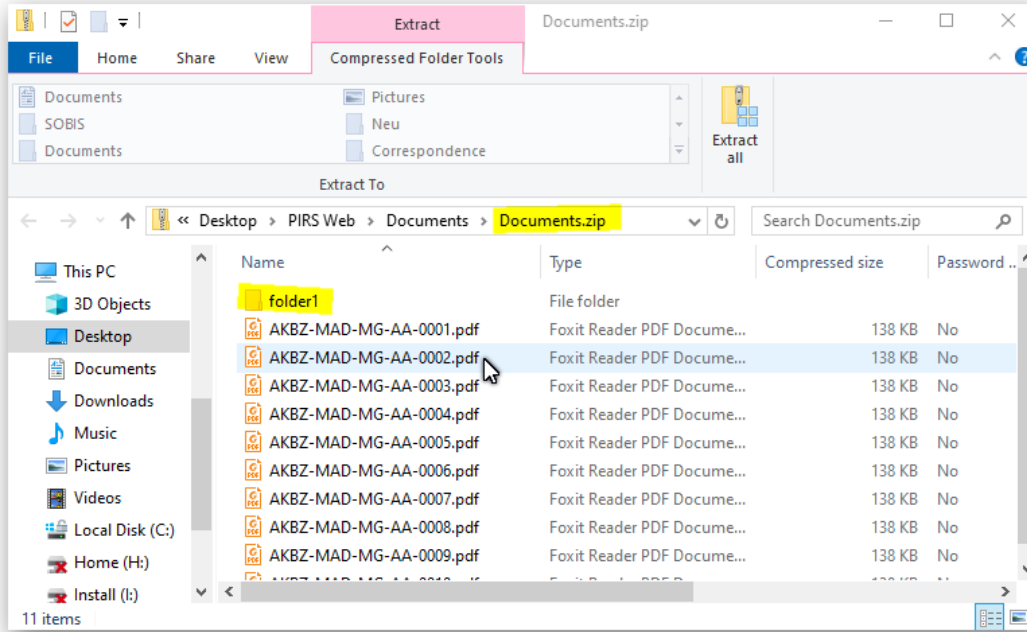
Every PIRS user that has the creator rights to the folder(s) he or she likes to import documents to will be able to choose the "Import Documents" feature presented to him / her in the "New" button options (compare to the screenshot).

By selecting this feature, an Excel file containing all the existing document information can be uploaded into the system.

You can find an excel sheet within the [template](#) chapter which can be used as template. All mandatory fields that need to be included are marked blue. Additional values can be added if necessary as new columns. Please make sure that new columns have the same title as the field you like to include in your upload.

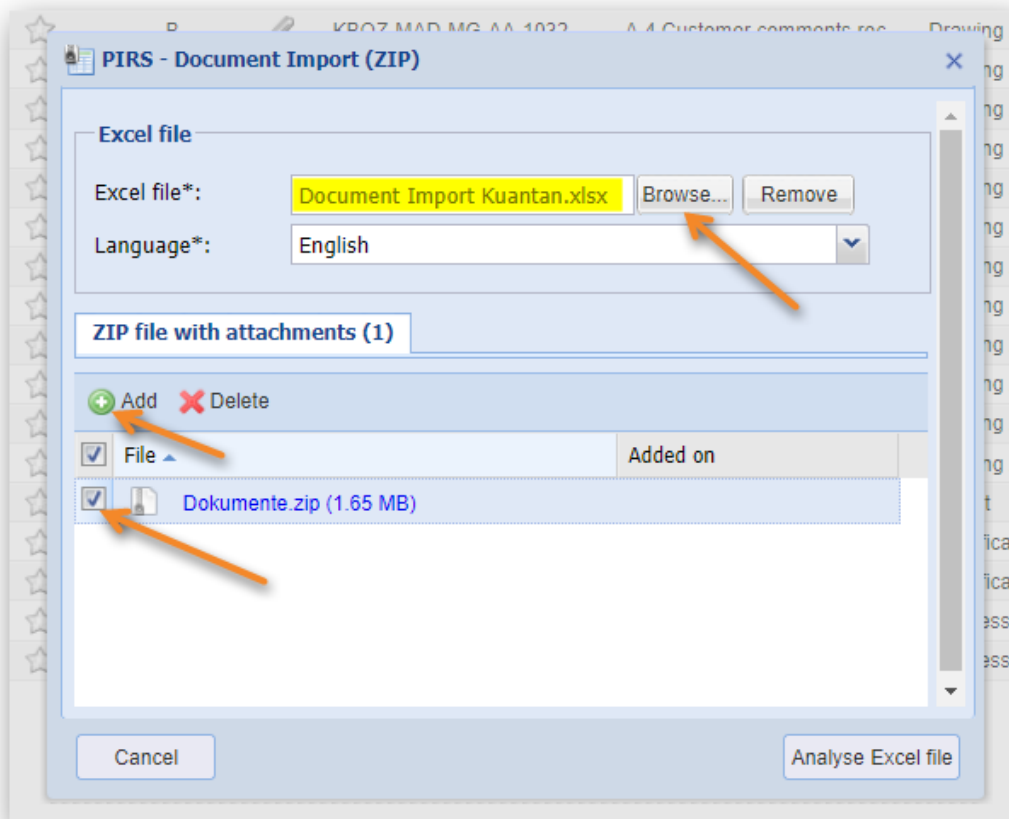
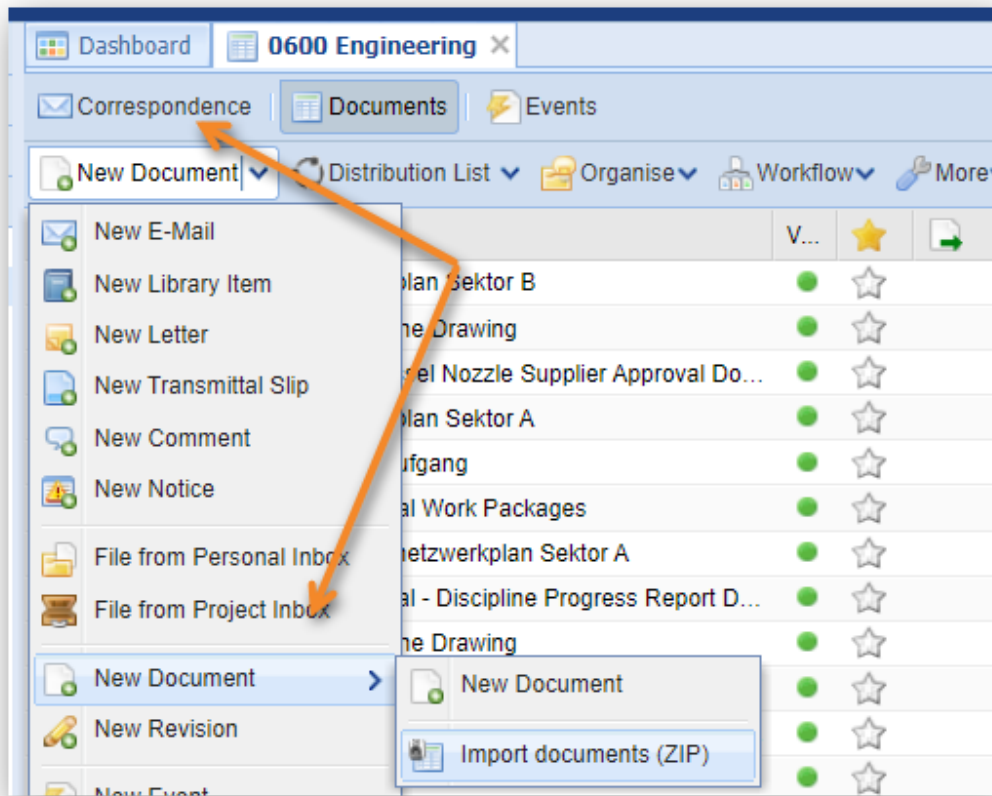
In order to use a zip file to upload existing files together with our meta data you need to follow these steps:

- first you need to create the list of documents containing values for all items in an excel list. Here you can use the provided template
- next you need to create a zip file of the files you would like to attach during your import and add the relative path of each file to the respective item in your list. Relative path means the path within your ZIP file to the file in question. So if your zip file contains simply a list of pdf files, you need to insert the path "/filename.pdf" if you zip file contains several folders the path could be "/folder1/filename.pdf" (compare with following screenshots)



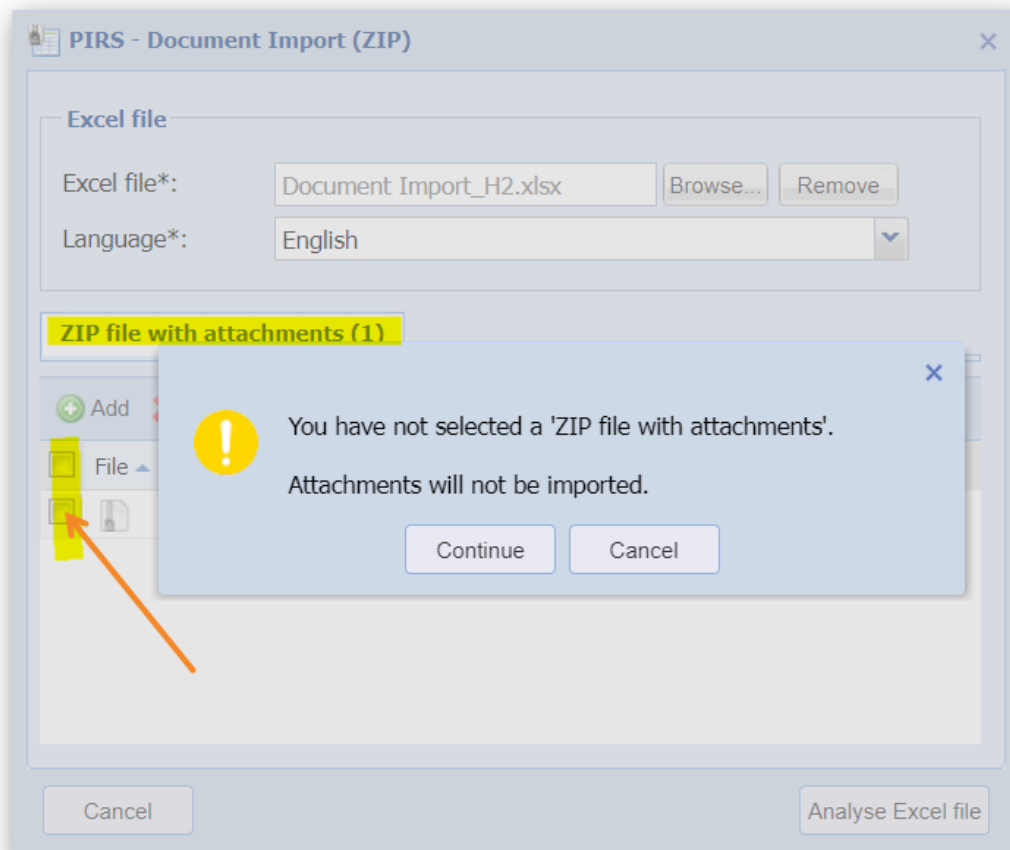
Select "Import documents (ZIP)" as show in the screenshot below.

A new window will open allowing you to select the excel file with your document list. In the bottom area of the window you then need to add the ZIP file containing the files you like to upload and attach to your documents. You can add several ZIP files and each uploaded ZIP file will be stored in PIRS for 24 hours allowing you to import several document lists relating to the files in your ZIP file without having to upload the ZIP file every time.



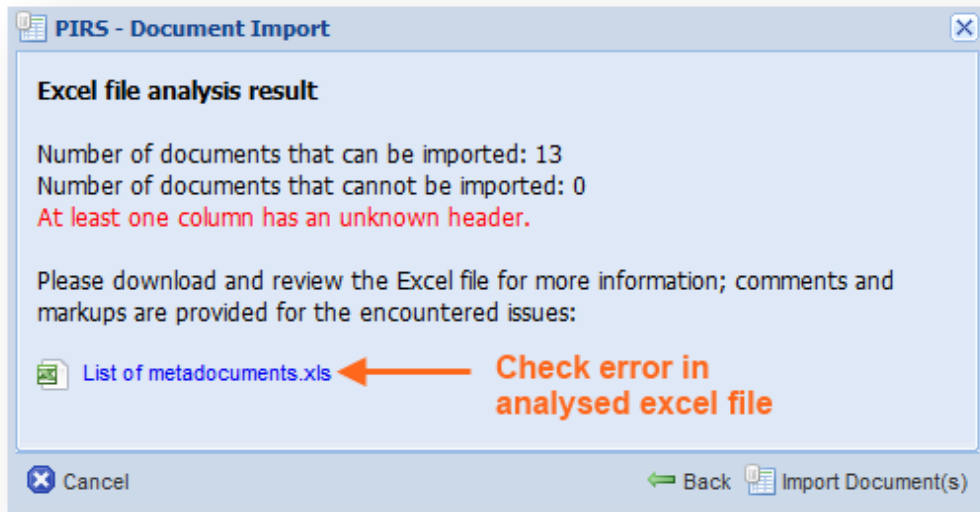
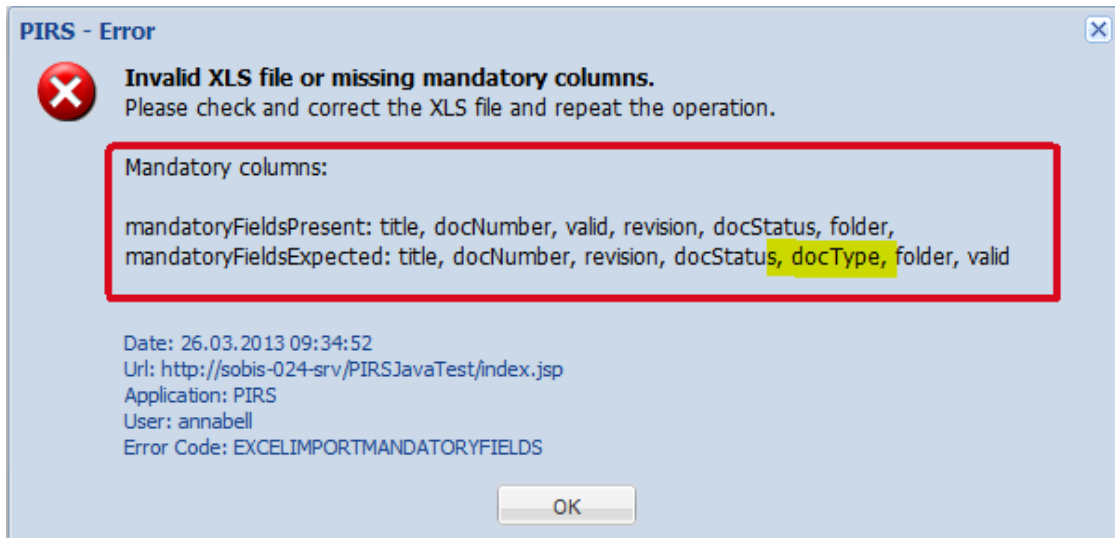
Use the "Browse..." button to select the excel file that contains the information for your technical documents and please be sure to select the ZIP file after you have uploaded it as illustrated in our example.

In case you have not selected a ZIP file PIRS will notify you that without a ZIP file selected, meta documents will be uploaded without any attachments. You can still proceed in case this was intentional.



Start the analyzing process by clicking "Analyse Excel file". Since each document has certain mandatory fields that require the entering of a value before the system allows the user to save the document, these fields also need to be included in the Excel sheet and they need to contain a value for each listed document. Therefore, the excel file must be analyzed before the upload is permitted.

As indicated by the following screenshots, PIRS ensures that all mandatory fields are listed in the attached excel file as well as that the required information is included in the respective cells. PIRS will allow you to upload all other existing document information (e.g. the required transmittal dates). Should the imported excel file contain value fields that cannot be matched with fields in the PIRS document format, the system will also inform you about this fact even though the document import is possible and will be performed.



The third possible scenario would be that you have all mandatory fields listed and entered a value, but that the entered value for some or all documents cannot be matched to the information stored in PIRS e.g. you entered a name that is not listed in the address book or a document status that does not exist. In this case the import of these documents will not be possible. PIRS will inform you how many documents can and cannot be imported and will offer you an excel file of the analyzed list that you can open. Here you will find all documents that cannot be imported marked and commented.

Following table will give you a list of all mandatory fields, their label as well as remarks on important facts to keep in mind when entering value. The mandatory fields match the fields listed in the document header.

Mandatory Fields		
Field name	Label	Remarks

Title	Title	-
Doc number	Doc number	The entered number must be unique for each document and may not already exist within the project
Valid	Valid	The value may only be "yes" or "no"
Status	Status	The value has to match one of the options listed in the respective project.
Revision	Revision	The value has to match one of the options listed in the respective project. Should your revisions be counted in numbers please ensure that the format of the cells is set to text and always escape the characters that you insert e.g. when entering the revision number 1.0 enter '1.0 and when the revision is 1 enter '1.
Folder	Folder	The value has to match one of the options listed in the respected project. Also the whole path to the folder must be listed, the parent folder must be separated from the child folder with a back-slash e.g.: 0600 Engineering\0600.10 Overall Engineering
Type	Type	The value has to match one of the options listed in the respective project

As mentioned above the document import also gives you the opportunity to include the actual document files (e.g. CAD, PDF etc.) stored on your company's FTP server. As indicated in the screenshot of the PIRS document import box above you are able not only to attach an excel file from your browser but also to enter your FTP server information (IP address) and your log in information. Should your excel file provide PIRS with the path information on the FTP server to the respective document files for each imported document, the files will then be attached to the newly created PIRS documents accordingly. You are of course able to attach multiple files to each document. An example will be given at the end of this chapter.

First, the following tables will list all other fields according to the tab in the content area where they can be found.

Not Mandatory Fields- Details		
Field name	Label	Remarks
Issue Date	Issue Date	Make sure that this column in your excel sheet is marked for containing date values. That way PIRS will recognize the date regardless of the format in which you enter the date.
Total Pages	Total Pages	Enter only full numbers (e.g. 9 or 13 but not 9.5 or nine)
Format	Format	The value has to match one of the options listed in the respective project
Language	Language	The value has to match one of the options listed in the respective project
Application Code	Application Code	The value has to match one of the options listed in the respective project
Notes	Notes	-

System	System	The value has to match one of the options listed in the respective project
Reference		The value has to match one of the options listed in the respective project
WSB	WSB	-
Activity ID	Activity ID	-
Producer	Producer	The name has to match one of the options listed in the address book of the respective project
Responsible	Responsible	The name has to match one of the options listed in the address book of the respective project
Owner	Owner	The name has to match one of the options listed in the address book of the respective project

Not Mandatory Fields- Customer & Supplier

Field name	Label	Remarks
Customer	Customer	The name has to match one of the options listed in the address book of the respective project
Doc number	Customer Doc number	The entered number must be unique for each document and may not already exist within the project
Revision	Customer Revision	The value has to match one of the options listed in the respective project
Status	Customer Status	The value has to match one of the options listed in the respective project
Category	Customer Category	The value has to match one of the options listed in the respective project
Scheduled Submission Date	Customer Scheduled Submission Date	Make sure that this column in your excel sheet is marked for containing date values. That way PIRS will recognize the date regardless of the format in which you enter the date.
Penalty	Customer Penalty	The value may only be “yes” or “no”
Notes	Customer Notes	-
Supplier	Supplier	The name has to match one of the options listed in the address book of the respective project
Doc number	Supplier Doc number	The entered number must be unique for each document and may not already exist within the project
Revision	Supplier Revision	The value has to match one of the options listed in the respective project
Status	Supplier Status	The value has to match one of the options listed in the respective project
Category	Supplier Category	The value has to match one of the options listed in the respective project
Scheduled Submission Date	Supplier Scheduled Submission Date	Make sure that this column in your excel sheet is marked for containing date values. That way PIRS will

		recognize the date regardless of the format in which you enter the date.
Penalty	Supplier Penalty	The value may only be “yes” or “no”
Notes	Supplier Notes	-
Not Mandatory Fields- Workflow		
Approval Configuration	Approval Configuration	In case your PIRS project supports the PIRS workflow module you are able to select the workflow fitting for the document by entering the workflow title under which it is stored in PIRS.


Note
 Please ensure that the cell format of the revision columns is set to text and be aware that when entering number values in the revision columns you must escape the characters (e.g. '1 instead of 1)
 Without escaping the character Excel cannot distinguish between 1 and 1.0 as Excel interprets all these characters as numeric values and returns 1.0 for both cases.

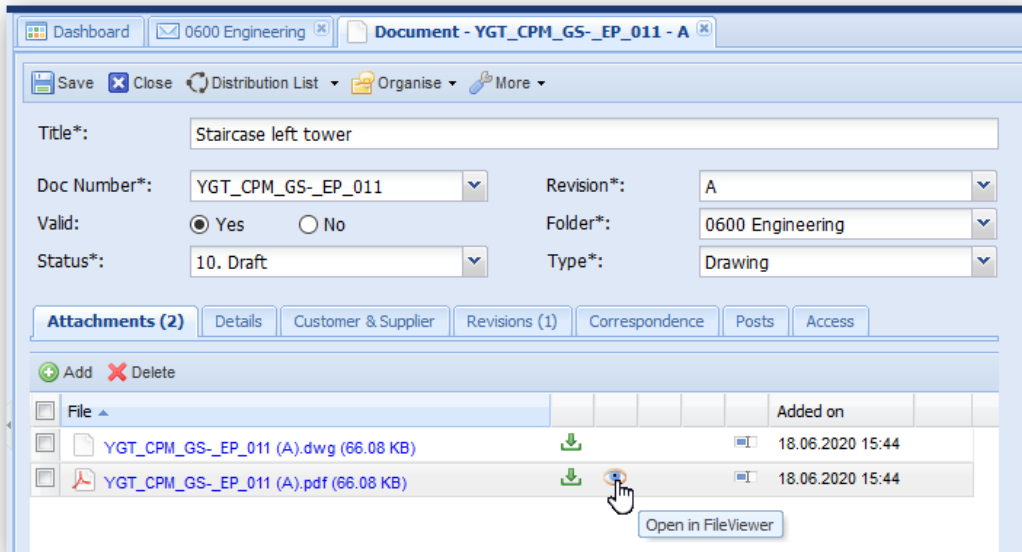
4.2.8 PIRS File Viewer

In addition to the option to open and view files directly in your browser, the PIRS File Viewer available since PIRS release 3.0, offers to also annotated all types of office documents (word, excel, powerpoint, PDF,...).

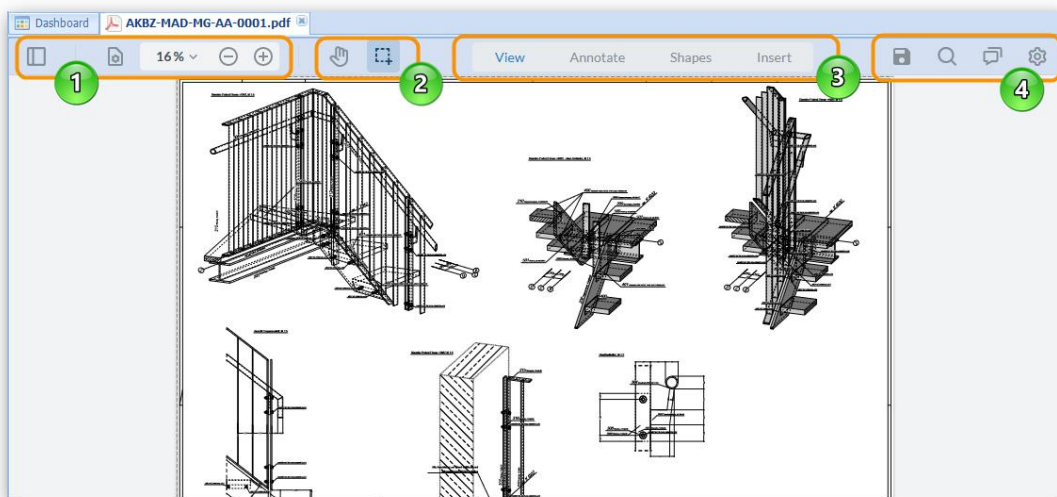
Instead of opening a document in a new tab in your browser, the PIRS File Viewer opens documents directly within your PIRS project. Furthermore, it offers several annotation and flag functions which will be introduced in detail below.

Open Documents in PIRS File Viewer

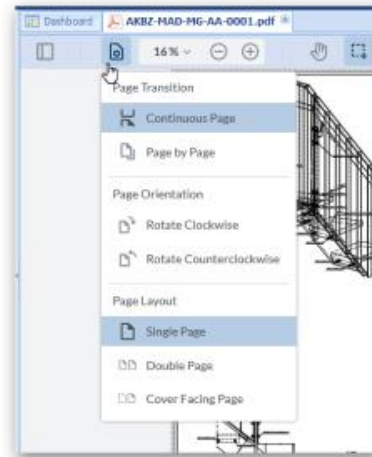
In order to open a document in the PIRS File Viewer, you need to click the  - symbol presented to you on the right hand side of an office file stored in PIRS. The File Viewer supports about 100 different file formats, most commonly used are PDF or picture formats such as PNG or GIF.







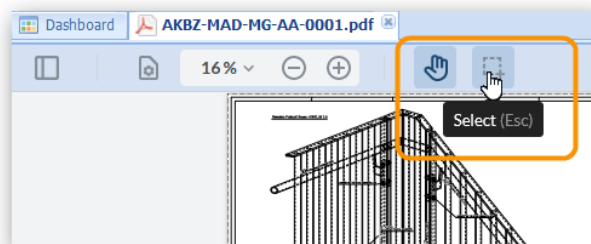
If the File Viewer is activated, the selected file will be opened within your PIRS project. Otherwise a new browser's tab will be used to display the file.



There are four different sections within the file viewer.

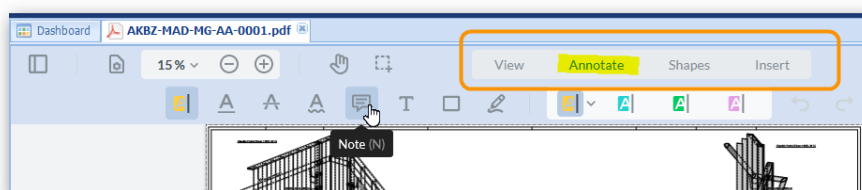


1. The first allows you to
 - a. open the panel () where you can view a thumbnail image of your document or access the outline
 - b. zoom in or out or generally resize the display (  25% )
 - c. or adjust the display of your document (regard screenshot to the right). Here you can choose for example to rotate the picture or in case the document has several pages display them side by side, continuously or separately.
2. The second area within the tool bar enables you to switch from selection tool to the hand tool which allows you to manually move the image around







a.

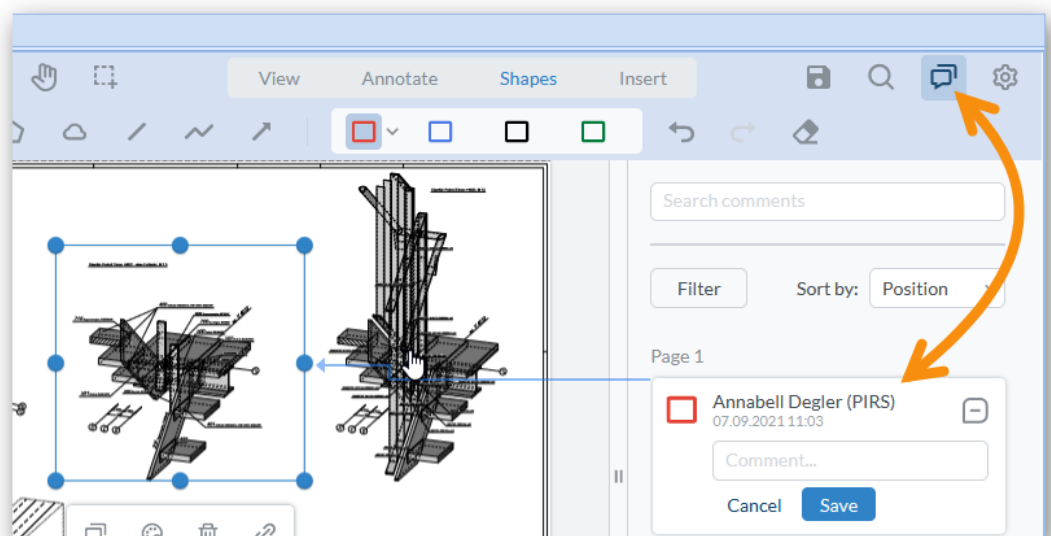
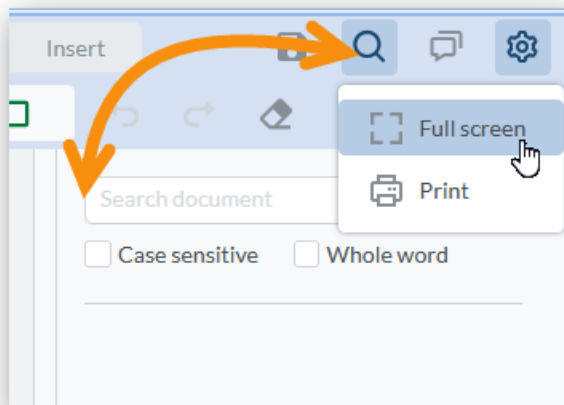
3. The third area offers the option to open the view display and choose between different annotation tools which will be explained in detail in the following table.




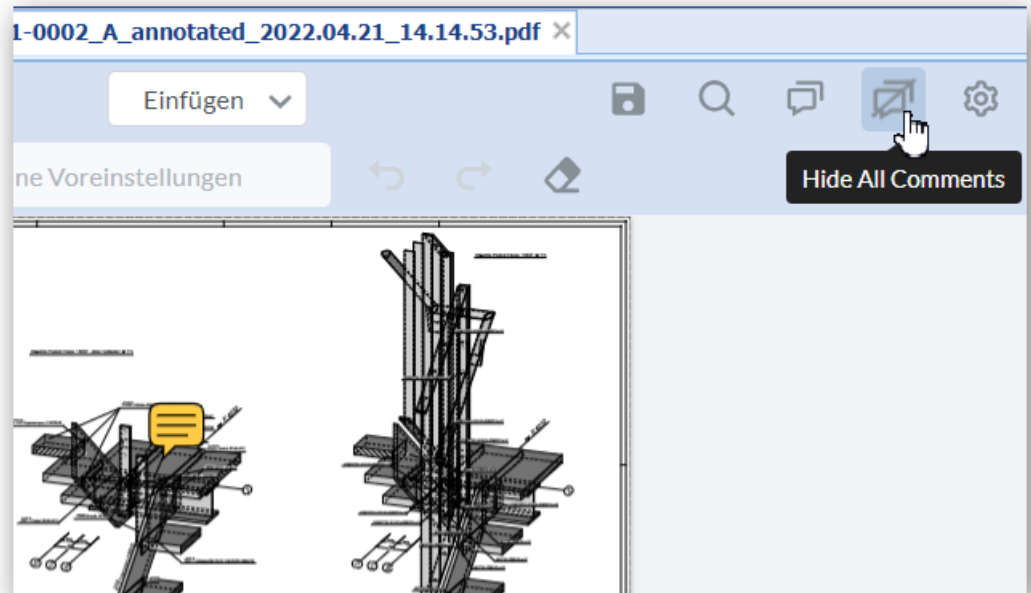
a.

4. The fourth area includes


- a. a button for saving your annotations ()
- b. the option to switch to a full screen display or directly print the document ()
- c. a search which allows you to enter a search term. Results will be displayed as soon as you start typing and can be adjusted by using several offered search criteria ().
- d. the option to leave comments and communicate with your colleagues directly within the file viewer ().



f. the option to hide all comments (). By clicking this action, you all made annotations are removed and you will see the original document without the redlining. Clicking the action again will again display the redlining layers on top of the document.


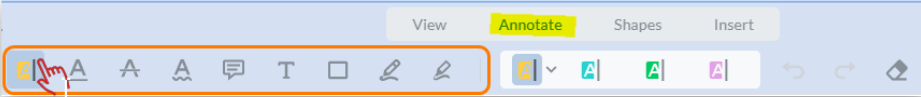



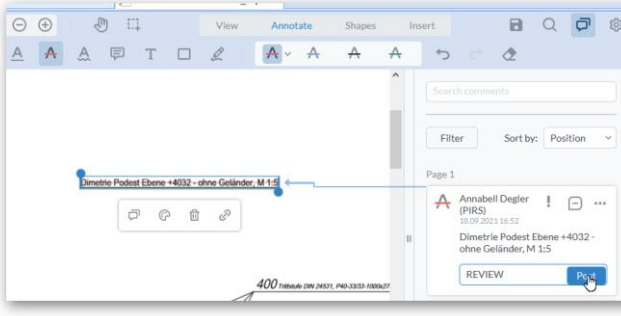

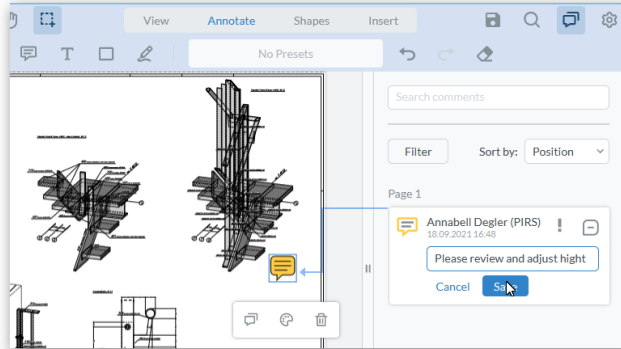
Annotations, Comments and Flags


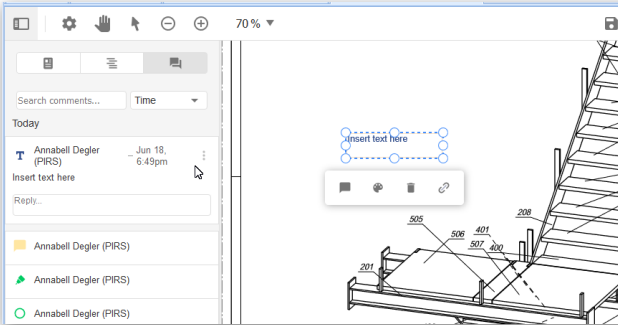


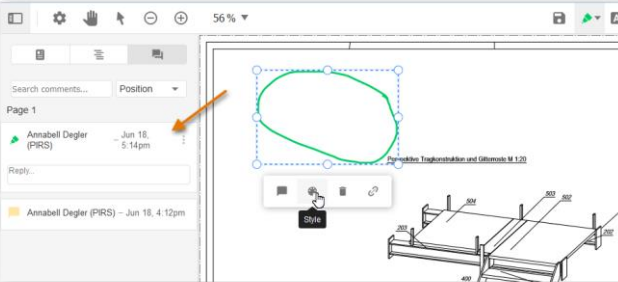
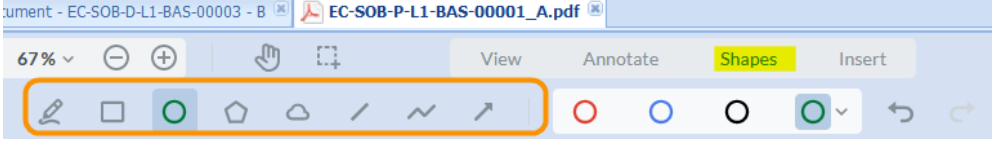
Following table lists all offered functions to include your comments and annotations within a file in PIRS. Made changes will be saved only after you have clicked save (). Each annotation will display the name of the person that made the changes as well as the time it was made.

There are four different sections to choose from within the annotation area:

1. Annotate - Offers different note, remark and highlight options
2. Shapes - Offers various shapes to mark an area
3. Insert - Offers options to set stamps and signatures
4. Measure - Offers different options to assign measures to sections, areas, etc.

Section	Symbol	Short Description	Long Description
Annotate			

Section	Symbol	Short Description	Long Description
		<p>Text tools:</p> <ol style="list-style-type: none"> 1. Highlight 2. Underline 3. Underline Squiggly 4. Strikeout 	<p>1. To highlight a specific text passage select this symbol then mark the respective text by holding the left click of your mouse.</p> <p>You select the color of your highlight prior to highlighting. In addition you can change the style, leave a comment, delete it or include a link by selecting the respective item in the panel and then right clicking on it within the document.</p> <p>2. and 3. You can underline or squiggly underline words or text fragments using these symbols. Simply mark the word or text you wish to underline with your mouse. Prior to marking the text you are able to select the color. As with all other annotations you are also able to change the style, add a comment, delete it or link a URL by selecting the item within your panel.</p> <p>4. Words or text elements can be crossed out using this symbol. Select the annotation, then mark the text passage you like to strike out. In addition you are also able to add comments to your strike-through in a message box that will open automatically.</p> 
		<p>Note</p>	<p>Select the comment symbol, then click on the area in the opened file you like to comment on.</p> <p>A note symbol will appear and the comment box will open in your panel. Here you can add your notes. Then click save.</p> <p>Should you wish to reply to a comment regardless who left it, you can use the reply feature within the panel.</p> 

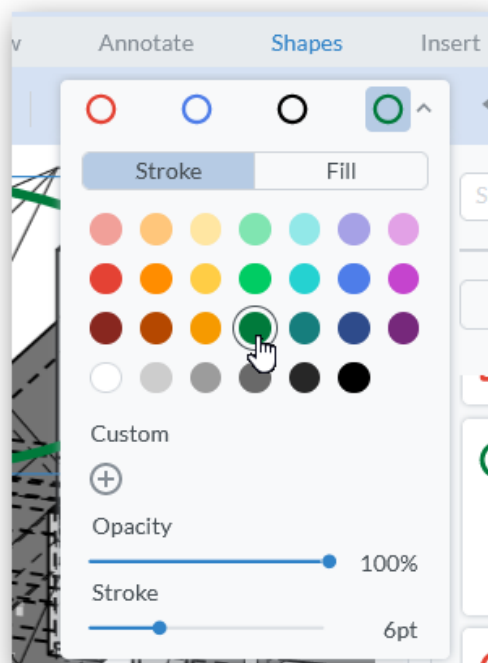
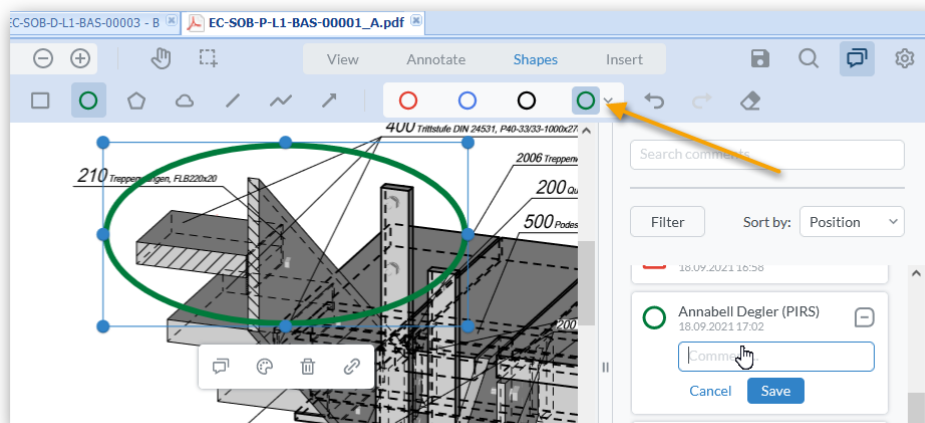
Section	Symbol	Short Description	Long Description
		Free Text	<p>In order to enter text anywhere on your document select this symbol. Then left click the area within which you like to insert your text.</p> <p>Enter your text within the box that appears. Color, thickness, text size as well as the box border and fill can be adjusted prior to selecting the area or afterwards by selecting the item within your panel.</p> 
Annotate & Shapes	 	Free hand tool Free hand highlight	<p>Prior to making free hand annotations or highlight an area free hand, you can pick the color.</p> <p>As soon as you finished the annotation, the item will appear within the panel.</p>  <p>If you select the item in the panel and then right click on the marked annotation you are able to</p> <ol style="list-style-type: none"> 1. leave a comment, explaining the marking for your colleagues 2. adjust the style (e.g. color, thickness, shape) 3. delete it 4. or link a page or URL
Shapes			
		Within the shape tools you are able to pick between	<ol style="list-style-type: none"> 1. a Rectangle 2. an Ellipse

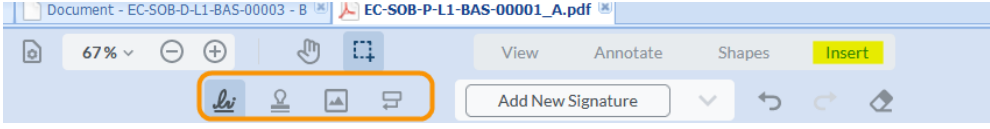

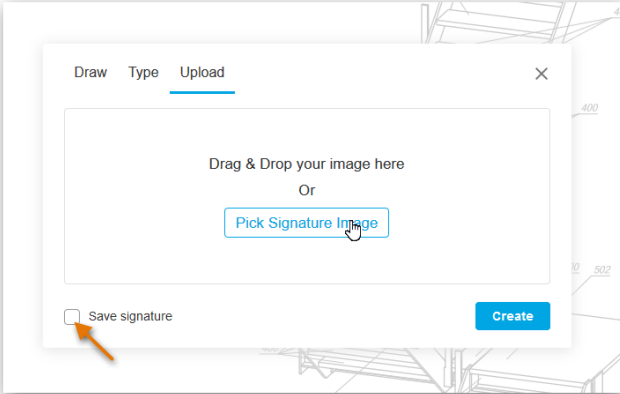
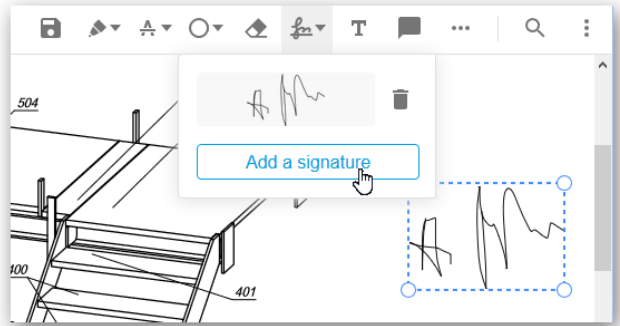

Section	Symbol	Short Description	Long Description
---------	--------	-------------------	------------------

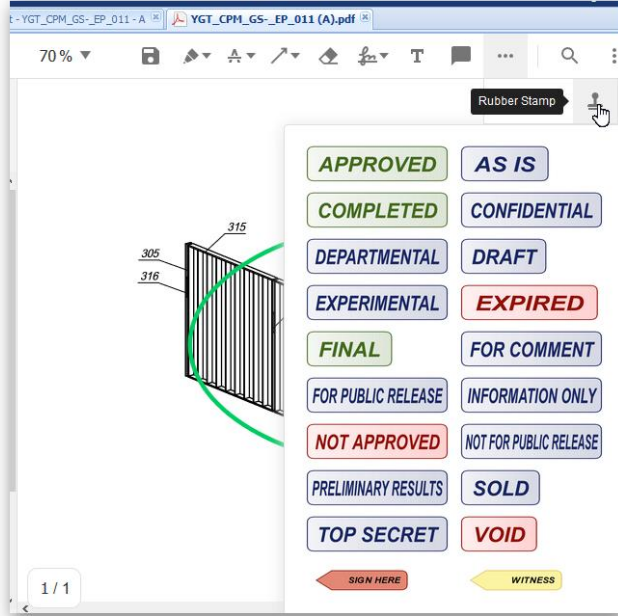
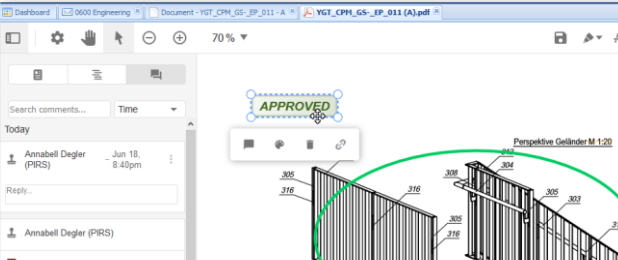
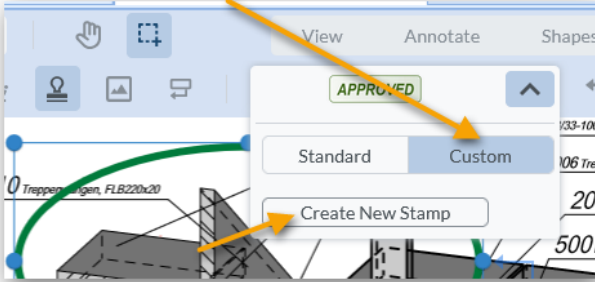
3. a Polygon
4. a Cloud
5. a Line
6. a Polyline
7. or an Arrow

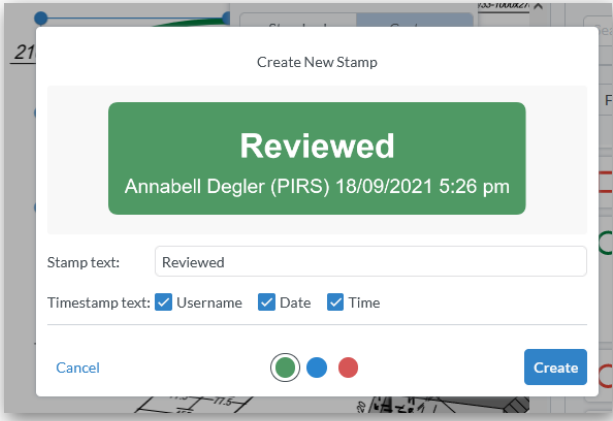

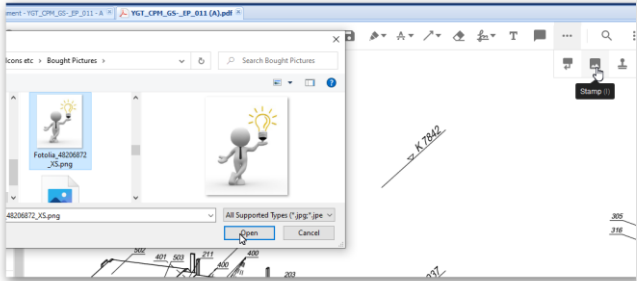
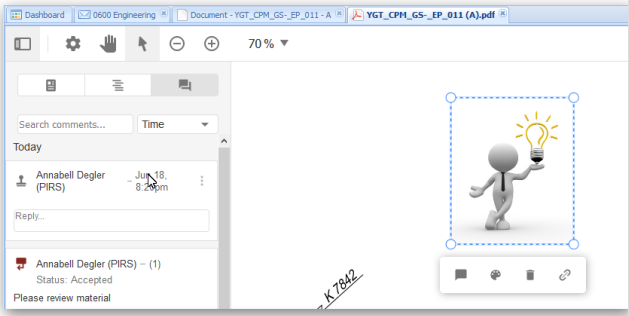
For each shape you can select the color of its border and, if it offers it, its fill. In addition you can also select its opacity as well as the thickness.


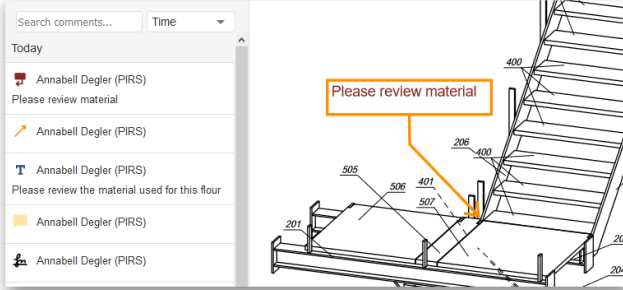
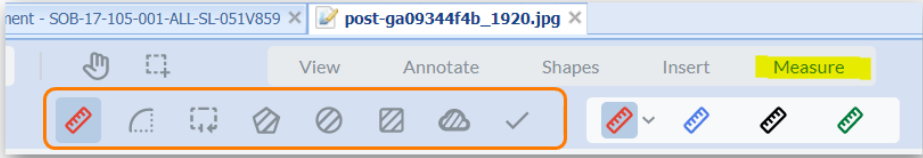

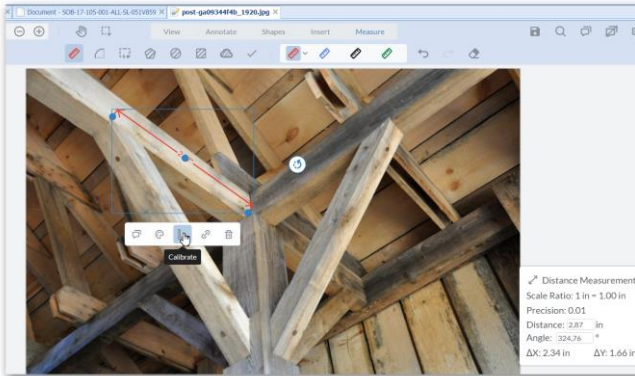
As with all annotations, these style settings can be adjusted and supplemented afterwards by selecting the item within the panel.


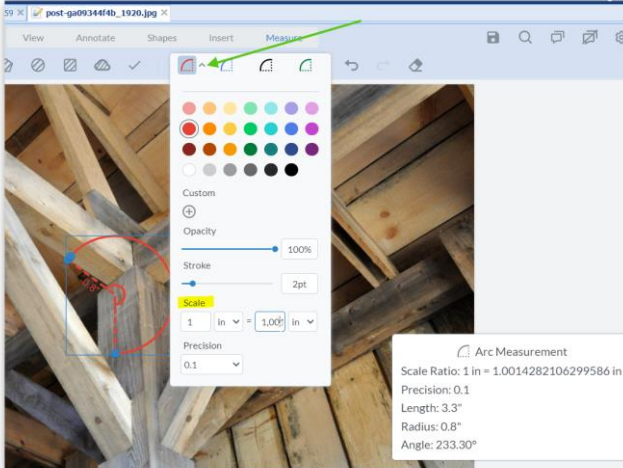

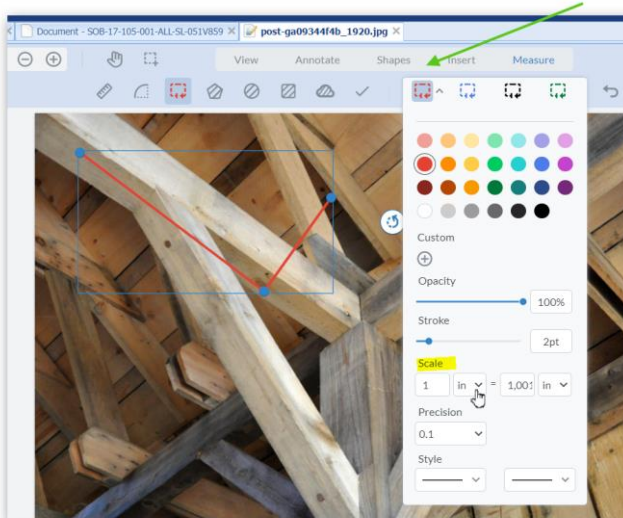


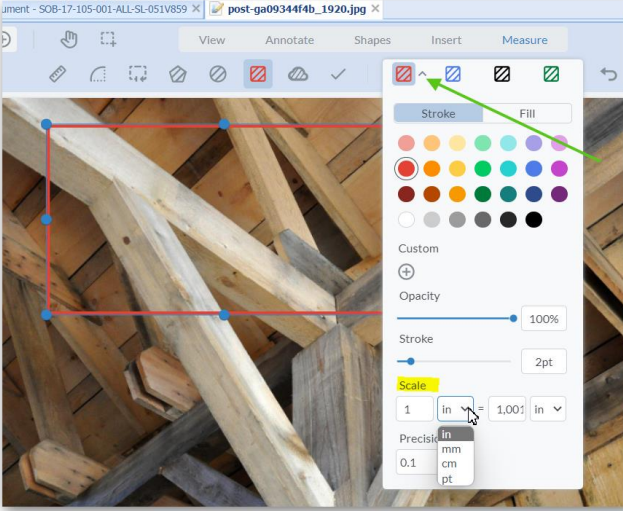
Section	Symbol	Short Description	Long Description
Insert			
		<p>Signature</p>	<p>The signature tool allows you to either draw your signature or initials by hand. Type it with our keyboard or upload a digital image of it.</p> <p>By selecting the option "Save signature" you can save the image for later annotations.</p> <p>The image you upload will be save with your profile, therefore only be available for your own use, not other PIRS users.</p> <p>You can always delete, replace or add additional signatures to your profile.</p> <div data-bbox="703 819 1324 1211">  </div> <div data-bbox="703 1267 1324 1592">  </div> <p>You can save up to 4 personal signatures within your account.</p>
		<p>Rubber Stamp</p>	<p>This tool offers a set of preset stamps for you to choose from. Once you select a stamp you can still move and resize the image right away.</p>

Section	Symbol	Short Description	Long Description
			  <p>In addition, you can of course also select the item within the panel and further edit the stamp.</p> <p>There is also the option to custom create a stamp.</p>  <p>First select the "Custom" section of the rubber stamp, next click "Create New Stamp".</p> <p>A pop up window opens, allowing you to enter your personal text, choose a color and decide which additional information, such as user name or time stamp, you would like to include.</p>

Section	Symbol	Short Description	Long Description
			 <p>Once you click "Create", your custom stamp can be placed.</p> <p>Please also note that it is possible to include your company's custom stamp design. To learn more about this feature, please get in touch with the SOBIS Service Desk.</p>
		<p>Stamp</p>	<p>By clicking this symbol, you can temporarily upload an image to be included as stamp within your document.</p> <p>First click the symbol, next click on the spot you would like to insert the image. Your explorer will be opened automatically, allowing you to select the file.</p>  <p>The image will be included on your document and listed as annotation item in your panel. You can still move, edit and resize your stamp.</p>  <p>Please be aware that a stamp is only uploaded temporarily and will not be stored for the next use.</p>

Section	Symbol	Short Description	Long Description
		<p>Call-out</p>	<p>A call-out is a special type of comment that allows you to point out a specific space or area on your document.</p>  <p>Click on the spot you like to draw attention to. Then use the left click again in order to insert your comment. The selected spot and your comment box will be connected with an arrow.</p>
<p>Measure</p>			
		<p>Distance</p>	 <p>The distance option allows you to measure distances, trace and assign perimeter in drawings. You can leave comment concerning the measurements and change the scale of measurement (calibrate) to match the specifications.</p>

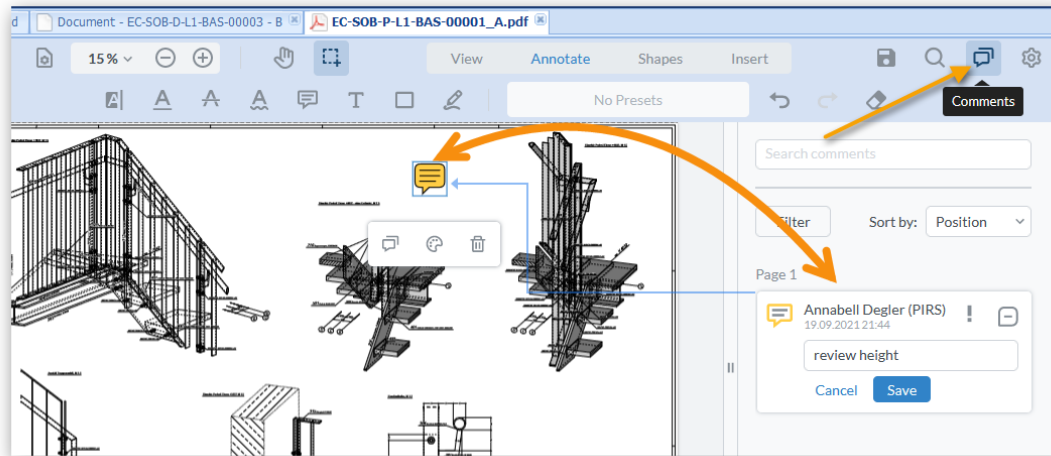
Section	Symbol	Short Description	Long Description
		<p>Arc Measurement</p>	 <p>This feature allows you to mark and measure the details of an arc, you are also able to assign new ratios and scale the arc.</p>
		<p>Perimeter</p>	<p>The perimeter option allows you for example to calculate the circumference of an area of section. Simple mark the section or area. Click once to mark a turning point and twice when you are finished marking.</p> <p>Select the setting adjustments to change colors, opacity, stroke thickness or modify scaling and precision.</p> 

Section	Symbol	Short Description	Long Description
		Area	 <p>The Area options offer you the option to define a specific area within your document, assign ratios and measures and leave comments.</p>
All Sections		Eraser	<p>The Eraser can be used to delete made notations. Keep in mind that this eraser is not going to erase elements within the document, but only made annotations.</p>
		Undo & Redo	<p>These buttons allow you to undo or redo steps. To undo a notations You can of course also use the keyboard combination (CTRL + Z or for German boards STRG + Z).</p>

Comments/Panel

As mentioned above you are always able to select an annotation to change its style, add a comment, delete it or add a link to it. Simply select the item, the viewer will automatically jump to the annotation and mark it. Then right click the annotation to open the options underneath.

In case the panel area/comments section is not displayed to the right already, you can open it by clicking the "Comments" symbol within the right hand corner of your tool bar.

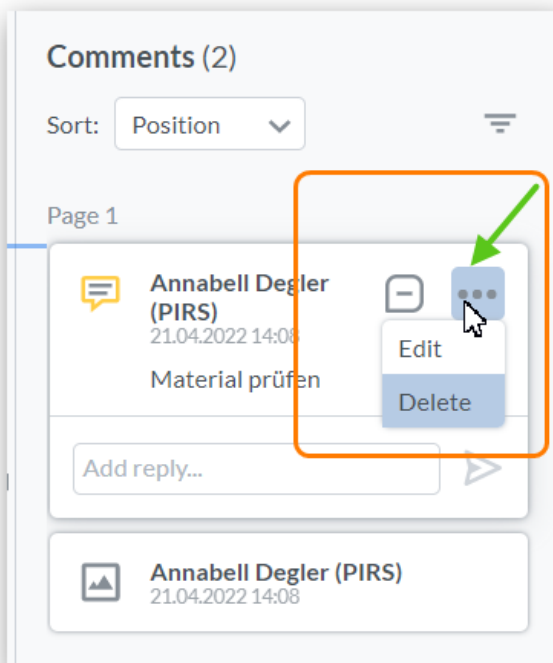
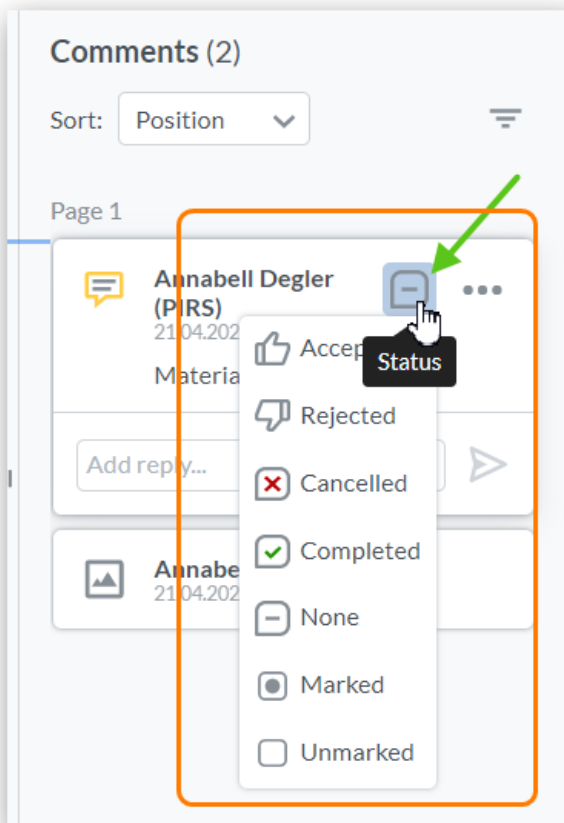


In order to remove an annotations, regardless whether you have already saved it or not, select the annotation item, then either click the delete key on your keyboard or open the options listed in the right corner of the item and select "Delete".

Besides the option to delete an annotation, you are also able to edit it.

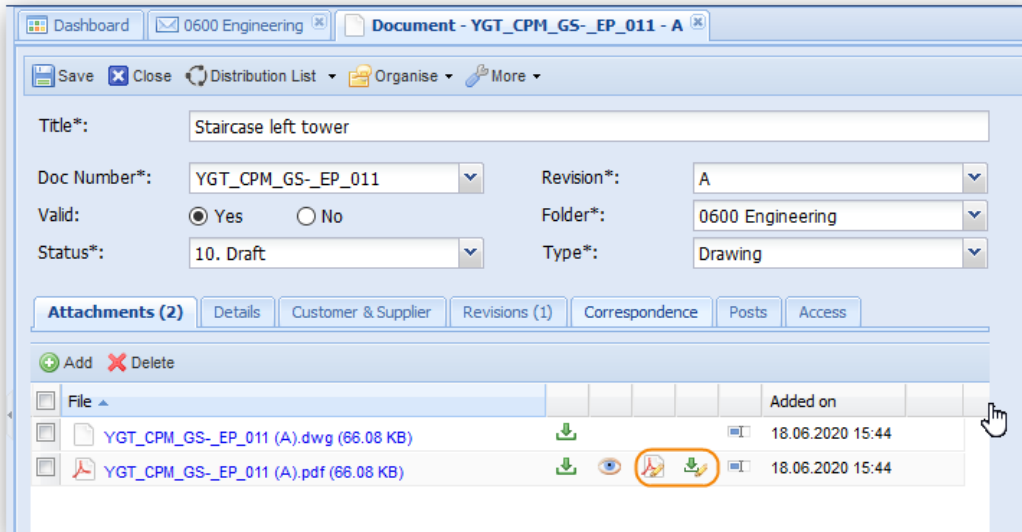
Furthermore, you can set a status for the item that for example reflects your review result. Here you can e.g. choose between accepted, rejected, cancelled or completed.


Once you selected the status, it will be listed directly underneath the annotation within the panel. You can always edit the status.

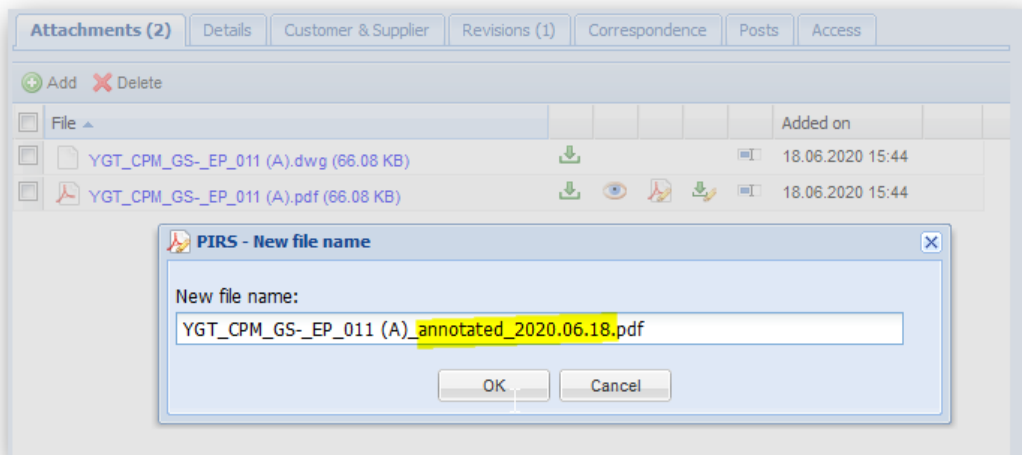


Save and download annotated files


Once you have saved annotations for a file, two more symbols will appear within your document that are visible in edit as well as read mode (compare with screenshot).



- Click the first new symbol () in order to save the file together with all thus far made annotations a new PDF file. A small box will allow you to edit the file name. By default the original file name will be supplemented with "annotated" and the current date.



The new PDF file will be added to the list of files within the document and can again be open and annotated in your file viewer if required.

- The second symbol () enables you to download the original file including all made annotations. The file will be converted into PDF. All annotations of the downloaded PDF can still be edited using any common PDF editor.

Please be aware!

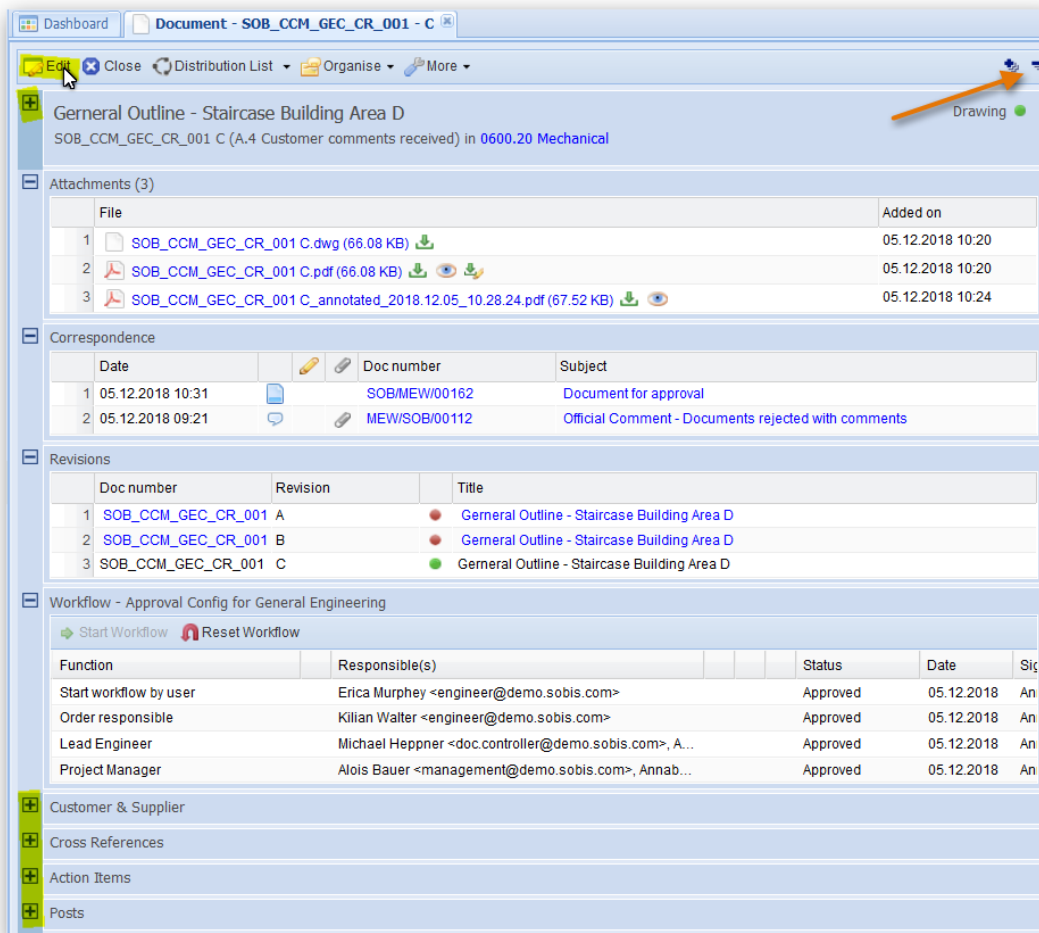
In case someone else is currently reviewing the document and has **checked it out** within PIRS, you will NOT be able to add any notes or annotations. In this case the file

viewer will still open the file in read mode, you will however not be able to use any of the annotation features.

4.2.9 Read Mode vs Edit Mode

When you double click on a document it will first open in read mode. Read mode looks slightly different than edit mode as you can see demonstrated in screenshots below.

All data fields that you have listed in tabs underneath the body field of a document in edit mode are available and offered in various sections. Each section can be expanded and collapsed separately or all at once as indicated by the orange arrow in the following screenshot.



The screenshot displays the SOBIS PIRS software interface for a document titled "General Outline - Staircase Building Area D". The document is in edit mode, as indicated by the "Edit" button in the top left. The interface is organized into several sections:

- Attachments (3):** A table listing three files:

File	Added on
1 SOB_CCM_GEC_CR_001 C.dwg (66.08 KB)	05.12.2018 10:20
2 SOB_CCM_GEC_CR_001 C.pdf (66.08 KB)	05.12.2018 10:20
3 SOB_CCM_GEC_CR_001 C_annotated_2018.12.05_10.28.24.pdf (67.52 KB)	05.12.2018 10:24
- Correspondence:** A table listing two entries:

Date	Doc number	Subject
1 05.12.2018 10:31	SOB/MEW/00162	Document for approval
2 05.12.2018 09:21	MEW/SOB/00112	Official Comment - Documents rejected with comments
- Revisions:** A table listing three revisions:

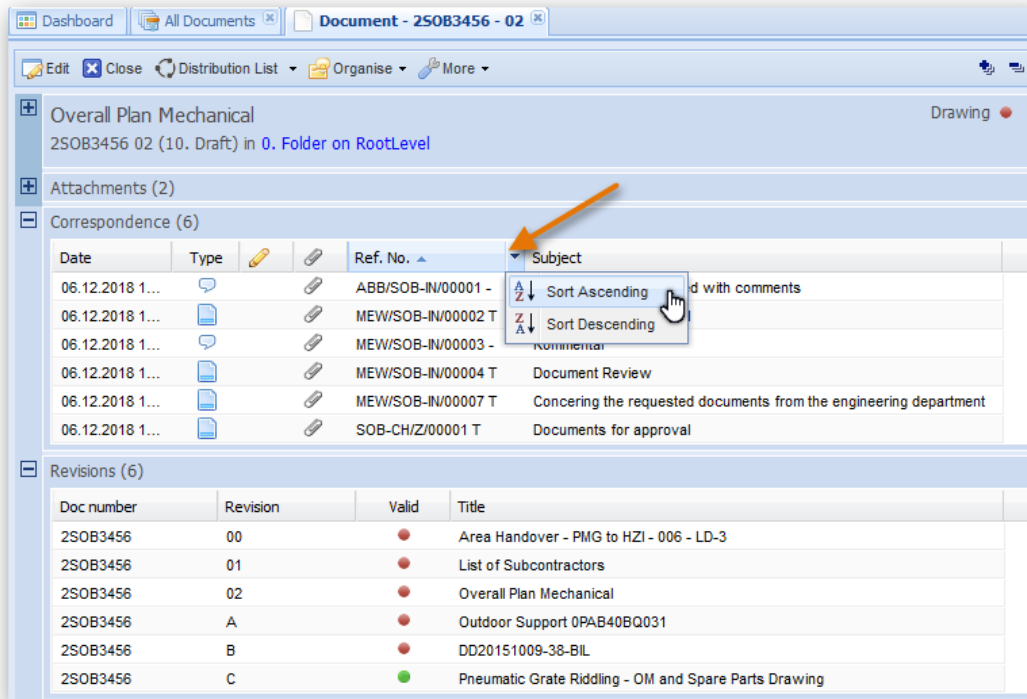
Doc number	Revision	Title
1 SOB_CCM_GEC_CR_001	A	General Outline - Staircase Building Area D
2 SOB_CCM_GEC_CR_001	B	General Outline - Staircase Building Area D
3 SOB_CCM_GEC_CR_001	C	General Outline - Staircase Building Area D
- Workflow - Approval Config for General Engineering:** A table showing the approval process:

Function	Responsible(s)	Status	Date	Sign
Start workflow by user	Erica Murphey <engineer@demo.sobis.com>	Approved	05.12.2018	An
Order responsible	Kilian Walter <engineer@demo.sobis.com>	Approved	05.12.2018	An
Lead Engineer	Michael Heppner <doc.controller@demo.sobis.com>, A...	Approved	05.12.2018	An
Project Manager	Alois Bauer <management@demo.sobis.com>, Annab...	Approved	05.12.2018	An
- Customer & Supplier**
- Cross References**
- Action Items**
- Posts**

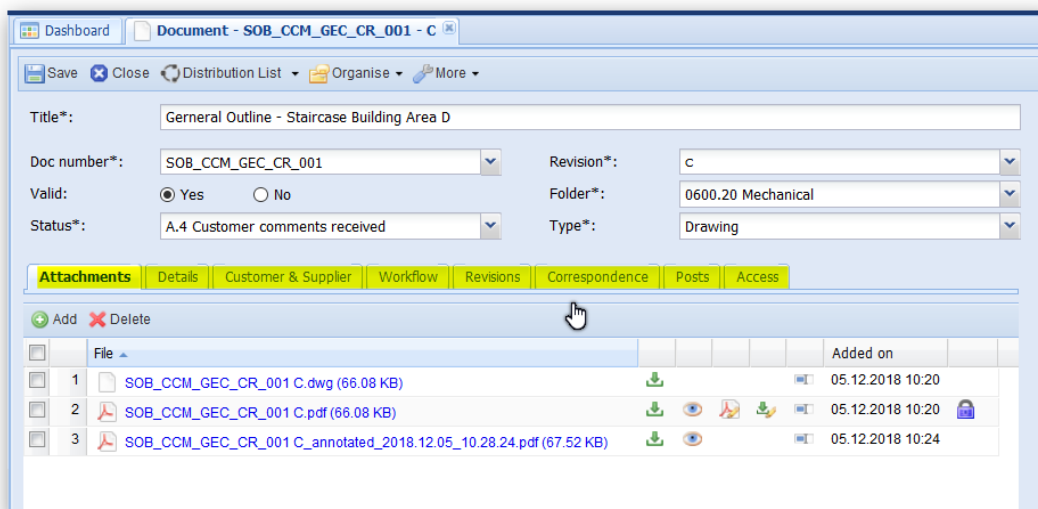
An orange arrow in the top right corner points to a "Drawing" icon, indicating that the document is a drawing file.

Within the sections "Correspondence" and "Documents", you'll find all created, sent and received correspondence directly related to your document as well as all previous revisions. By clicking on the links, the correspondence and previous revisions will open in a new tab. You are able to download or directly open all listed attachments in our PIRS file viewer and leave your comments.

You are also able to sort all listed correspondence files directly in read mode. Simply hover your cursor over the tab and either click on the tab directly or on the arrow head to select ascending or descending sorting. Compare with the screenshot below.



In case you hold edit rights to the document you have opened in read mode, the "Edit" button will be displayed.



With edit rights access, you are able to adjust meta information, access the extended document action bar and add or delete files within the attachments section. Please be aware that if the document has already been sent via transmittal slip, you will only be able to delete files that have not been sent yet. All sent files are marked with a lock symbol.

4.2.10 Use Templates to send Transmittals & Comments

For creating and sending transmittal slips as well as comments, PIRS offers a great feature called "Predefined Document Actions". PDAs are templates created by your project or document manager that you can use to save time. With a PDA mandatory as well as optional fields of a comment or a transmittal such as the recipient, the body text or the required response date can be preset.

Learn more about PDAs [here](#).

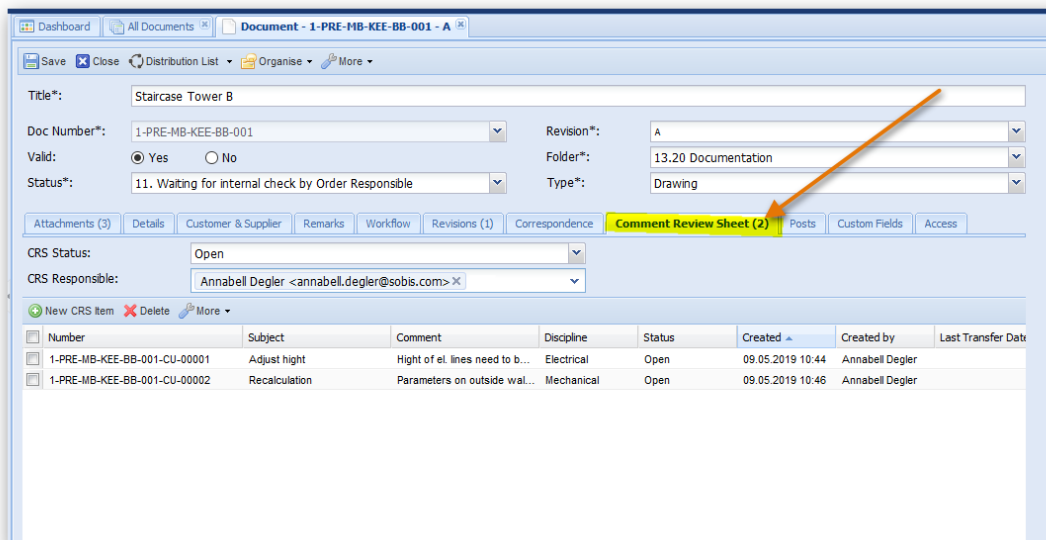
4.2.11 Comment Review Sheet (CRS)

Communication, team work and efficient collaboration internally as well as with all external members of a project, those are the key elements that can make or break your project.

Especially during large EPC projects collaboration is vital. Several parties are involved and thousands of documents have to be reviewed, revised, commented on, approved and the final versions used for construction and the as built documentation.

Being able to exchange and follow up on comments plays a vital role in the entire process of reviewing till the final document is released.

The Comment Review Sheet, which is a tab in the content area of your meta document will allow users not only to manage, trace and track their documents, revisions and communication but have precisely one common place to leave, share and exchange their views for each document and its revisions.



4.2.11.1 Why you should work with CRS

When reviewing a document either on your screen or the good old way as a print out on your desk, you are probably used to leave your remarks directly on the drawing. But we all know that it gets rather difficult to follow up on the remarks and comments of several people, made directly on a document.

Also, once you create a new revision all those comments are lost, more or less. Therefore, comments are usually recorded in lists which are then attached, changed and reattached to the document. With the PIRS Comment Review Sheet this is no longer necessary.

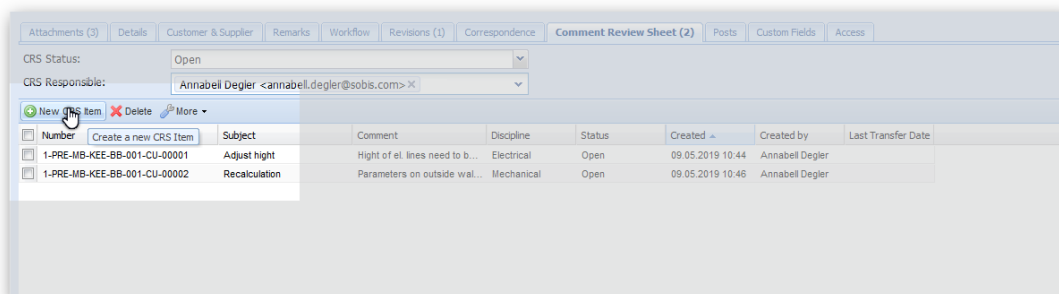
You can...

- Make remarks directly attached to the reviewed document
- Have a standard, company-wide process to leave & share comments
- Automatically create & maintain a central list of all comments that can be exported to Excel
- Follow up on each comment with status, responsible & discipline
- Include open comments from previous revisions in latest revision
- Share comments between all parties internally as well as externally

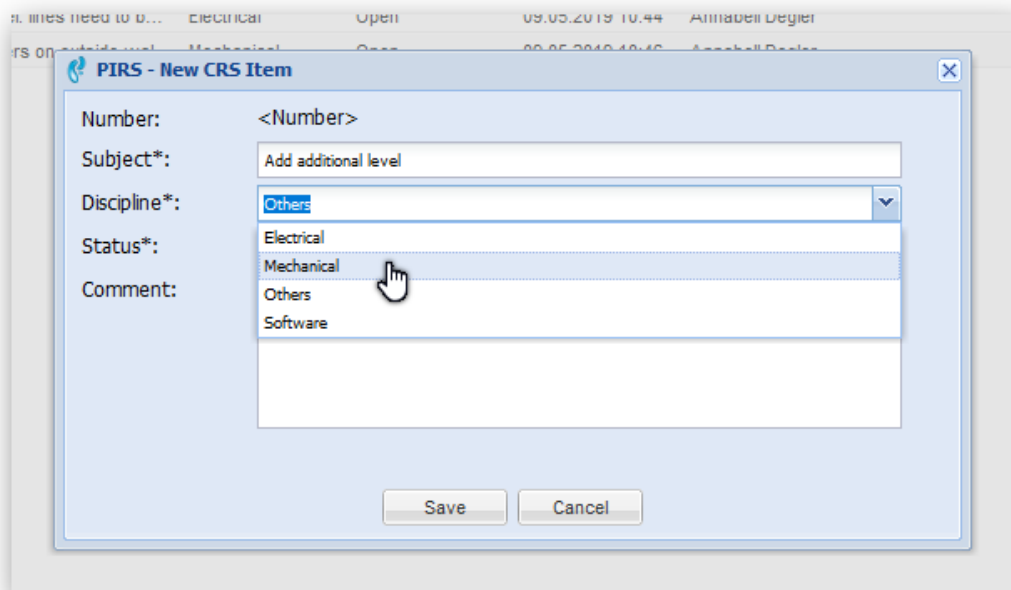
4.2.11.2 *How does it work*

The CRS is a new section directly integrated into a PIRS meta document, hereby allowing you to comment on every document revision by making a list. In case the CRS tab is not visible within your meta document, please contact your project manager or support desk.

Each item within the list reflects one open point or remark that needs to be addressed. In order to create a new CRS item click the "New CRS Item" button.

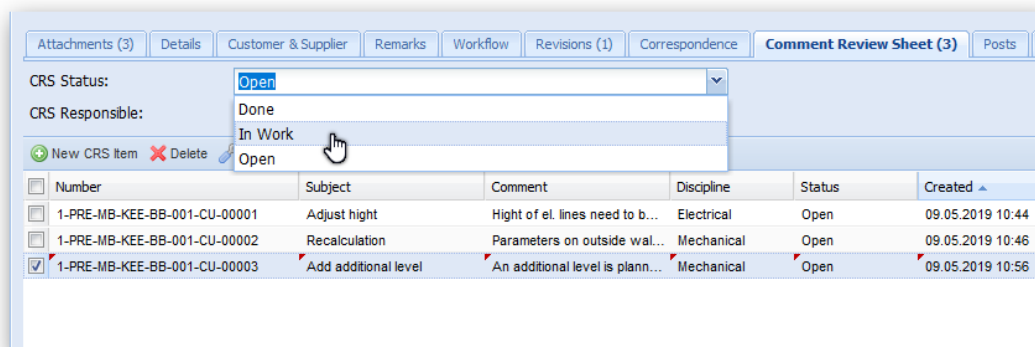


A new window opens, allowing you to enter a summary of the issue within the subject field, select a discipline as well as a status and enter a more detailed description within the comment field.



As you click save, your item will be listed within the CRS tab. You can adjust the status of each item separately during the course of e.g. the document workflow. In addition, can easily reply to each made remark directly within the Comment area of the CRS item.

The CRS also has a general status to reflect for example whether or not CRS items are open, all closed or still in progress.

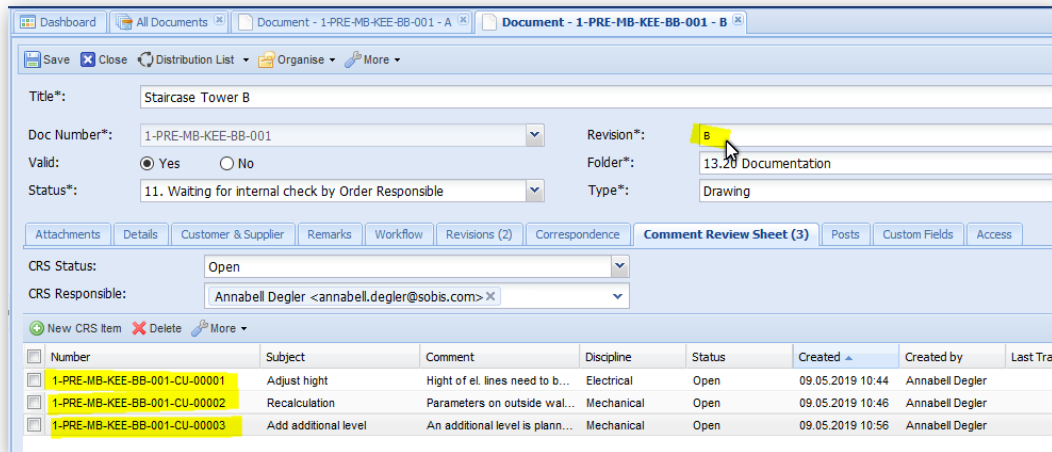


There are no limitations on how many comment items you and your team will create within the Comment Review Sheet tab.

4.2.11.3 Revision Management

Since the CRS is a tab within the PIRS meta document, your comment items are listed directly to and can be maintained directly within each document.

Because in most cases it is important to have a list of all CRS items in every revision or to have at least items that are not yet closed transferred to the next revisions, PIRS will automatically copy all items listed within your CRS when a new revision of a document is made.

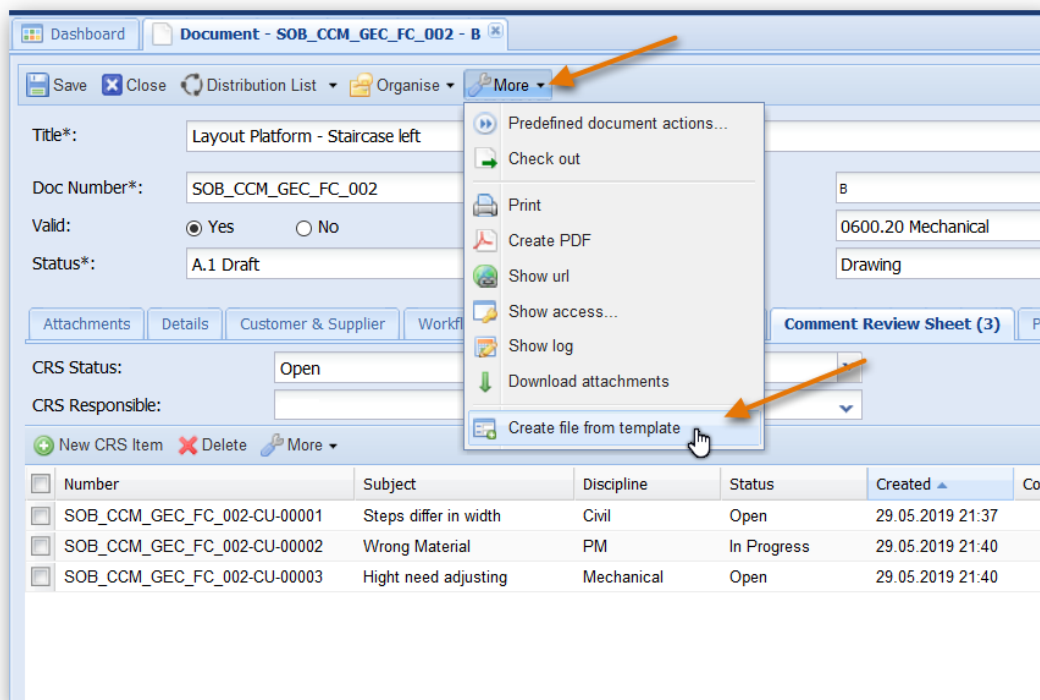


Since each item receives a unique number which will also be transferred in case you create a new revision you can always follow up according to the number. Items that are not needed within a new revision can of course also be deleted using the "Delete" button.

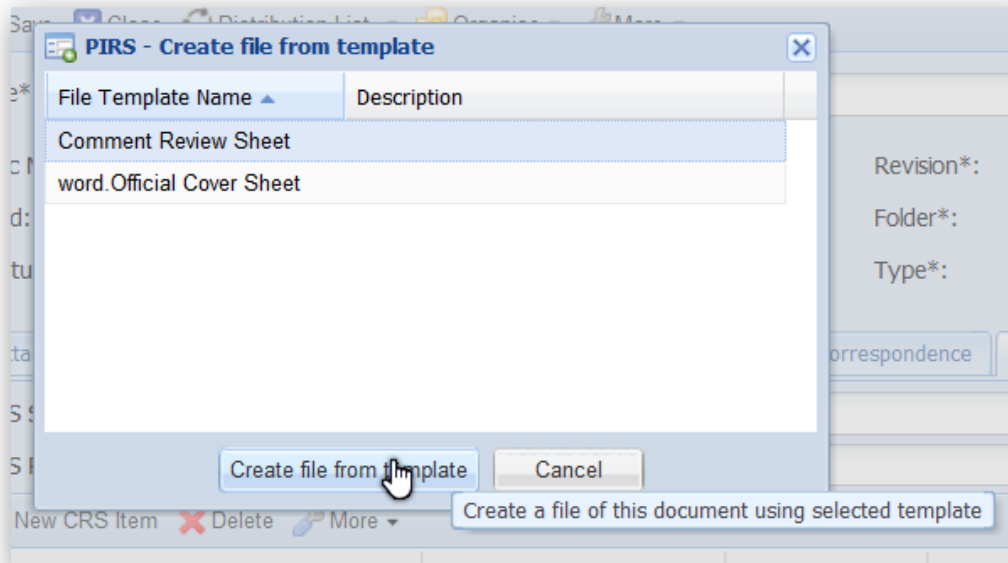
4.2.11.4 Share CRS Items with externals

In order to easily share comments with externals, the content of the CRS can be included as Excel file when sending documents from PIRS automatically. In addition you can of course create said Excel sheet at any point of the process and submit it to your suppliers, consultants or customers separately.

In order to create the Excel sheet, you need to open the document in edit mode. Then select the more options. As last feature in the list you will find the option "Create file from template".



There can be several different templates based on what you need for your project. Select the template that fit your requirements and click "Create file from template" as illustrated below.

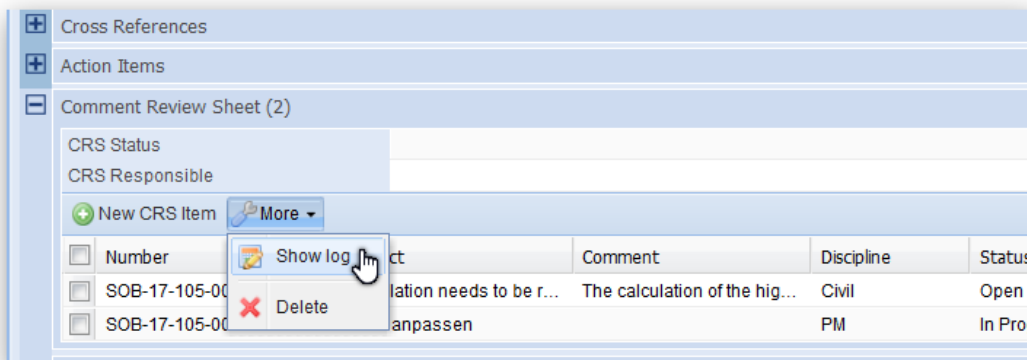


The CRS list will be created based on your company template and if that option was selected in your project set up also automatically attached to your PIRS document.

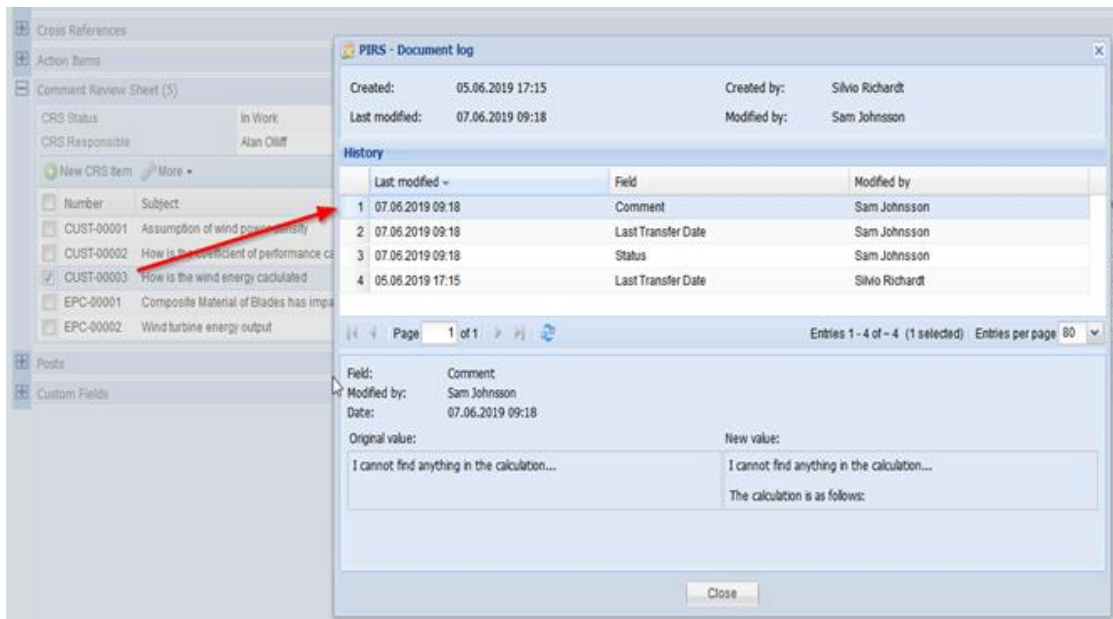
4.2.11.5 **CRS exchange with Portal**

If required, PIRS Portal user can also be integrated directly within the comment process offered by the CRS. Please contact your project manager or SOBIS Service Desk to learn more about the activation of CRS for PIRS Portal.

Once the CRS for Portal is activated all CRS items will also be transferred to PIRS Portal when you send a PIRS document via Transmittal Slip. The PIRS Portal user will then be able to add there own CRS Items and answer to listed items created by you and your team.



The CRS item number will reflect whether the item was created internally or from a Portal user. In addition you can access the log for each CRS item that will allow you to track who edited the CRS item.



4.2.12 Interfaces with CAD, PDM or ERP systems

PIRS offers several options to integrate data from other system via web services. Therefore, we are able to develop and enable reading interfaces to any other system or tool you are working with, as long as we have access to its documentation and can cooperate with your internal IT.

One interface already offered within our standard is an interface to COMOS. Depending on your COMOS version and set up, only little adaptations will be needed in order to offer an automated import of meta data and files directly from COMOS based on xml. Together with your project managers we are able to:

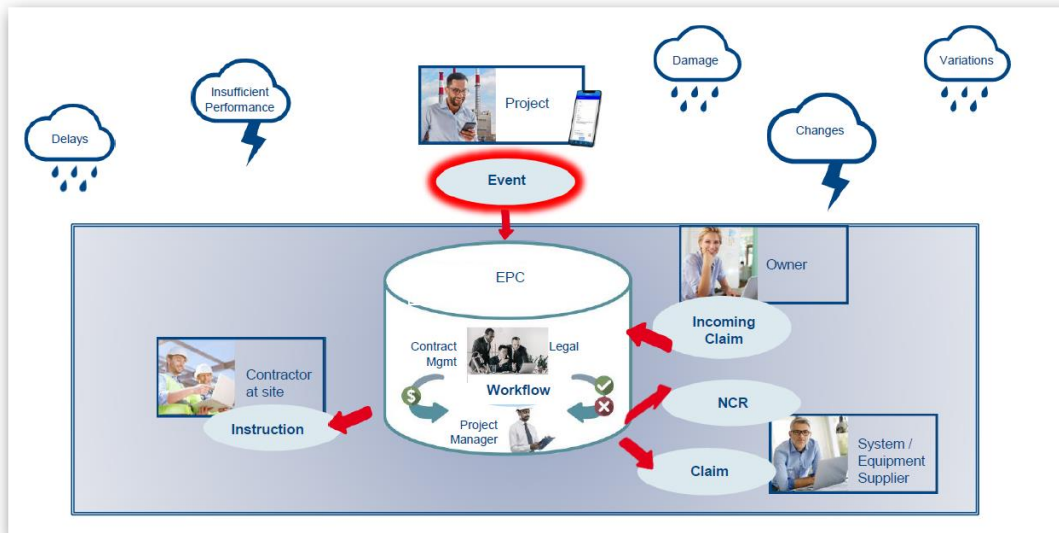
- define a name pattern for uploaded files
- automatically handle and recognize new document revisions
- customize mapping between COMOS and PIRS fields
- and recognize duplicates

Of course based on the same general method, we are also able to set up an automated import from your FTP server.

Please get in touch with your SOBIS responsible or your service desk to learn more.

4.3 Events

An Event offers the option to document and record all deviations, variations and changes within your project. So any "Event" that might lead to addition costs or time delays, should be documented as a PIRS Event.

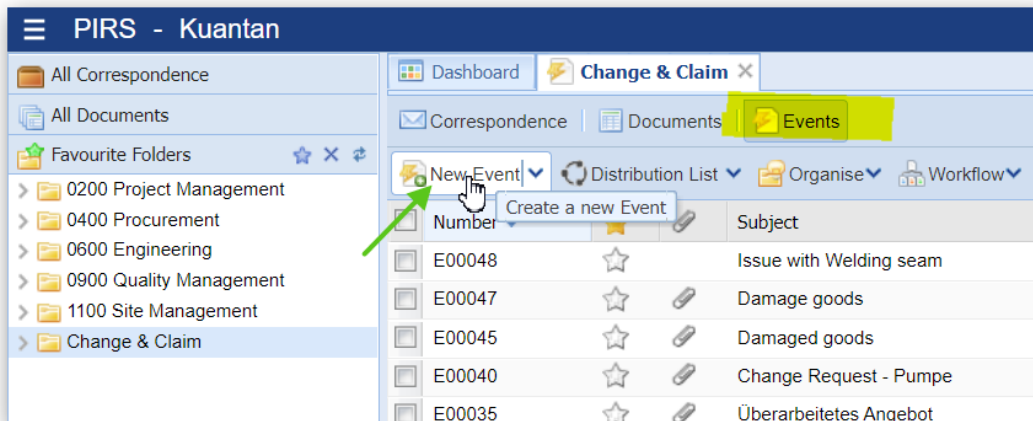


The Event allows to categorize, evaluate and assess possible impacts. Based on the process offered within the Event, follow-up information can then be created with precision, required workflows can be put into place and necessary notices can be send to external parties.

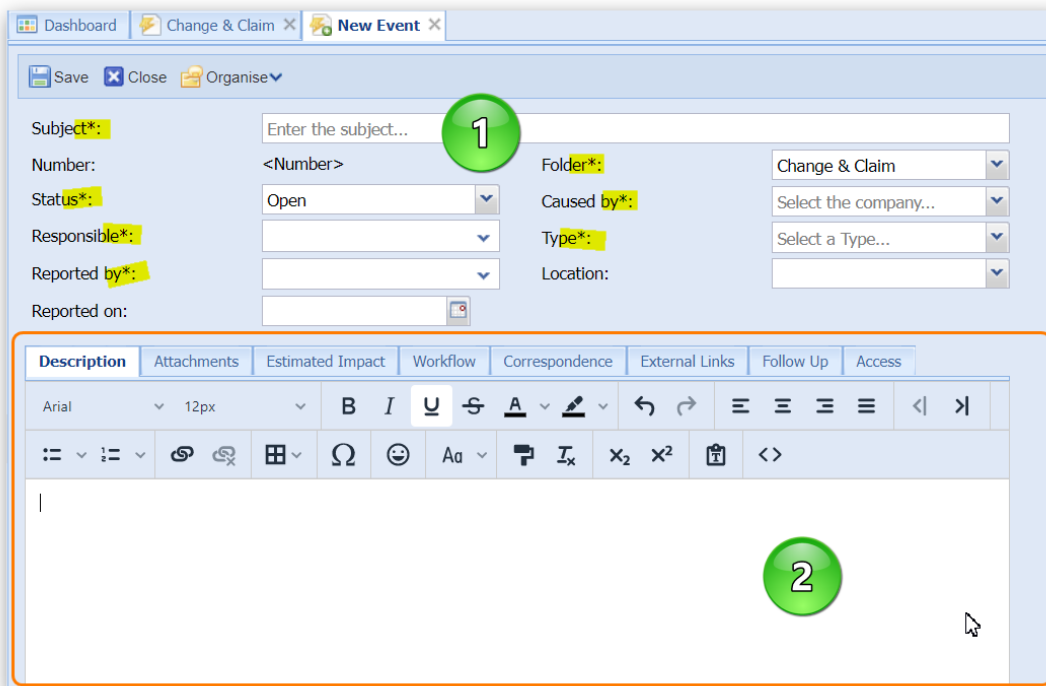
In order to closely monitor all project deviations and variations each team member is recommended to create a new Event for each event occurring during the course of the project no matter how minor or major the event might seem and regardless of the immediate level of estimated effects the event might have. An event can for example be a delayed or damaged delivery, a strike or sudden illness of employees, an earthquake or any other incident.

4.3.1 Create new Event

In order to create an event you simply click the "New Event" button that is presented to you in the Event section of your folders or within any Event view as indicated in the screenshots. A new Event document will open in a new tab within your content area.



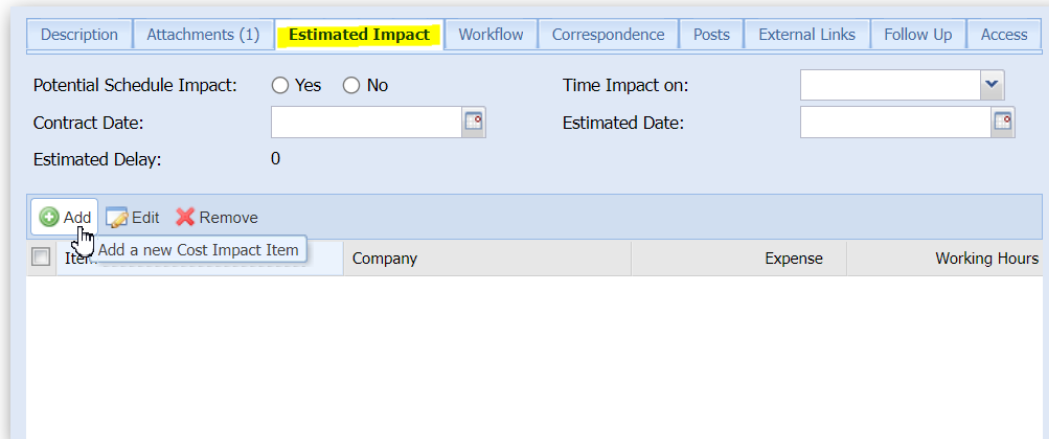
The following image and its related description will give you a quick overview of the information to be entered in an Event and its purpose.



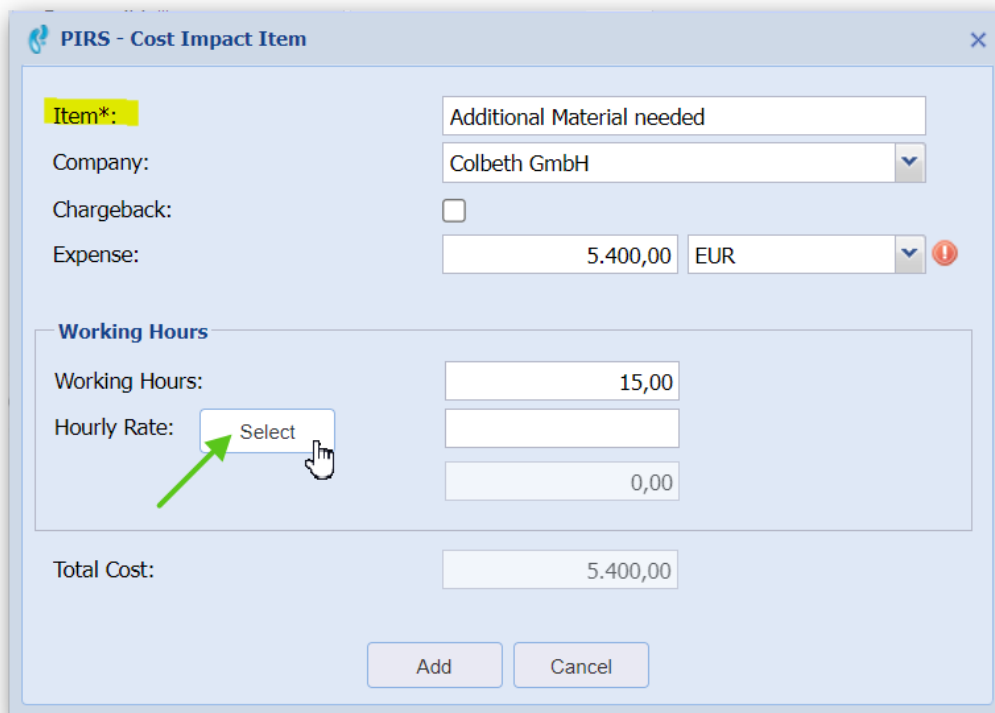
1) This area is the header of the Event. Here the main Event documentation and categorization e.g. in form of a short description (Subject), the event status and type as well as the responsible and the company that caused the event can or must be entered. All mandatory fields are marked with a * symbol, highlighted in the screenshot above.

2) The tabs in the area below the header offer you the option to include additional and more detailed information about the event. The first tab lets you insert a detailed description of the event while the second tab enables you to upload any files related to the Event e.g. photos, calculations or documents for the construction site.

The predicted or recorded time and cost impact of the event can be calculated and documented in the third tab. Here you can select whether or not you expect an impact on your schedule and pick the schedule entry or milestone / project phase that will be affected. In case a specific date was defined by a contract you can also include it together with the estimated deviation.



To add estimated costs, click the "Add" action as displayed above. A small input mask will open, allowing you to enter a title, company, expected expenses and list working hours for which you can pick hourly rates based on your company rates. In case chargeback costs are expected they can also be listed in a separate cost item entry.



If workflows are used to manage internal information or approval processes, the "[Workflow](#)" tab will allow you to pick and assign the right WF.

Within the "Correspondence" tab you will see all notices that have been sent and the "[External Links](#)" tab enables you to insert a link to another webtool or any website (e.g. google maps).

In the screenshot above you also see a tab called "Follow Up". This tab can be defined by you and offers the option to include a simple or complex input mask. Your company can use this feature to include any other meta data that needs to be entered. You could for example document follow up processes such as Claims, Change Order, Instruction, Non Conformity and so on.

The last tab offers the option to define or limit the access other team members will have to the Event. Unless the access is already defined by the folder, by default all team members will be able to read your document. However, you will be the only person with author rights which means that other than you only team members that have admin rights will be able to edit this document. (Compare with the image below.)

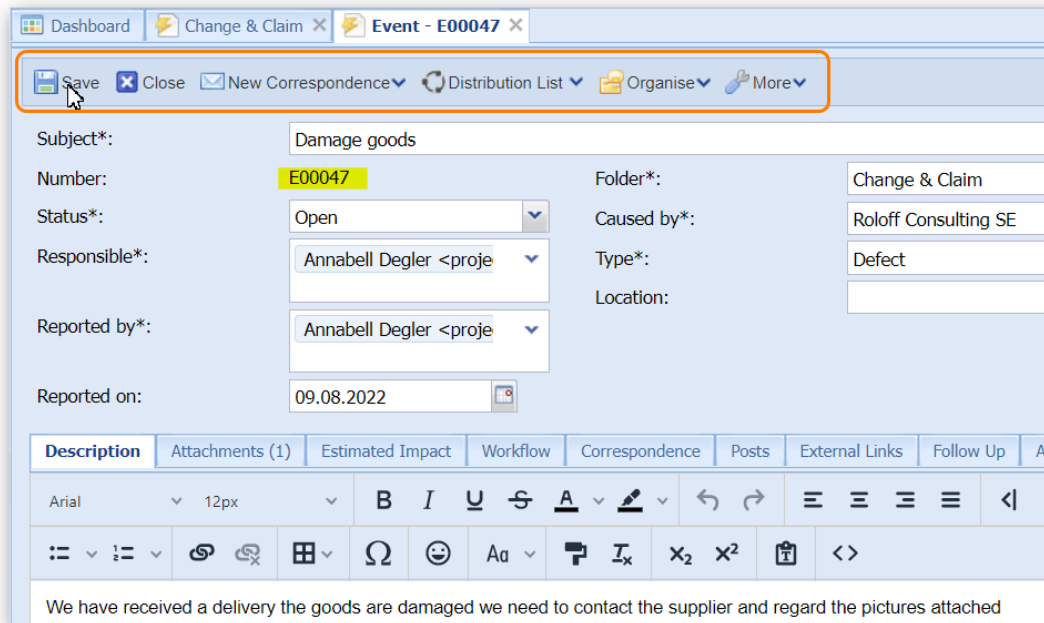
The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Description, Attachments, Estimated Impact, Workflow, Correspondence, External Links, Follow Up, and Access (which is highlighted in yellow). Below the tabs, there are two sections for setting permissions:

- Who can read this document?**
 - All
 - All editors and following contacts/user groups
- Who can edit this document?**
 - Document author only
 - Document author and following contacts/user groups

Save your Event

If you have entered all important and required information, click save in order to save the Event.

Once an Event is saved, it automatically receives a unique document number. Compare with highlighted area in the screenshot below. Furthermore, additional buttons appear within the document action bar.

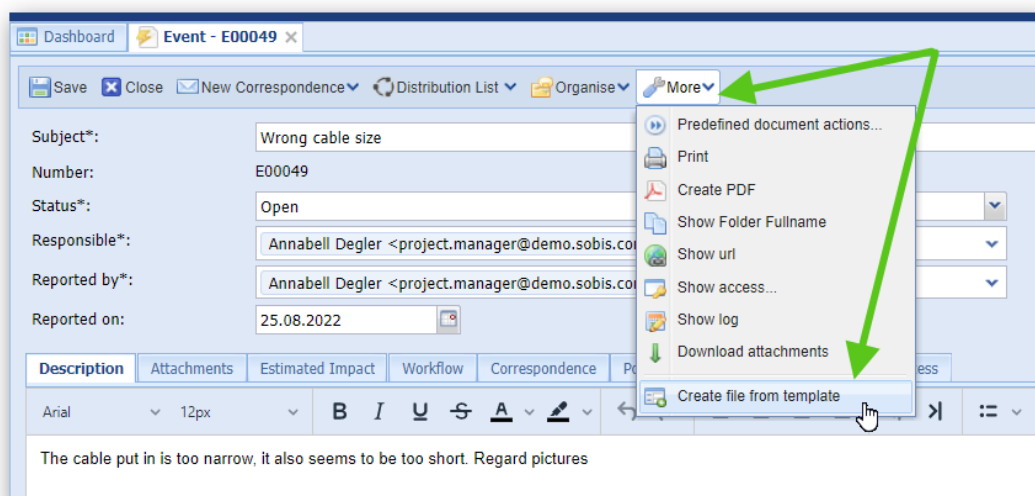


All general options and actions offered within the action bar are described within the chapter [PIRS Tool Bar Actions](#).

4.3.1.1 Use Office Templates

In case your company has provided SOBIS with office templates used to document e.g. non conformities, changes, instructions, damage reports and so on, you can use the information recorded in your Event to create these documents based on your templates.

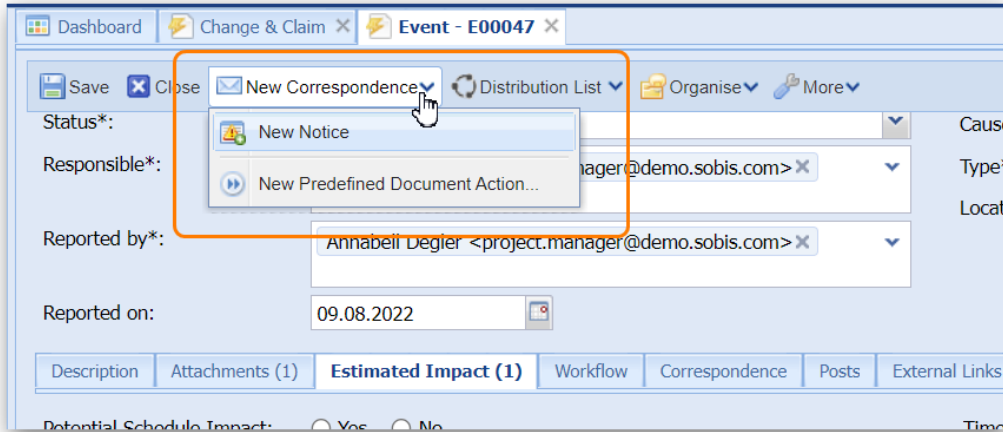
You will find the templates within the "Create file from template" feature listed under the "More" options.



To learn more about the template feature please refer to chapter [Create file from template](#).

4.3.2 Send Notice

Events can be sent to externals using Notices. Notices will then automatically be linked with the Event. Similar to a Transmittal Slip, PIRS will create a cover letter, containing information about the sent Event as well as an action the recipient is expected to perform.

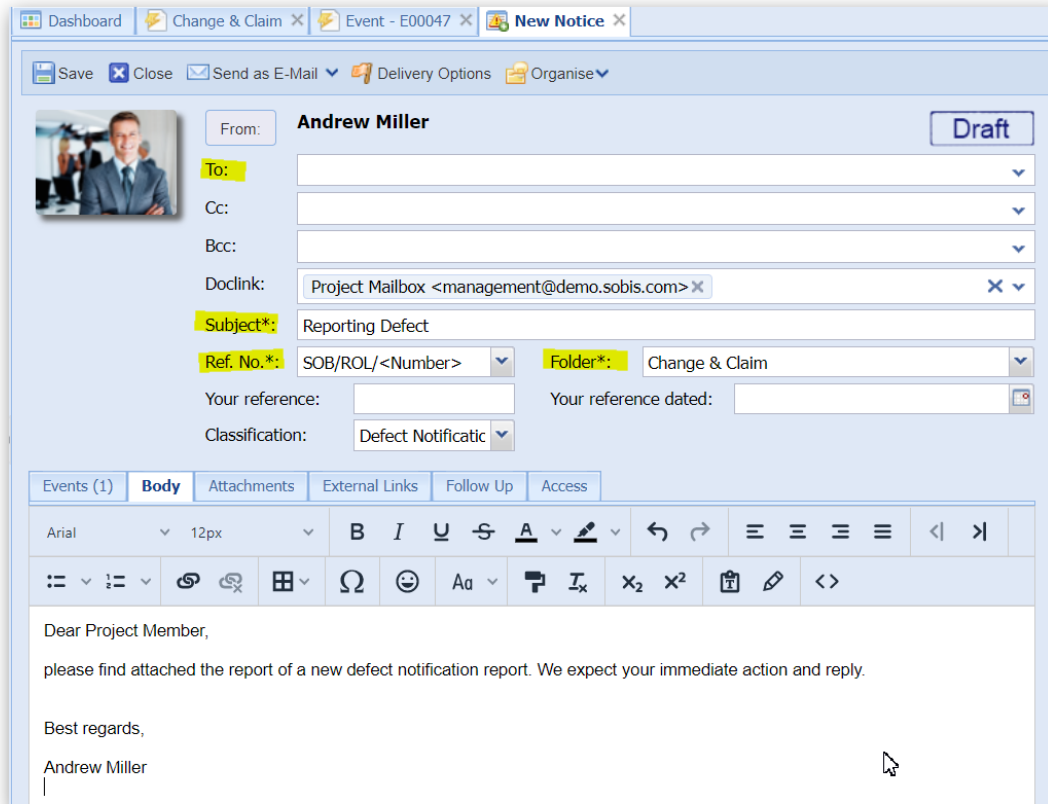


To create a new notice, click the "New Correspondence" action within your event tool bar. You can either create a new notice from scratch or use a company template ("New Predefined Document Action").

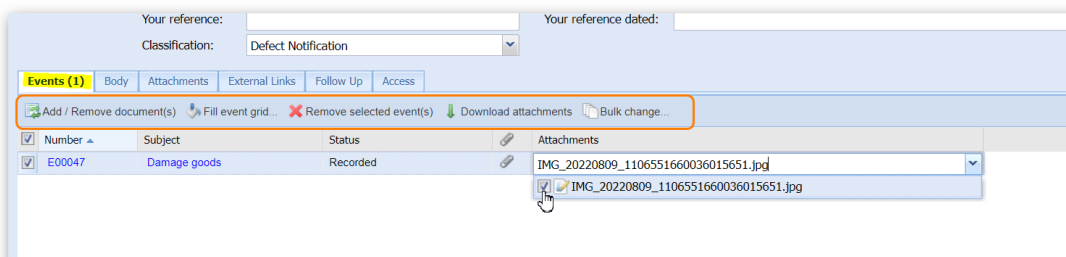
In case your company has not defined templates yet, get in touch with your PIRS responsible or contact the SOBIS service desk.

The new Notice will open in a new tab.

Select a recipient, make sure to enter values for all mandatory fields and enter your text within the body field.

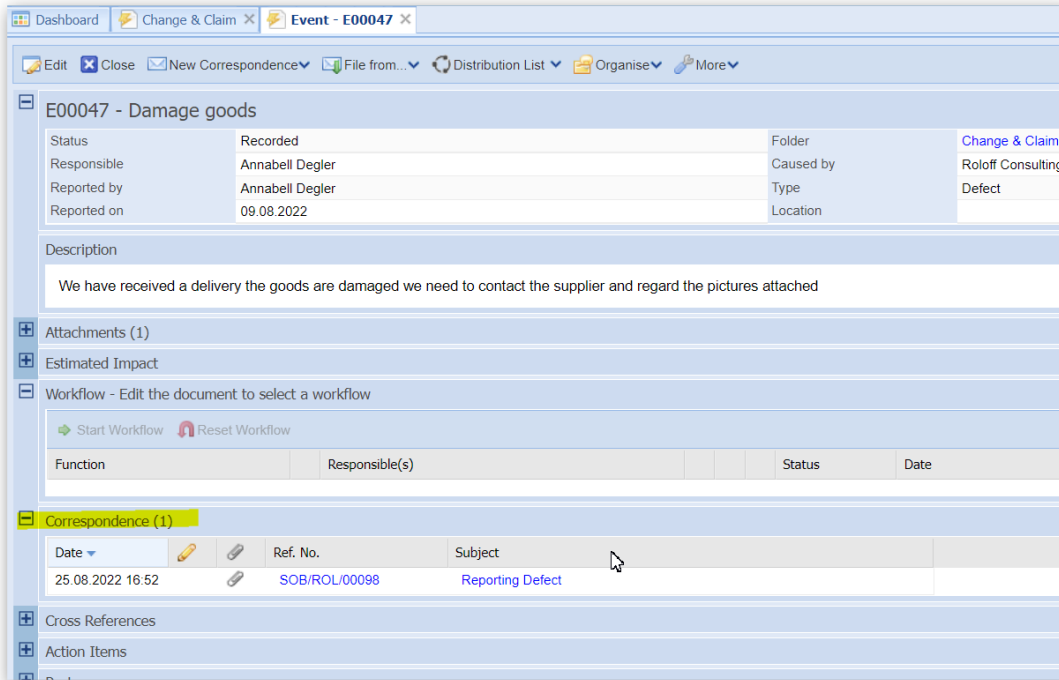


The Event will be automatically linked within the "Event(s)" tab. Similar to the transmittal slip used to send documents, you can define a new status which will be assigned to the Event after the notice has been sent. You can choose and select files attached to the event to be shared with the recipient of the notice.



In addition, you can add or remove events for your list, use the "Fill event grid" feature to adjust the setting on some or all events that will be send out. With the bulk change feature, you are able to change values on the event(s) directly from the notice. This might come in handy in case you want to e.g. change the responsible of all selected events to another team member.

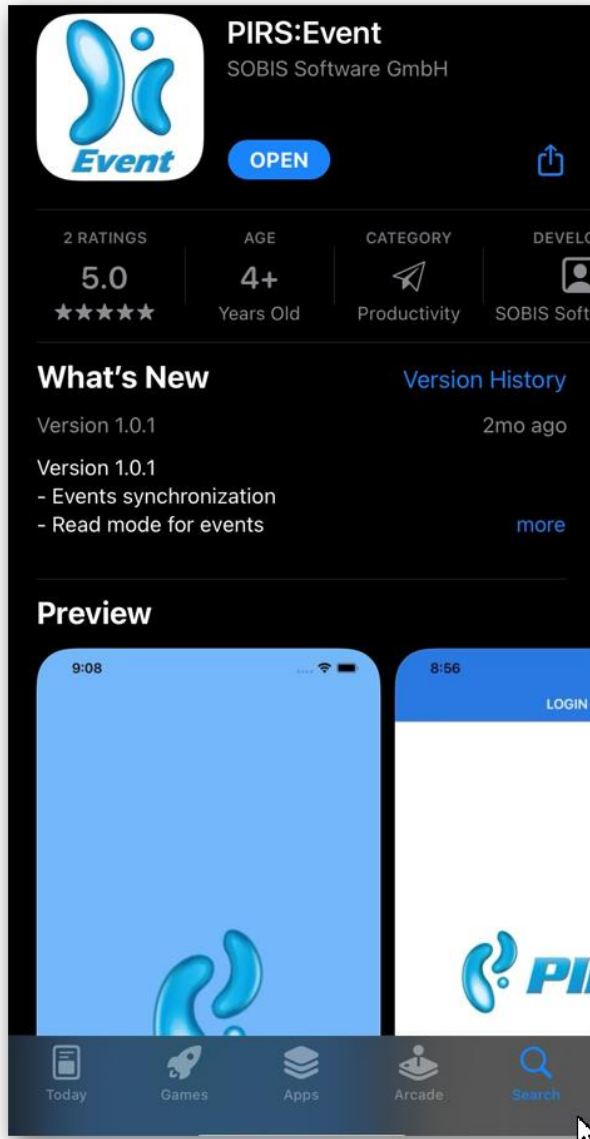
Once the notice has been saved or sent, it will be listed within the Event under the correspondence tab.

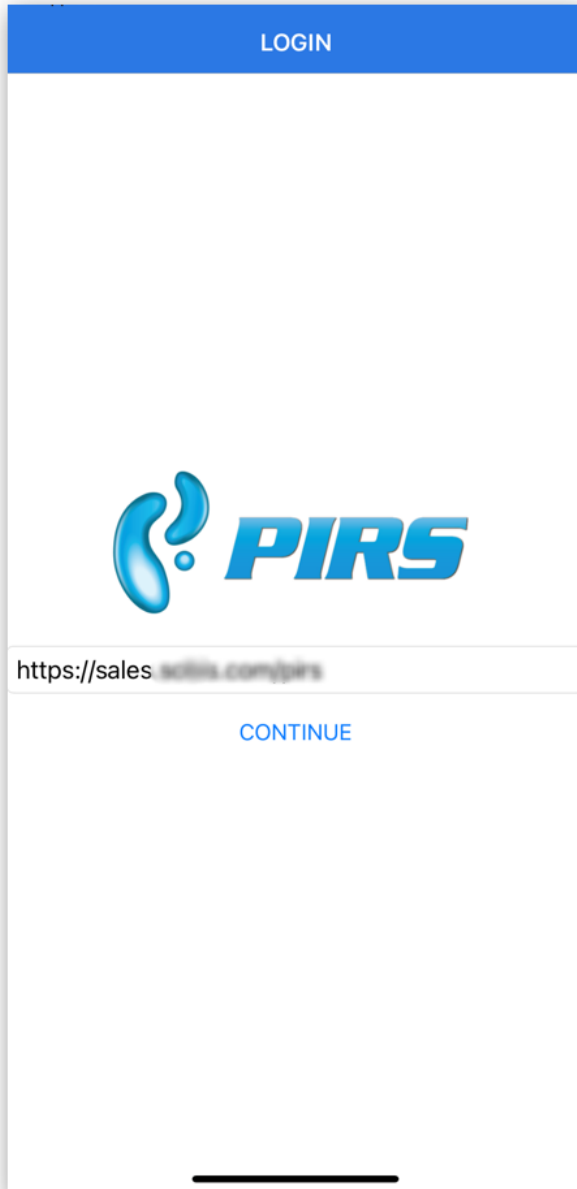


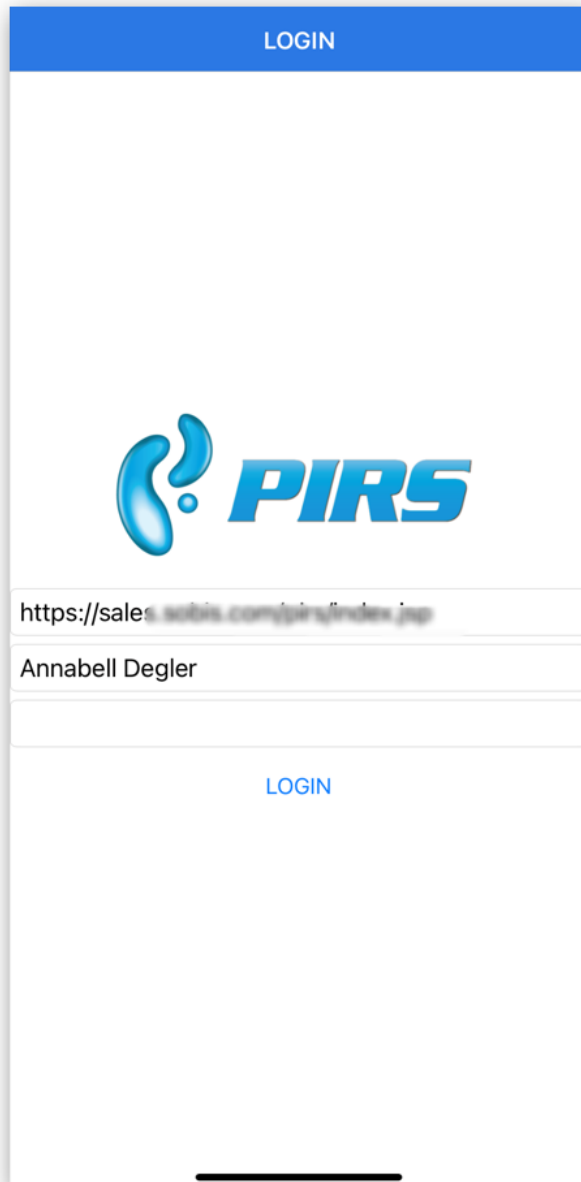
4.3.3 PIRS Event App

The PIRS Event app offers you the option to quickly create and report new events using your cell phone or tablet. The app is also available offline, therefore enabling you to document events e.g. directly at the construction site regardless of internet access.

To download the app search for PIRS Event within your app store (IOS or Android). Open the app and enter your PIRS URL. Log in using your username and password. In case single sign on (SSO) has been set up within your company, you need to set up MS Office (Outlook) on your device.






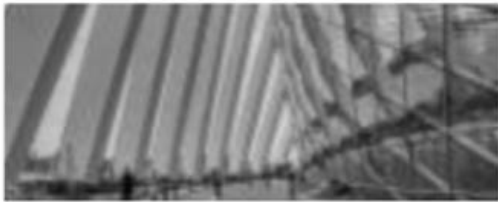


Once you are logged in, all your active PIRS projects will be listed in your app. Select the project you want to create an event for. A list of all Events created by you and/or you have access to will be offered. You can access the events and attached files by selecting the entry.

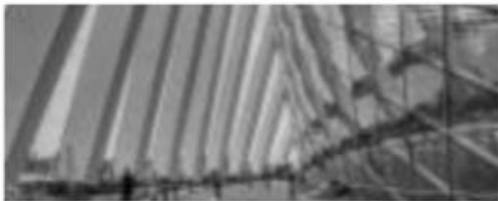
Project List



Kuantan
Project Manager - Annabell Degler
Last sync status: 09-Aug-2022 10:06:12



Duban (Bott Consulting)
This is the PORTAL of XIRON Chemicals project. Working together with engineering c...



Duban (XIRON)
This is a project of XIRON Chemicals

Project List		Events	
Q Search			
E00048		09-08-2022	
Issue with Welding seam		Open	
E00047		09-08-2022	
🔗 Damage goods		Recorded	
E00046		09-08-2022	
Accident on the construction site		Open	
E00045		09-08-2022	
🔗 Damaged goods	Contractual Partner informed		
E00044		09-08-2022	
🔗 issue with material		Recorded	
E00043		19-07-2022	
🔗 Schlechte Schweißnaht		Open	
E00042		19-07-2022	
🔗 Rohrleitung zu kurz		Open	
E00040		21-06-2022	
🔗 Change Request - Pumpe		Recorded	
E00039		13-06-2022	
🔗 Damaged goods		Open	
E00038		02-06-2022	
🔗 New Order Details		Open	
E00037		01-06-2022	
🔗 Damaged goods		Open	
E00036		01-06-2022	
🔗 Delay in material delivery		In progress	
E00034		01-06-2022	
🔗 Sublieferant insolvent		In progress	
E00033		31-05-2022	
🔗 Lieferprobleme		In progress	
E00032		20-05-2022	



The screenshot shows a mobile application interface for creating an event. At the top, there is a blue header with a back arrow and the text 'Events' on the left, and 'Event' on the right. Below the header, the title 'Kuantan' is centered. The form consists of several sections, each with a blue header and a white input field:

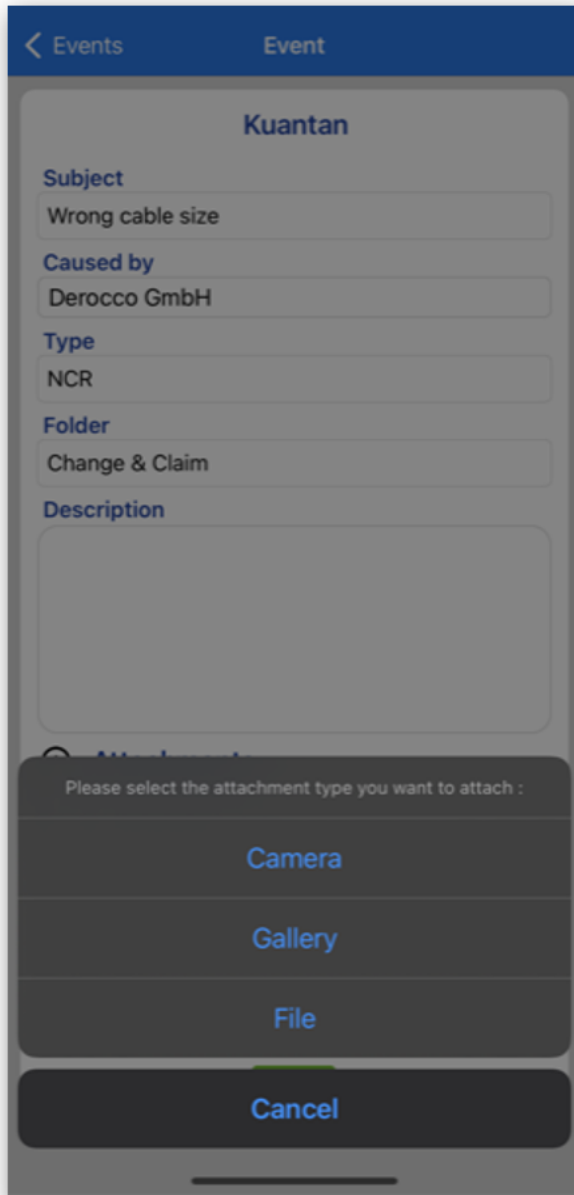
- Subject:** 'Wrong cable size'
- Caused by:** 'Derocco GmbH'
- Type:** 'NCR'
- Folder:** 'Change & Claim'
- Description:** 'The cable put in is too narrow, it also seems to be too short. Regard pictures'

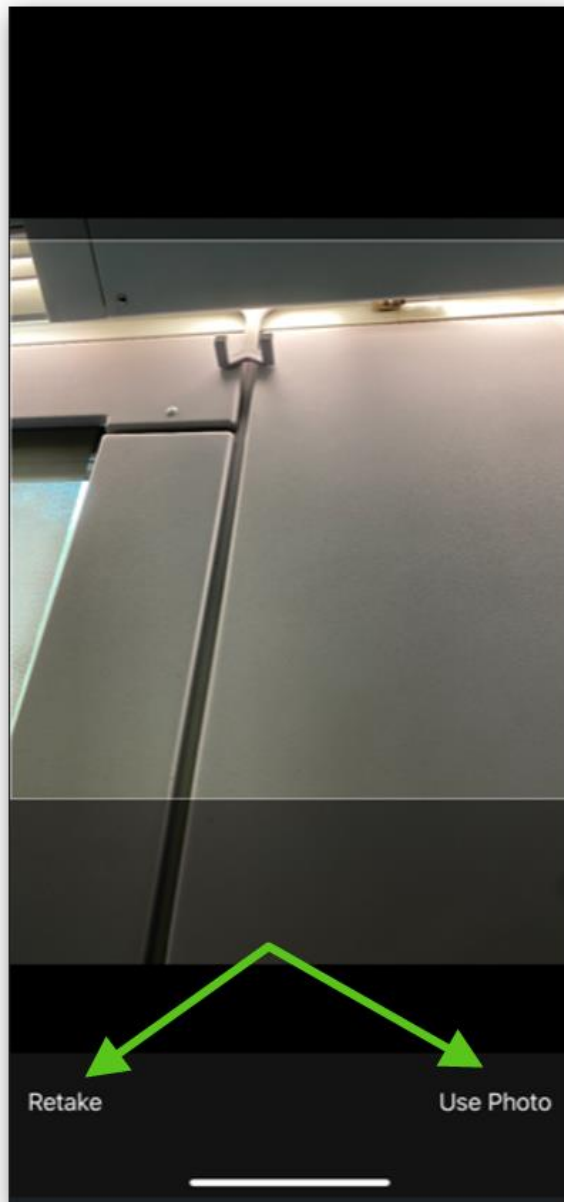
Below the description is an 'Attachments' section, indicated by a green arrow pointing to a plus sign icon. The section shows one attachment: 'IMG_20220825_17045216614...' with an eye icon and a trash can icon. At the bottom of the form is a green 'Save' button.

To create a new event, select the green + in the right lower corner.

An empty event will open. Enter a subject, select a causing party and a type from the list. Optionally enter more details within the description area.

By selecting the plus symbol next to the "Attachments" you can take a picture which will directly be attached to the event, pick a picture from your gallery or add a file from your cell phone.





Once all important information has been added click save. The event will be transferred to PIRS and a responsible informed. In case you are not connected to the internet, the event is saved and will be transferred as soon as internet connection is available again.

The screenshot shows a mobile application interface for an event titled "Kuantan". The form includes the following fields:

- Subject:** Wrong cable size
- Caused by:** Derocco GmbH
- Type:** NCR
- Folder:** Change & Claim
- Description:** The cable put in also seems to be too short. Regard pictures

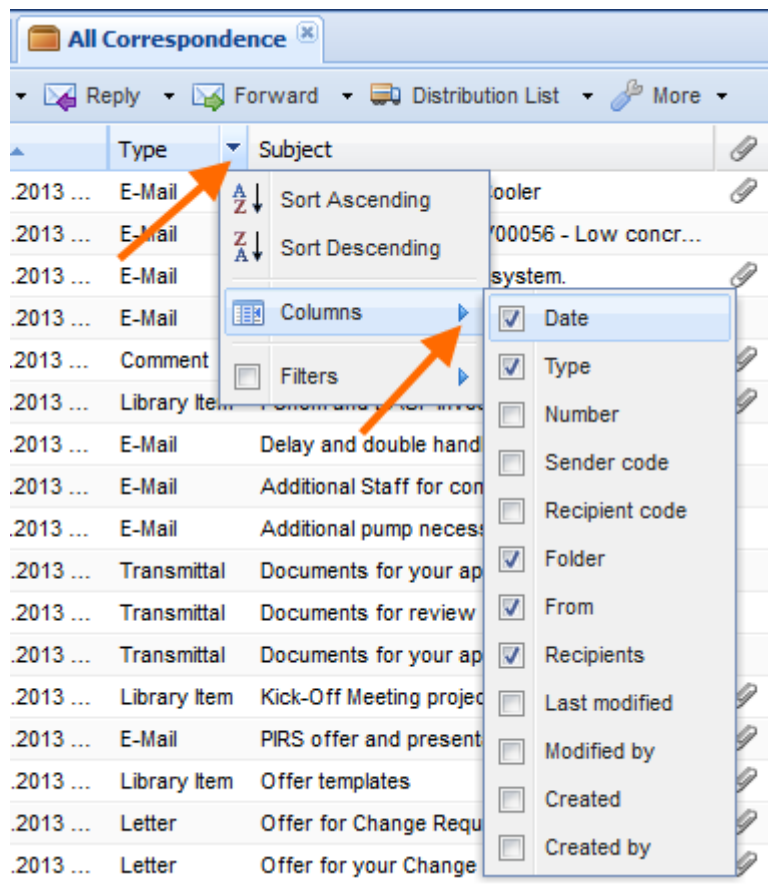
A "Submitting" dialog box is overlaid on the Description field. Below the form is an "Attachments" section with one file listed: "IMG_20220825_17045216614...". A "Save" button is located at the bottom of the form.

5 General Actions

There are several features generally available to users for documents as well as correspondence. Some of these features can be found within your tool bar, others are offered within the document or correspondence item directly.

5.1 Search & Filter Functions

There are many different possibilities supported in PIRS that allow you to quickly and easily find and retrieve all information, correspondence and / or documents that you might seek.



But before going into the details of searching and filtering information and data within the different folders and views, please be reminded of your options to alter and manipulate the information presented to you in each folder and view individually.

PIRS allows you to activate or deactivate the display of any column of each view or folder (compare with the screenshot) and furthermore you have the option to adjust the order of the columns for each content display via drag and drop.

The application will save changes made by you even after you have logged out. Therefore you can modify your correspondence and document view individually to show exactly the information you need at one glance. In order to reset your modifications enter your settings.

For more details please refer to the chapters [Customize a grid](#) and [User Preferences and Setup](#).

5.1.1 Filter data

As mentioned above, PIRS offers the possibility to adjust any grid within any view, regardless of where you are currently operating in.

This means you can add or remove columns and move their position within your grid. All changes you make within a correspondence grid (e.g. "All Correspondence") or within a document grid (e.g. "All Documents") will be memorized within your individual settings.

Therefore, all changes you make within one correspondence grid, will be memorized for all other correspondence grids and displayed for all your sessions. This feature enables you to adjust your general content display to your preferences.

"Filters" allow you to search for particular documents or correspondence items by filtering the data content for certain criteria. So, let's say for example, that you need to send a list of all emails, comments and transmittal slips sent from your company to another company during the last 3 months, PIRS offers the opportunity to filter the data within the view "All Correspondence" to fit all search criteria.

Click the arrow in the corner of each concerning column, namely date, type, sender and recipient code.

For each column a selection box will expand within which the desired filter option can be selected. For the date column a date span before or after a certain date or one particular date can be chosen. For our example the time span would be the last 3 months. Next we need to activate the filter of the type column and select the type E-Mail, Comment and Transmittal Slip as a filter. Then we choose the sender and recipient code that matches our company and customer code. PIRS will start to filter the content as soon as the filter option is selected. You find each step illustrated in the images below.

Dashboard | All Correspondence

New E-Mail | Reply | Forward | Distribution List | More

Date	Type	Subject	Fold
03.02.2014		Fw: Re: Document for approval	0600
03.02.2014		Fw: Offer for your Change Request from 0...	0000
03.02.2014		Offer for Change Request A32	0000
03.02.2014		Minutes of Meeting PM	0200
17.01.2014		r Approval	0600
17.01.2014		rest	0600
17.01.2014	E-Mail		0600
17.01.2014	Comment		0600
13.01.2014	Comment	Official Com	0600
10.01.2014	E-Mail	Redundand	0200
20.12.2013	Comment	Re: Docume	0600
20.12.2013	Transmittal	Document f	0600
18.12.2013	E-Mail	Kuantan ME	0200
18.12.2013	Comment	Documents	0600
18.12.2013	Comment	Documents	0600
18.12.2013	Transmittal	Documents for your approval	0600

Context Menu: Sort Ascending, Sort Descending, Columns, Filters, Before, After, On

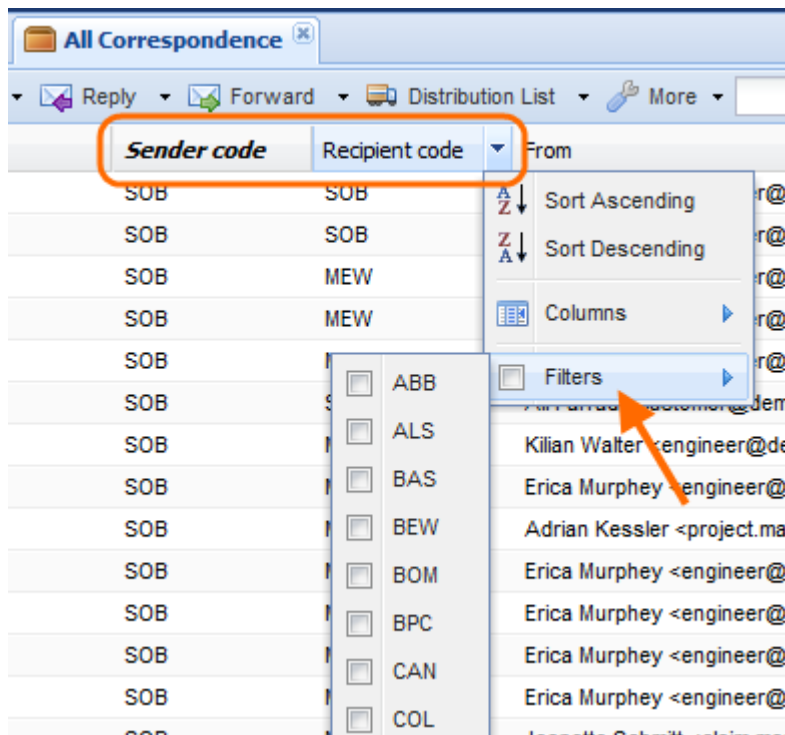
Calendar: October 2013

All Correspondence

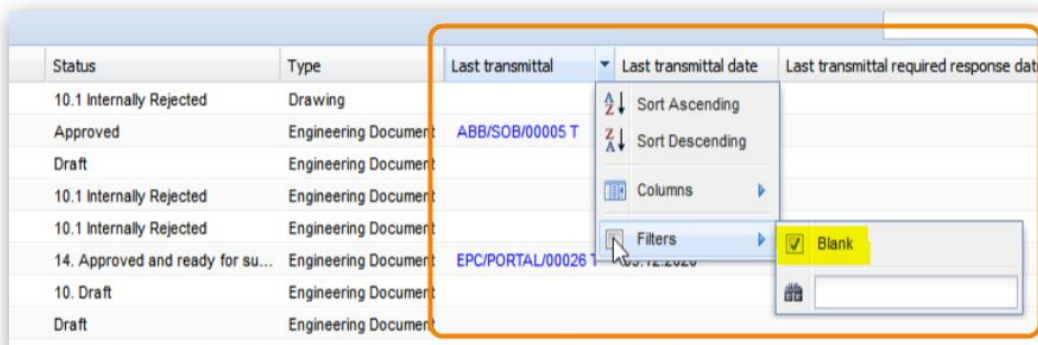
Reply | Forward | Distribution List | More

Type	Subject
Comment	Document for approval
E-Mail	for your Change Reque
Transmittal	t for Approval
E-Mail	request
Transmittal	
E-Mail	Docume
Transmittal	Docume
E-Mail	Meeting
Transmittal	Docume
Transmittal	Docume
Transmittal	Documents for your approval

Context Menu: Sort Ascending, Sort Descending, Columns, Filters, Comment, E-Mail, Letter, Library Item, Transmittal



Columns where you can select from a list of different options as well as some other columns (e.g. where you can enter a value manually) will also allow you to choose a blank. Meaning that you want this particular field to "not" carry a value. So, in case you would like to search for documents that have not been transmitted yet, you can select a blank for the column "Last transmittal" as shown in the screenshot below.

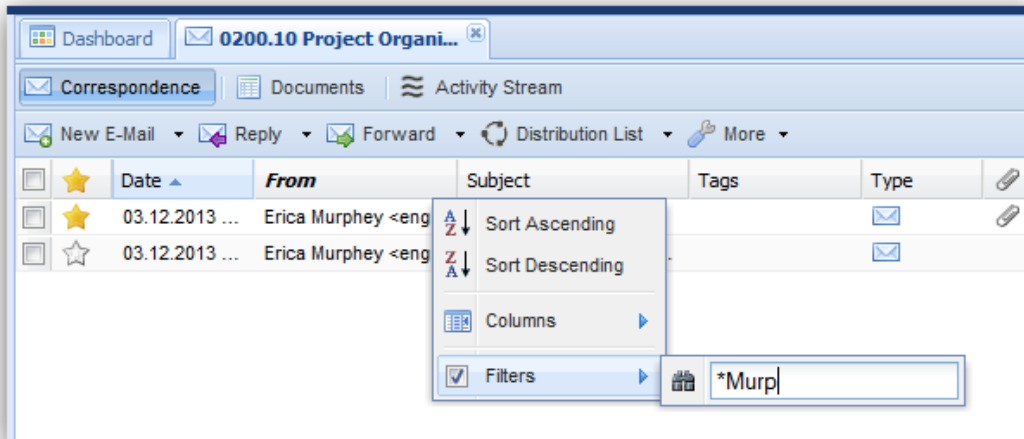


Keep in mind however, that this option will only be available for fields that are not mandatory.

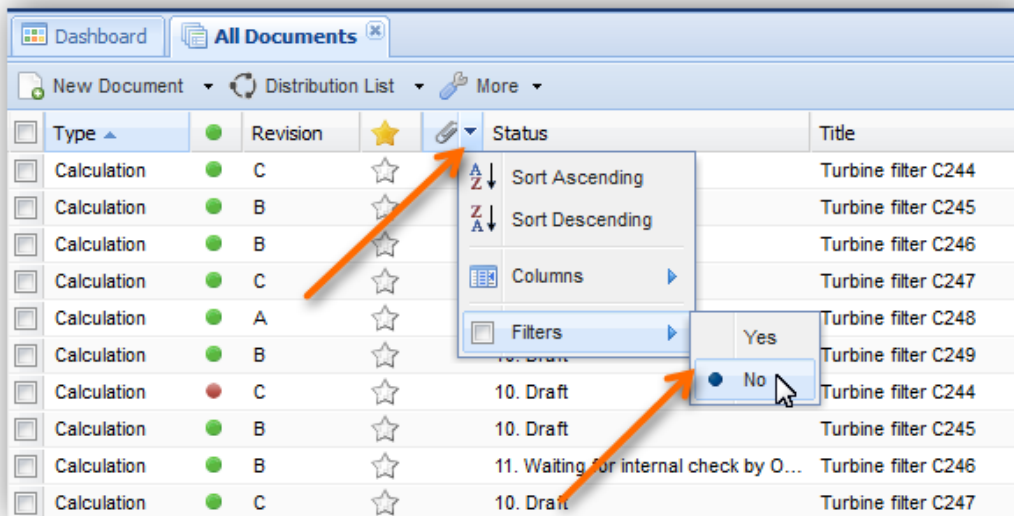
For certain columns, e.g. name fields, you are able to enter the value manually. Hereby, it is possible to enter the value only partially, the application will also recognize partial words. In both cases PIRS will find matching entries.

In order to offer you the best results possible without influencing performance negatively, it is necessary to insert the * symbol in front of words or partial words when they are not the first letters of the particular value you are looking for. For example, let's say you like to filter entries for a certain person who created those entries e.g. Erica Murphey. If you enter "Erica" in your filter for the "From" column you don't need to add a * symbol because the value you are

looking for starts with "Erica". Should you like to search for "Murphey" however, you need to enter " * " before you start to type Murphey.



Since PIRS release 3.1, you are able to filter for existing attachments. So, in case you need to know for example how many documents currently don't have any technical drawings attached you can select "No" for the column attachments, as illustrated in the screenshot below.



All filters can be deactivated one by one or all in one move. You can clear each filter you have set separately by removing the check mark from the filter. If you would like to deactivate all filters click the **More** button in the action bar and select the action



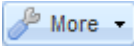

When you close or reopen a folder or view all set filters will be cleared automatically. When open this folder or filter next time, all previously set filters won't be active and the whole content of the folder or view will be displayed. The exception is the use of the refresh action

offered to you in every folder and view. If you click the refresh button after having set filters, your filter selection will still be valid.

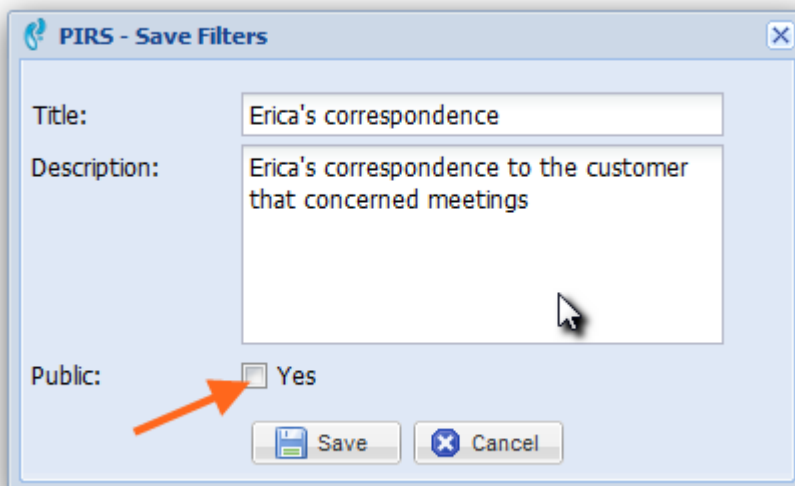
5.1.1.1 Save Filters

In case you use certain filter combinations on a regular basis and prefer not to set them manually every time, you can choose to save filter combinations for PIRS correspondence as well as PIRS documents.

In order to save filter combinations go to the "All Correspondence" or "All Documents" view and select the filters you need. Filter combinations might show all meeting related correspondence sent from Erica Murphey to the customer, or in case of documents, all valid documents that were sent to the customer, but where no comments have been received yet.

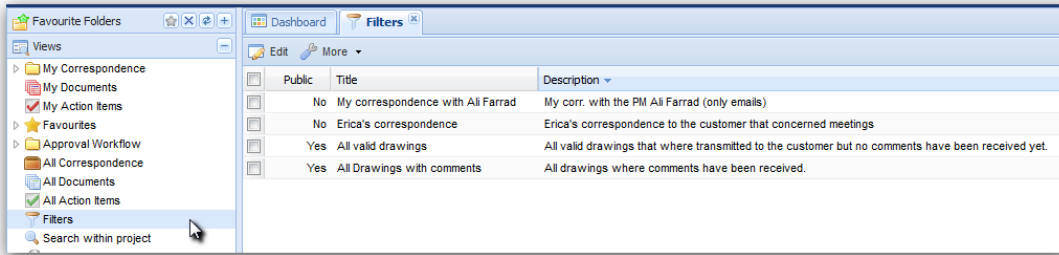
Then expand the  button and click .

A new small window opens allowing you to enter a title and description of your filter combination, before you save it.



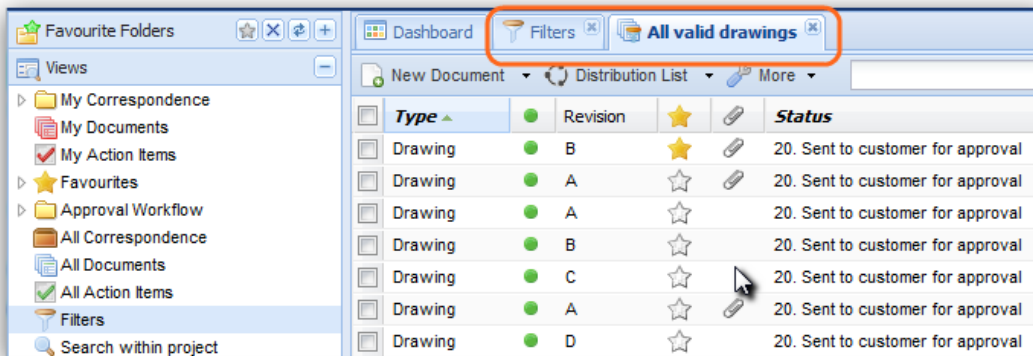
In case you have the necessary rights you are able to create and save filters that are available for all team members by checking "Yes" for public use, as indicated in the screenshot. You can create as many personal filters for your regular use as needed.

In order to open filters, enter the view "Filters" listed under "Views" in your PIRS navigation. Here you will find all your personally created filters as well as the filters that have been created for public use listed with their title and description.



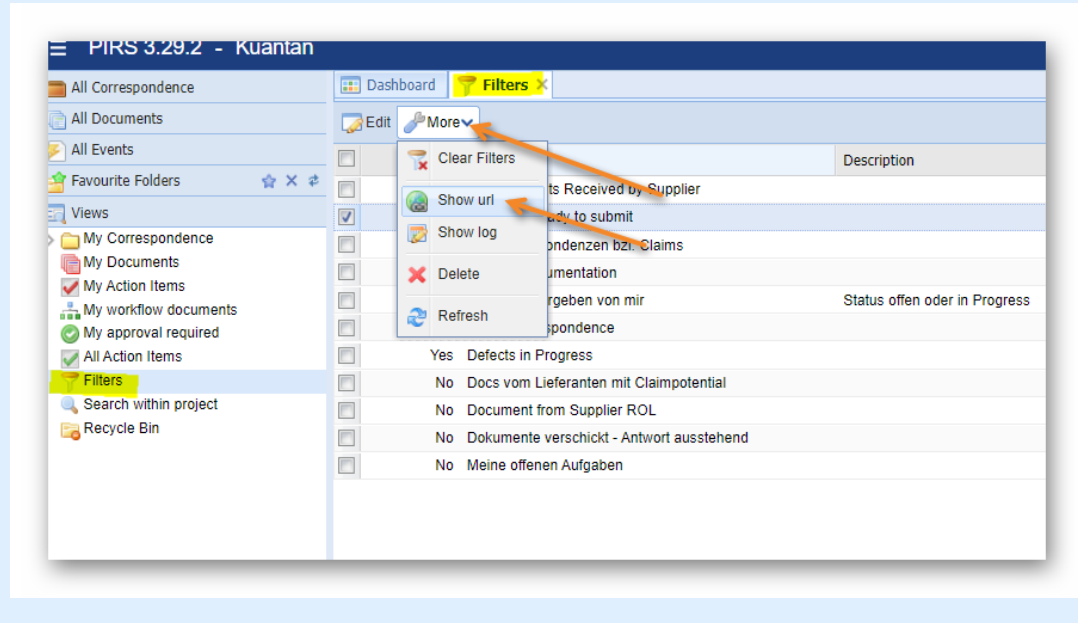
You are always able to edit your own filters. The "More" button within the filter view offers the option to delete them, take a look at the history log of a filter or refresh the page. In case there are many filters listed and you need to find a certain filter quickly, you have the option to set filters within your "Filters" view.

In order to open a filter double click it and the content matching your filter criteria will be opened in a new tab.



Tipp

You can also add your favorite filters directly as a bookmark within your browser. Simply use the "Show URL" feature to copy the URL and use the data to create a new browser bookmark.





5.1.2 Search documents with full-text search

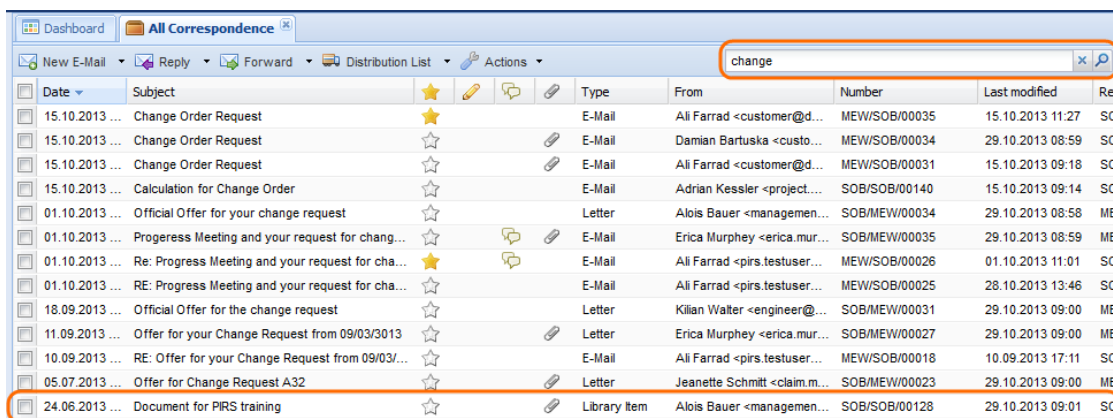
The search function in PIRS is a very useful and flexible feature. The whole content of a database or just one singular view content can be searched for certain keywords or a user defined string. The full-text search hereby considers all existing entries and includes the content of attachments stored within PIRS.

The search function provides the possibility to search for any given or user-defined term within all documents displayed in the view you are currently working in. The results of a full-text search are listed according to the frequency of the search term within each found document. Therefore, those documents in which the search term has been found most frequently are listed at the top of the list of results.

Search within a view:

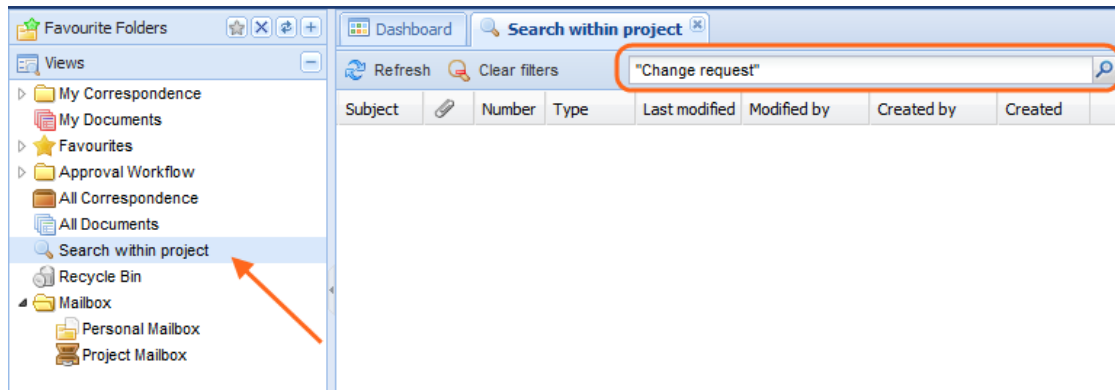
In order to initiate a search within a particular view e.g. the all correspondence view, enter the term, you would like to search the view content for, into the text field in the right hand corner of the view action bar, outline in the following screenshot, and either hit enter or click the  button.

The results are calculated and displayed as soon as you click the search symbol. As you can see in the screenshot below, the first couple of results carry the search term within their subject name but there are also results displayed that don't show the term in any visible value field. This would be an example where the term was only found in the document body or the attachment. By clicking the  button the search box will be cleared, revoking the search result display.



Search within the entire project database

This search feature is a very useful tool in case you might not be certain in which folder or view a desired document can be found, because it will apply the full-text search to all files stored within a project database. To initiate a search within the project database, open the view "Search within project". An empty grid will be displayed and similar to the search feature within a regular view there will be a text field located in the right corner of the view action bar allowing you to enter a search term. Compare to the screenshot below.



After entering and confirming the term you would like to search for, the results will be displayed within the table. The results include all type of files, correspondence e.g. email, letters or library items, documents as well as address book files like contact groups.

If you need to further narrow down the search results you have the possibility to customize your column display and add filters as described in the previous chapters [Filter data](#) and [Customize a grid](#).

Search History

PIRS will remember your search terms, offering you to quickly go back to previous search results or reenter previous search phrases.

5.1.2.1 The PIRS full text search options

To allow you to search for exactly the search terms you need, the PIRS full text search enables you to create your own queries, search for word fragments or narrow down your search by excluding or including specific word combinations. The search itself is not case sensitive. So regardless whether you enter e.g. Kick Off, kick off or KICK OFF, the result will be the same. Nevertheless it should be noted that the search term should ideally be entered in lower case letters in order to help the system to differentiate between the search term and the offered Boolean operators.

The Wildcard

Among other features the PIRS search includes the possibility to insert the ? symbol as a wild card for a letter within a search term or the * symbol to replace several letters within a word or a phrase. Instead of the search term *meeting* you could for example enter mee?ing and in order to insure all word combination that could refer to kick off meetings (kickoff, kick-off, kicking off, ...) you could type kick*.

Search for a string

In order to ensure that the result will return found matches for exactly a specific combination of words e.g. kick off meeting, you are able to inclose the search phrase into quotation marks ("kick off meeting"). In this case the search will display only those documents where exactly this word combination could be found. Should you for example search for all documents where your name is mentioned you could enter "john smith".

Boolean Operators

Furthermore, you can use Boolean operators which allow terms to be combined through logic operators. The syntax supports "AND", "+", "OR" as combining Boolean operators and "NOT" or "-" in order to exclude or prohibit certain terms from the search.

In general the OR operator is used as the default conjunction operator, meaning that in case you haven't entered any Boolean operator between two terms, the OR operator is used automatically. The search will then find all matching documents where either term or both terms exist. The letter Boolean operators must be ALL CAPS.

Please be aware that there is a slight difference between using an operator written in all caps letters and a symbol operator and they will not always return the same results. The "NOT" operator and the "-" operator for example both exclude documents that contain the term that follows directly after the operator but only the "-" operator can be used as a single search requirement. The "NOT" operator on the other hand can not be used as a stand-alone. This means that a search like "NOT meeting" will always return no search results even though there might be many hits for documents that don't contain the word meeting. However, should you enter the query syntax "- meeting" the search will display all documents not containing the term "meeting". There can also be different results when combining both types of operators. In order to minimize any mix-up in your search results, we recommend to always use quotation marks framing your search terms.

Would you for example like to find all documents that refer to the internal PIRS training for admins that was organized by John Smith and where PIRS:Claim wasn't on the agenda you could use the following search term:

"PIRS training" AND "John Smith" AND "admin" AND NOT "PIRS:Claim"

Searching within specific field(s)

By default the PIRS full text search will always search for the entered term or search criteria within all existing document fields and grid columns but PIRS also supports the specified search for field data. This means that when performing a search you can specify a field (column) to which the search should be limited.

Hereby, you simply type the field name followed by a colon ":" and then enter the term you are looking for. You should be aware however that you need to use the technical field name rather than the label of the field.

As an example, let's say you are in the All Correspondence view and you like to search for all documents where the Subject field contains "kick off meeting" and the Sender Code column displays the code SOB. You can create the following search phrase:

- **subject:"kick off meeting" AND refNo_sender_code: SOB**

Please note that the field is only valid for the search term that it directly precedes, so e.g. the

query *subject:kick off meeting* would only look for the word kick within the subject field while "off" and "meeting" will be searched for in all fields. Another example: Within correspondence grids there is only one column that includes all recipients regardless whether the recipients were listed within "To", "Cc" or "Doclink". Should you like to consider only the recipients that were included within the "To" and "Cc" fields you can use the following search term while looking for the recipient "Schmidt"

- **to_valueReadMode:Schmidt OR cc_valueReadMode:Schmidt**

Supported field names are described within the [next chapter](#)

The PIRS full text search is oriented on the rules of the Apache Lucene Syntax. Should you like to inform yourself about all supported search queries and the vocabulary used in the Lucence rich query language please follow this link:

http://lucene.apache.org/core/old_versioned_docs/versions/2_9_1/queryparsersyntax.html

5.1.3 Full-text search field names

Field names to be used in full text search are described below. Please ensure to be familiar with the supported search syntax also described in detail [here](#)

Documents

PIRS Label	Name required for search	Remarks
Document Number	docNumber	
Revision	revision_value	
Title	title	
Folder	folder_name	Current folder name (not full folder path)
Valid	valid	Value can be true or false. Example search: <i>valid:true</i>
Status	docStatus_value	
Type	docType_value	
Format	docFormat_value	
Language	language_value	
Application code	applicationCode_value	
System	system_value	
Reference	reference_value	
WBS	wbs	
Activity ID	activityId	
Produce	producer_fullName	

PIRS Label	Name required for search	Remarks
Responsible	responsible_fullName	
Owner	owner_fullName	
Notes	remarks	
Customer	customer_name	
Customer Status	customerStatus_value	
Customer Document number	customerDocNumber	
Customer Revision	customerRevision_value	
Customer Category	customerCategory_value	
Customer Penalty	customerPenalty	Value can be true or false
Customer Notes	customerRemarks	
Supplier	supplier_name	
Supplier Status	supplierStatus_value	
Supplier Document number	supplierDocNumber	
Supplier Revision	supplierRevision_value	
Supplier Category	supplierCategory_value	
Supplier Penalty	supplierPenalty	Value can be true or false
Supplier Notes	supplierRemarks	

Correspondence

PIRS Label	Name required for search	Remarks
From	from_valueReadMode	
Reference Number	refNo_formattedNumber	<p>Please do not forget to escape the '/' character used in standard PIRS reference number (as mentioned in search syntax description)</p> <p>Example: If you are looking for all correspondence with reference number like DESOB/DESOB/* the correct search term is</p> <p><i>refNo_formattedNumber:DESOBVDESOB*</i></p>
Reference Number Sender Code	refNo_sender_code	
Reference Number Recipient Code	refNo_recipient_code	

PIRS Label	Name required for search	Remarks
Recipients	recipients_address	Search within all recipients of the correspondence
To	to_valueReadMode	Search within the recipients listed in the To field
Cc	cc_valueReadMode	Search within the recipients listed in the Cc field
Doclink	doclinkTo_valueReadMode	Search within the recipients that receive the correspondence as Doclink
Folder	folder_name	
Subject	subject	
Body	body	

Contacts

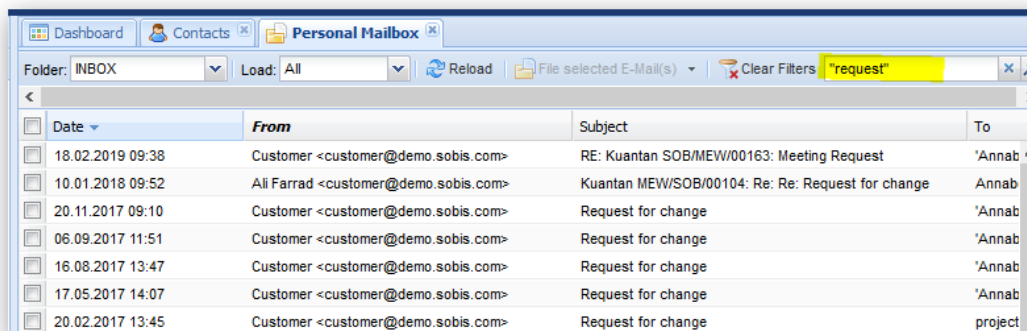
PIRS Label	Name required for search	Remarks
First Name	firstName	
Last Name	lastName	
E-Mail	email	
Short Name	shortName	
Office Phone	officePhoneNo	
Mobile	cellPhoneNo	
Fax number	faxNo	
Contact Type	contactType_value	
Company	company_name	
Postal Address	address	
Country	country_name	
Default Corr. Code	correspondenceCode_code	

5.1.4 Use Full Text Search within Mailbox Views

The views "Personal Mailbox" and "Project Mailbox" are views that offer an insight into the content of your personal as well as your project mail files. These contents are not included in your PIRS projects directly but are accessed on your company mail server. In order to include mails in your project you first need to upload them into PIRS. However, the mailbox views allow you to access your mail files, review all contents including all body content as well as attachments and work within PIRS, without having to access your mail files directly to check for new messages.

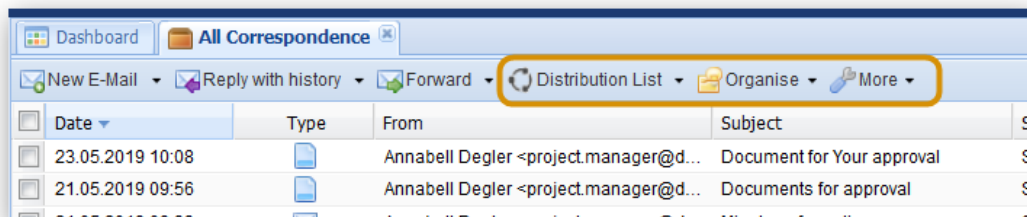
Nevertheless, there are certain limitations to minimize effects on PIRS performance e.g. mail contents are not displayed automatically. Therefore there are also some differences on how the search works within your mailbox views. Since PIRS release 3.6. you are able to use

search features such as quotes and asterisks in mailbox searches, compare the list of offered search features in article [Search documents with full-text search](#). However, keep in mind that a full text search will only consider the content of fields listed in your mailbox grid, but not the actual mail contents.



5.2 PIRS Tool Bar Actions

There are three options that are displayed on all PIRS toolbars regardless whether you operate within correspondence or document views.



First there is the "Distribution List" option, second there are several options offered to you within the "Organise" option and third there is a list of actions presented to you with the "More" option.

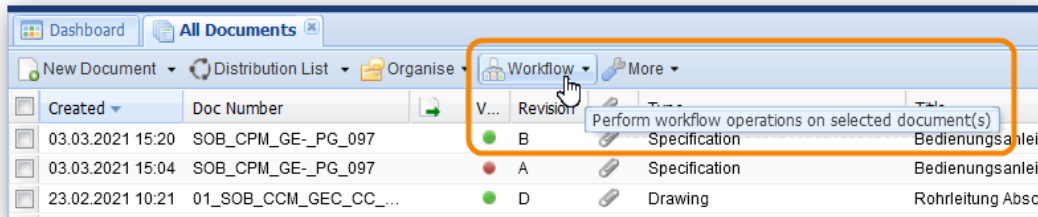
To learn more about the "Distribution List", please refer to the chapter [Distribution List](#).

To learn more about the "More" options, please refer to the chapter [More](#).

Workflow Options

In case it is activated for your PIRS application, you will also have the option to bulk change workflows within your document grids and views.

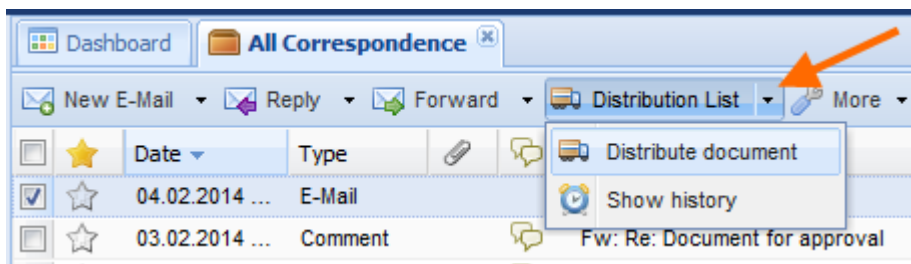
If that is the case, there will be a "Workflow" button listed within the document grids as illustrated in the below screenshot.



Please refer to the chapter for managing [workflows](#) for further information.

5.2.1 Distribution List

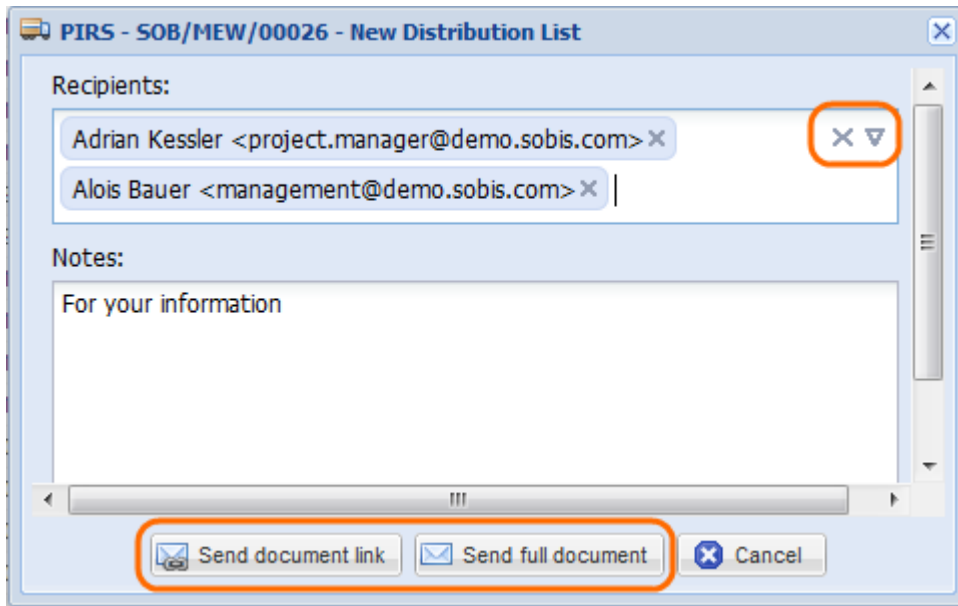
A given on all action bars, regardless whether you operate within correspondence or document views or are currently displaying a PIRS correspondence/document form, is the "Distribution List" option.



If you expand the action by clicking the arrow, it offers two selection possibilities. As illustrated by the screenshot, you can either choose to distribute the selected correspondence / document or show its distribution list history.

The "Distribution document"

Should you need to distribute a correspondence or a document to e.g. your team members for their information, you are able to create a new distribution document as demonstrated by the image to the left.



The upper red outline highlights the opportunity to select contacts of groups from your project address book, a feature already seen in earlier chapter. The text box allows you to address the recipients with a short note. The second red outline indicates your possibility to either send the document as a document link or send the full document as an email to all recipients.

If you send the file as a document link the recipients will receive your note (outlined in the screenshot) together with a link in a standardized blue box that will lead them directly to the respective correspondence / document within the PIRS application. Furthermore the email will contain a standardized text and signature including the name of the sender.

Distribution List Kuantan SOB/MEW/00026: Minutes of meeting

Erica Murphey <engineer@demo.sobis.com>

Gesendet: Di 04.02.2014 15:52

An: Adrian Kessler; Alois Bauer

Erica Murphey - SOBIS Software GmbH - E-Mail: engineer@demo.sobis.com - Phone: +49 621 329 1228 5600
 - Mobile: +49 621 329 1228 5600

PIRS Actions: [Open](#) ← Open document in PIRS using the PIRS link

Dear Project Member,

You are included in the distribution list of this PIRS e-mail (you can open the document by clicking on the document link above).

Comment: For your information

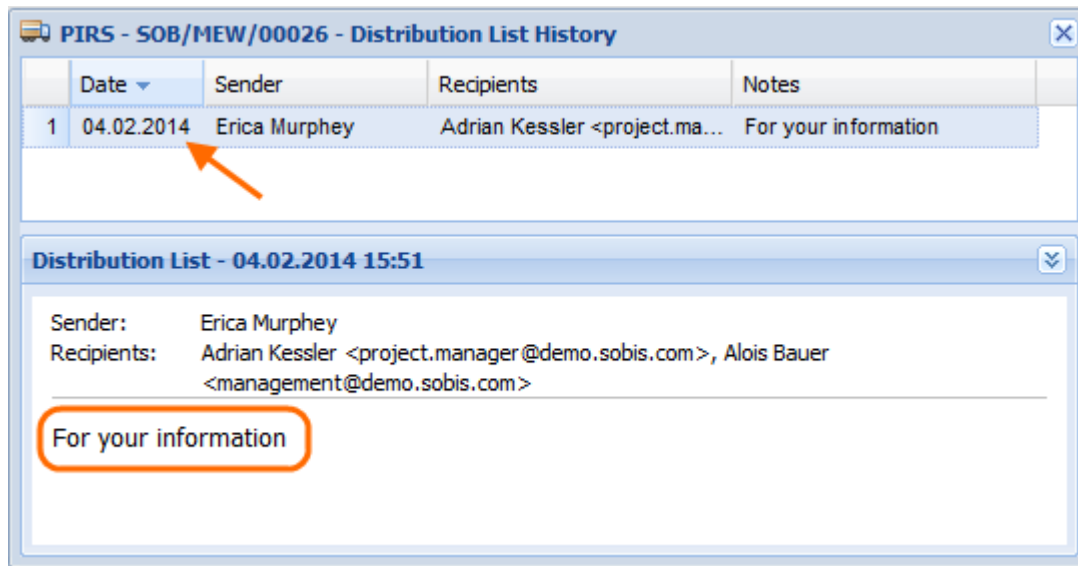
Best Regards,

Erica Murphey

Should you choose to send the full document, which is recommended if all or some of the recipients have no access to the application and therefore wouldn't be able to open the document link, the recipients will receive the complete file including all attachments as well as the document link.

The "Show history" function

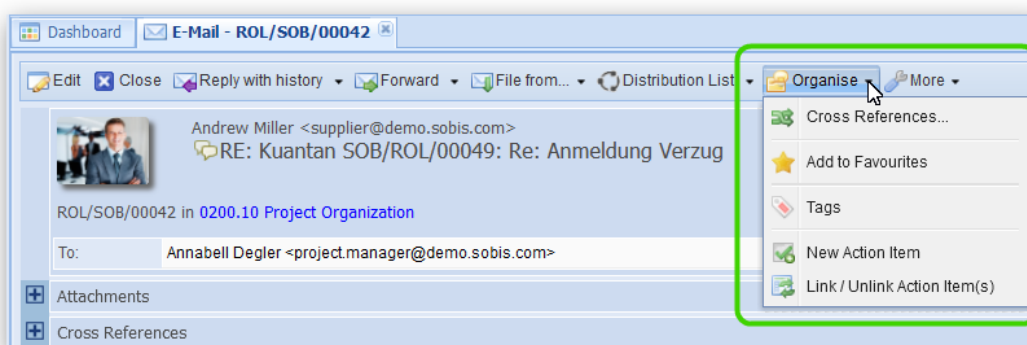
In order to learn if a document has been distributed yet and, if that is the case, to whom it has been distributed, you can use the second option of the distribution list action.



First select the file you are interested in. Next click "Show history". Consequently, either a new window will open displaying the file's distribution history including the distribution dates, senders, and recipients as well as the respective notes (compare the screenshot) or a small message box will inform you that the document has not been distributed yet.

5.2.2 Organise

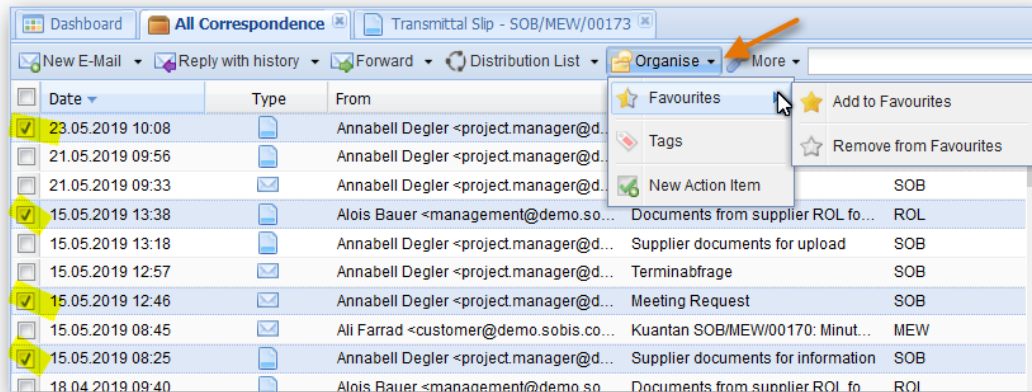
The "Organise" button enables you to set cross references between different PIRS correspondence and documents, regardless of their type.



The other options offer to you within this button are to add PIRS items to your favourites and to create an action item that will be liked to the PIRS item, e.g. a correspondence or a document. In addition you are also able to select Tags based a a list of tags managed by your project manager.

When selecting the "Organise" option directly within a correspondence or document, all three of these features are only visible after your have either saved or sent the PIRS item.

In order to save time, you are able to select several correspondence or document items within a folder or view and add them to your favourites, select Tags or create an action item that will be linked to all selected items. All in one go.



5.2.2.1 Action Items

Action Items are individual PIRS items that help you and your team to manage your personal as well as your team's tasks and meetings. They can be created by each team member for themselves as well as for each other. For each Action Item you are able to set a reminder date that will make sure that a task or a meeting is pursued and will be completed on time.

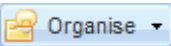
Hereby, an Action Item can be either created in relation to one or more documents and correspondence (e.g. as a reminder to yourself or your colleague to send an answer to a received email from the customer) or it can be created without any connection to another PIRS item (e.g. as a personal reminder to make a follow up call until a certain date).

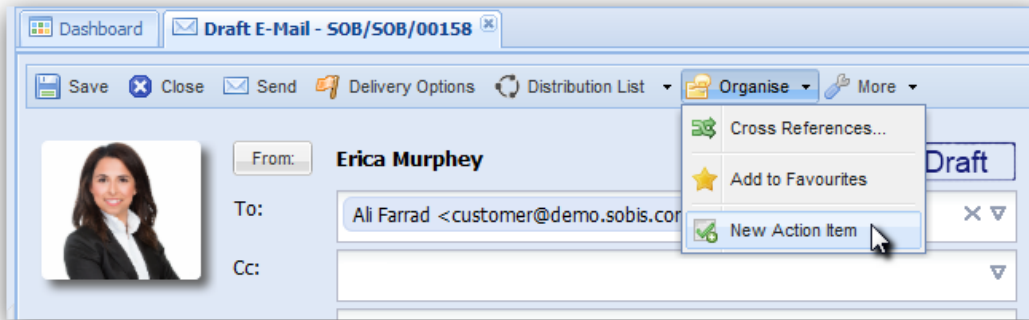
There are two ways to create an Action Item:

1. From within a PIRS Item in read or edit mode
2. From the Action Items View

Both options will be introduced in detail below.

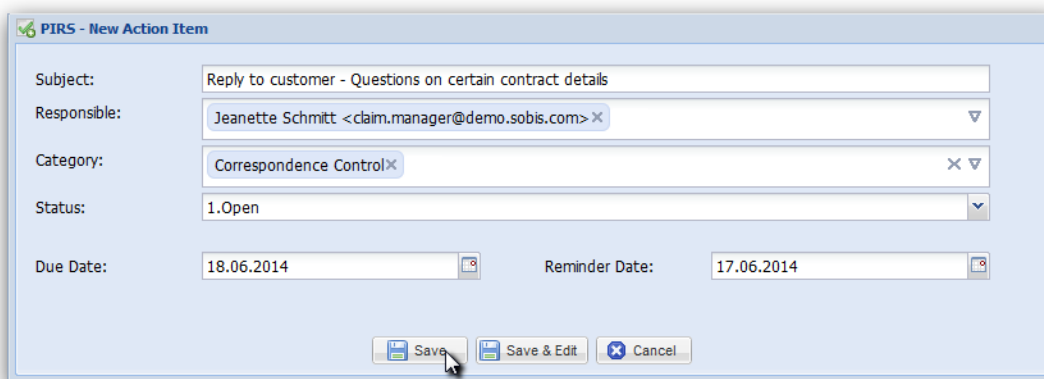
5.2.2.1.1 Create an Action Item from within a PIRS item

In order to create an Action Item that is automatically linked to a certain correspondence or document, open the PIRS item in read or edit mode and click the  button. A list of options will be presented to you. Click on "New Action Item" as indicated in the screenshot.

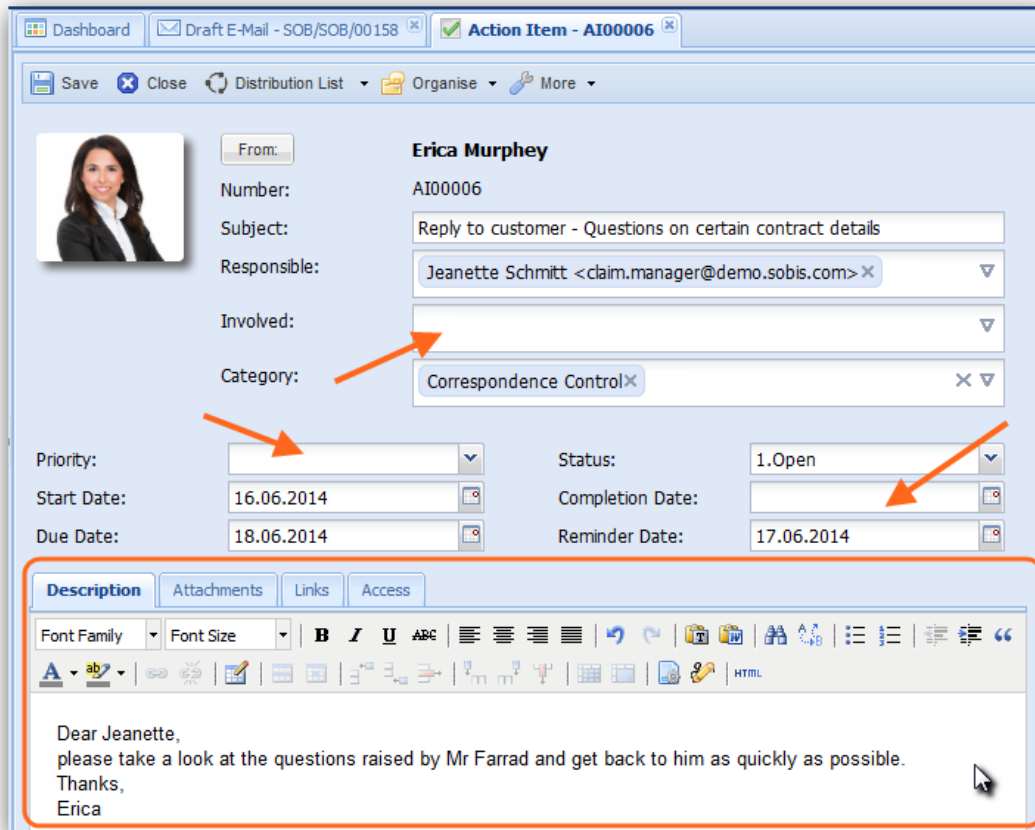


Depending on your project set up, either an input mask will open in a new window or the new Action Item will open in a new tab.

In case your company has activated the pop up option with a limited input mask, you can assign a subject and a responsible to your new Action Item. Furthermore, at this step you are also able to select a specific category reflecting on your company standards (e.g. task, follow up or correspondence control), the status as well as a due and reminder date. This is the minimum information you can enter to create a new Action Item.



In case you need to add further information to your Action Item, click the button "Save & Edit" and the document will be opened in edit mode. You will now for example be able to enter a detailed description, add more information to the Action Item, restrict the access of other team members within the "Access" tab or attach additional PIRS items within the "Links" tab.

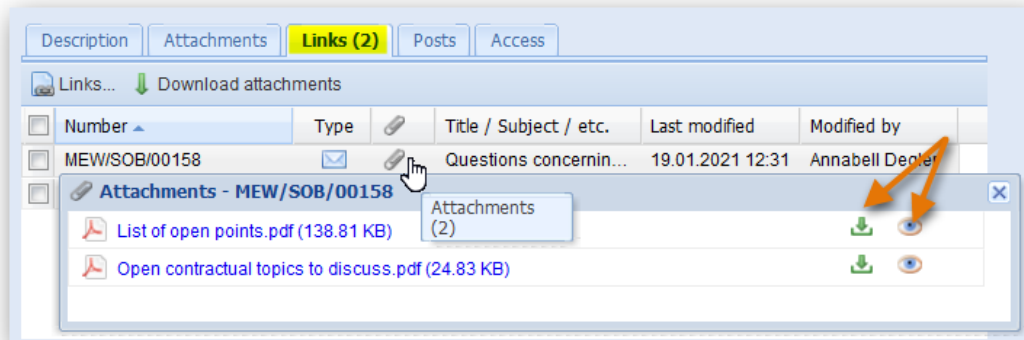


If your company has not activated the pop up the new Action Item will open right away, allowing you to enter all required information.

Notify responsible

Regardless whether you create a new Action Item via pop up window or directly as new AI, once you click save the responsible will be informed. If you have set a reminder date, the responsible will also receive a note containing the link and a standard reminder text at the start of his work day on the respective date.

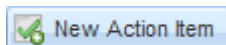
Within the Links tab you will see all linked correspondence and/or documents. You are always able to open the linked items directly out of the action item. Furthermore you can also directly open or download any files attached to the linked PIRS items, thereby allowing you to bypass having to open each correspondence or document prior to accessing the attached files.



5.2.2.1.2 Manage and Create an Action Item within the Action Items View

In order to manage your own tasks and reminders you can follow your Action Items within your personal "My Action Items" view. All Action Items, your own as well as those of your team will be listed within the "All Action Items" view and can be followed and manage from this area. Furthermore you are also able to declare Action Items as your personal favourites and manage them in yet another view listed in your "Favourites".

From within all those views you are able to create new Action Items by clicking the



button. In this case you will be presented with the whole input mask for Action Items, as seen in the previous screenshot. Please be aware that since you are not creating the Action Item based on another PIRS item there will be no correspondence or document automatically linked to your new task or reminder. Should you wish to link another item use the "Links" tab.

5.2.2.1.3 Inform responsible & other users about new task

Unless otherwise defined, PIRS will automatically send out an email to the user who is listed as responsible in a new Action Item. This way, the risk that an assigned task is not recognized can be avoided.

Since PIRS release 3.6. it is possible to define additional recipients for each project. This is a project setting that can be activated as default, in which case all additional users that have been defined as mail recipients for newly created Action Items will receive a notification mail every time a new Action Item is saved. Further more the notification mail for responsible and other users can be activated as optional service. If the setting is included as optional service, users are able to decide for each new Action Item they create, whether or not the responsible and all other listed users should be informed.

Dashboard | 0. Folder on RootLevel | Transmittal Slip - MEW/SOB-IN/00003 T

Edit | Close | Reply to all with history and attachments | Forward | File from... | Distribution List | Organise | More

Chester Gregoroff <chester@gregoroff.com>
Sent by: PIRS Setup <pirs.setup@sobis.com>
Documents for approval

MEW/SOB-IN/000

To: PIR

Attachments (2)
Documents (4)
Cross References
Action Items
New Action Item
Number

Posts

PIRS - New Action Item - Transmittal Slip - MEW/SOB-IN/00003 T

Subject*: Setup a phone conference with Transmittal recipients

Responsible: Eddie Aamot <eddie@aamot.com>

Category: Follow Up

Status*: Open

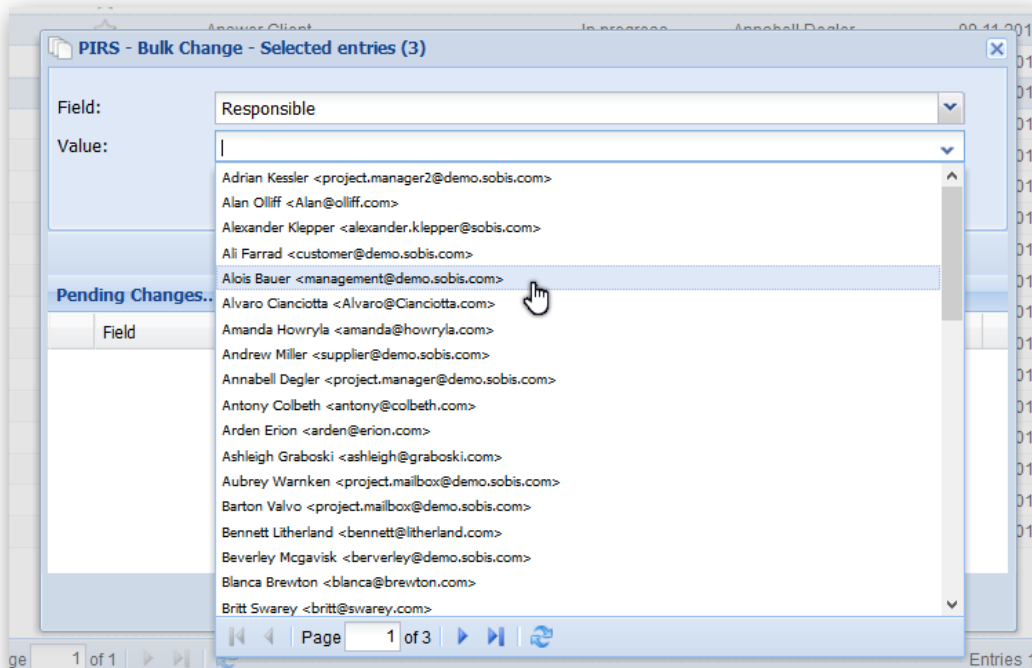
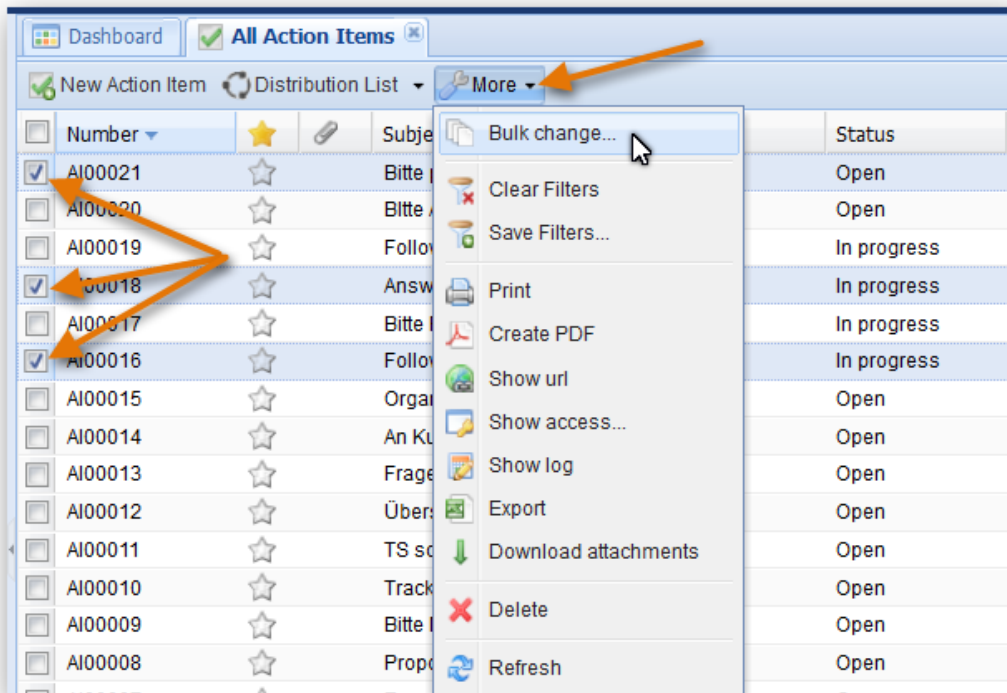
Due Date: 16.01.2019 | Reminder Date:

Inform (responsible) users about the new Action Item

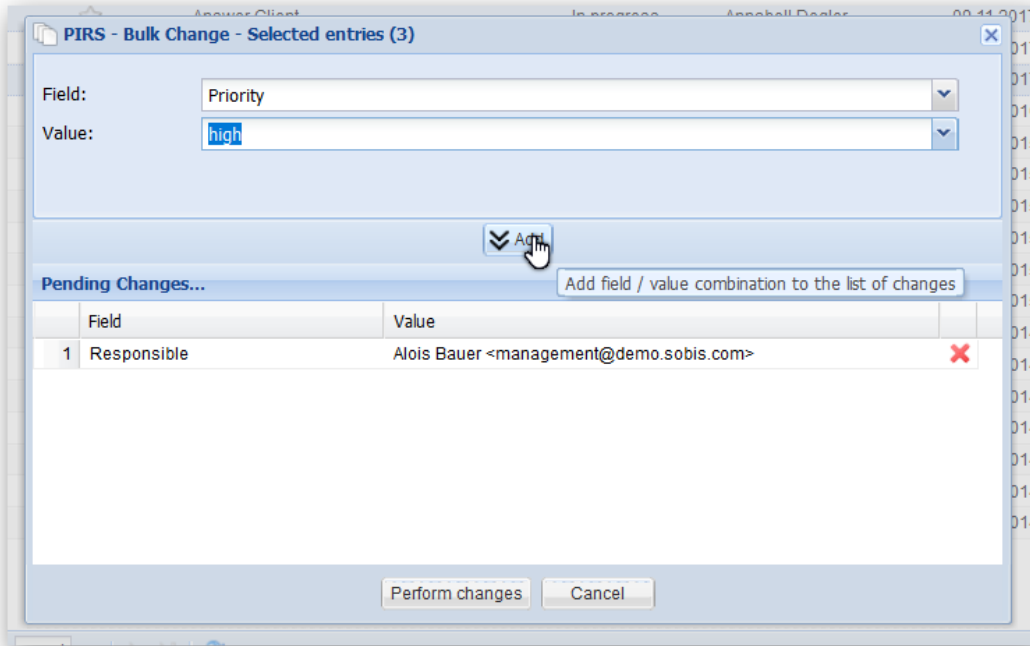
Save | Save & Edit | Cancel

5.2.2.1.4 Use Bulk change to edit several Action Item in one go

The feature "Bulk change..." listed under the "More" options in your tool bar, allows you to change values for several Action Items in one go. Should you e.g. need to change the responsible for multiple Action Items, simply select the items in question, open the "More" options and click "Bulk change..."

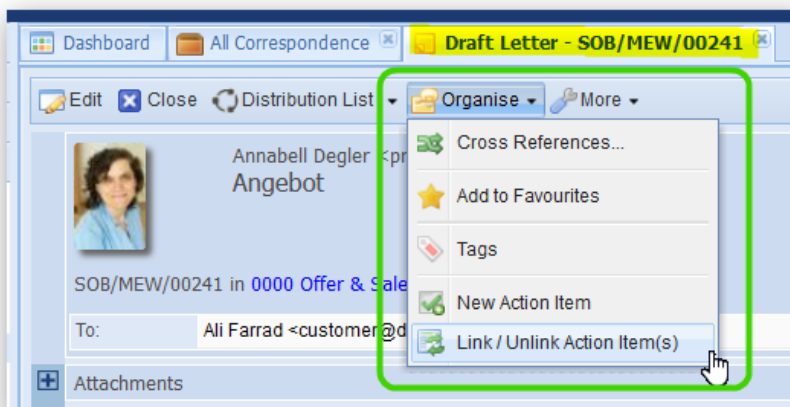


Next a window will open allowing you first to select the field you would like to change and then enter the new value. Once you picked a new value, click on the "Add" button to add the new field value to your list of values to be changed. You can select new values for all fields that offer keyword selection and for several fields at once. Free text field such as the description cannot be edited within a bulk change.



5.2.2.1.5 Linking or Unlinking Action Items

When you create an Action Item from within a PIRS document or correspondent, the entry is already linked to this particular item. However, you might create an Action Item without any current relations or you might want to add links after creating the AI.

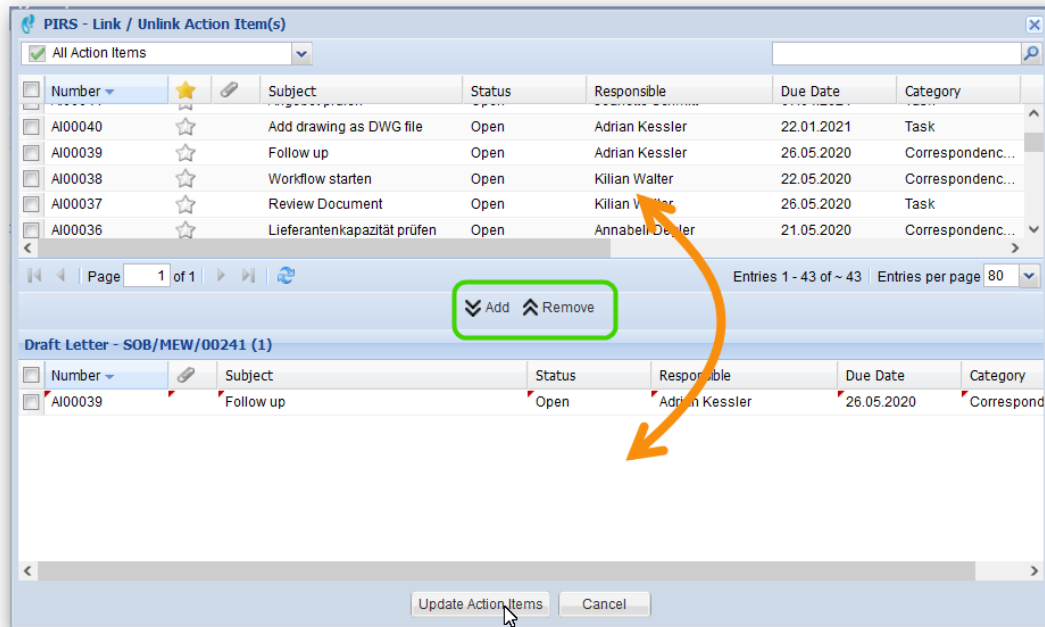


For this cases PIRS offers the option to link or also unlink PIRS documents or correspondence to an existing AI.

To link or unlink an PIRS entry to an Action Item open the "Organise" action within the tool bar of your opened PIRS correspondence or document and then select "Link / Unlink Action Item(s)".

Once you selected the Link/Unlink feature, a new window will open allowing you to select action items to link or unlink with the opened PIRS entry.

You can select via drag & drop or by using the "Add" and "Remove" buttons.



Click "Update Action Items" to complete the process.

Transfer AI link to new revisions

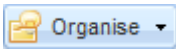
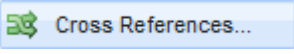
You are able to move Action Item linked to a PIRS document from one revision to the next. This means that all Action Items linked to a document will be automatically available in the new revision.

This feature needs to be activated. So if the transfer currently doesn't happen in your project and you would like to change that, please contact your service desk.

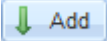
5.2.2.2 Set Cross References

Cross References enable you to connect correspondence and documents with each other. Hereby you can for example link an email to a library item which contains related information that might be important for the recipient or you are able to show relations between multiple documents.

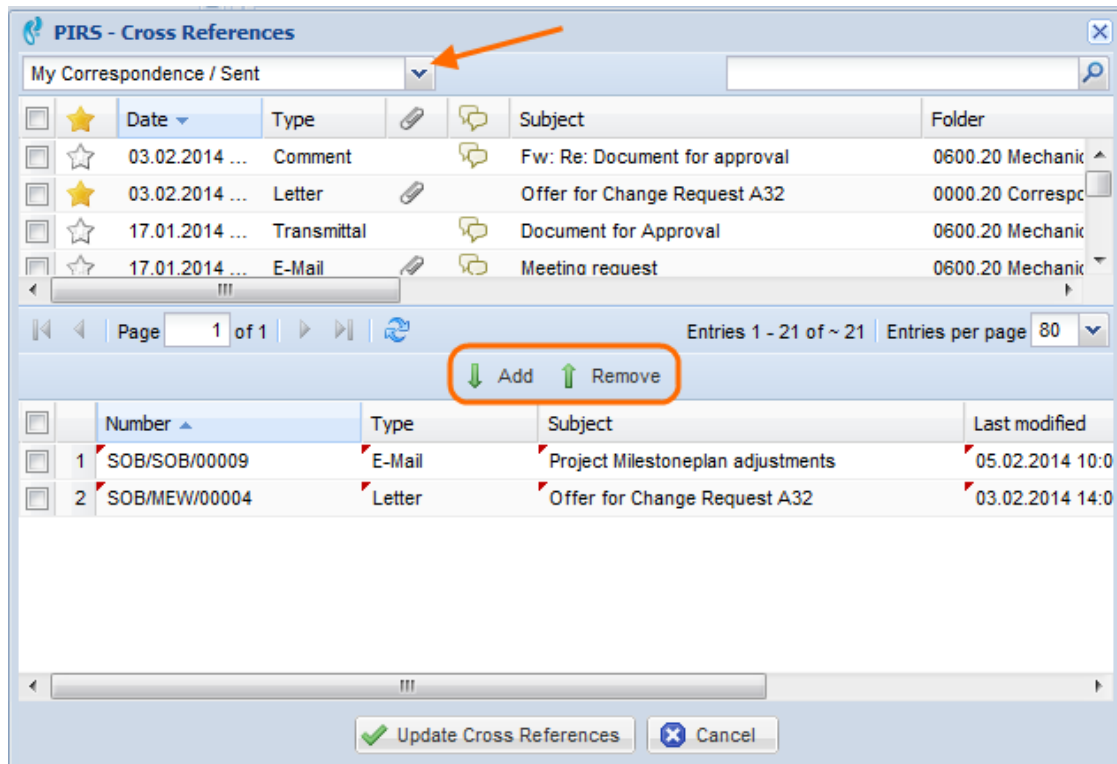
The process is similar to the process of linking documents to a transmittal slip. After clicking

the  followed by the  button a selection box will open.

As indicated by the arrow in the following image, you are then able to select a correspondence or document view from which you like to select the cross reference(s). The example below displays the "All Documents" view. You are now able to either select documents via drag &

drop or by marking all documents you like to include in the cross reference and clicking the  button. The same way, you can remove items from the list either via drag & drop or by using the remove button.

It is possible to switch between the views. So you can first select a correspondence item from any correspondence view and afterwards select all the documents you need from any document view.





The correspondence or documents that were linked to the respective PIRS item will then be listed as cross reference. All cross references can be opened out of the referred PIRS item and the link will be visible both ways, which means that within the item that was cross referenced you will also be able to find a link to the other one. You therefore will only have to select the cross reference once.

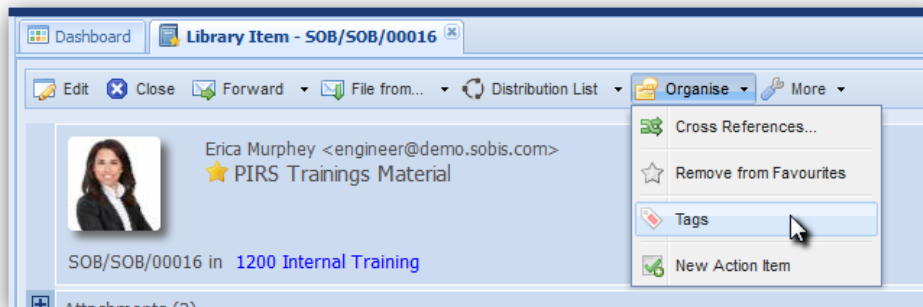
5.2.2.3 Tags

Tags are keywords that can optionally be assigned to all PIRS correspondence, Documents and Action Items in order to provide the reader with additional information.

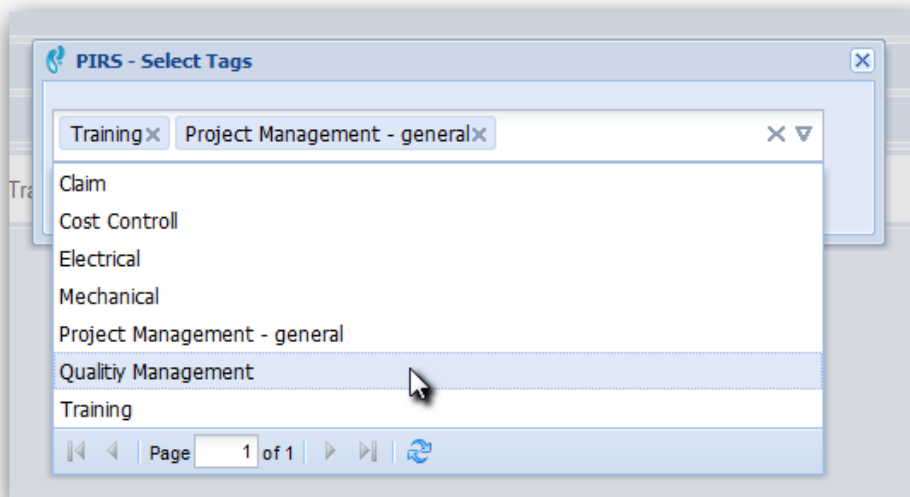
They offer a useful way to group related PIRS correspondence and/or documents together and to quickly give readers an insight into their topics. Tags also make it easier for PIRS users to find content they are looking for because they can specifically search for tags or filter grid contents using tags as their filter criteria.

Select Tags

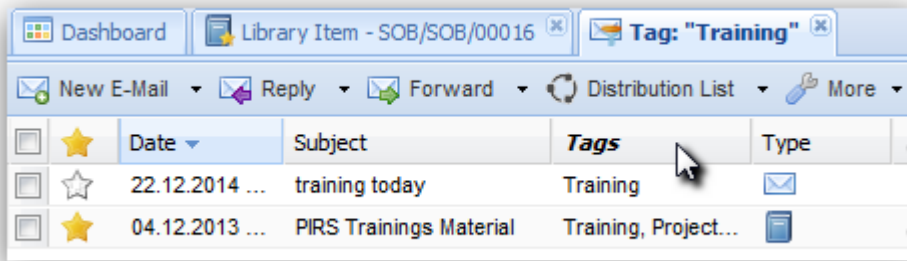
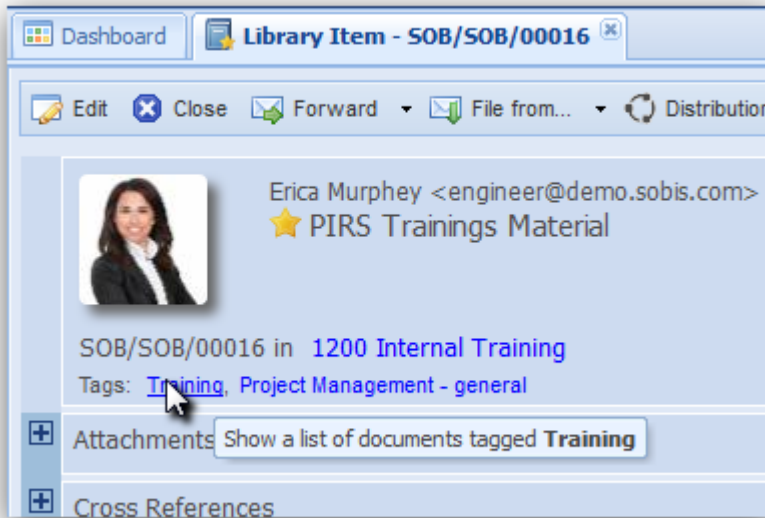
In order to assign tags to your correspondence or documents select the  **Organise** option in your toolbar. Then click  **Tags**.



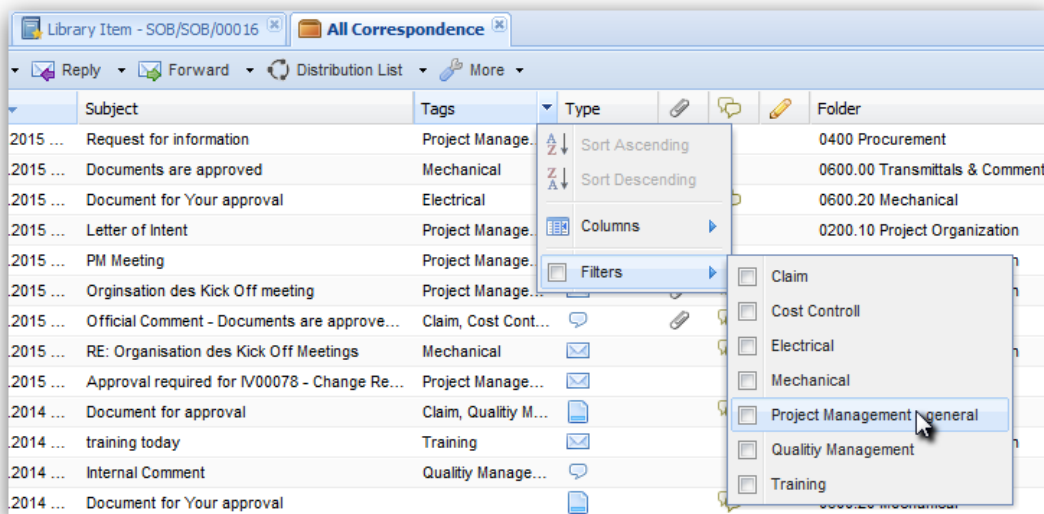
A new box will open providing you with a selection of tag keywords stored within your PIRS project. You can select one or more tags depending on the information you would like to assign to the particular correspondence, Document or Action Item.



After saving you tags selection to the PIRS item the tags will be listed within the header-information of the correspondence / document as indicated by the following screenshot. Please be aware that tags are only displayed as header information in read mode.



You are able to open a list of all PIRS items that were tagged with the same tag keyword either by clicking directly on the tag in question or by filtering for one or more specific tags within a folder or view.

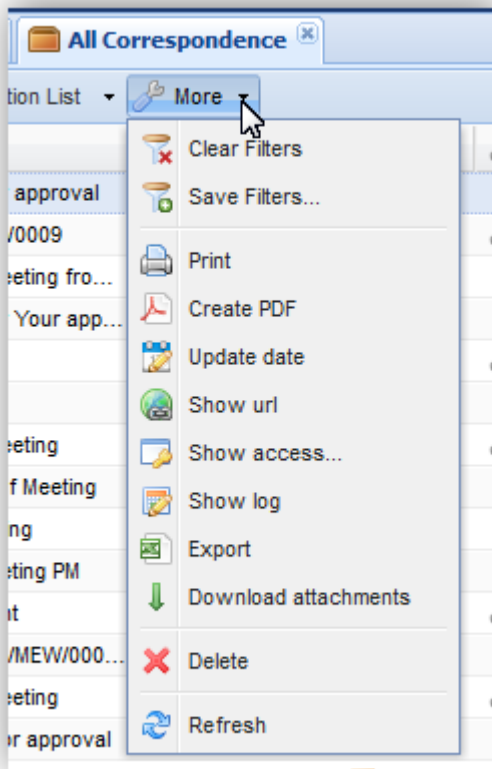


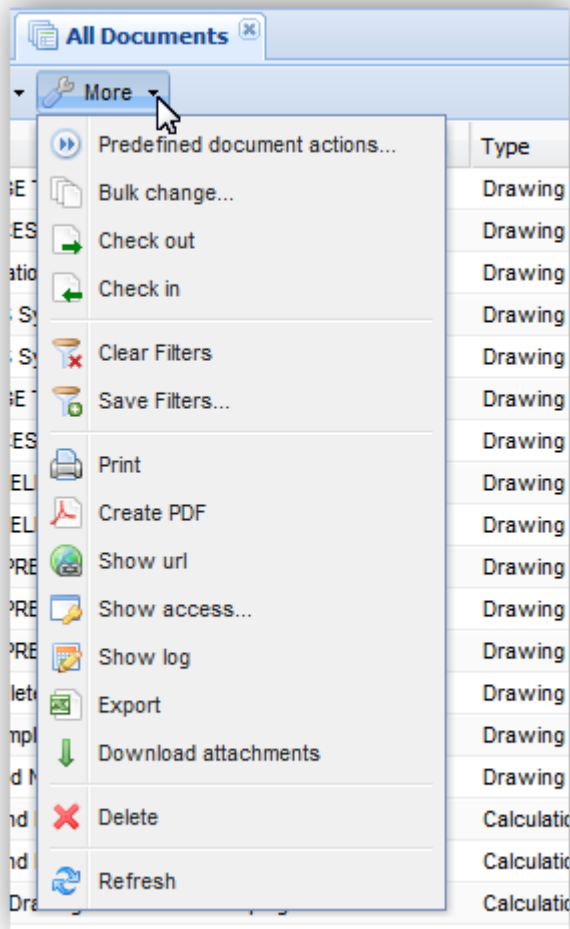
Set up Tag keywords

The list of tags that PIRS users can choose from is usually defined at the beginning of project set up by your project manager. In case certain tags are missing, need to be changed, edited or expanded, either the project manager or your PIRS support desk will be able to make adjustments within the project administration. For further information please contact your project manager or PIRS support desk.

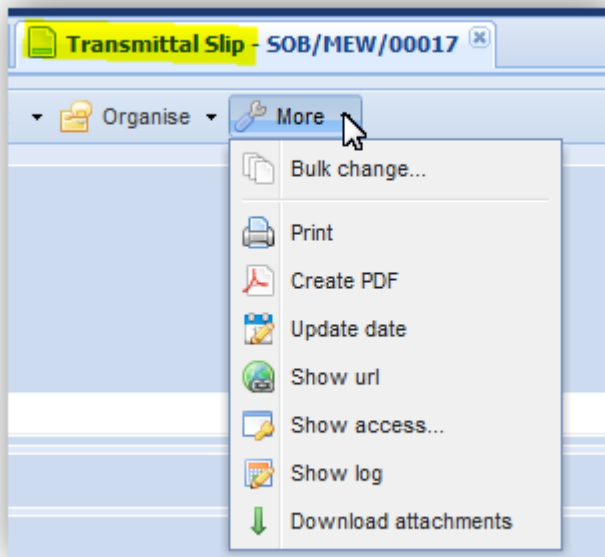
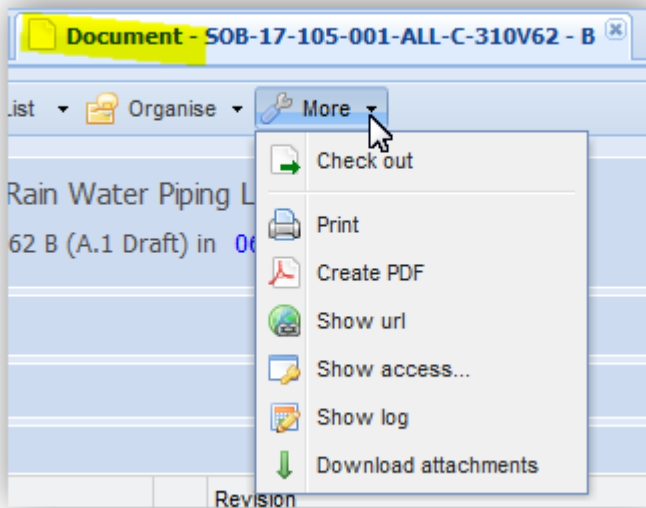
5.2.3 More

Following each possible action listed within the "More" button will be explain briefly. You have the different action options offered to you depending on your access level and whether you are currently within a correspondence or document view / folder. As you can see in the following two screenshots, some functions are the same while some differ. The first image shows the options when you are within the "All Correspondence" view. The second image displays the options listed within the "All Documents" view.








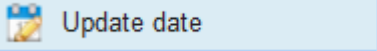
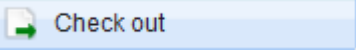
Furthermore there are also different actions listed when you have opened a correspondence or document in read or edit mode. As illustrated by the following screenshots the options available in an open correspondence or document are mainly the same. But there is one exception for comments and transmittal slips which have an additional action that allows you to make bulk changes to the documents that are listed in the comment / transmittal slip.



For more detailed explanations please refer to the respective chapters.

Selection option	Description
 Save Filters...	This action allows you to save filter combinations that you use on a regular basis as a personal view. (Please also refer to chapter Filter data)
 Clear Filters	This action will clear your current view of all filters that might have been set previously. (Please also refer to chapter Search & Filter Functions)
 Show url	This action will display the URL link of the document you have selected in a separate window giving you the option to copy and paste the link into any kind of document that you might want to send or store or you could use it to open the document in another

	browser. (Please also refer to chapter Show document URL)
Show access...	This action will open a separate window in which you can select a contact or group from the project address book. In a second step the application will calculate what kind of access rights the selected person/group currently holds for the selected document. (Please also refer to chapter Show access rights)
Show log	This feature will display all information about when, how and from who the selected document has been created, modified, send etc. (For detailed information about document logs please also refer to the chapter Document log)
Export	By clicking this action all selected files within the current grid of the view will be exported to a new excel sheet which allows you to analyze, store and print the information collected within this view. (For detailed information about excel export functions please also refer to chapter Export grid to MS Excel)
Download attachments	This useful action enables you to download all files attached to selected correspondence or documents with one click. (Please also refer to chapter Download Attachments)
Delete	This action will move all selected documents to the recycle bin. (To learn more about PIRS deletion process refer to chapter Deletion concept)
Refresh	This action will refresh the current view.
Create PDF	This action will create a PDF file according to your company templates that are stored within PIRS. It is possible to have multiple templates and you will be able to choose the right template before the PDF file is created. (Please also refer to chapter Create & Print using PDF templates)
Bulk change...	The bulk change allows you to change the value of one or multiple fields within either the documents you have selected within a document view / folder or within all the documents sent with or commented by a transmittal slip or comment. (For detailed instructions please refer to chapter Bulk Change)
Predefined document actions...	With this functions PIRS offers you the option to create a new comment or transmittal slip that will already have predefined settings for certain existing value fields e.g the recipient(s), sender and recipient code or the time period in which the recipient has to respond to the transmittal slip or comment. (For detailed information also refer to chapter Predefined Document Actions)
Print	The Print option allows you to quickly print any PIRS document or correspondence without

	selecting a print template. (Please also refer to chapter Print without print template)
 Update date	The update feature offers the option to update the date of draft letters and library items. Project Admins can update all correspondence dates. (For detailed information also refer to chapter Update date)
 Check out	This option allows you to check out a PIRS document in order to block other PIRS users to work on the document while you are making changes. (For detailed information also refer to chapter Document check-in & check-out)

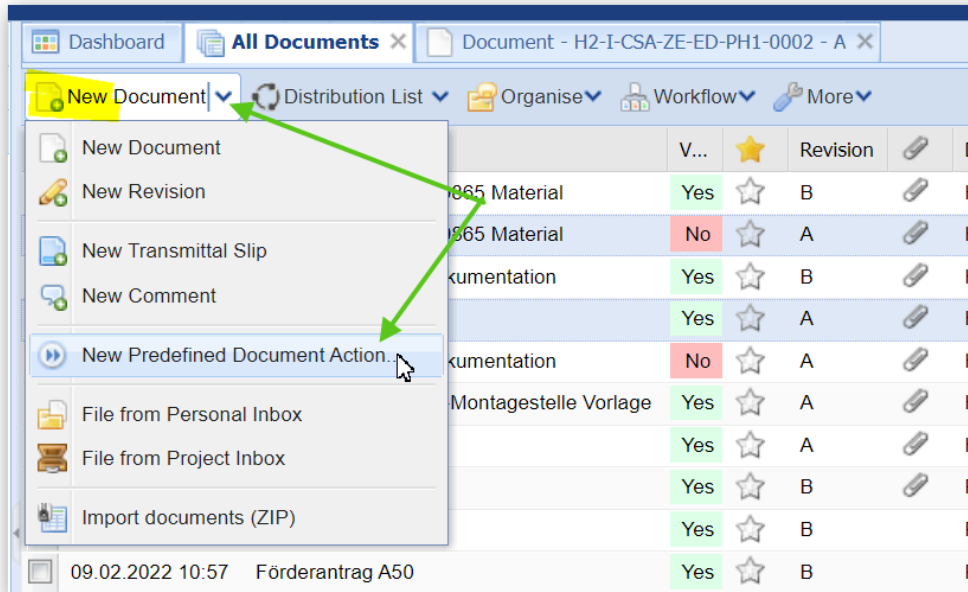
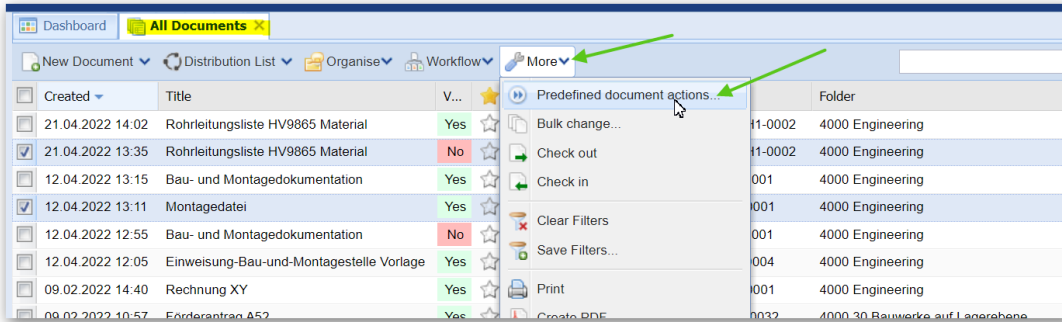
5.2.3.1 Predefined Document Actions

For each project there are certain actions that are performed over and over, therefore are documented in PIRS in the same manner. One of this actions is to send a transmittal slip. In order to save time, PIRS offers the use of text templates that can be easily integrated into an email or transmittal slip. This feature is explained in chapter [Use text templates](#).

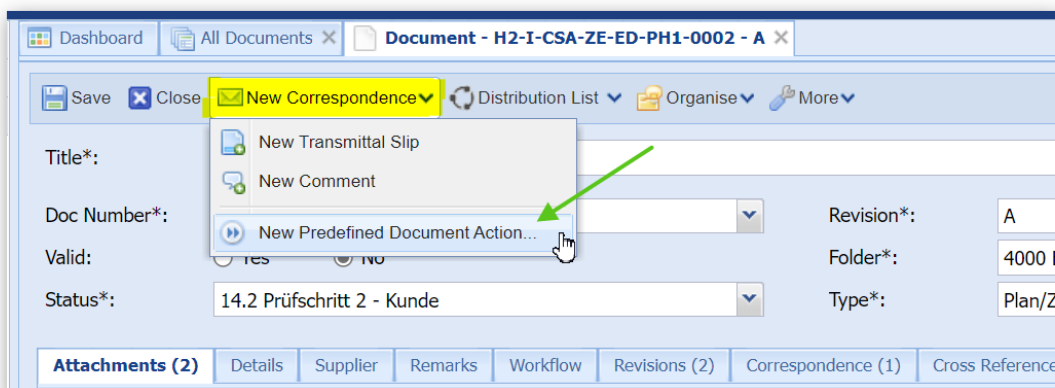
With predefined document actions PIRS offers a standards with preset values. Users with project administration rights can set up templates that will allow each user to quickly create a comment, transmittal slip, e-mail, letter or library item where most of the necessary value fields have already been filled by the template.

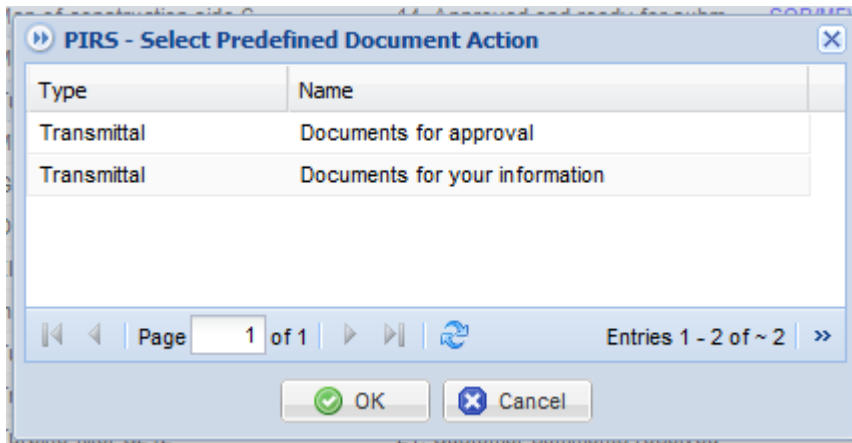
There are two options to create a correspondence based on a PDA:

1) Within a view e.g. All Documents, the option Predefined Document Action is listed under the "More" options or within your "New-" options, compare with the following screenshots.

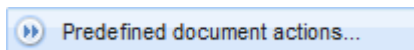


2) When you have a saved document open in read or edit mode, there will be an option listed within your tool bar called "New Correspondence" allowing you to directly create a new transmittal slip or comment. The last option in the list offers to select a PDA.





In case you work within a view, select the document(s) you like to send within your view, then click the



option listed under "More". If you create the PDA from a document, it is of course already preselected.

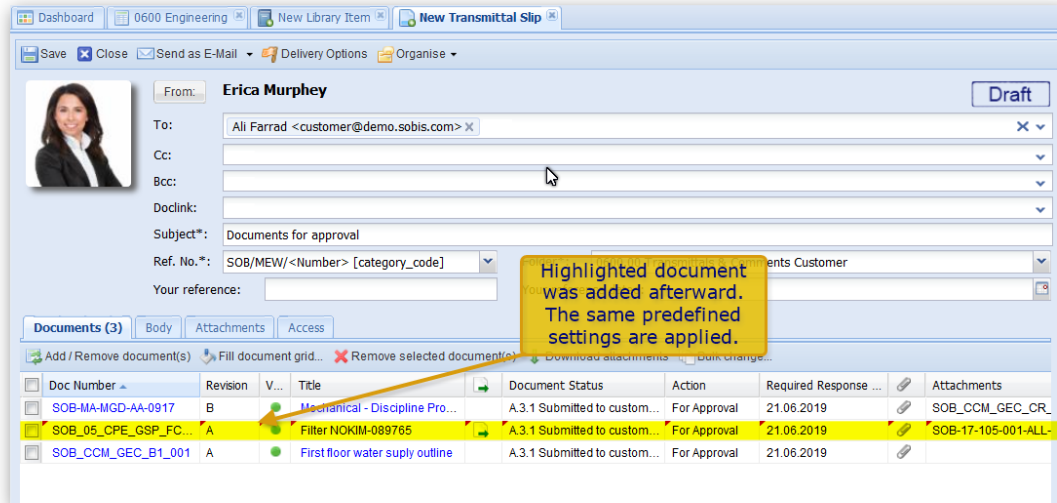
A selection window will let you choose the template e.g. "Documents for approval" and as soon as you have selected a template, PIRS will create a transmittal slip with the predefined field value settings.

You can still add or remove PIRS documents. Furthermore, you can also change all value fields and precede the same way you would with any other transmittal slips.

Please be aware that if the template you have picked has a set sender/recipient code and/or folder, these values will always be used regardless of your own default sender code, the default code for your recipient or the folder that you currently work in.

If these values are not defined by the template your default settings will be filled in automatically. Therefore, if you select a predefined document action to send a transmittal or comment, please pay special attention to the mandatory fields sender code, recipient code and the folder.

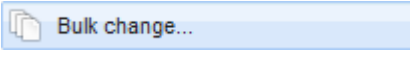
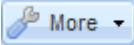
If you add additional documents to a TS that was created using a PDA, all predefined actions will also be used for the additional documents.

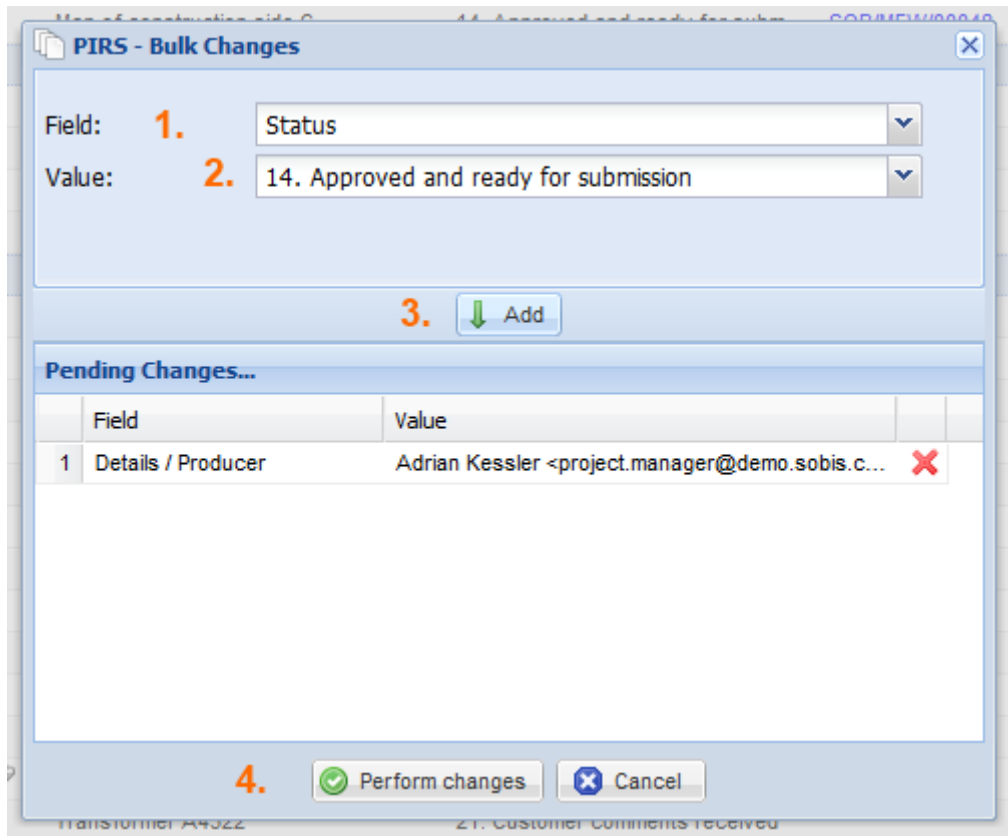


Templates can be created for Transmittal Slips, Comments, Letter and Library Items. In case there is a template you would like to have and that is not listed, please contact your project administration or your PIRS support.

5.2.3.2 Bulk Change

The bulk change feature allows you to modify the value of one or multiple fields within one or multiple documents in one swift process. Hereby, you can either work within a document view or the document module of a folder where you mark the document(s) in question or you can open a transmittal slip / comment and perform a bulk change on all the attached documents.

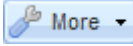
In both cases a window will open after you click  in your  options.



First select the field that you would like to modify, then select or enter the new value. After you have click the "Add" button the change will be listed in the table for all pending changes you want to preform in one go. Before you click the "Preform changes" button all pending changes can still be deleted from the list. Please be aware that as soon as you have preformed the changes they can only be reversed manually for each document at time.

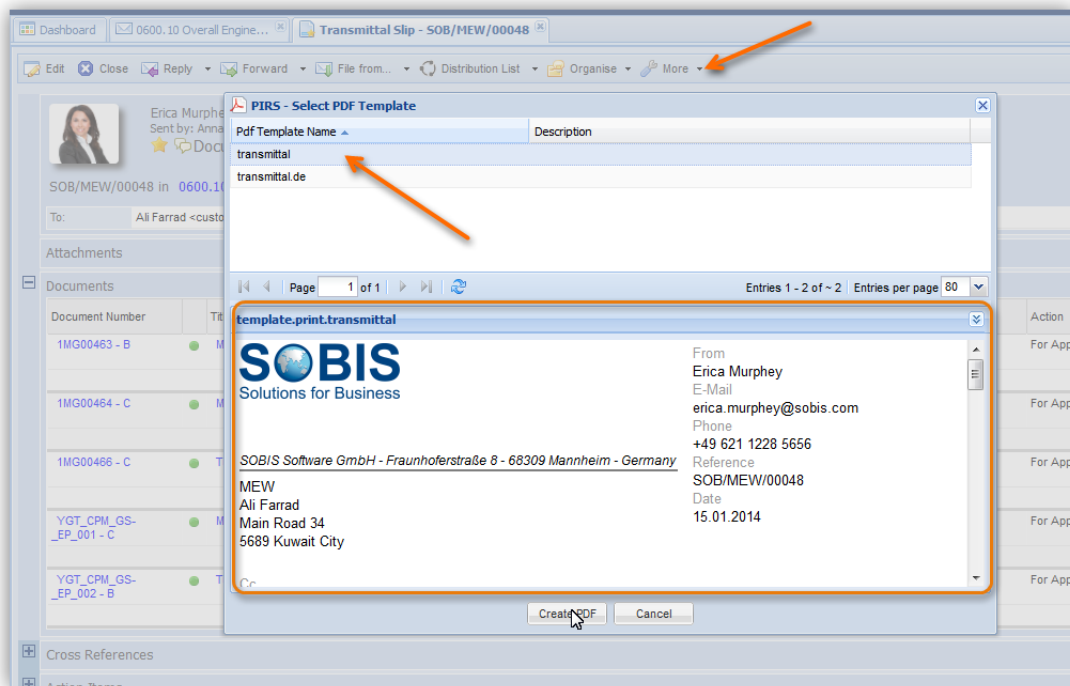
Bulk changes on PIRS correspondence is not supported because sent correspondence should not be changed in order to sustains important information. Furthermore, bulk changes can only be preformed by users that have the necessary access rights to the respective documents.

5.2.3.3 Create & Print using PDF templates

In case you need to preserve a correspondence or meta document in an unchangeable version e.g. if you wish to send the document to a customer as attachment or in paper form, you have the option to create a PDF file of any PIRS entity (correspondence, documents, action items ect.). Click the action "Create PDF" which is located as one of the options within the  button in the action bar. The PDF action is offered within PIRS views and folders.

If your company has only one template stored for the PDF creation of this particular document type, the file will be created without further delay. But in case there is more than one template option provided by your company (e.g. different languages or different layouts or logos), you will now be offered the possibility of choosing the suitable template. The optional templates will


be listed in a table stating the template file and if provided a short description. In addition you will have the possibility to display a preview of the templates.

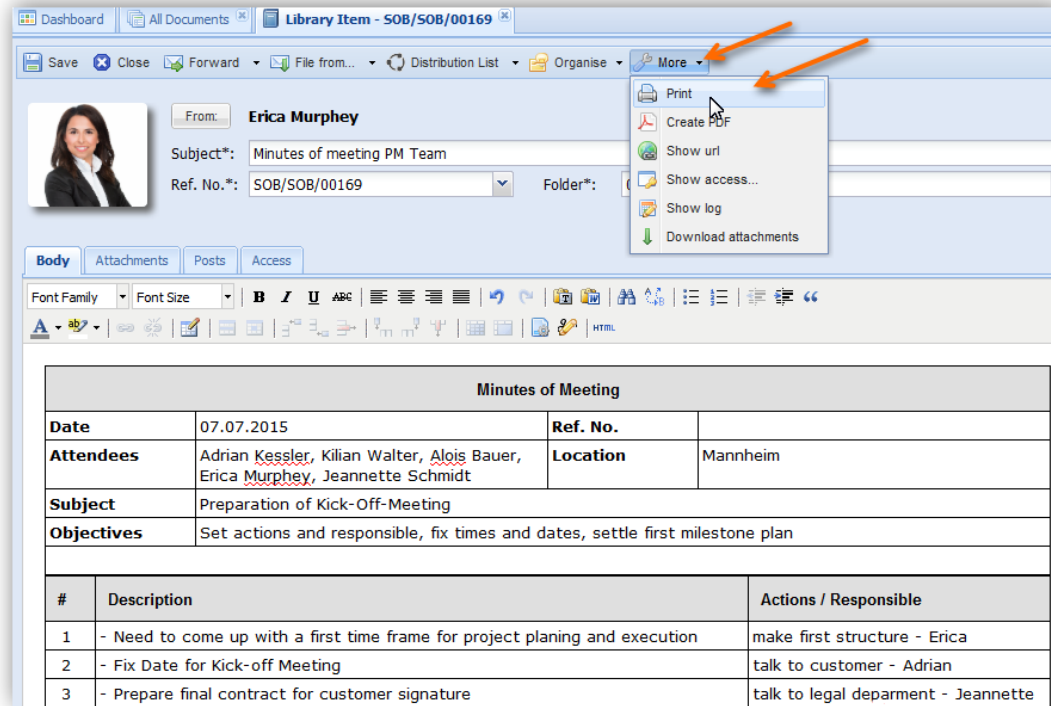


After having selected a template, click the "Create PDF" button. The PDF file will then be generated and opened in a new tab. Please insure that your browser settings allow the automatic opening of a PDF file, because otherwise it will be prevented by your browser. Following image gives you an impression on how your PDF file might be illustrated. A header displays the entered header information of the respective PIRS document (in this case a library item) while the body shows the entire content. In addition the project name, the creation date of the PDF file is added to the document.

5.2.3.4 Print without print template

Since release PIRS 3.1. the PIRS tool bar offers a new print option. As described in the previous chapter ([Create & Print using PDF templates](#)) you can always create PDF files from any of your PIRS correspondence and documents using your company templates. This option should always be used when printing a PIRS letter for example.

In case you quickly need to print an e-mail, library item or document you are now also able to use the print button ( Print) offered to you within the "More" options.



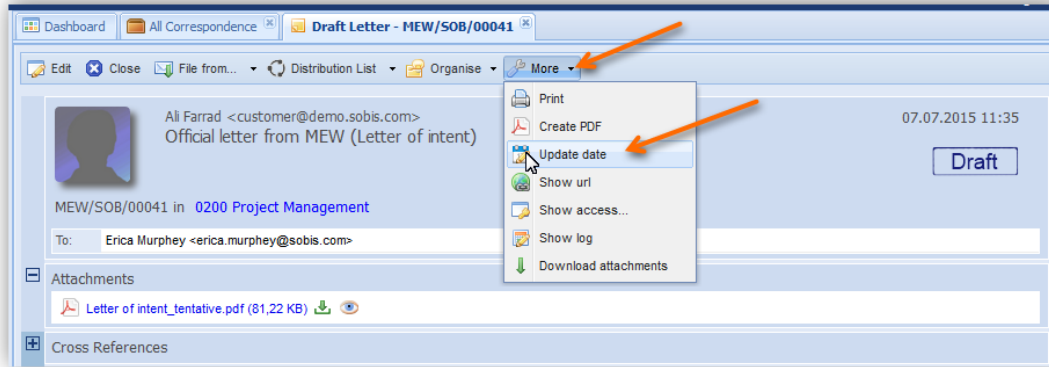
PIRS will connect your browser printer and depending on the browser you are using the printer options will open in a new window or browser tab. You are now able to select the correct printer from your offered company printers and also select all other standard printing options.

Info
 Please be aware that only the content of a saved PIRS document / correspondence is considered for the print out. So make sure to save your document before you print it. Also, since PIRS is directly connecting with your browser printer the layout of the print out might not be consistent with your PIRS document / correspondence.

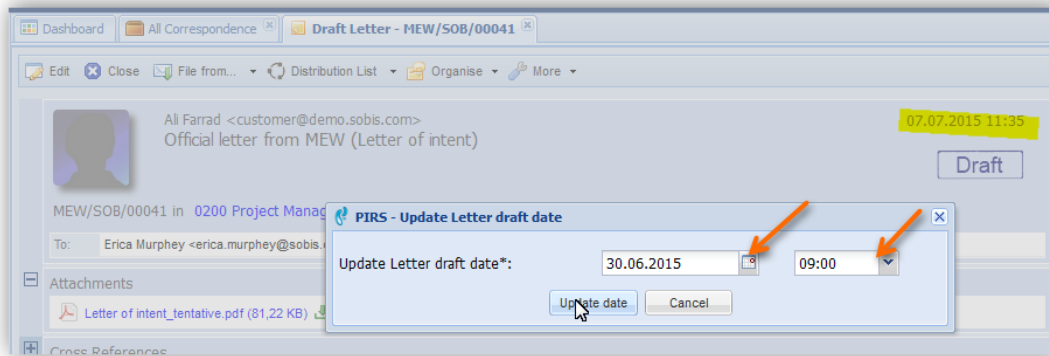
5.2.3.5 Update date

The "Update date" option allows you to change the sent date of letters and the creation date of library items. If you for example have received or sent an official letter and you like to include this document within PIRS you can either create a new letter or create a library item to store the letter and change the sent / receive date to the original date after you have saved the letter / library item.

In order to be able to update the date you need to open the letter / library item in read mode, then click "Update date" listed within the "More" options.

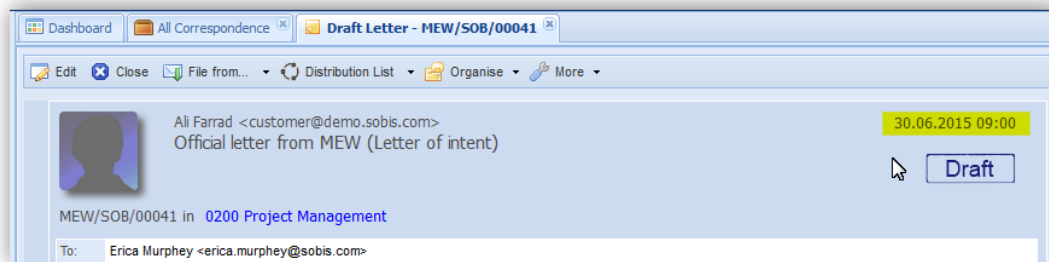


Next a new message box will open allowing you to adjust the original date and time of this letter / library item.



Click "Update date" to save your changes.

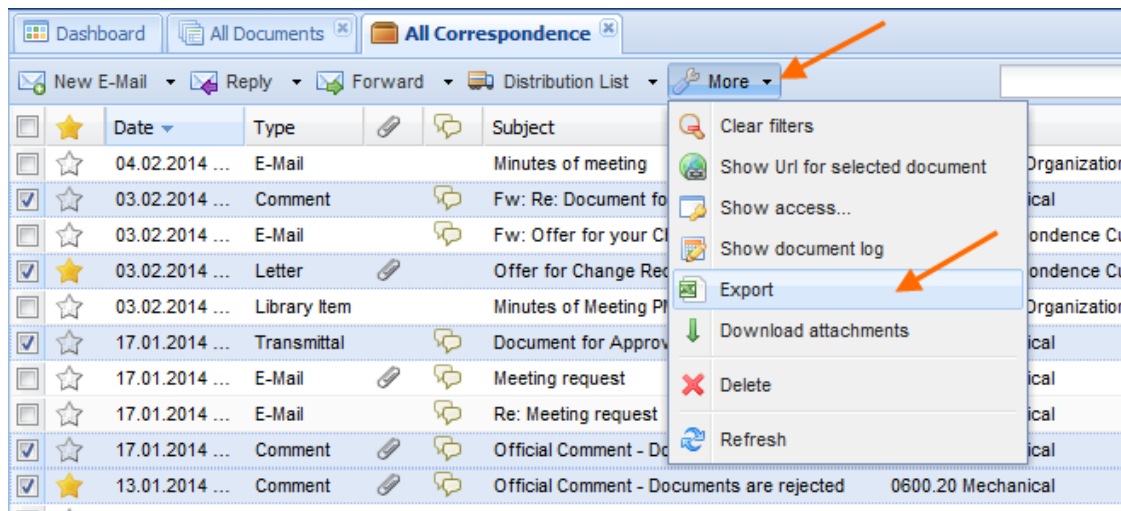
In order to see the new date and time values close and reopen the letter / library item.



Access Rights

Team members are able to change the date of all library items and letters in Draft to which they have editor rights. This means that users can change dates of library items and letters in Draft that they have either created themselves or that the creator has assigned them editor access to. Project managers can update the date of all existing PIRS correspondence.

5.2.3.6 Export grid to MS Excel



To support a smooth and easy transition of information, PIRS offers a feature called excel export.

Regardless of the view or folder display, you will find the "Export" function within the choices of the "More" options displayed in the action bar.

To export exactly those files (correspondence or documents) that will fit your information requirements, you will now have two different options, either you manually select all those files from the table or you first filter the table content according to your intended result and then export the respective documents.

For information on how to filter data and search for specific information please refer to the chapter [Search & Filter Functions](#) .

In both cases the result of the export will be opened automatically in a new excel sheet.

The column values of each document regardless if they are visible or deactivated within your current customize grid, will be taken into account and presented in a separate column in the excel sheet. In addition another column displaying the document link is added to the excel table allowing you to directly open the file within PIRS. Please be aware that the maximum number of documents exported is 5.000. If you like to change this limitation, please contact your project manager or service desk.

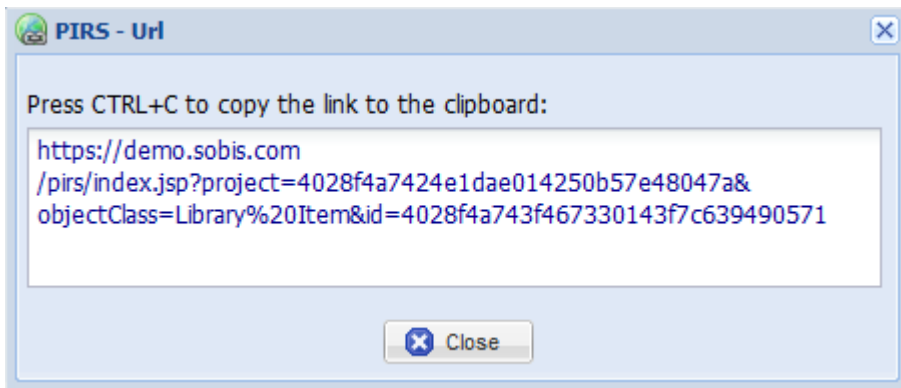
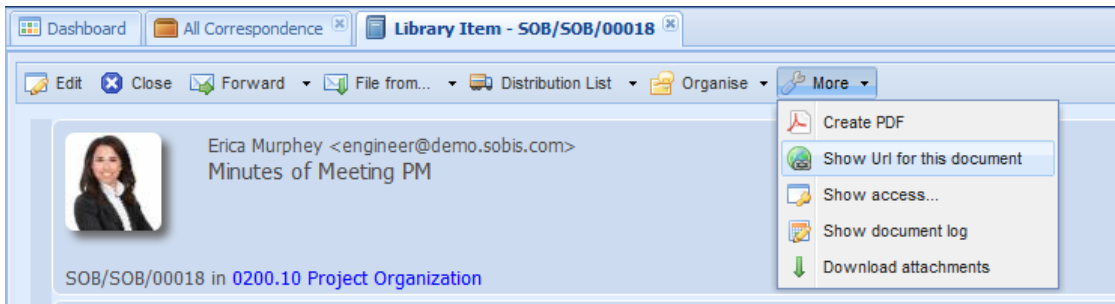
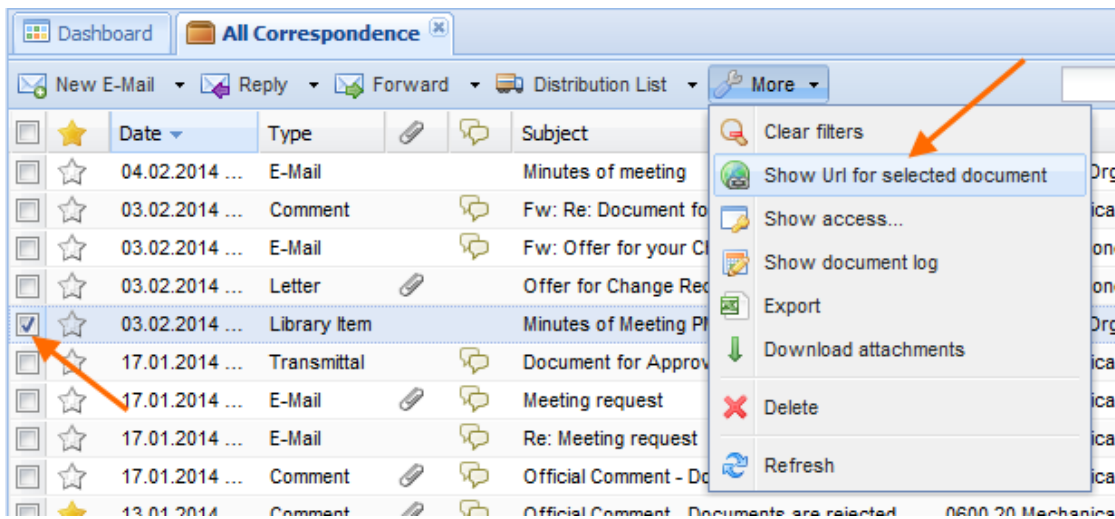
Export all documents

If you like to export all documents within a folder or view, you don't need to select them all manually. Simply don't select any documents and automatically all documents of the folder or view you are exporting form are going to be considered for the export.

5.2.3.7 Show document URL

Each correspondence and document file is assigned a unique document URL as soon as the file is saved or sent in which case the file will automatically be saved and stored within the PIRS application database.

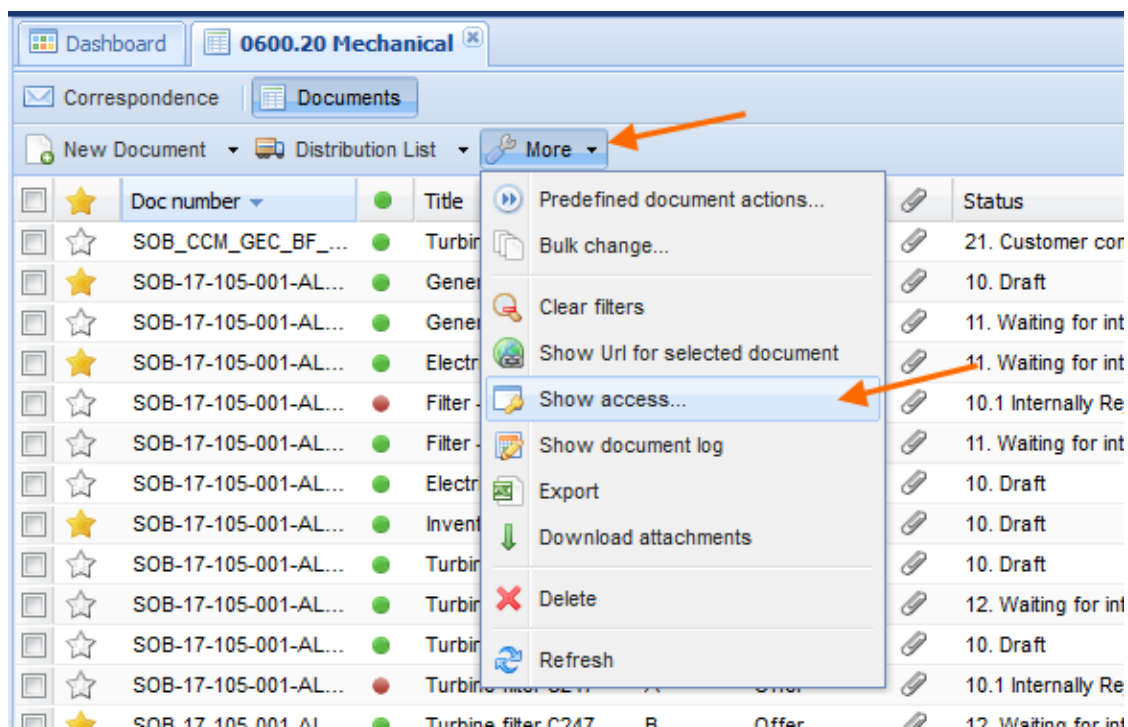
In order to trace the unique URL of a correspondence or document you can either select the file within the respective view (e.g. "All Correspondence") or open the document in read or edit mode. Next expand the selection options within the "More"-button positioned in the action bar, and simply select the option "Show URL for selected document" if you have selected a document in a view, or "Show URL for this document" if you have chosen to first open the document. (Compare with the following screenshots.)



A small message box will appear in the center of your screen containing the document URL and giving you instructions on how to copy the link the simplest way possible.

5.2.3.8 Show access rights

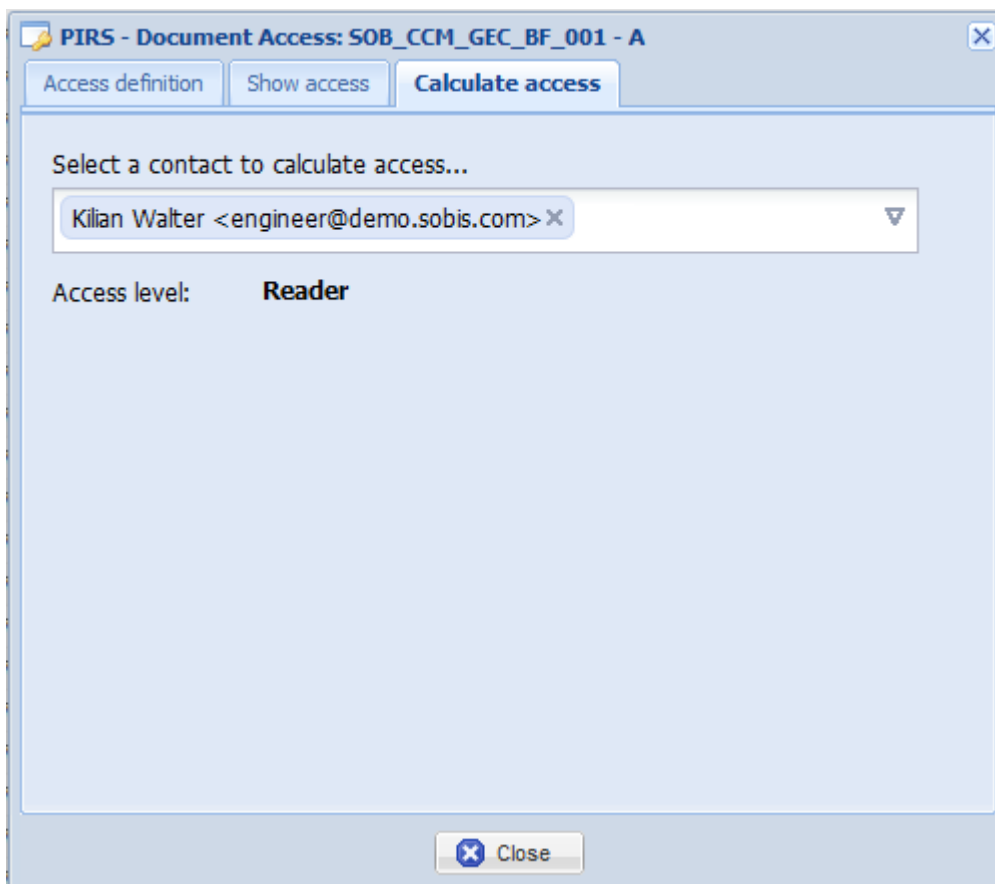
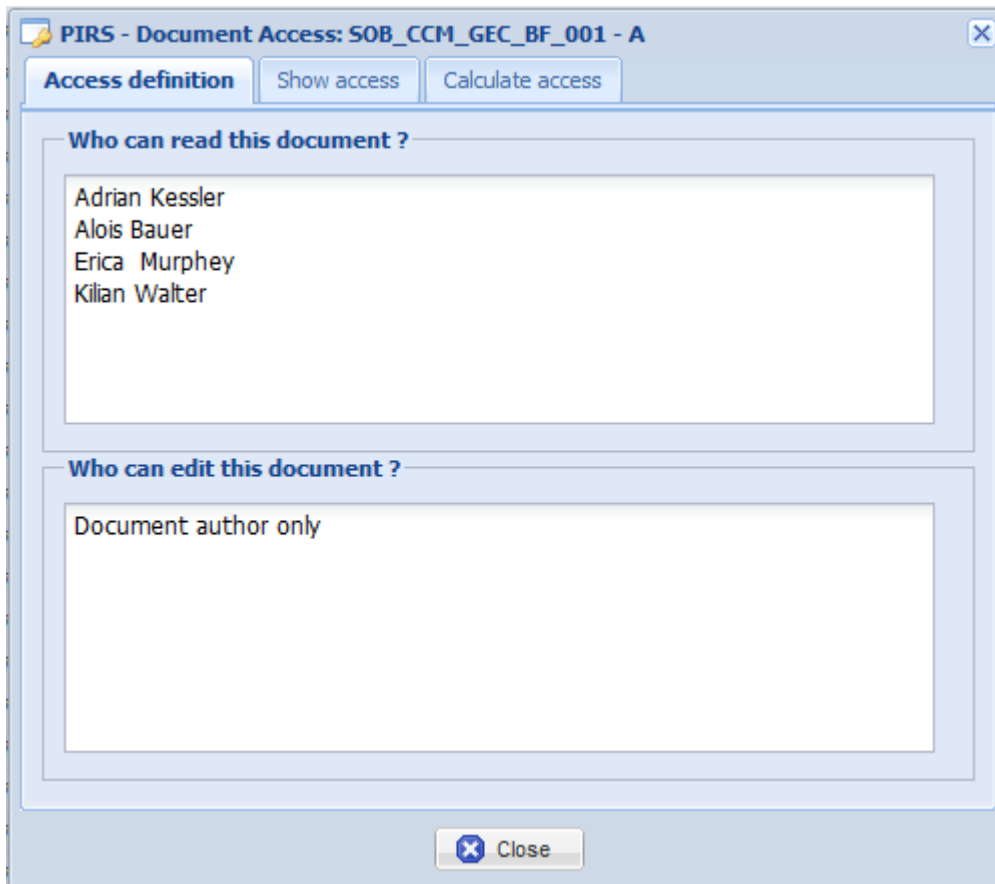
In case you need to know what kind of access rights a certain project member or project group has to a specific correspondence or document file, you can use the "Show access..." feature. It can be found within the options of the actions features within the action bars of all views.



The access to a file can either be viewed or calculated out of any view or directly within an open file in read or edit mode. As illustrated by the screenshot, you will first need to select a document in order to show or calculate the access information. Please be aware that only the access setting of one specific PIRS file can be displayed at once. If you select more than one file you will receive an error message.

After selecting a file and clicking the "Show Access" button, a new window will be opened presenting three different tabs.

The first tab will give you the general access information defined for the selected correspondence or document file while the second tab will list all PIRS users who have currently access to the file according to their access level (reader, author, editor).



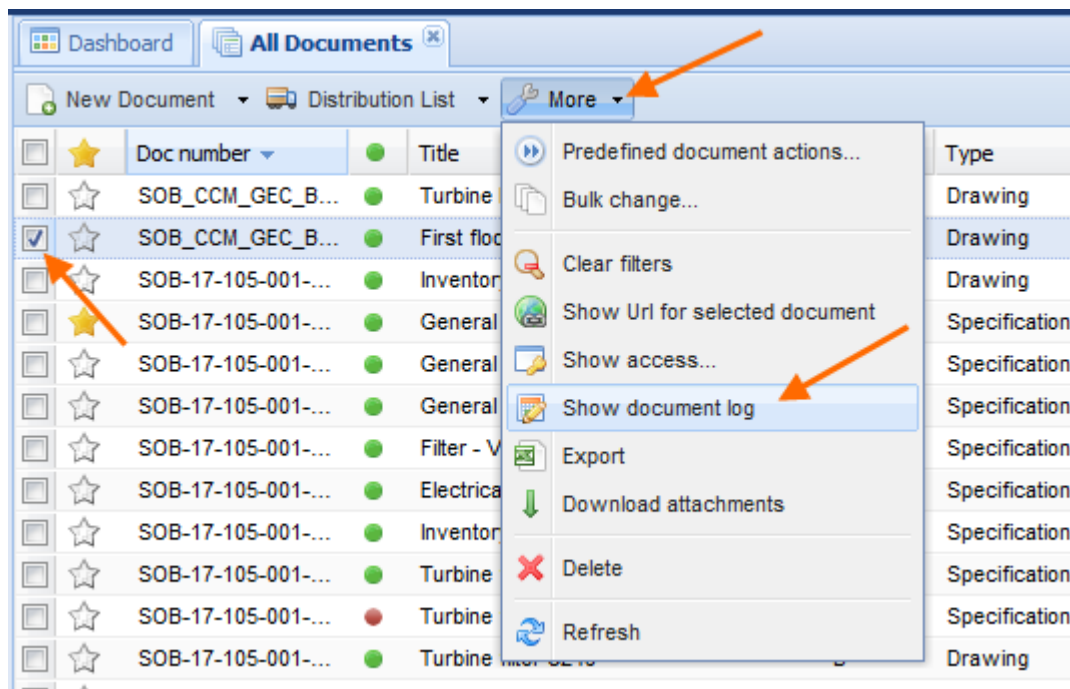
In case you need to calculate the access of one specific PIRS user or group to a PIRS file, the third tab includes a selection field where you can either enter the person or group for whom

you wish to determine his/her/its access rights manually or you can select them from the address book which you can unfold by clicking the arrow head to the right hand side of the box. Again you will only be able to select one value.

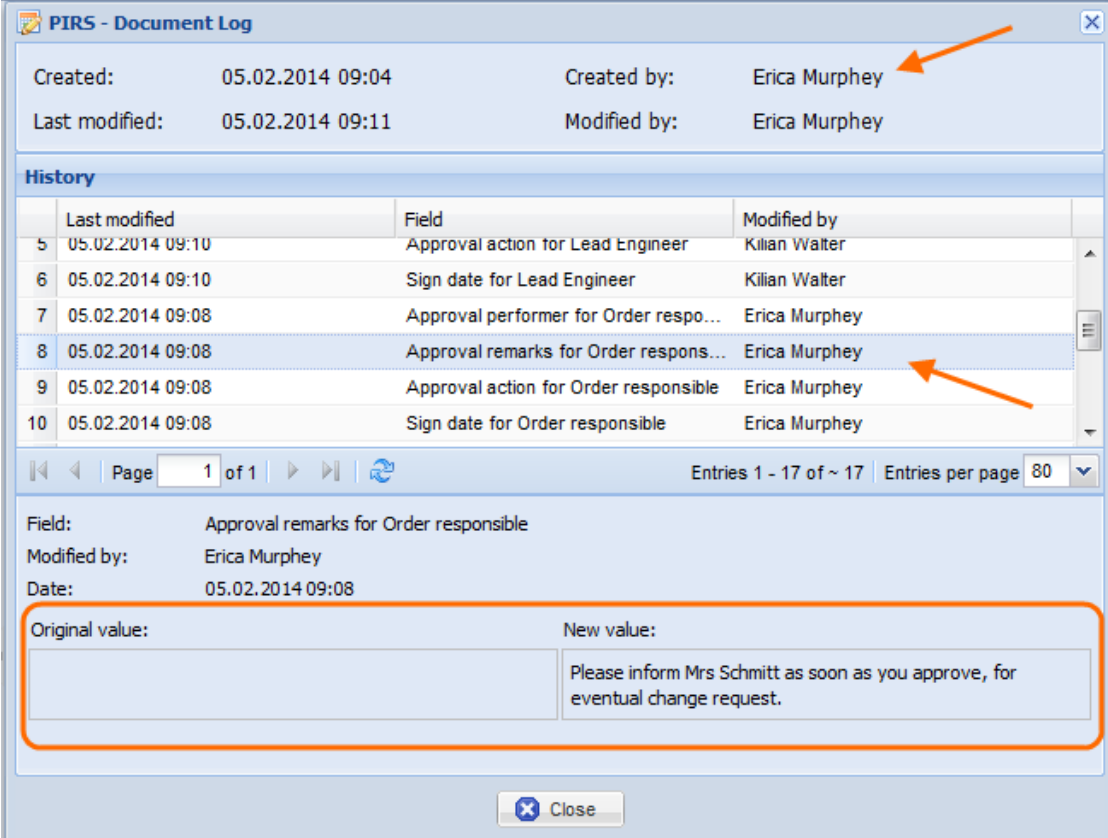
The access level of the person/group in question will be calculated as soon as a person or group has been entered in the contact field.

5.2.3.9 Document log

The document log is a very helpful tool to analyze and trace changes, modifications and actions that were made within a document. It enables project members and especially project managers to always insure that each step during editing processes of all types of documents can be tracked and trace back to the person who modified the document in question and when each modification took place. This function therefore insures that no information is lost and that it can be restored if necessary.



In order to show the log information of a specific document or correspondence you first need to select the file within the respective view / folder or open the document in either read or edit mode. Next expand the selection options within the "Action"-button positioned in the action bar and select the option "Show document log". The following window will open on top of your PIRS content screen.



PIRS - Document Log

Created: 05.02.2014 09:04 Created by: Erica Murphey
 Last modified: 05.02.2014 09:11 Modified by: Erica Murphey

History

	Last modified	Field	Modified by
5	05.02.2014 09:10	Approval action for Lead Engineer	Kilian Walter
6	05.02.2014 09:10	Sign date for Lead Engineer	Kilian Walter
7	05.02.2014 09:08	Approval performer for Order respo...	Erica Murphey
8	05.02.2014 09:08	Approval remarks for Order respons...	Erica Murphey
9	05.02.2014 09:08	Approval action for Order responsible	Erica Murphey
10	05.02.2014 09:08	Sign date for Order responsible	Erica Murphey

Page 1 of 1 Entries 1 - 17 of ~ 17 Entries per page 80

Field: Approval remarks for Order responsible
 Modified by: Erica Murphey
 Date: 05.02.2014 09:08

Original value: New value:
 Please inform Mrs Schmitt as soon as you approve, for eventual change request.

Close

Three fields are displayed within a PIRS document log window. The top field will always show the creation date of the document as well as its creator and the date when the document has last been modified as well as by whom it was modified.

The second field presents you with a table listing all document modifications and actions such as if a value field has been filled with information. It includes the date a modification was made, the specific field that was modified as well as the responsible project member.

Within the third field the actual modification of the selected table entry will be displayed showing you not only the modified field name, the modifier and the date of the modification but also the original as well as new value of the field in question.

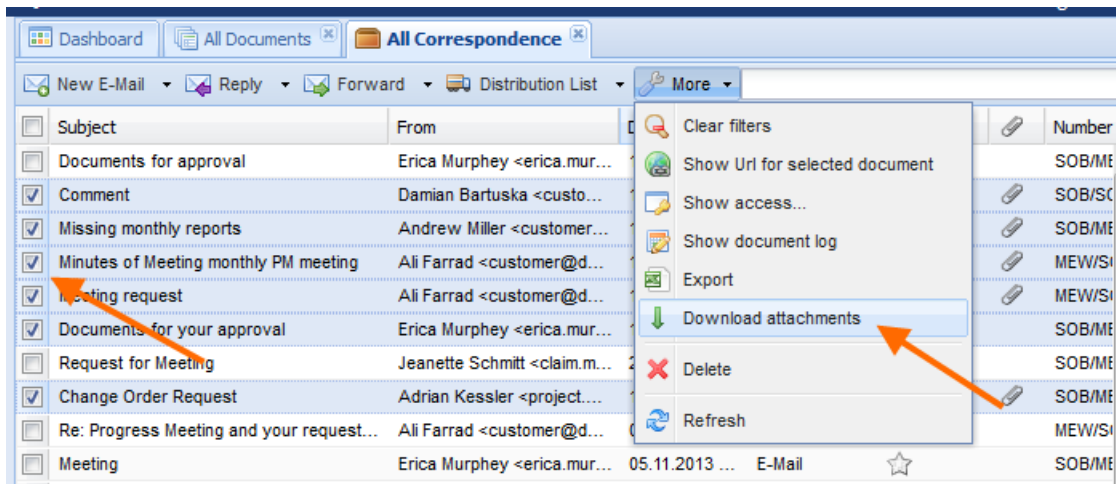
Included in Log...


The log will also show an entry for changes caused by sending and receiving of transmittals and comments. The person listed as modifier will be the sender of the transmittal/comment.

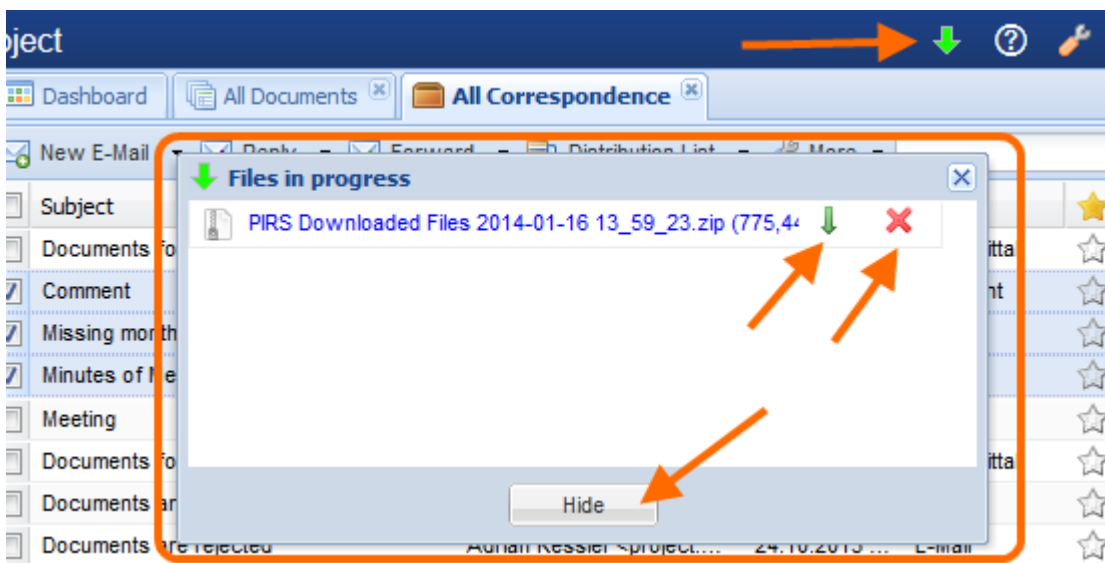
5.2.3.10 Download Attachments

With the PIRS release 2.3.0, PIRS offers its users the option to quickly and easily extract files from PIRS correspondence and documents and store them locally.

First select the correspondence / documents from which you would like to extract the files. Then open the "More" options in your action bar and select the "Download attachments" feature.



PIRS will start the download process and show the progress of the file download in a separate pop-up window. At any time during the download you are able to hide the window and reopen it by clicking the grey arrow  in the top level PIRS tool bar.

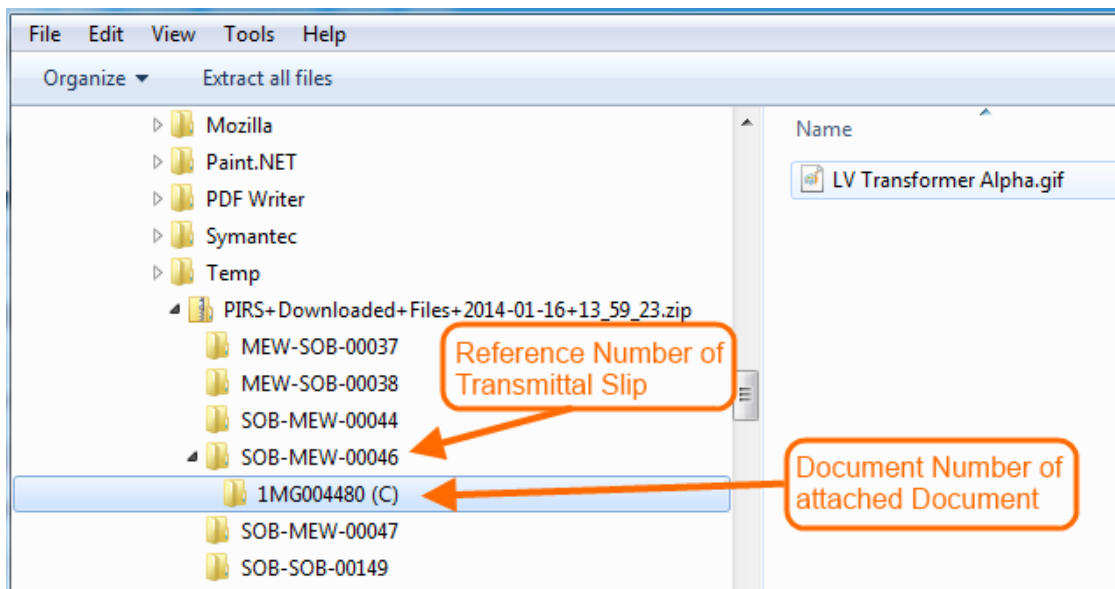
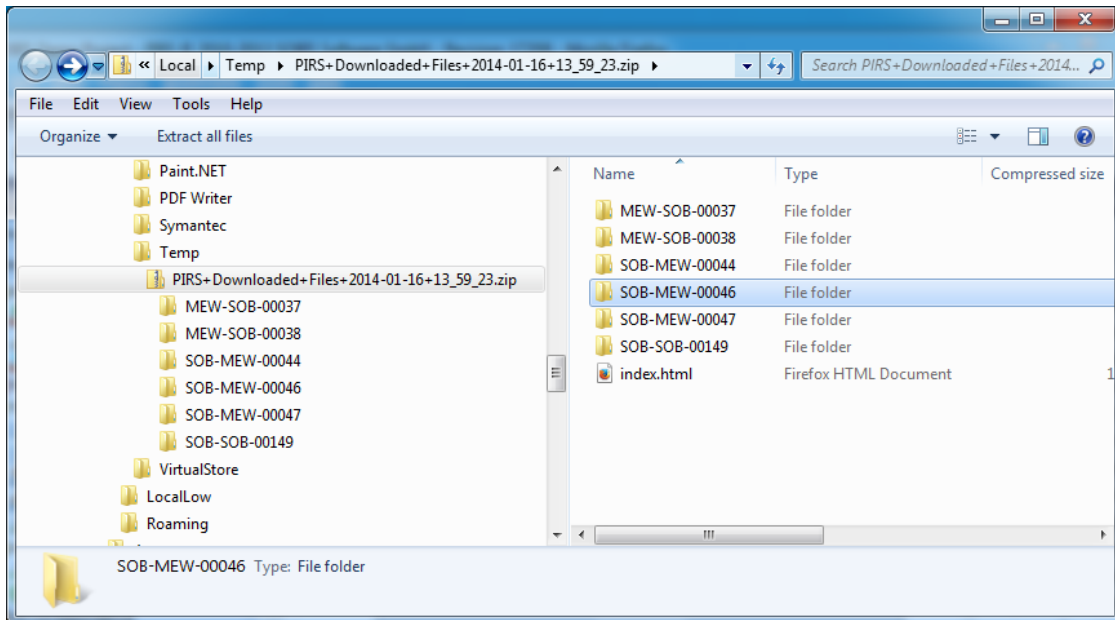


As soon as the download is completed you will be informed by a small message box and the arrow in the tool bar will turn green.

All files will be organized and stored in folders according to the reference number and / or document number. Those folders are compressed in a zip file and stored locally on our computer. The path used to store the zip file can be defined in your browser settings.

Either by double clicking the item or by clicking the green arrow in the download window the zip folder will be opened. A download can be canceled or deleted after the download is completed with the red cross indicated in the screenshot.

Besides the folders named after the respective reference and document numbers, the zip file also contains an html index file that can be opened in your browser and that shows a detailed list of all downloaded attachments.



Transmittal Slips can contain document attachments (technical documents) from one or multiple PIRS documents as well as additional files attached to the transmittal itself. This will usually be the case because you will attach one or multiple documents when sending a

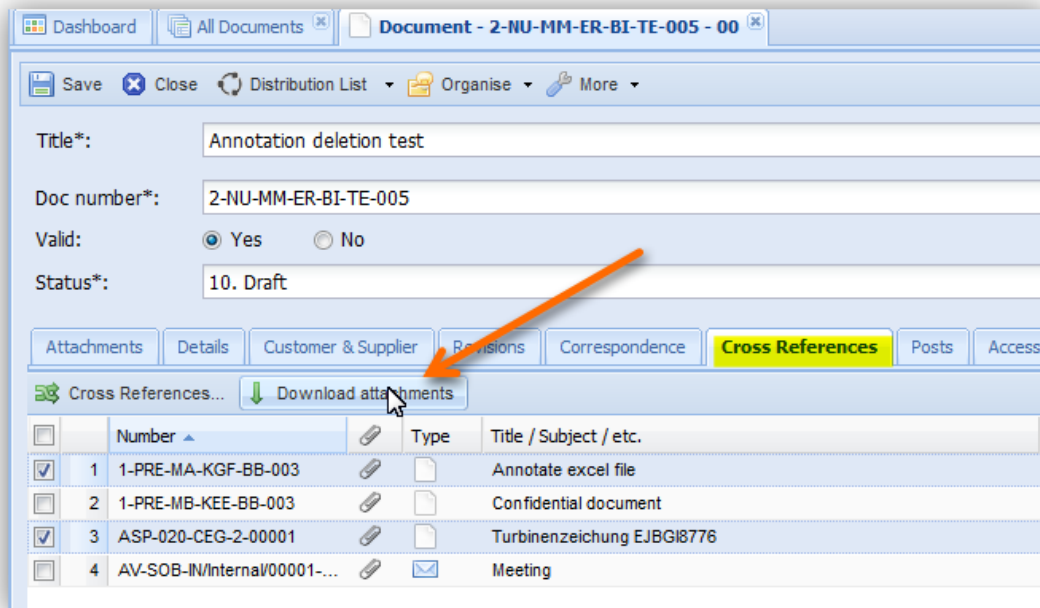
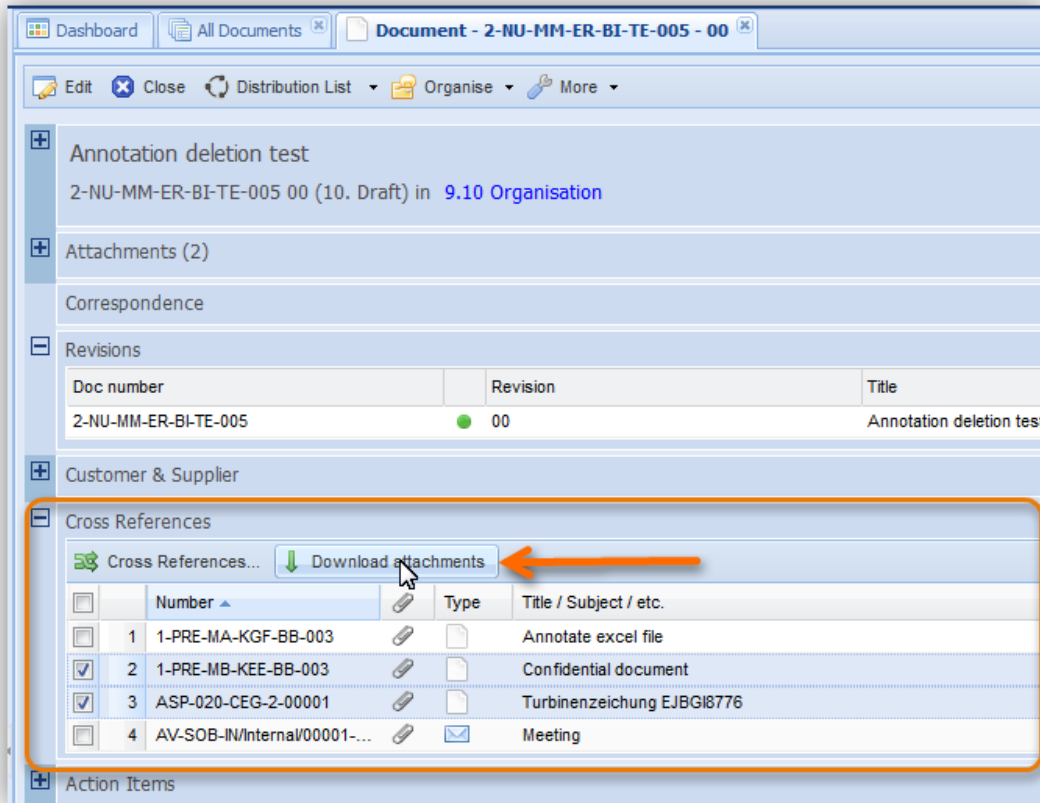
transmittal and for each transmittal slip there will be at least one PDF file automatically created by PIRS and attached to the correspondence.

Therefore the download will create one folder named after the reference number of the transmittal slip which will contain all attachments directly linked to the correspondence and in addition one folder for each PIRS document that includes all send technical documents.

5.2.3.10.1 Download attachments from Cross References

Besides the general download offered in PIRS views and folder grid displays you are also able to download attachments from documents and correspondence listed in cross references. To learn more about PIRS cross references refer to chapter [Set Cross References](#).

Regardless whether you open a document / correspondence in read or edit mode, there is an area or a tab that displays all PIRS entities that are interlinked. Here you have the option to add and remove cross references. In addition you can also select any of the linked PIRS entities and download their attachments.



In both cases, PIRS will create a zip file containing all selected attachments as described for the attachment download above.

5.2.3.11 Deletion concept

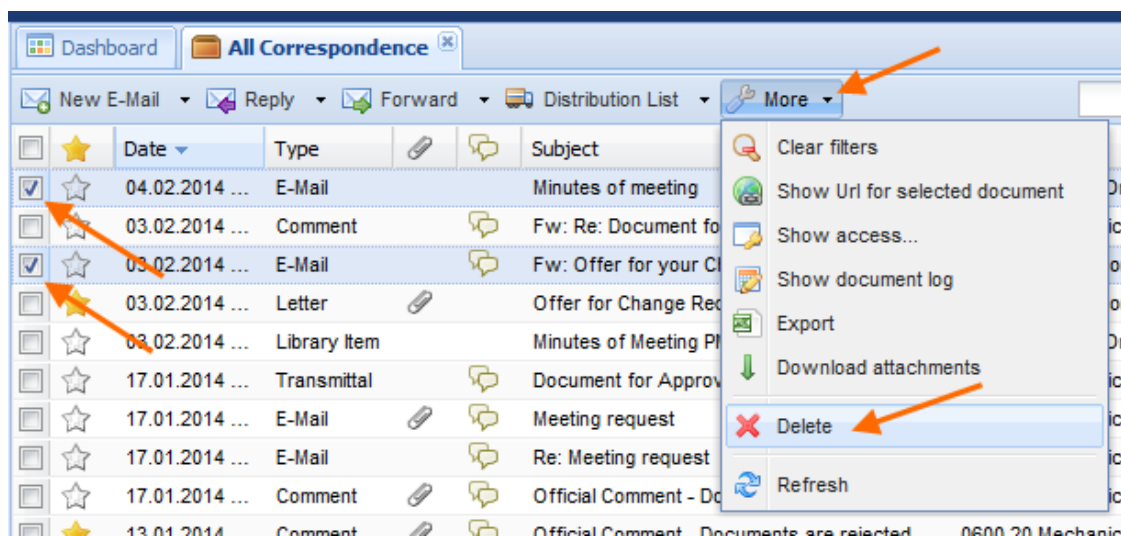
The goal of PIRS is to insure the highest level of information density and security. All project relevant information and documentation should be stored consistently and without gaps. All

workflows and processes should be documented, logged and traceable. Therefore PIRS follows the principle of a soft delete.

Any correspondence or document can only be deleted by its creator (its author). Those project members the author provided with the necessary access rights or project members who have editor rights e.g. a project manager can also delete the files in question (for more information on access rights please refer to [Manage Access Rights](#)).

PIRS forms that have been deleted will not be lost or removed from the database irretrievably, but rather move into a recycle bin from where they can be restored again. This guarantees that no file can be deleted accidentally.

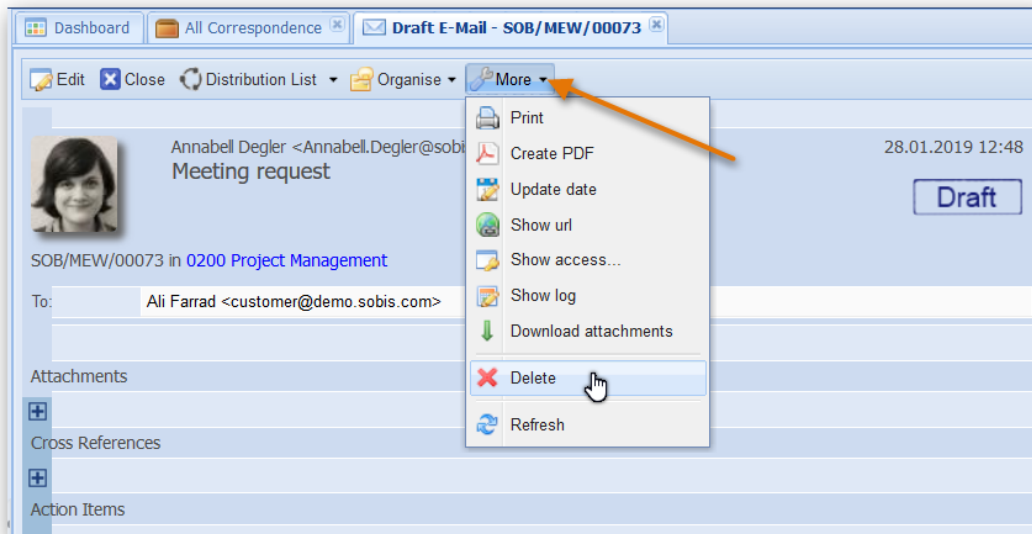
In order to delete one or more files you simply need to select it/them in the respective view (e.g. all correspondence) or folder and then click the delete symbol located within the "Actions"-options in the view action bar as illustrated in the following image.



You will now be asked if you really want to delete the selected document(s), allowing you to reconsider and cancel the deletion process.

After you have confirmed that you intent to delete the files, PIRS will check whether or not you are allowed to remove all selected documents and if you hold the required rights they will be moved to the recycle bin.

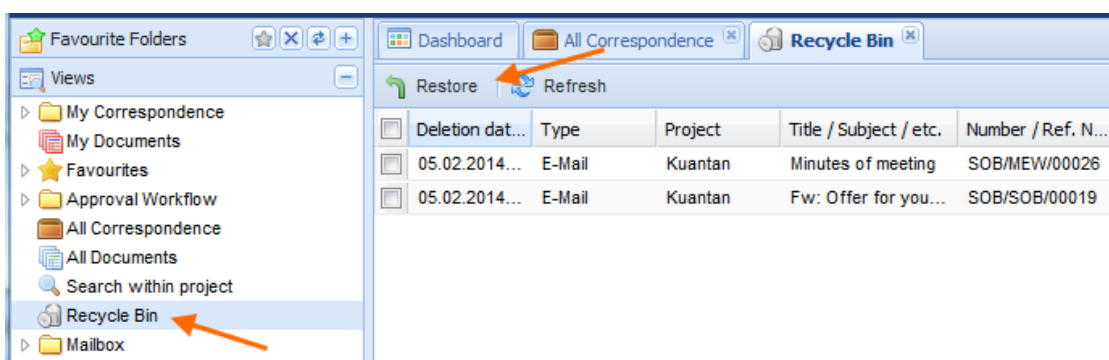
Besides being able to delete documents and correspondence within a grid, you are also able to remove them directly when you have opened them in read mode.



Please be aware that deletion is only possible in read mode.

As illustrated in the screenshot below you are still able to restore files that were soft deleted. Restored files will be moved back to their previous storage place within the folder structure. You are not able to remove soft deleted files from the database completely. In case a document needs to be hard deleted which ultimately erases it from the database, please contact your PIRS administrator.

Please be aware that even deleted files keep their previously assigned unique reference number which thus cannot be reassigned to another file. If it is highly important that the sequential numbering is not interrupted or shows any gaps, you should make sure that a draft document that might not be used or that will likely be deleted is primarily assign a special number to save the document.

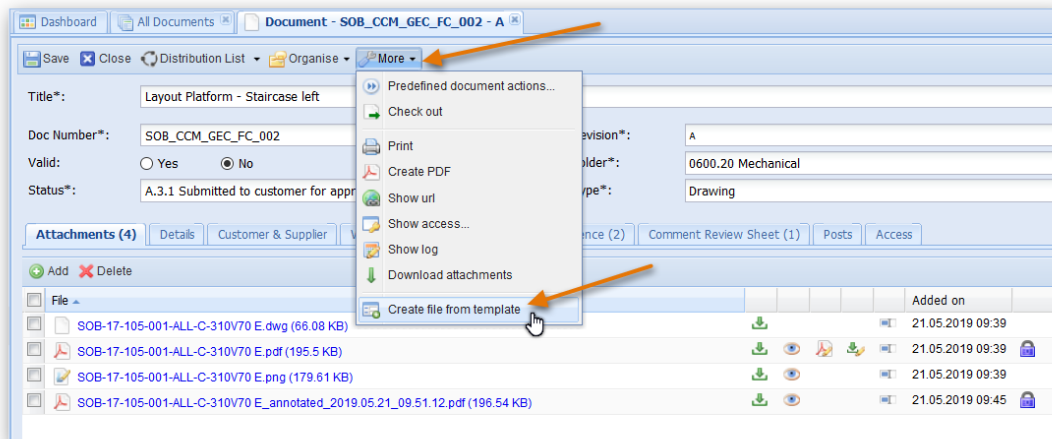


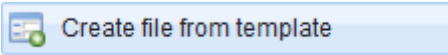
5.2.3.12 Create file from template

The feature create file from template allows you to create a office document (e.g EXCEL or Word) based on your company templates and fill it with information from your PIRS document or correspondence. Should you e.g. need to create a cover sheet for your PIRS document this feature can create it automatically based on the meta information maintained in your PIRS document.

In order to create a file based on your company template, the template needs to be added within PIRS administration. To add new templates please contact your project manager or PIRS support.

Open the document in question in edit mode. This feature is not available in read mode.



Next select the  listed a last point under the "More" options.

A list of currently available templates is offered to you to choose from. Select the correct template and click OK. Based on the settings of the template, the word, excel or PDF file will be created and opened automatically.

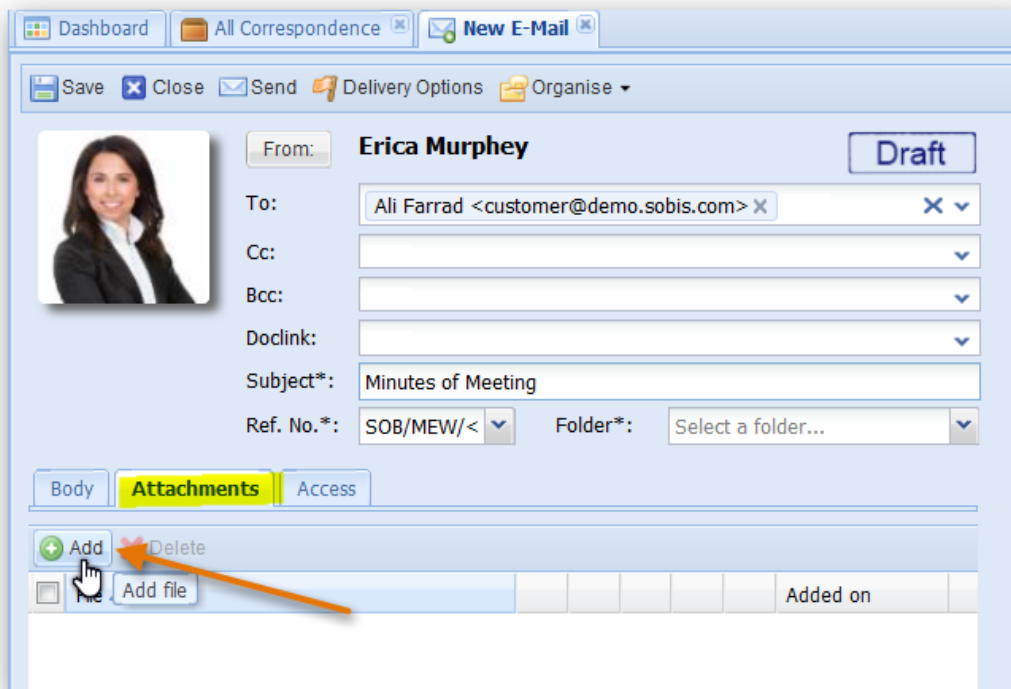
Depending on how this feature is integrated in your project, PIRS will automatically attache the created file to your PIRS document.

Furthermore, it is also possible to export documents based on a search query. To learn more about this option, please contact your PIRS Service Desk.

5.3 Manage Attachments

5.3.1 Add attachments to any PIRS entity

Any PIRS entity, regardless if it is a correspondence, a document or any other item offered allows you to add files form your sever or directly from client.

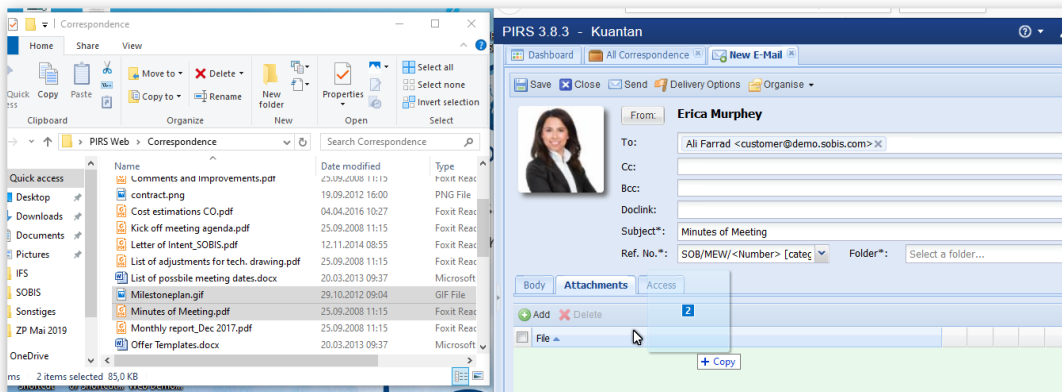


To add a files open the entity, e.g. an email in edit mode and select the tab "Attachments".

Next either add the file(s) via drag & drop or use the "Add" button to enter your explorer and select the file(s) manually.


If you choose to add files via drag & drop you simply drag the file(s) directly into the content area as illustrated in the screenshot below.

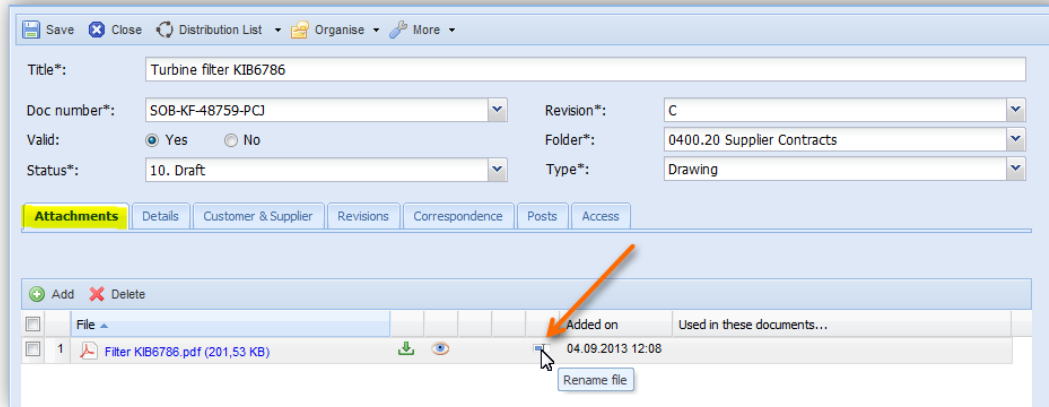
There are no limitations concerning file format, file size or the number of files. Therefore, you are able to add a many files as needed.



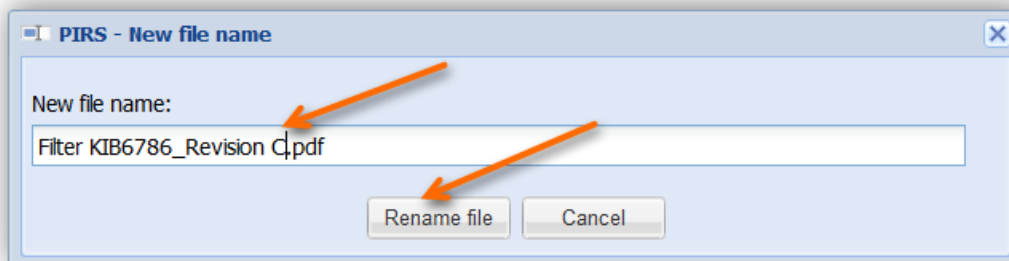
5.3.2 Rename Attachments

Given that you have the necessary access rights, any file added to correspondence prior to sending or when the correspondence is in 'Draft', as well as all files added to a PIRS document can be renamed.

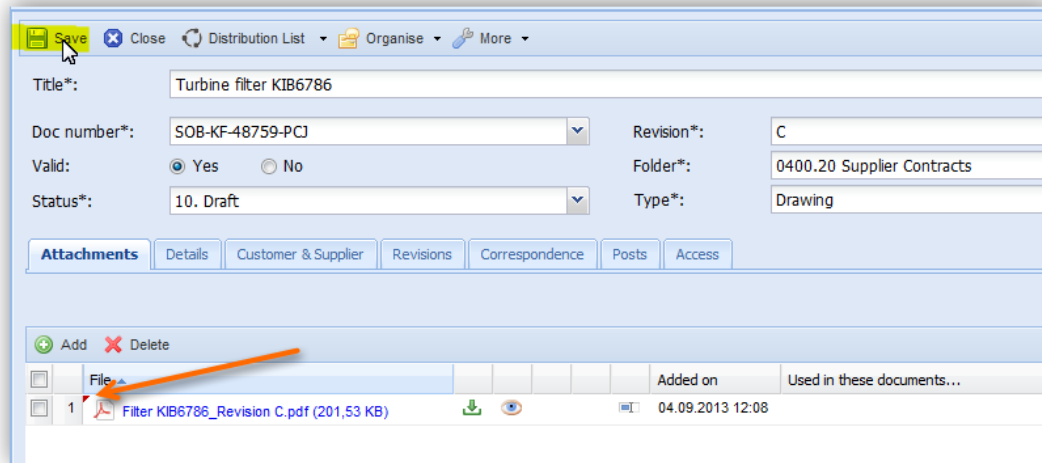
In order to rename a file, first open the PIRS correspondence or PIRS document in edit mode, then select the tab "Attachments". Click the symbol for renaming a file () which can be found on the right hand side of the file name as indicated in the following screenshot.



As soon as you click the symbol a small box will open allowing you to adjust the file name. Click the 'Rename file' button in order to save the new file name.

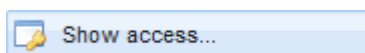


The renamed file will be indicated with a red marker. Please save the PIRS document in order to ensure that the renaming of the file is completed.



5.4 Manage Access Rights

As you can see from the following image, there are three different levels of access rights for PIRS users: editors, authors and readers. Readers, as the name already indicates, are only allowed to read all documents that have not been specifically excluded by their authors. Authors can in addition to the given read access also compose, modify and soft delete their own documents. They will also be able to change and delete documents from other authors if the respective author has granted them author rights. Finally editors will be able to compose, modify and delete their own documents as well as those of other project members. Generally most users will have author rights. If you are not sure what kind of access rights you have within a project you can always check them within your "My Settings" (for further information please refer to the chapter [User preferences](#)). Your individual access to a specific file can also be determined by the means of the



option within the action bar (for further information please refer to the chapter [Show access rights](#)).

Please be informed that PIRS project and global administrators are provided with different access rights that enable them to support you in your daily work and your occasional challenges with the application. Since the level of administrator access right has no direct influence on your work processes within PIRS they will not be explained in detail at this point.



How to manage access rights to your document

Each correspondence and document file is provided with a tab titled "Access". Within the access tab you will be able to assign and specify access rights to each individual correspondence or document you are creating and you will be able to adjust those access rights before as well as after having saved, sent or in any way distributed the file.

There are two different settings you can adjust, first who will be allowed to read the document and second who receives author rights for the document besides yourself. By default each newly created file will assign reader access rights to all project members and author access to none other than yourself. Thereby PIRS is preventing that your document can be modified by any other but yourself. You are however able to change the setting in order to, on the one hand restrict reading access to a certain number of project members and/or contact groups, and on the other hand grant the right to modify your document to other members and/or groups within the project.

Dashboard | New E-Mail

Save | Close | Send | Delivery Options | Organise

From: Erica Murphey

To: Ali Farrad <customer@demo.sobis.com>

Cc: Andrew Miller <customer@demo.sobis.com>

Bcc:

Doclink: Adrian Kessler <project.manager@demo.sobis.com>

Subject: Minutes of meeting

Ref. No.: SOB/MEW/<Nt> | **Folder:** 0200.10 Project Organization

Body | Attachments | **Access**

Who can read this document ?

- All
- Following contacts/groups

Who can edit this document ?

- Document author only
- Document author and following contacts/groups

Body | Attachments | **Access**

Who can read this document ?

- All
- Following contacts/groups

Who can edit this document ?

- Document author only
- Document author and following contacts/groups

Adrian Kessler <project.manager@demo.sobis.com>

Alois Bauer <management@demo.sobis.com>

Erica Murphey <engineer@demo.sobis.com>

Kilian Walter <engineer@demo.sobis.com>

Michael Heppner <doc.controller@demo.sobis.com>

Page 1 of 1

As soon as you e.g. select "Document author and following contacts/groups" within the box "Who can edit this document" PIRS will automatically allow you to choose contacts as well as contact groups from the project address book.

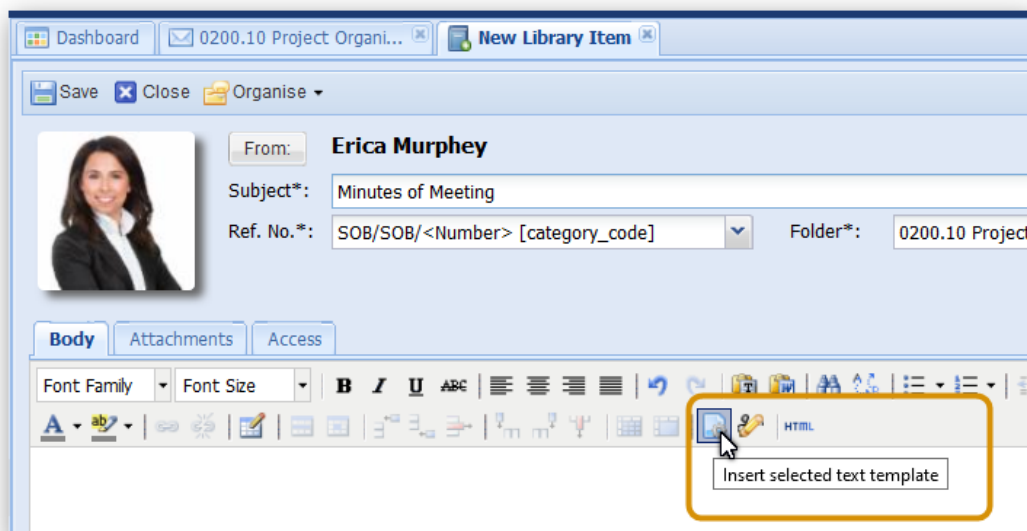
Please be aware that it is possible that access rights concerning certain folders may be predefined by the owner or the application administrators. In this particular case you will not have the default selection options or they might be restricted because all PIRS forms created within these predefined folders inherit the access rights from the folder level.

Furthermore, you should be aware that a PIRS user that previously had no reader's access to a PIRS correspondence or document will be assigned readers access as soon as the form was sent to him / her by the author or an editor. Hereby it should be mentioned that this will be only the case if this PIRS user holds access rights to the PIRS project and was listed within the project address book. Also the form has to be distributed via email. Recipients listed in a distribution list will not be able to access the document unless they already hold the access right.

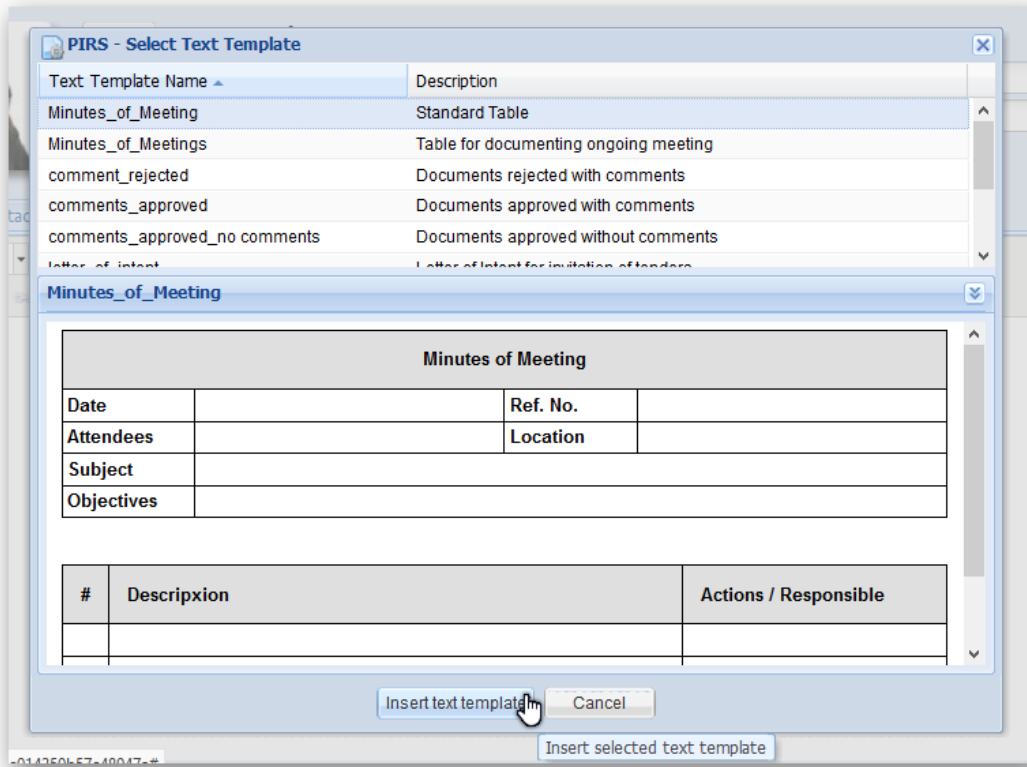
5.5 Use text templates

There are several phrases, text or tables you might use on a regular bases e.g. to create a new report or document minutes of meetings in a Library Item. To save time, your project manager is able to create text templates within the administration area for you and your team to use.

In order to select a template click the template icon within your text field as illustrated below.



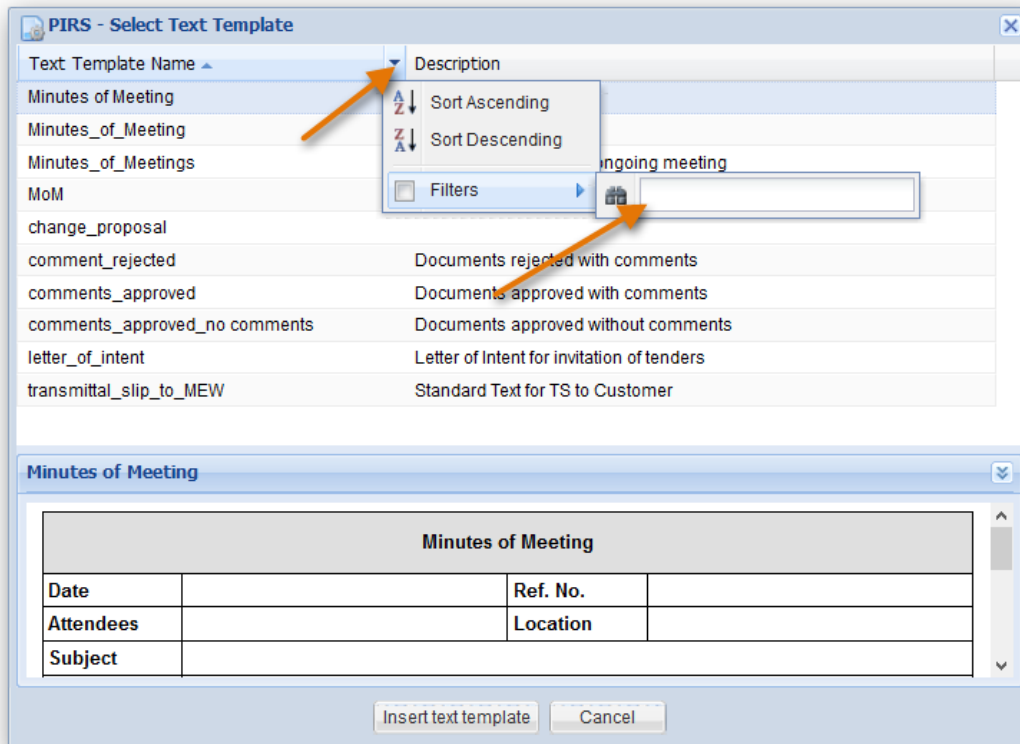
Next you are able to select a template from a list. A preview panel will show you the content of the template. In case the template you are looking for is not offered, please contact your project manager.



Click "Insert text template" to add the content to your text field.

5.5.1 Filter for the right template

In case the list of templates is relatively long and you have trouble finding the right template, use the filter option to reduce the list of offered templates. To set a filter simply hover your cursor over the column, you'd like to filter and expand the search & filter options by clicking the arrow head on the right hand side (compare with following screenshot).



5.6 Activity Stream

Activity Stream

Activities of PIRS users such as creating or editing new correspondence or documents, sending transmittal slips and comments or creating new contacts or action items are always documented within the PIRS Activity Stream.

The Activity Stream lists all actions but is restricted by the users individual access rights. This means that each user will only be able to see the activities he has the right to be informed about and for which is allowed to access the related items in PIRS. For example, should your project manager create a confidential document, than this event would only be visible within the activity stream of those PIRS users who have at least read access to the respective document. All other users would not have this particular event listed in their Activity Stream.

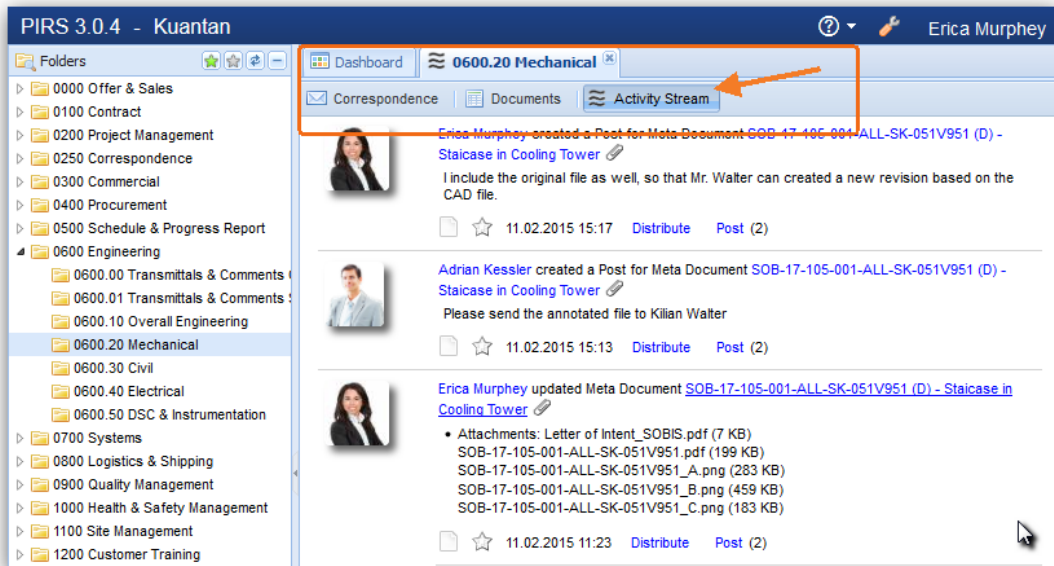
All actions listed in your Activity Stream include links to the contact who carried out the event as well as to the related PIRS item (e.g. the document or the correspondence that was created).

There are two different type of Activity Streams. You can either take a look at latest activities focused on one particular folder or referring to the entire project.

1. Folder based Activity Stream

Up to PIRS release 2.4 there were two separate areas within each folder, one for the correspondence and the other for the documents stored within the respective folder.

Since PIRS 3.0, users will find a third section presented to them in each folder titled "Activity Stream".

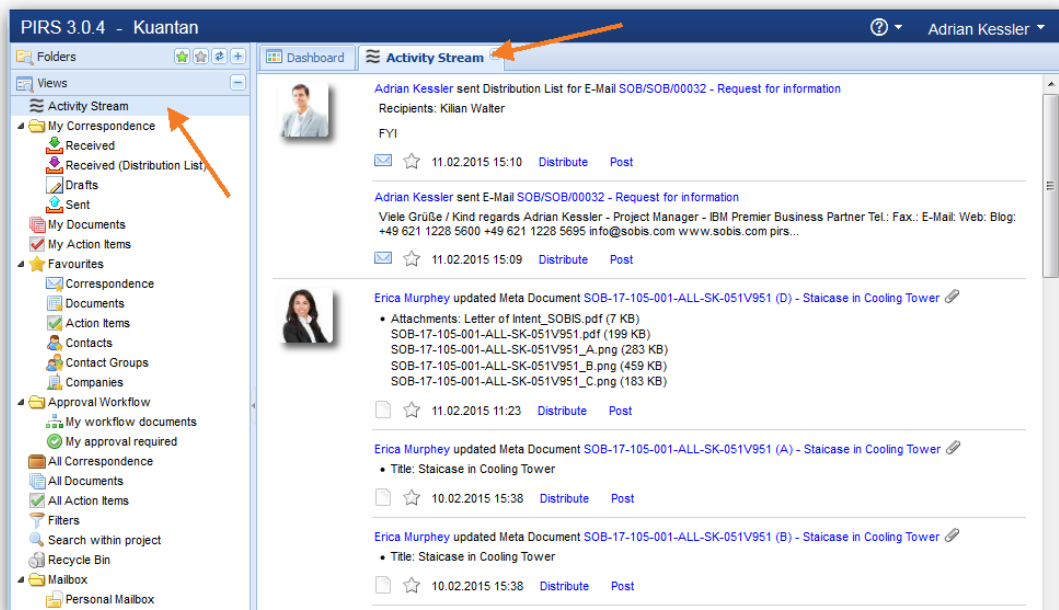


Within this third folder area you are able to follow all current folder-based activities.

1. Project based Activity Stream

In order to keep track of all current events and actions of your project, PIRS offers a view titled "Activity Stream" that displays all new activities regardless which folder or PIRS area they occurred in.

The view can be found in the "Views" area of your navigation panel. Furthermore, the view can also be added to your project dashboard as widget.

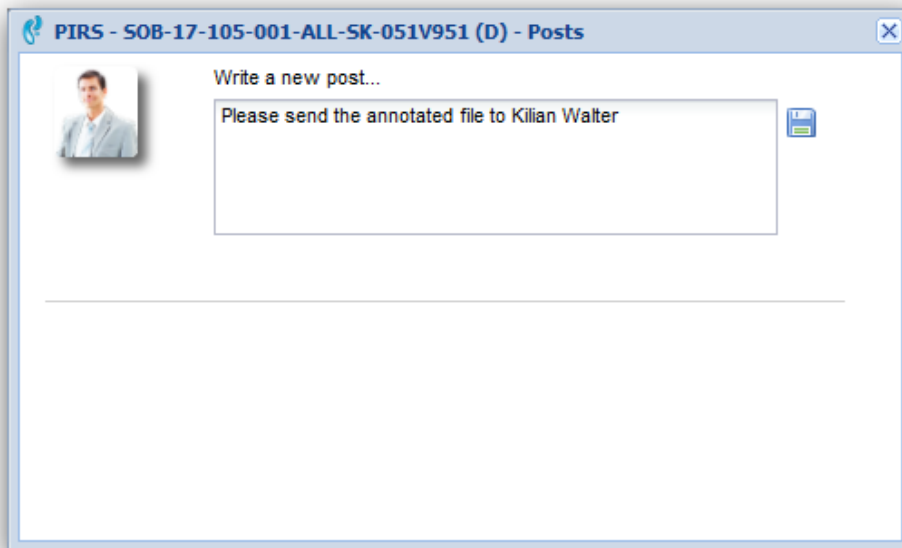



Communicate using Distributions Lists & Posts

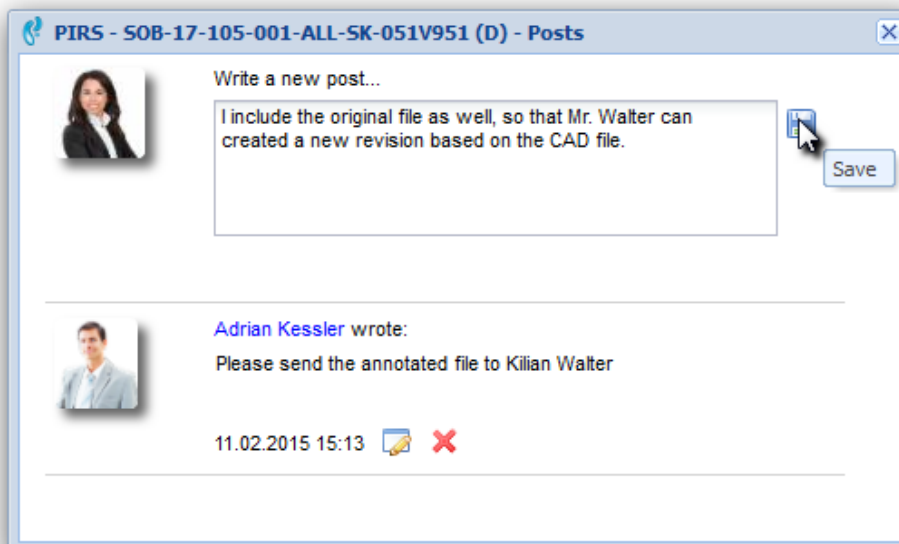
Each activity listed in your Activity Stream offers two ways to communicate with your team and create notes for the initiator or other team members. First of all, you can click the "[Distribute](#)" action which will allow you to send a distribution list to your team members containing a link to the related PIRS item. So if for example the entry in the Activity Stream would state that Erica Murphey has updated a specific Meta Document, the distribution list would include a link to this specific Meta Document.

Second of all, you are able to leave a note concerning the entry in your Activity Stream by clicking "[Post](#)".

A message box will open where you can enter your comment.



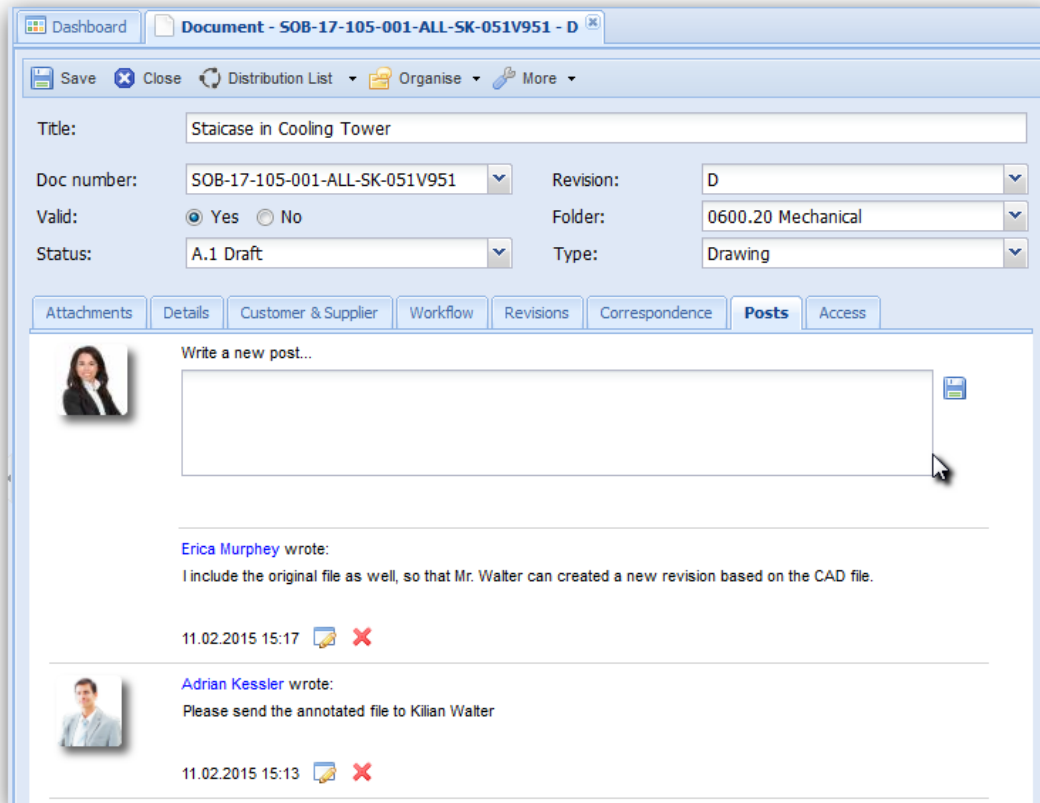
As soon as you click the save symbol () your post will appear in the bottom part of the message box. As indicated by the following screenshot you are still able to edit or delete your own posts.



Should other team members like to leave posts as well, either as answers to previous posts or as comments to the activity stream entry, their notes will be added within the already existing posts box.

5.7 Posts

PIRS includes a "Posts" tab within every PIRS item. Posts are like the yellow sticker you pin to a paper or your fridge to quickly share information and write down an idea. They offer you the option to leave comments relating to the respective PIRS item and communicate with you team members directly regarding this item. So for example, should team members have an important information they want to share quickly regarding one particular revision, they can simply create posts. All posts will be listed within the "Posts" tab of the related document (compare with screenshot).



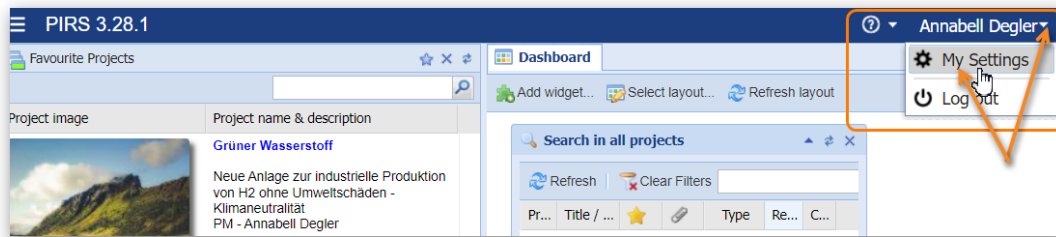
You can edit your your posts and/delete them, just like described in the previous chapter on [Activity Stream](#).

Receive notification about new post

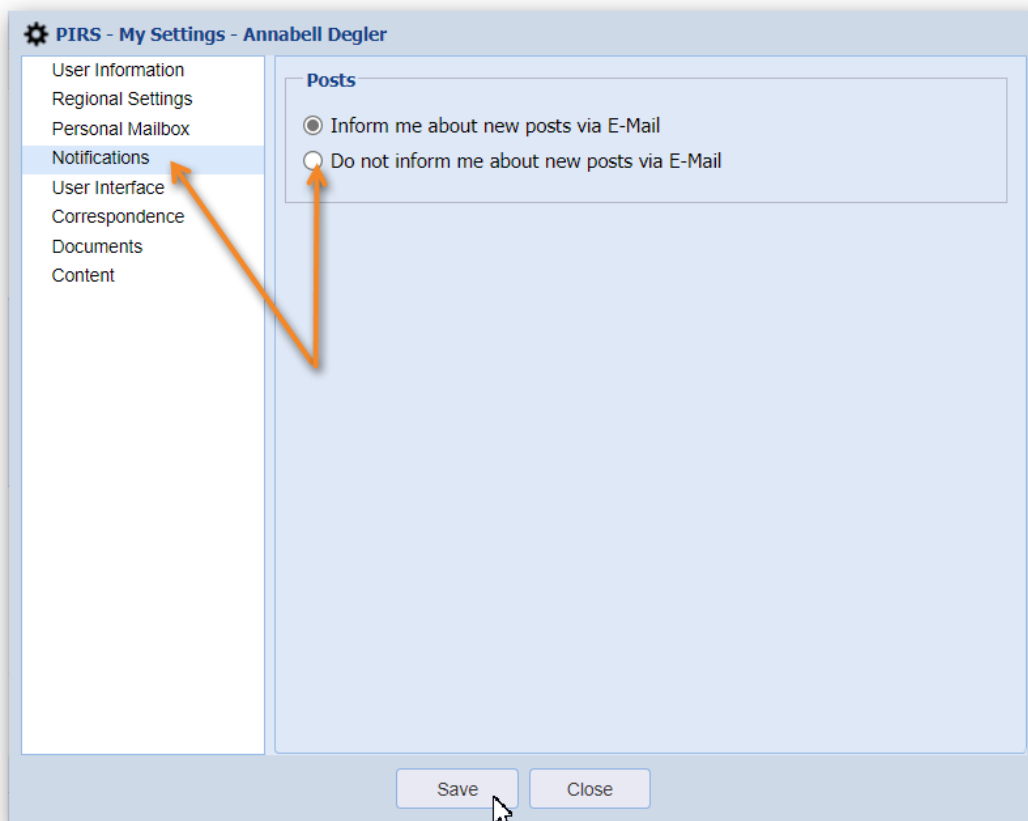
By default PIRS will inform you if your team members write new posts concerning your PIRS correspondence or documents or in relation to your activities. This means that you will receive a note when a user writes a post to:

1. correspondence / document / action item you have created / modified *or*
2. correspondence / document / action item you have marked as favorite *or*
3. correspondence / document / action item that you have received via distribution list *or*
4. a document where you are producer, owner, or responsible
5. e-mail, letter, transmittal slip, comment that you have received *or*
6. an action item where you are responsible, or listed as involved *or*
7. correspondence where you are listed as "from"
8. You will also receive a notice if a user has added a Post to a correspondence / document / action item

If you don't want to receive notifications in form of e-mails you need to enter your personal settings and open the section "Notifications".

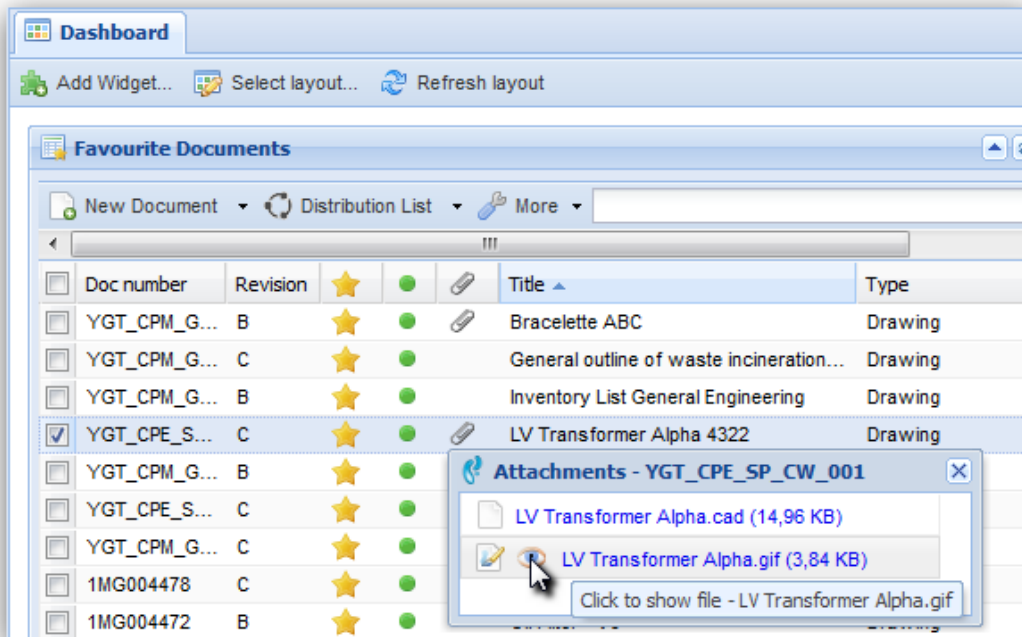


Within this tab you have the option to activate or deactivate the distribution of your personal notification.

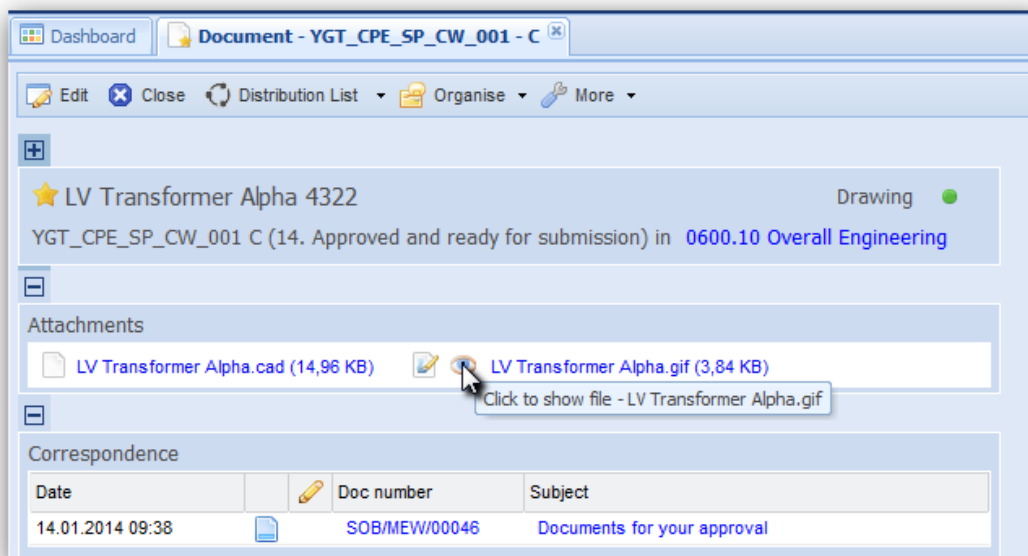


5.8 View Files within your Browser

With the PIRS release 2.4 users are able to open PDF and picture files attached to PIRS items, e.g. a correspondence or document, directly within their browser without having to download them first.



When there are attachments for a PIRS item visible in a view or when you open any PIRS item that has files attached to it, you will notice that there is an additional icon displayed for picture files and PDFs. The icon looks like an eye and when you hover your cursor over it, a small message box will inform you about the option to show the content of this file.

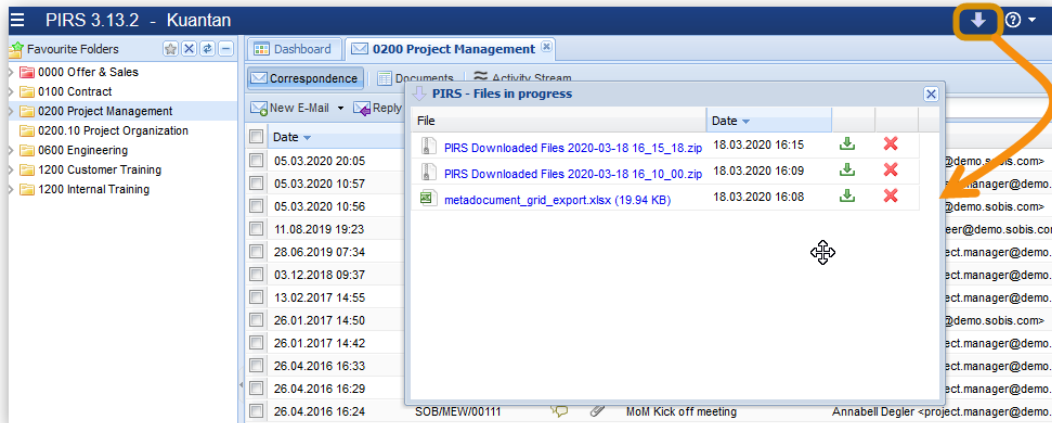


Once you click the icon, the file will open in a new tab allowing you to take a quick look at the file content.

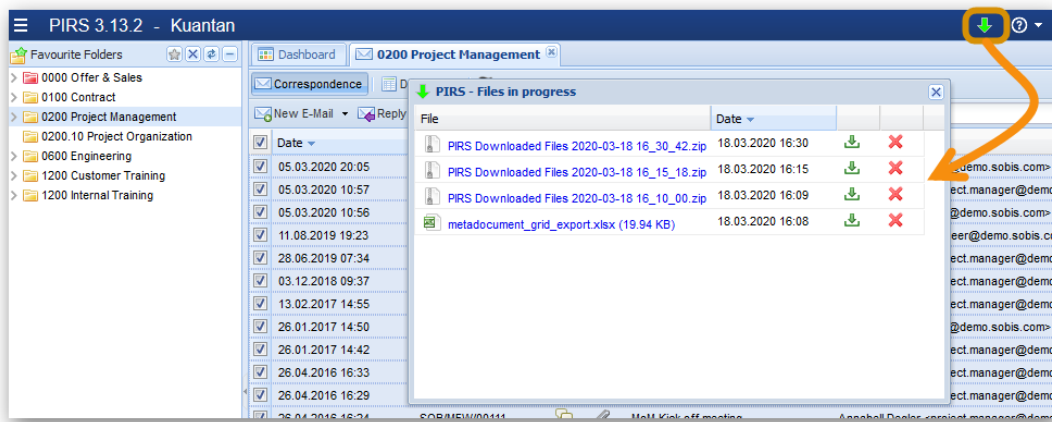
Should the PIRS File Viewer be activated for your PIRS project, files will be opened directly within your PIRS project and several additional features will be offered to you. (Compare with chapter [PIRS File Viewer](#)).

5.9 PIRS Downloads

All files created within PIRS e.g. when exporting items as a Excel list or when downloading attachments from correspondence or documents, are listed in within your download area. You can always access your download area by clicking the grey arrow within your PIRS application tool bar as pointed out in the following screenshot.



While a new download is in progress or if there are only "old" download files the arrow is grey. When a current download is completed the arrow will turn green.

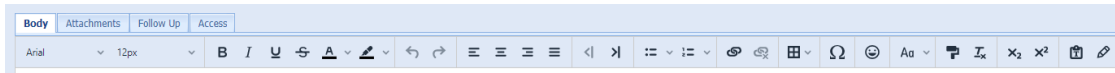


PIRS will remember your download history up to 24 hours even if you close the browser or switch to another device.

5.10 Rich Text Editor

Within every PIRS body field (e.g. the e-mail body field or the remarks tab within a document) you are working with our PIRS Rich Text Editor.

The editor offers all common fields known within editors. You can adapt the style, size and insert your signature and specific text templates. The table below will offer an explanation for all offered features:



Symbol	Short description	Function
	Front	Here you can select the style
	Front seize	Allows you to pick the seize of the displayed text
	Bold	Sets all selected writing in bold.
	Italic	Sets all selected writing in italic.
	Underline	Underlines all selected writings
	Strike Through	Inflicts a strike through on all selected text
	Text color	Allows you to pick a color for your selected text
	Background color	Allows you to pick a background color for your selected text
	reverse or forward	Here you can reverse or "un-reverse" actions you did.
	Decrease/increase indent	These two features offer to decrease or increase the indent of your text.
	Bullet list	Here you can start a bullet list.
	Numbered list	These action offers the option to set up a numbered list.
	insert/edit Link or unlink	With this feature you can insert and/or edit a link. Simply select a section within your text, next click this button and insert the link you and to refer to.
	Table	This feature allows you to insert a table
	Special characters	You can add special characters.
	Emotions	This feature offers the option to insert emojis as you see fit.

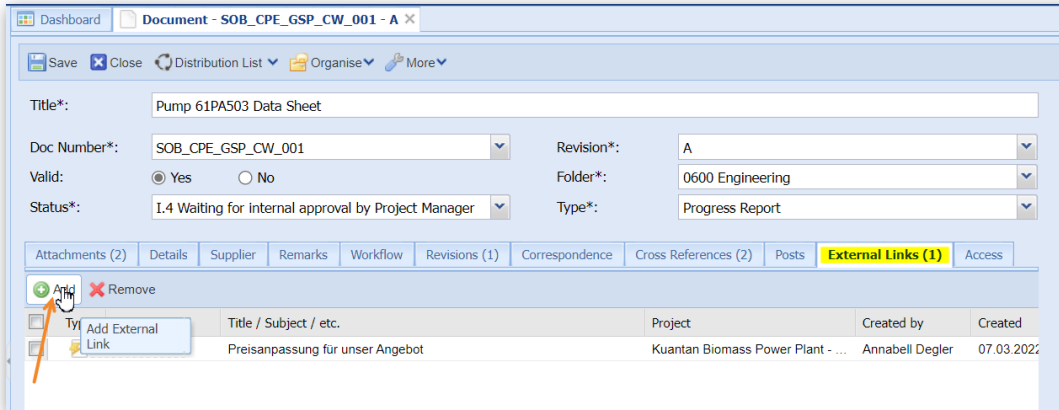
Symbol	Short description	Function
	Capitalization	Here you can set that the text will be all lowercase, all uppercase or all titel case
	Format painter	The format painter allows you to copy and then paste the format of a text.
	Clear formatting	With this feature you can clear all formatting from your text. The format will be reset to default value.
	Subscript	With this button you are able to set text or text elements as subscript.
	Superscript	With this button you are able to set text or text elements as superscript.
	Insert text template	In case your company or your project set up has provided text templates, you will be able to access them here.
	Insert signature	You are able to maintain your personal signature within your contact entry. If you have provided a signature within your contact you can insert it any time using this button

5.11 External Link Tab

As optional feature, you are able to activate an additional tab within your PIRS project.

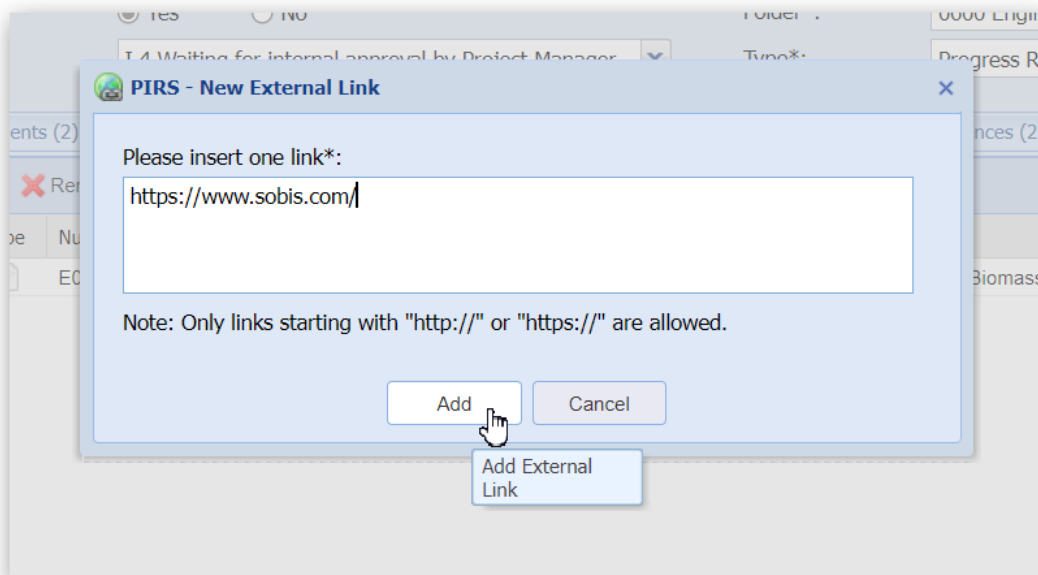
This new tab offers the option to either enter a link to any other external website (e.g. another web application or a homepage), or link directly to an Event or any other PIRS:Claim document. PIRS:Claim is a stand-alone application which offers documentation, tracking and reporting options for project changes, deviations or claims.

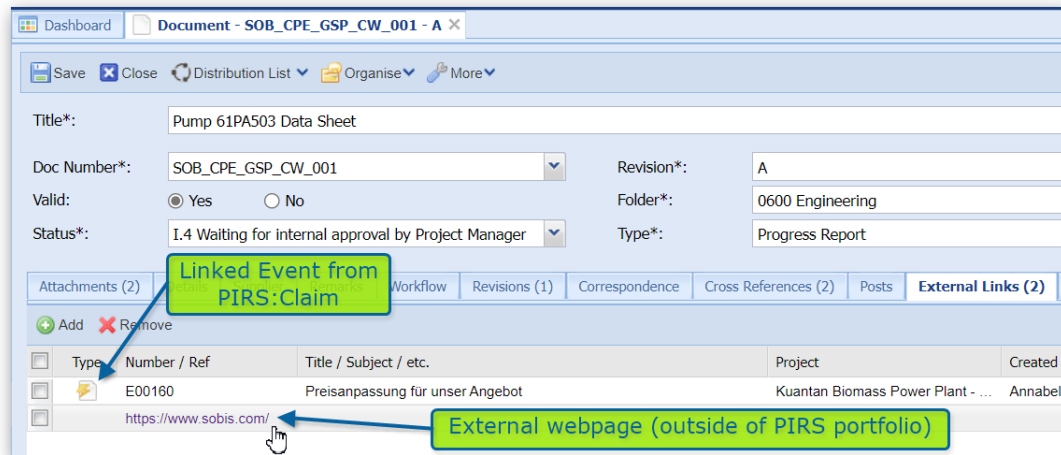
In case the external link tab has been activated you will see it listed within your PIRS Documents, Correspondence, Action Items (for task management) and (if activated) your Events.



In order to add an external link click the Add button as pointed out in the screenshot above.

A pop-up window will open, allowing you to enter (e.g. via copy & paste) the link to the external page or other web application. In case the entered link refers to a PIRS:Claim document this document will be displayed in detail as soon as you have saved your changes. Otherwise the link is displayed as illustrated in the following screenshots.





Important!

Please make sure, always to enter a link starting with "http://" or "https://". Otherwise it will not be recognized.

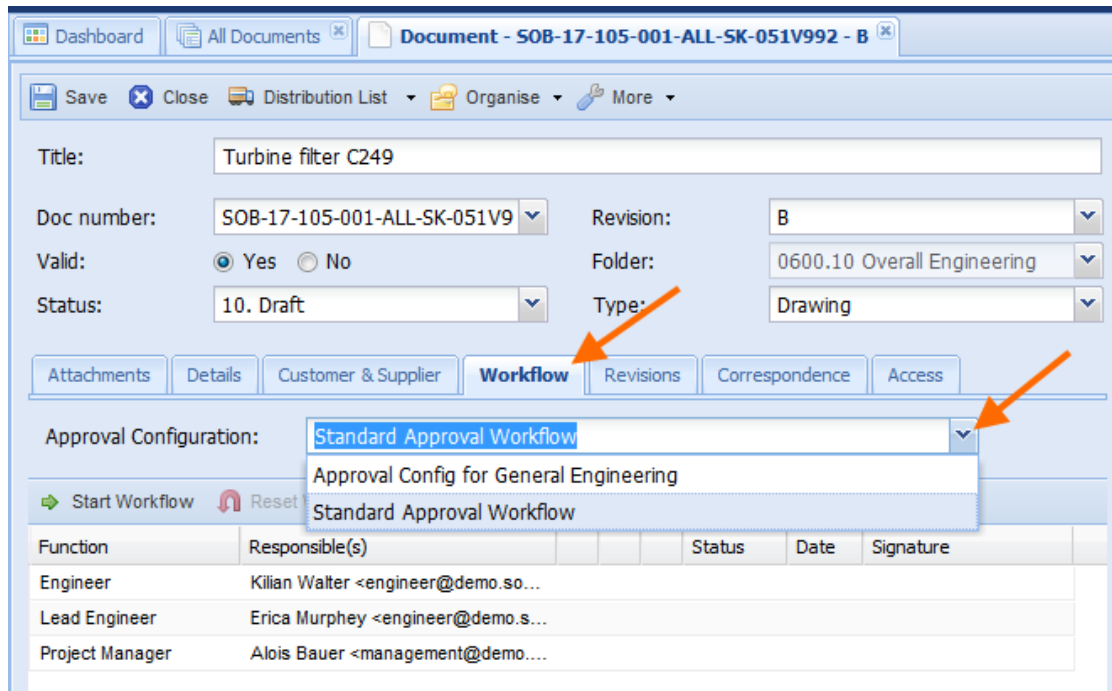
If you have any further questions, or would like to activate this feature for your project(s), please get in touch with your SOBIS service desk or PIRS responsible.

5.12 Workflow

For the configuration of Workflows please find following link to the **PIRS Project Administration**: [Approval Workflows](#)

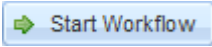
The PIRS workflow is intended to support and track your internal approval processes.

If it is activated within your project, documents and/or events will contain an additional tab in content area called Workflow. Within this tab all workflows that are implemented in your project will be presented to you to choose from. Each workflow could e.g. be specific for the various departments, engineering teams or in case of events based on the amount of expected costs. The number of workflows that can be implemented is limitless and each workflow can be adjusted in the administration area in case changes need to be made.



In case your PIRS project specifications were implemented with a default value for the document status, each newly created document will carry this default value. In the example displayed above this status is "10. Draft". If the document workflow is started by the document creator or a PIRS user with the necessary access rights, the document status will be changed and modified automatically according to the respective workflow step.

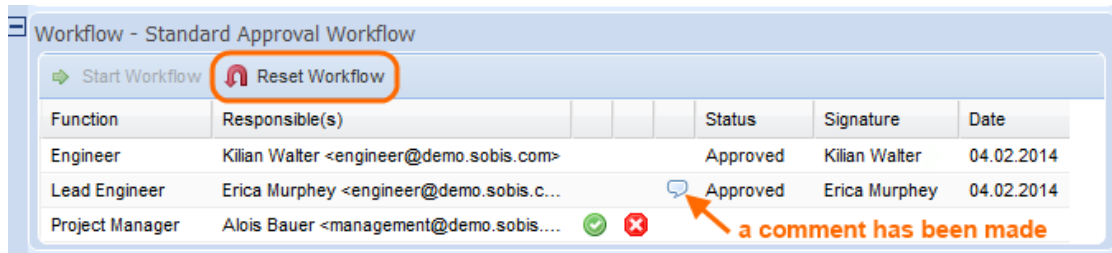
It is however possible to choose not to start the workflow for a document and still be able to adjust the document status as well as distribute it via transmittal slip, create comments or / and create new revisions.

After a workflow has been selected, the respective workflow steps will be visible in the content area of the workflow tab and the workflow can be started by clicking the  button in the upper right corner of the workflow tab.

As soon as the workflow has been started the document will be saved, closed and represented to you in read mode. The uploaded attachments will be frozen meanwhile, therefore the only possible way to integrate changes or adjustments to the technical document (e.g. a technical drawing) is to create a new revision. An exception to this strict rule applies to the project administrators who might need to be able to make adjustments even after the workflow has been started.

The responsible party of each workflow step will be informed as soon as his or her approval is required and he or she can either approve or reject the document directly in read mode. Each approval or reject will be saved in PIRS with a time stamp that includes the date as well as the exact time of the approval/rejection.

Either way, the responsible has the possibility to include a comment with their approval / rejection that will be indicated by a speech bubble within the workflow content table (compare with following screenshots).



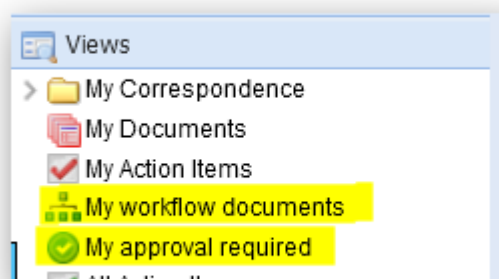
At any point of the workflow, it is possible for the document/project administrator to reset the workflow. At this point the option to change the selected workflow to another offered workflow will be presented again.

Should a document be rejected the workflow will be interrupted and the user, who started the process, will be informed about the rejection. The workflow can then again be reset by the administrator or a new revision can be created after which the workflow can be started again for the new revision.

Time stamp

If required, a time stamp with the exact time when an approval/rejection was made can be activated in the date display.

5.12.1 Workflow Views and Widgets

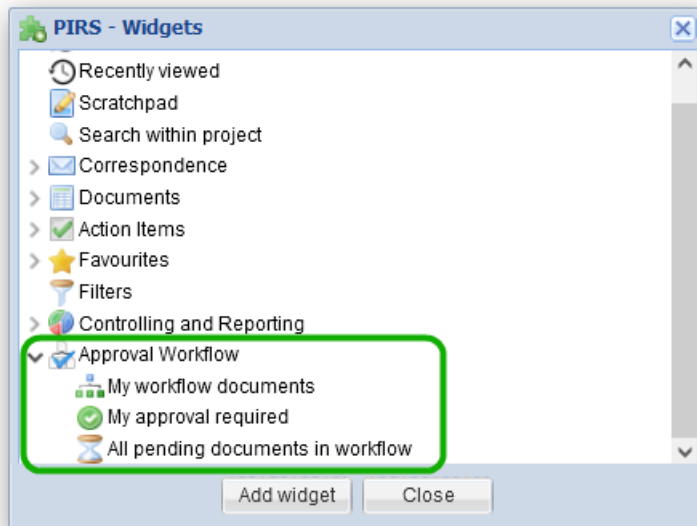


There are two views in addition to your other personal PIRS views. First of all you can choose to look at all your documents where currently a workflow is active and second of all you can display all documents that are currently waiting for your approval.

As it is the case with most PIRS views, you will then additionally have the opportunity to select either or both workflow views as widgets to be displayed on your project dashboard which will

allow for a quick and easy overview of all your workflow documents as soon as you open your PIRS project.

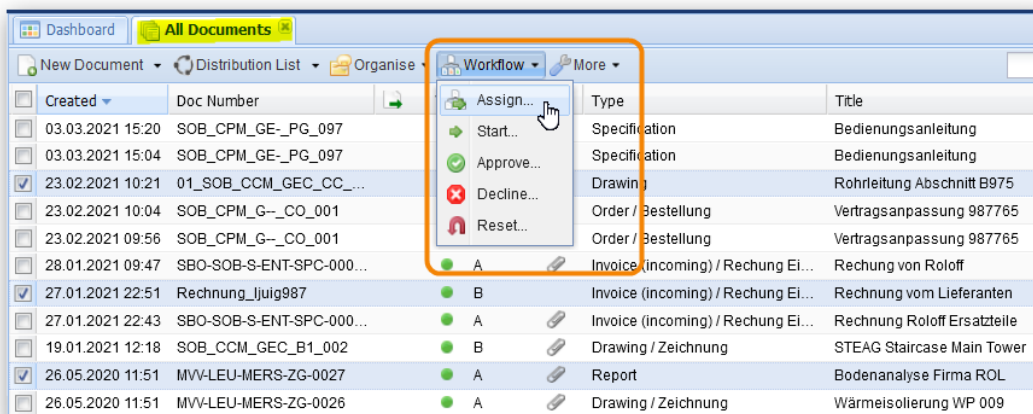
In order to keep track of all workflows that are currently pending, there is also an additional view which displays all documents where a workflow is currently pending.



5.12.2 Workflow actions within the PIRS tool bar

If it is activated for your project, you have the option to assign, start, approve, decline or (in case you have the necessary rights) reset workflows for one or multiple documents within your document grid, e.g. within the view "All Documents".

In order to e.g. assign a workflow for multiple documents you have just uploaded or created, select the documents in question, unfold the workflow options within your tool bar and select "Assign".



The list of options displayed within the "Workflow" tool bar can be defined and adjusted to reflect your company requirements. So, in case you are missing a feature e.g. the option to "Approve" or "Decline" multiple workflows, this option might be disabled within your PIRS application.

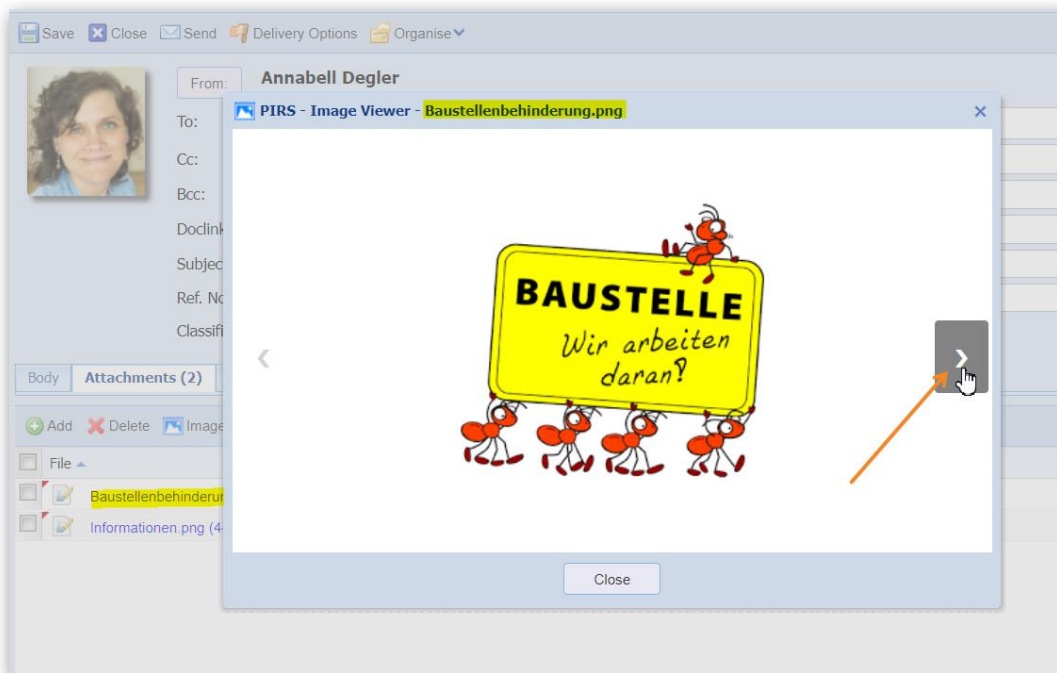
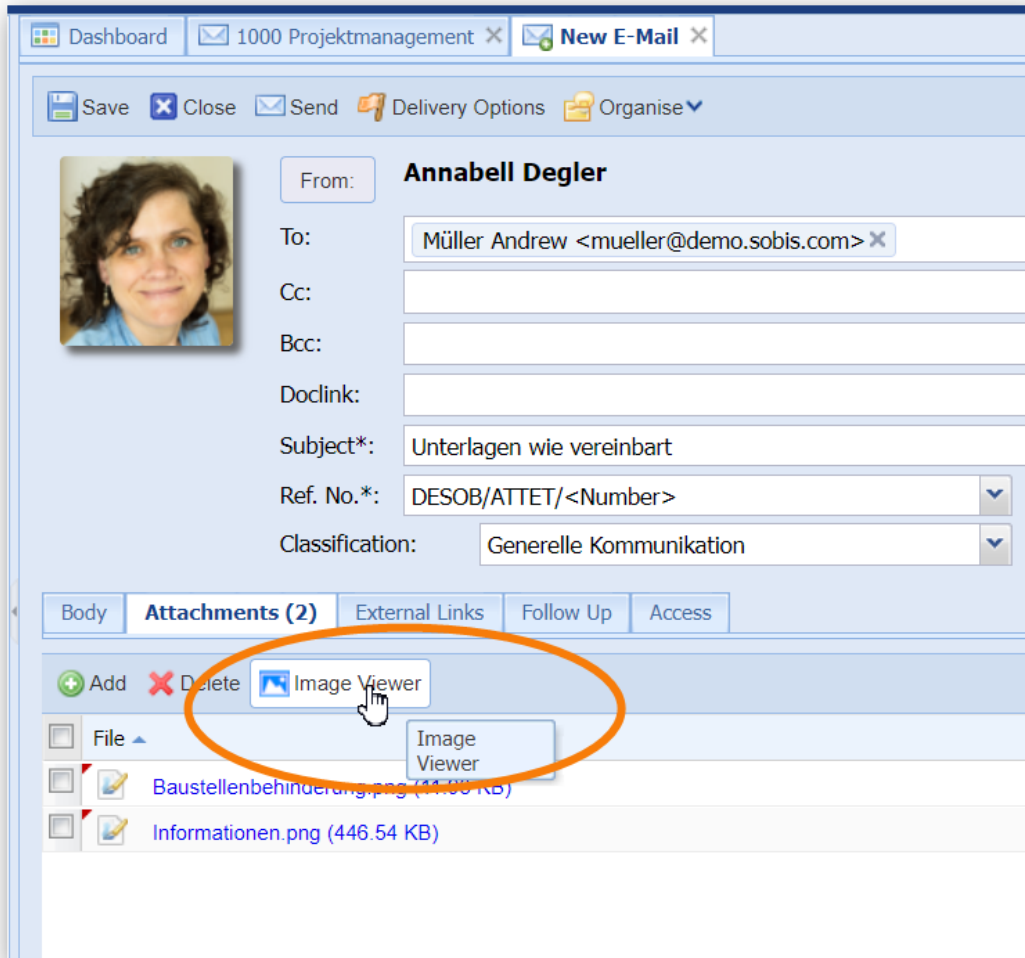
Also keep in mind that you will only be able to use the workflow features for documents where you are allowed to perform changes or more precisely, where you are allowed to assign, start, approve or reset a workflow.

5.13 Image Viewer

The PIRS image viewer allows you to directly open and view images attached to PIRS entries (e.g. documents, emails, action items etc.) without needing to download the file(s) in question.

Supported are all common image formats, such as png, jpeg or jpg.

As soon as an image file is attached to a PIRS entry e.g. an email, a new action is offered within the action bar called "Image Viewer".

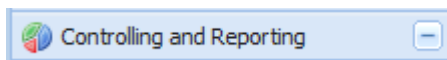


Once you click the new action "Image Viewer", a pop-up window will display the first image file attached. By using the arrow presented at the side of the window, you can flip through all attached image files.

The image viewer will be presented as soon as you attach an image file. No need to first save the changes.

6 Controlling and Reporting Area

Depending on your access level to a project, an area called



will be presented to you within your PIRS project navigation. This area allows you to trace and track all documents, its revisions and its relating correspondence and offers you the possibility to generate different reports.


6.1 Document controlling

In order to help follow up on document distributions to customers and suppliers, to enable project managers to monitor document development and to keep track of internal as well as external communication, PIRS offers its users the document controlling features. Please be aware that PIRS collects the information analyzed and displayed within the controlling views out of the content tabs of the PIRS documents and their linked correspondence. Therefore it is recommended to maintain all document information as completely as possible.

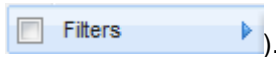
PIRS Controlling features enable you to easily answer following question:

- Did we submit all required documents to the customer?
- Did we/our customers or suppliers submit the documents on time?
- Did the customer reply to my documents ?
- What documents did we submit in a specific time frame?
- What documents do we have to submit in future?
-

The Controlling View Layout

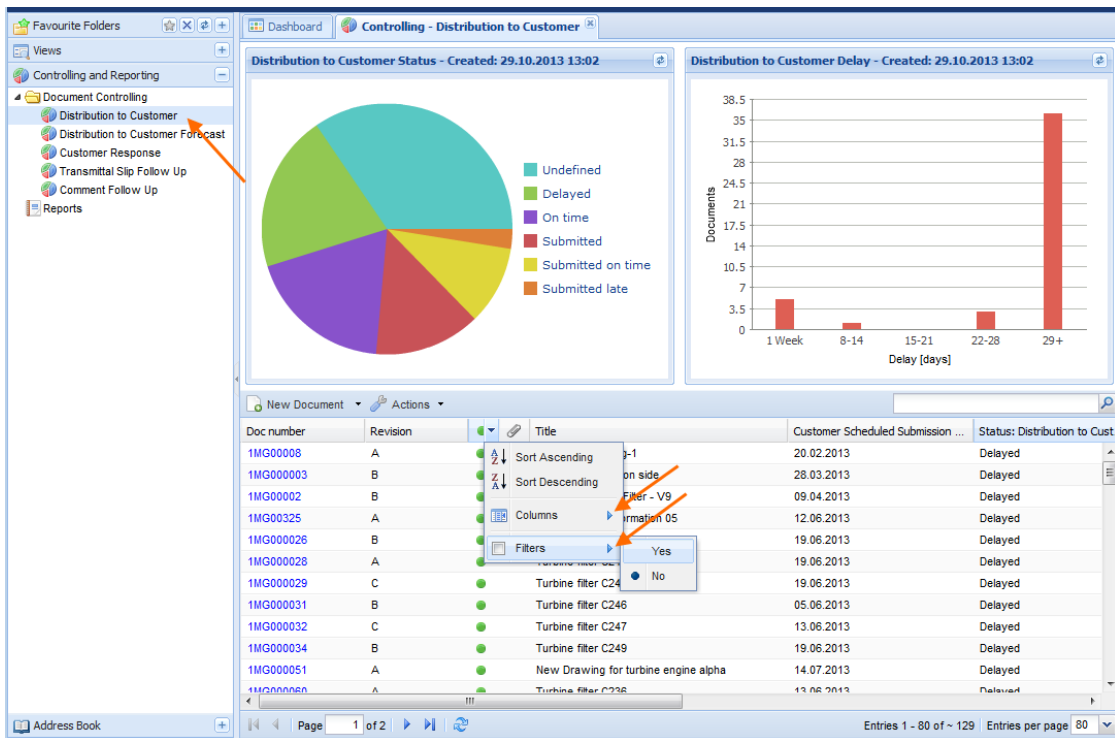
You will find a separate navigation area listing five standard controlling views within the PIRS navigator. Each view is divided into three sections. While a grid in the bottom part of the view will display all document and correspondence files matching the respective controlling view configurations, the upper part of the view graphically illustrates the data listed in the grid as a pie chart as well as a bar chart. The charts will be updated automatically according to regular intervals but they can also be updated manually by clicking the refresh button visible in the right upper corner of each chart ()

As already explained in previous chapters, you are also able to alter the grid content by either using the search feature () or by adding different filters (



),). In addition you can modify the presented content by adjusting the displayed columns. (For further information on customizing and adjusting grid content and setting filters, please refer to the chapters [Customize a grid](#) and [Search and filter functions.](#))

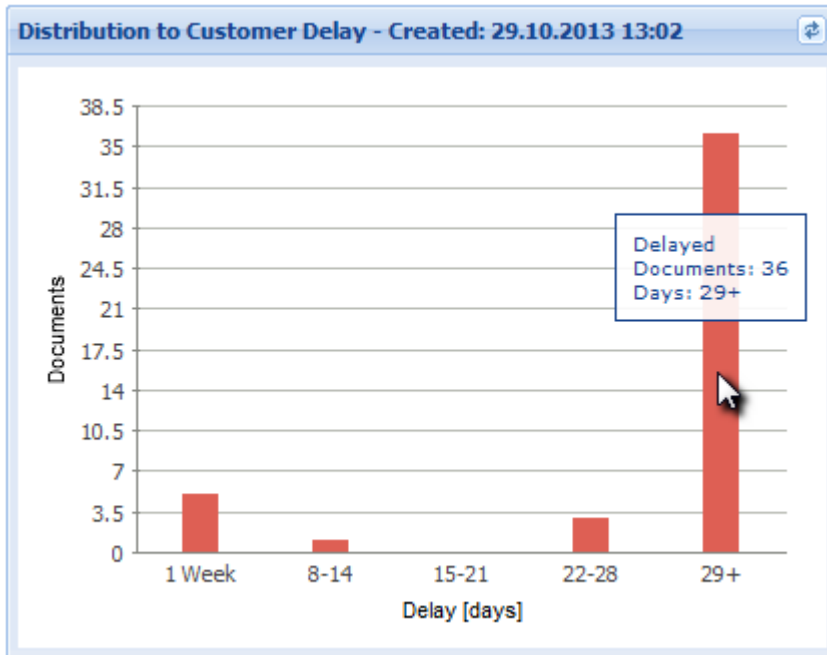
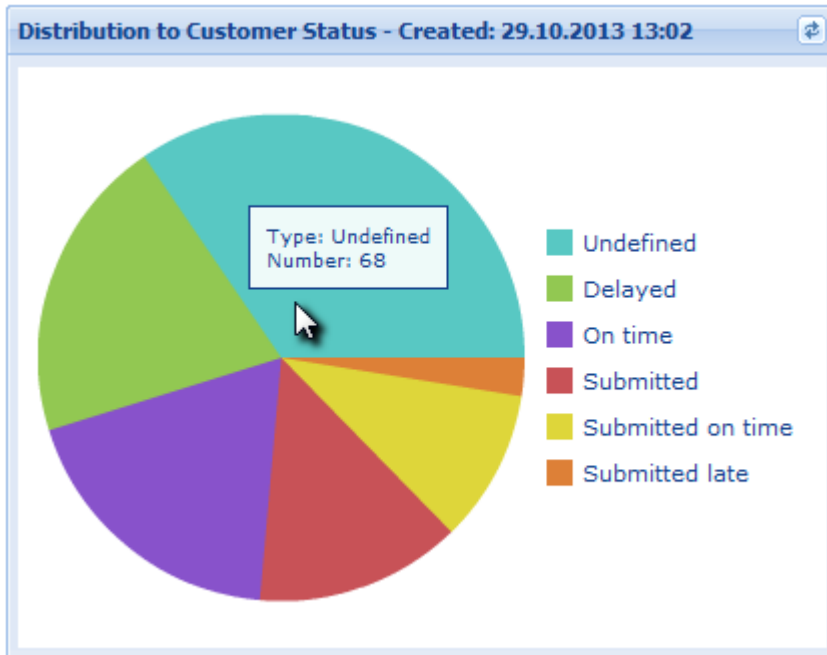
For your information shall be noted that the configurations of the charts in the various controlling views can also be customized to fit you specific needs. If this should be the case, please contact your PIRS administrator and inform him/her about your requirements.



6.1.1 Distribution to Customer

The first controlling view called "Distribution to Customer" will show you if you submitted all required documents to your customers. While the pie chart will enable you to see at one glance the number of documents according to their customer status, the bar chart displays the number of documents in a current delay range.

As exemplary illustrated in the following screenshots, the number of documents within each customer status will appear on each pie section as soon as you hover the cursor over it. In this case 5 documents are currently in the customer status "delayed". The second chart enables you to gather more detailed information about the time frame of the delayed documents. The x-axis displays the time frame while the y-axis indicates the number of documents. To show the exact number of delayed documents within a time period again, hover your cursor over the respective bar.



Status	Description
Delayed	The scheduled delivery date has passed & no transmittal to the customer has been performed out of PIRS
Submitted on time	The scheduled delivery date equals the transmittal to customer sending date
Submitted	The scheduled delivery date is not defined but a transmittal to customer exists
On time	The scheduled delivery date is still in the future, but no transmittal to customer has been performed out of PIRS
Submitted late	The document was transmitted to the customer passed the scheduled delivery date

Undefined	The scheduled delivery date is not defined yet
------------------	------------------------------------------------

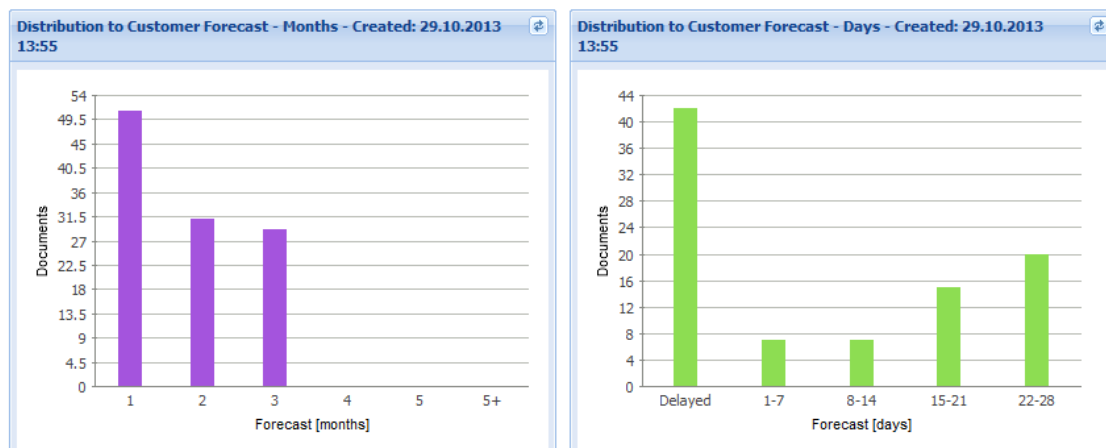
6.1.2 Distribution to Customer Forecast

The second controlling view will help you to keep track of the documents that have to be submitted in the near as well as far future.

The content grid below lists all documents where the scheduled transmittal date lies in the future, regardless if the documents have already been transmitted or not.

The two bar charts displayed in the upper part of the view will show the number of documents that will need to be submitted according to the schedules submission month or according to a certain frame of days.

The x-axis displays the number of months within which the documents will have to be submitted respectively the number of days or the time frame within which the documents will need to be send to the customer. The y-axis indicates the number of documents to be distributed within each time limit.



6.1.3 Customer Response

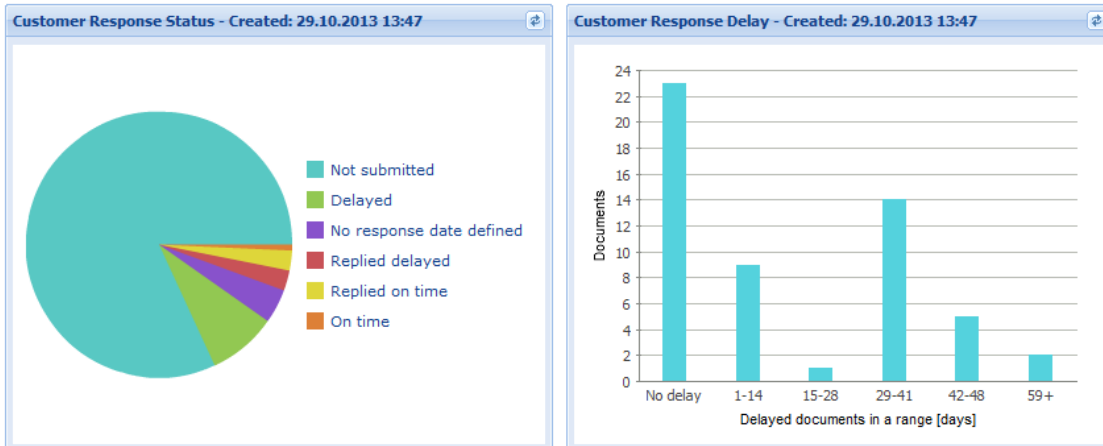
The third controlling view offers a review of all collected customer responses.

Please keep in mind that in order to ensure a complete representation of all correspondence, all relevant emails sent to private company mailboxes as well as paper correspondence sent via postal services need to be filed and stored within PIRS.

Again the content grid will display all documents were a customer response e.g. a comment or an approval notification has been filed.

While the first chart will provide you with an overview of the number of documents per customer illustrated as a pie chart, the second chart offers you a representation of the number of documents where the customer has failed to respond on time and for how long his response has been expected. Similar to the charts in the controlling view described above, the exact number of documents will be revealed as soon as you move the cursor over the respective pie

piece or bar. The number of documents that have not been responded to by the customer, is represented by the y-axis and the time period is listed along the x-axis.



The following table displays a short descriptions for the different possible response statuses.

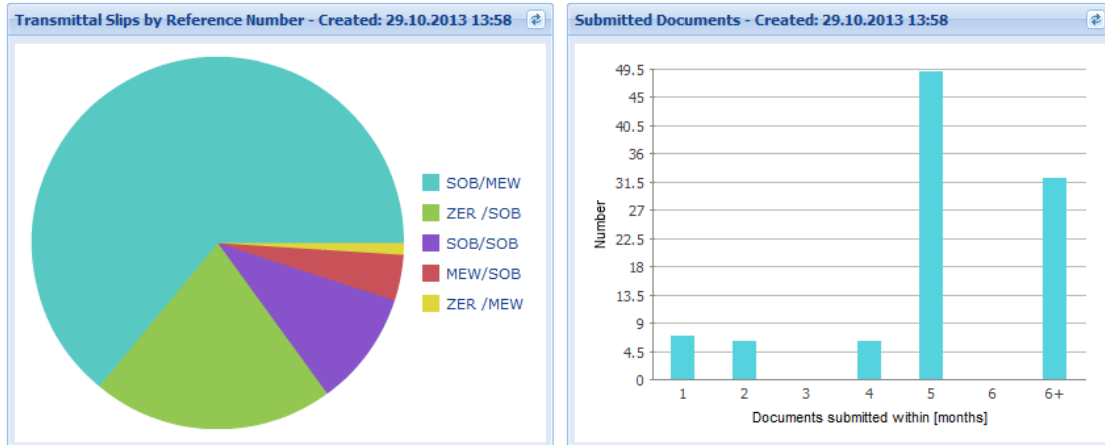
Status	Description
Not submitted	No transmittal slip to customer exists within PIRS
Delayed	Required response date has passed and no customer comment is available
No response date defined	A transmittal to Customer exists but no required response date is defined for the document
On time	Required response date is today or in the future and no customer comment is available
Replied delayed	Required response date predates the submission date of the customer comment
Replied on time	Required response date equal or lies after the submission date of the customer comment

6.1.4 Transmittal Follow Up

The view "Transmittal Follow Up" gives you the opportunity to monitor the submitted documents according to specific time frames or categorized by their respective sender and recipient code combination.

All distributed documents will be displayed in the content grid and while the pie chart shows the number of transmittal slips for each existing reference code combination, the bar chart will display the total number of submitted documents within a specific time frame.

As illustrated by the following images, by default the bar chart will show the time period counting backwards from today in months (4 weeks) represented on the x-axis and the number of documents on the y-axis.

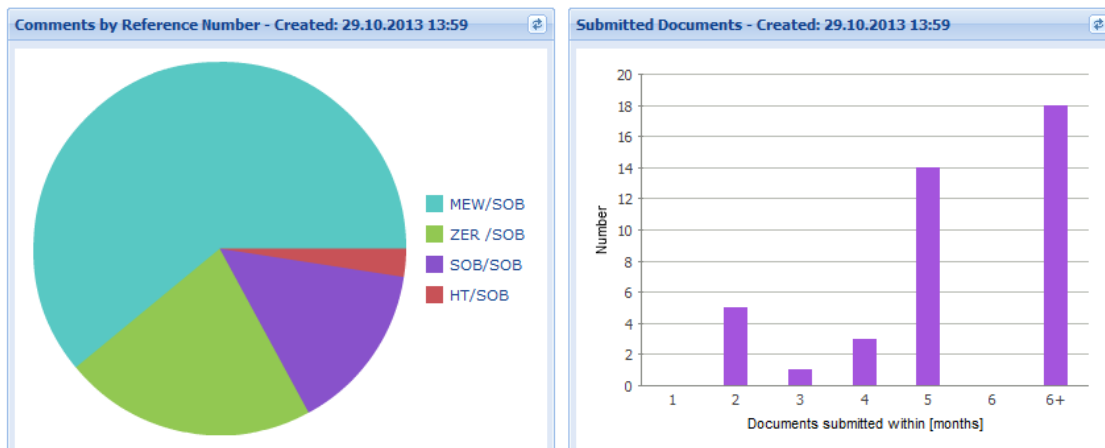


6.1.5 Comment Follow Up

In using the controlling view "Comment Follow Up", you are able to monitor the internal and external comments receive in a specific time frame.

The content grid in the lower part of the view will present you with a table listing all documents that were commented by the customers, the suppliers or by internal sources. The two charts above the table highlight two important information details from which you will be able gain knowledge about the success of your projects.

The chart to the left which presents its data in form of a pie chart, displays the number of comments of each existing sender and recipient code combination. In the exemplary screenshot below the number of all internal comments is pointed out (the indication that those comments are internal comments is suggested by the fact the sender and recipient code is the same). The bar chart positioned on the right hand side of this view, displays the number of comments as well as the number of submitted documents within a specific time frame (e.g. one month / four weeks). In the below illustrated example there were 16 comments sent within a five month time frame.



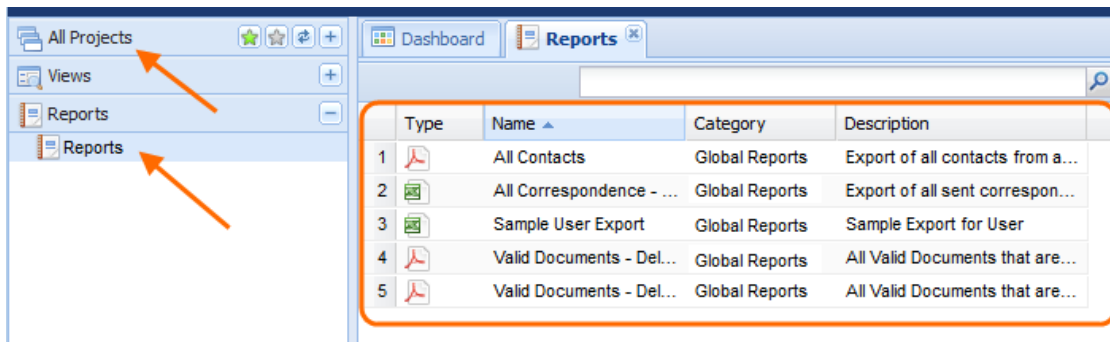
6.2 Reports

All within PIRS stored information can be used to create reports, therefore presenting the information in a different format, with a new perspective and maybe from a different angle.

PIRS hereby offers two different types of reports that can be generated. There are those reports that consider all information cross-projects and those that are limited to only one project at the time.

Global Reports

Global reports are offered to you on your global dashboard. You will be able to open a separate reports view in your global content area by selecting it in your global navigation area.

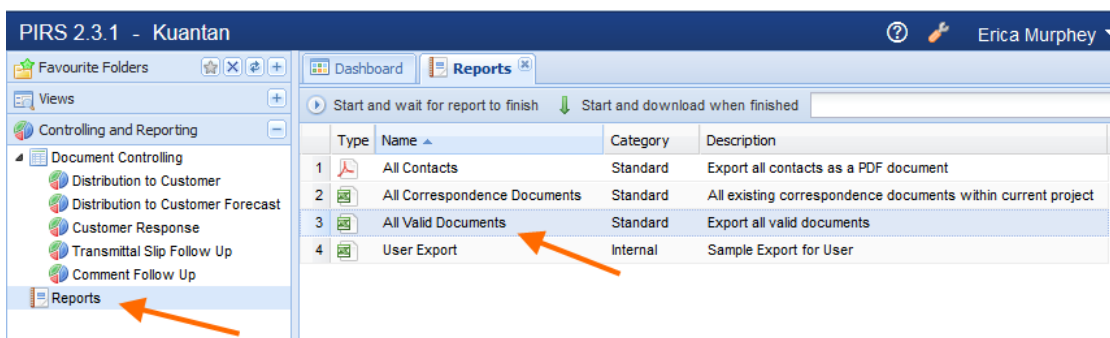


Reports are initiated by simply double clicking the respective report entry in the content grid. PIRS will then access all your projects and create the selected report including information from all entries that you hold the necessary access rights for.

Project Reports

Unlike global reports, project reports only consider information regarding one specific project. Therefore, PIRS offers a separate reports view within each project which can be opened from the "Controlling and Reporting" area in your project navigation.

Reports available to you will be displayed and can be run by clicking the respective report entry.

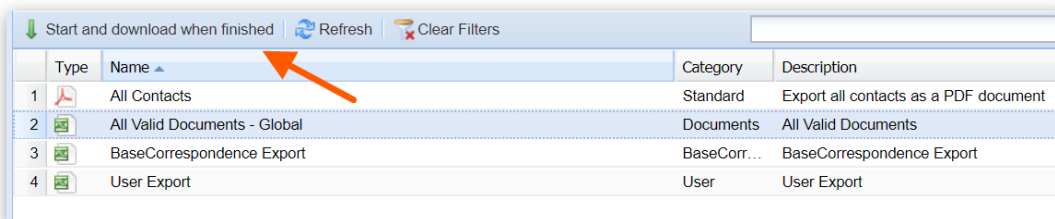


There are certain standard project reports that PIRS provides to each user such as the export of all his or her existing documents including all their collected meta information to an Excel sheet with which further calculations can be conducted.

In addition, it is of course also possible to have individual global or project reports created for you by your PIRS support team. Besides exports to Excel sheets, reports can be created in the formats of PDF, HTML or regular MS Word, depending on how the information should be displayed.

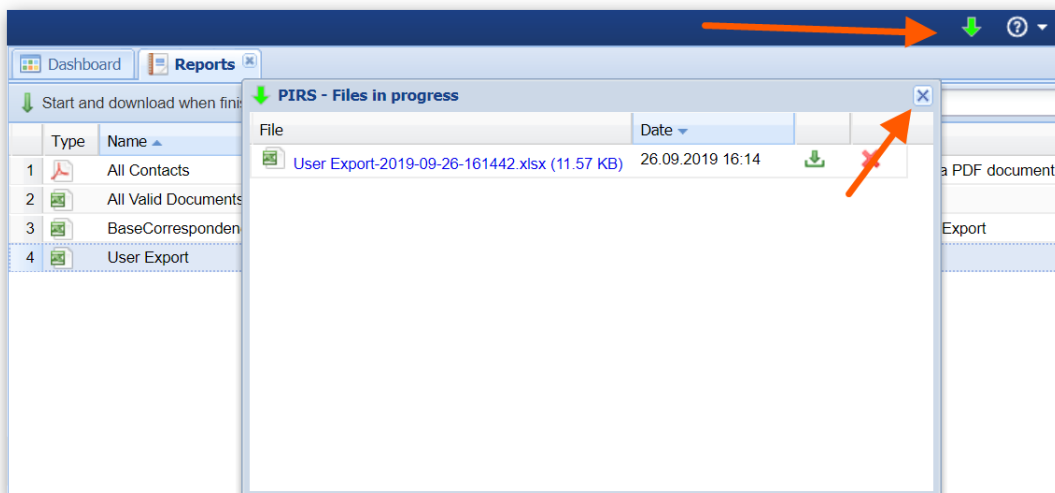
How to run a report

A report can be started by selecting and then using the offered start report buttons (compare with the following screenshot).



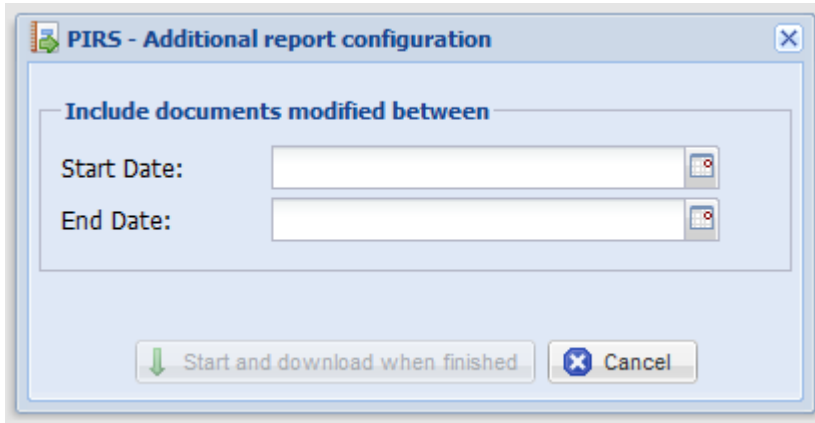
Therefore you can start the report and continue working while the system generates it in the background. This opinion will download the report as soon as its data collection has been completed.

As soon as you start a report using the download function, a pop-up window will appear informing you about the status of the download. You can hide the window and open it again by clicking the newly visible arrow in the top right corner. The completion of the report download will be indicated by this arrow as well. The download is finished and can be opened as soon as the arrow turns green



Additional report configurations

In order to allow the user to specify or restrict the data that is used for the creation of a report, PIRS offers you to specify additional report configurations before starting a report. Depending on the report you would like to run you are now able to enter further information e.g. a certain time frame or for only a certain type of correspondence or documents to be considered for generating a report.

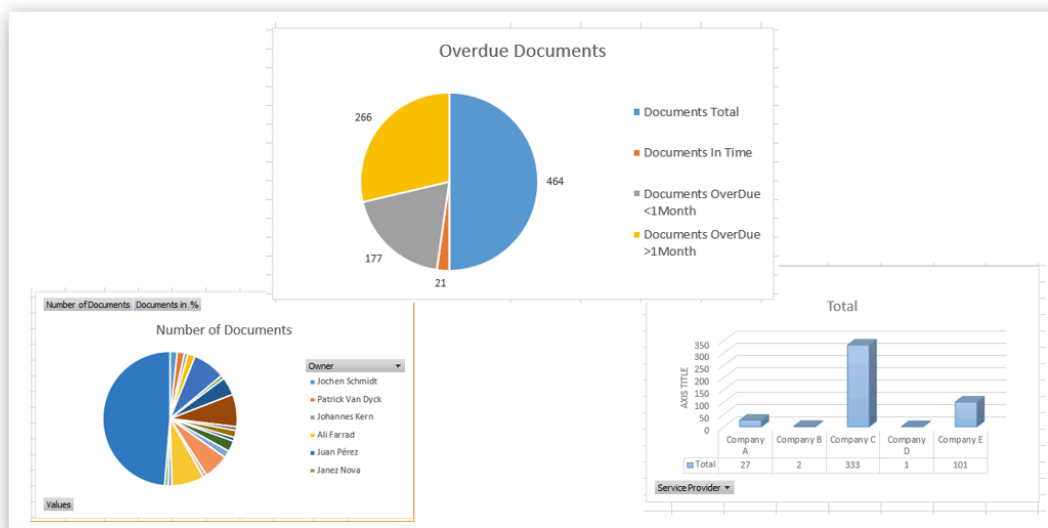


This additional report query needs to be included in the report setting in the PIRS administration. For further information please contact your PIRS support.

6.3 Reports based on templates

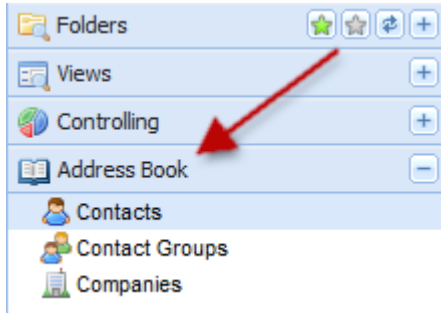
Most companies will already use certain templates to generate reports and usually those templates are based on Excel sheets with macros to display data as diagrams, pivot tables or other charts


With PIRS you are able to integrate these templates and create reports based on the data and information entered and maintained within PIRS.





To learn more on how to integrate you report templates, please contact your SOBIS Service Desk.

7 Address Book



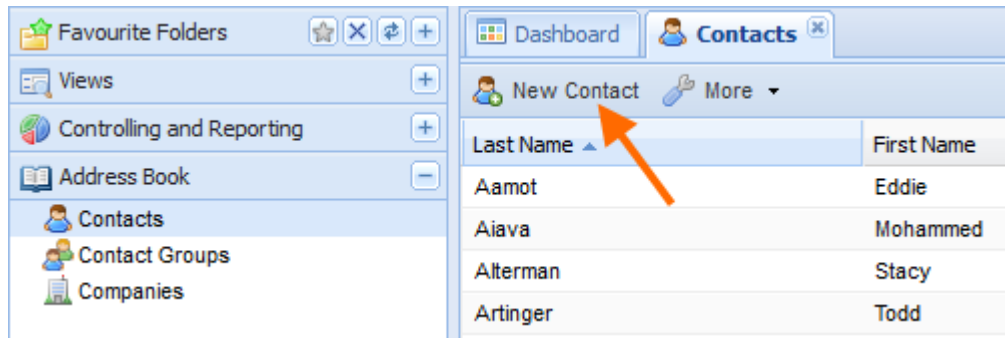
The PIRS address book is divided into three different areas that are interlinked with each other. First of all there are the contacts () which include all the contact information of each project member that has been provided initially by your company at the beginning of the individual project. Please be aware that for each project there is an individual project address book and the various project address books are generally not interlinked with one-another. Therefore contacts that might be provided in one project address book don't necessarily have to be stored in another project address book. You do however have the opportunity to add new contacts or ask you SOBIS support team to add a list of contacts for you, if you find that contacts are missing form a certain address book. The chapter [Create a new Contact](#) further instructs you on how to create new contacts.

Second of all, there are contact groups () which will help you to address a certain group of project members that belong to the same work group, fall into the same or a similar category or are situated at the same location. By entering only one single name into the respective recipient fields of your correspondence all members of this group will be included. To learn how to create new contact groups and see how they can be used to your advantage please refer to chapter [Create a new Contact Group](#).

Thirdly, you are able to add new companies () to your project address book. Each contact form includes fields with information about the company the respective project member works for. Most of those fields must have a value and therefore all companies involved in the project should be present within the project address book. For further instructions and information on how new companies are added to the address book please refer to the chapter [Add a new Company](#).

7.1 Create & Edit Contacts

In order to create a new contact click the "new contact"-button located on the left hand side of the "Contact View" action bar, as indicated on the screenshot to below. The new contact document will then be opened in a new tab.



The empty body field in the content tab structure positioned at the lower part of the contact document can be used to enter a company signature. The signature will be used as template to be inserted automatically into the body of new email correspondence created by the respective project member.

The second tab "Notes" allows you to enter any additional information about the project member. The third tab will display a list of all contact groups the project member is currently a member of. Please be aware that this list cannot be altered within the contact document, it serves simply informational purposes. If contacts need to be added to certain contact groups this needs to be done within the "Contact Groups" view. (For further information please refer to the chapter [Create a new Contact Group.](#))

The values that are supposed to be entered into the fields in the header (numbered in red form 1 to 11 in the screenshot below) will be described in the following table.

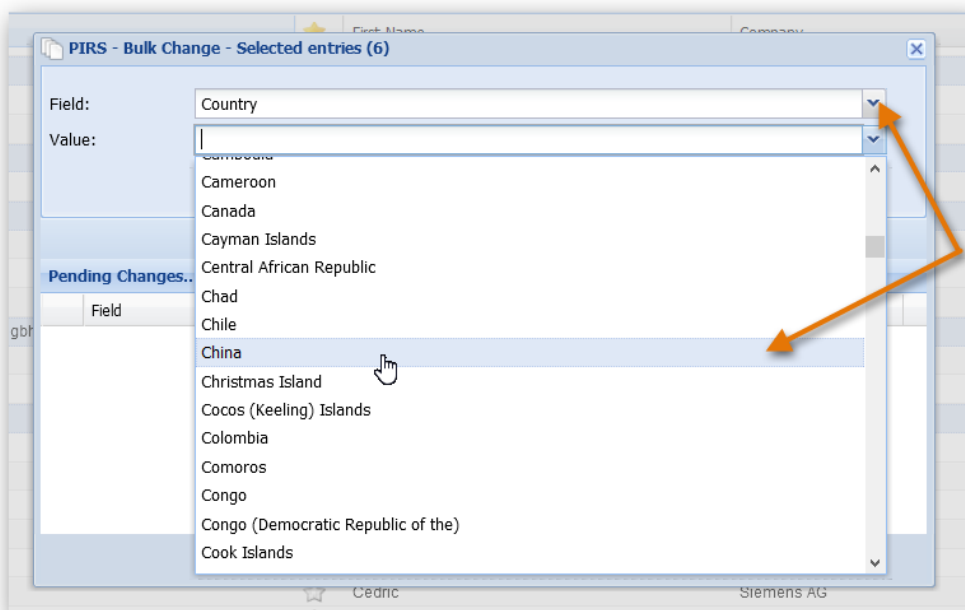
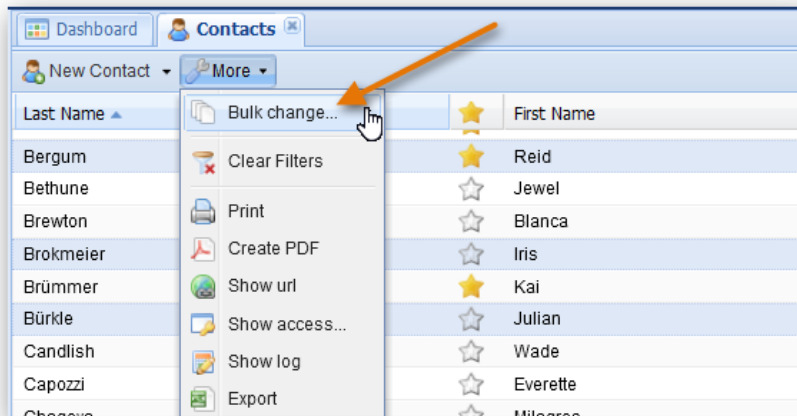
Field name	Description
First Name	The first name of the person you wish to create this contact sheet for must be entered as field value.
Last Name	The last name of the person you wish to create this contact sheet for must be entered as field value.
Short Name	Short name can be an additional name or nick name. This field value is not mandatory.
Company	Here the company the project member works for has to be entered or selected. You can either type in the company name or type it in partially in which case the application will offer you a small selection of companies out of the project companies listed in the address book or you can open the complete list by clicking the arrow at the corner of the value field. Please be aware that the company field is a required value and that only companies that are already listed in the project address book can be entered or selected as true values. If you have already started working on the new contact document but haven't added the affiliated company document yet, you don't need to close the new contact document. PIRS enables you to also add the new company file while the new contact file is still open. Simply click the "Company View" within your address book navigation, add the new company document and then you can proceed to enter data into your contact document. The newly added company file will be available for selection immediately after the adding process is completed. (For information on how to add new companies please also refer to the chapter Add a new Company.)
Contact Type	This field value can only be selected form a list of contact types that were provided by your company. The selection process is similar to that of the company with the only difference that if you find yourself unable to select the correct value because the contact type you are looking for is not listed you won't be able to add a new contact type on your own. In this case please either turn to your administrator or contact your PIRS support team.
Postal Address	The address field should be used to enter the address of the company location the project member is currently working at.
Email address	This field should contain the project member's email address or if he/she has more than one the email address that the project member is using for the project

	communication. This email address will be inserted into correspondence and document files. This value cannot be empty.
Default Corr. Code	The default correspondence code that is chosen for a contact stands for the sender / the recipient code that will be automatically selected for the reference number of a correspondence or document as soon as the contact is entered as sender / recipient. The value of this field can remain empty and is not required for the contact to be valid. It is however highly recommended to set this value since it will save you time when creating new correspondence or document files.
Office Phone Number	None of these fields are required to be filled with information. It is up to you and your company directives to decide to enter the project member's various telephone and / or fax numbers. You also will be able to save the contact document without having selected the country the project member is currently located at. To maintain all address book information as plenary as possible it is recommended to enter all contact information that is available.
Cell Phone Number	
Fax Number	
Country	

7.1.1 Bulk Change

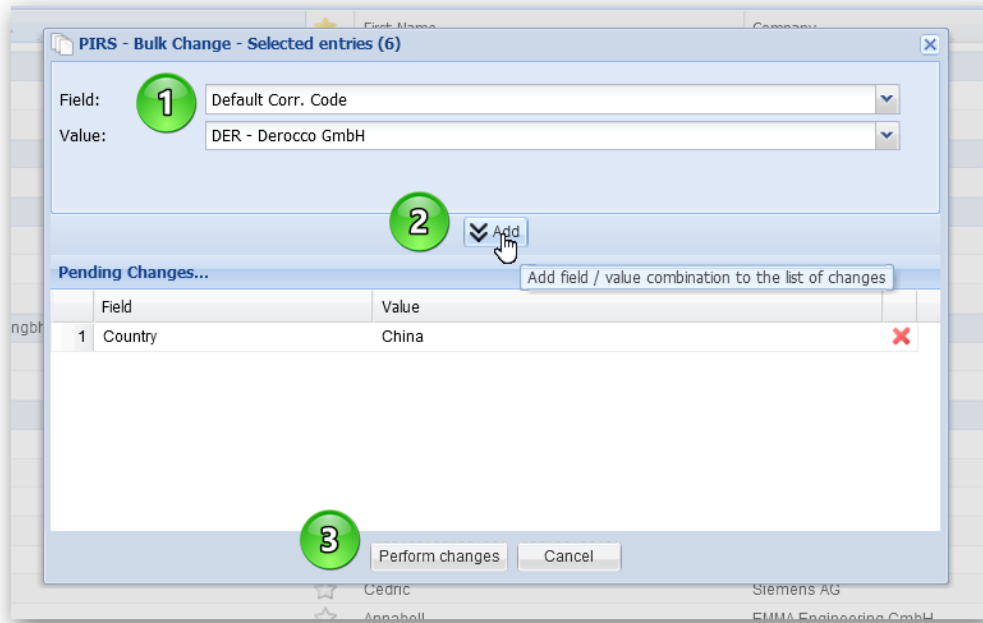
In order to change field values on several contacts in one go, PIRS offers a bulk change option within the "More" options of your tool bar. In case the bulk change is not displayed, please contact your Service Desk and request to activate this feature for your project.

The bulk change allows you to set new values to one or multiple fields of one or multiple contact entries. First select the contact(s) you would like to adjust. A new window will open where you are able to select first the field you would like to change and then select or enter the new value. Compare with the following screenshots.



Click the "Add" button to confirm the value change for the selected field. In the screenshot the value for the field "Country" needs to be changed for all previously selected contacts.

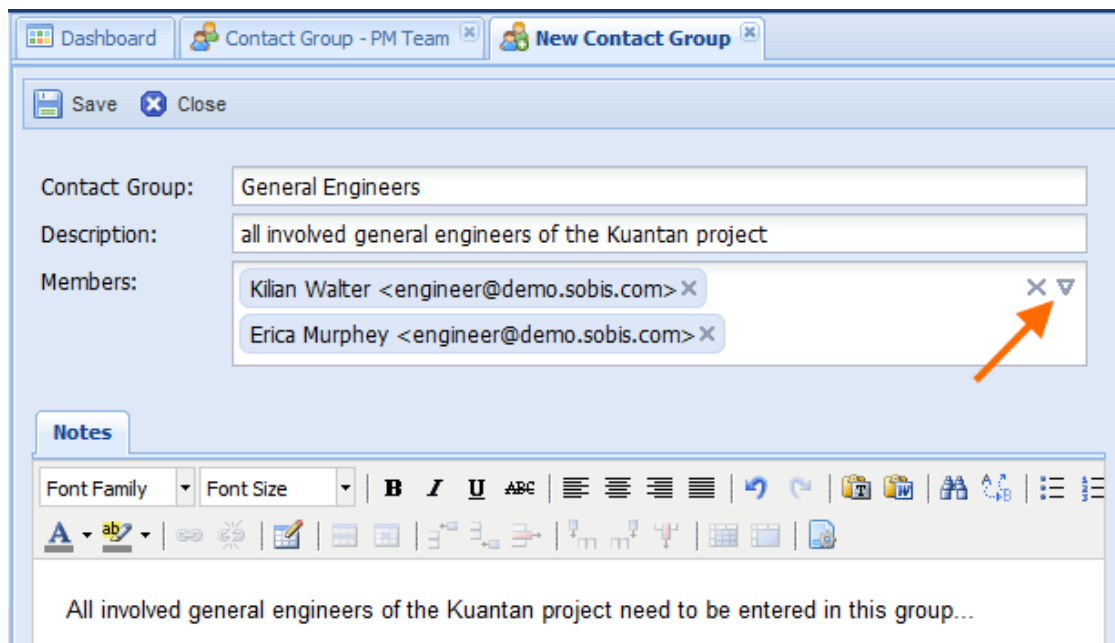
You can choose to change the value of one or multiple fields in one go. Simply select another field, e.g. Default Cor. Code, set a new value, and again click the "Add" button. Once you have assigned new values to all the fields that require changing, click "Perform changes" and the settings will be adjusted accordingly.



7.2 Create a new Contact Group

The view "Contact Groups" displays all groups that were created for the respective project. Each of the presented contact group forms can be opened and adjusted out of this view.

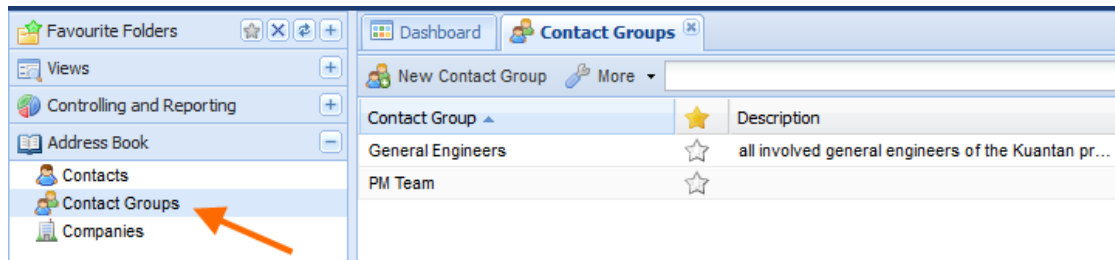
In order to create a new contact group you need to click the "New Contact Group" button. A new form will open in a separate tab.



Besides the name of the group which could be e.g. General Engineers, you can also add a short description that will be display together with the name in the "Contact Groups" view. If required, a more detailed description can be added in the "Notes" field.

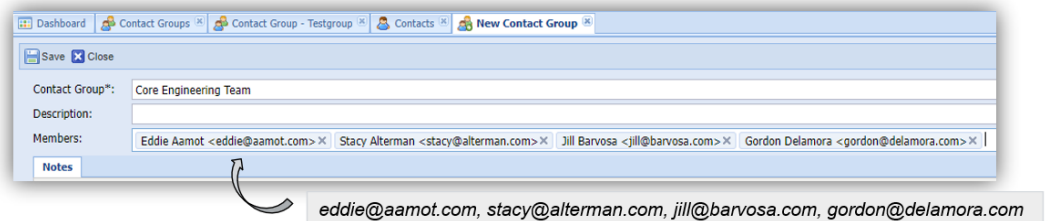
The members of the group can then either be picked from the list of registered contacts that can be unfolded by clicking the arrow head in the corner of the members field (pointed out in the screenshot) or they can be entered manually in which case the application will offer you matching choices from the contacts as soon as you enter more than two letters.

After the new contact group has been saved it will be listed in the contact group view alongside with the description. (Compare with the screenshot below.)



Tip

You can also copy & paste the e-mail address of a contact (e.g. from another mail). You can even copy & paste several e-mail addresses in one go. The only thing you need to pay attention to, is that all the addresses you paste within the members field are also listed within the PIRS Address Book.



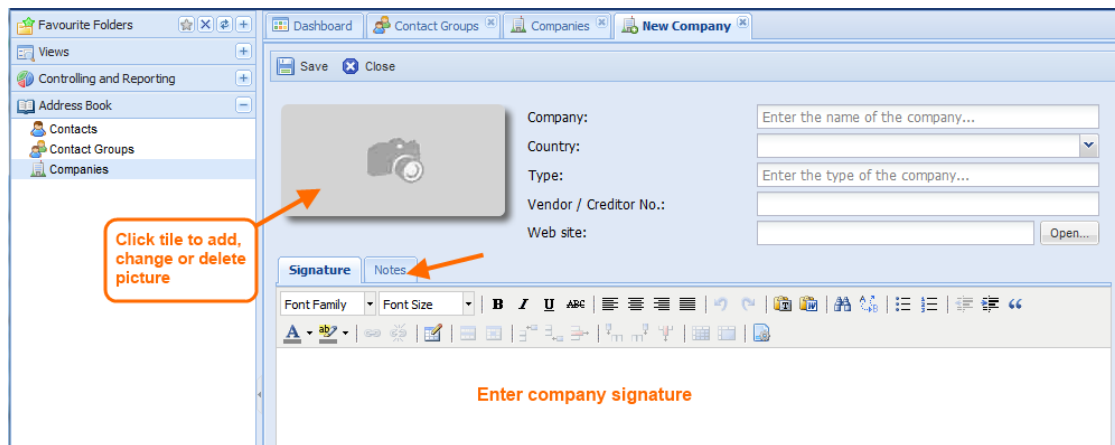
Group Name Nomenclature

It is possible to restrict the nomenclature of group names in order to allow only certain name structures. In case e.g. all groups should start with a specific prefix, it can be set up, that all newly added groups that don't apply the standard can not be saved. If a user tries to add a group which a non-compliant name, he will be informed about the nomenclature for group names set up for this project.

If you would like to set up a specific group name nomenclature, please get in touch with your SOBIS Service Desk any time.

7.3 Add a new Company

In order to add a new company to your project you need to open the "Companies" view within the project address book and click the "New Company" button. A new window will open in a new tab allowing you to enter the specifics of the company you wish to add.



As illustrated in the screenshot, you are able to enter the company's name, type and its web site. As company type you could for example differ between customers, suppliers or partner.

In addition you also have the opportunity to insert a company specific image by right clicking the rectangle that bears the camera image. Furthermore you could enter a company specific signature which can then be automatically attached to related all PIRS forms.

Similar to the contact documents there is also the possibility to enter all additional company information in the "Notes" field, pointed out in the screenshot by the red arrow.

Please be aware that the company correspondence code cannot be added in the company form. In order to add a correspondence code please contact your PIRS administrator.

Restrict rights to add new companies

Generally, all PIRS users with creator rights are able to add new companies. In case you would like to restrict this option and only allow a certain group of people to add new companies within your projects, please contact your SOBIS Service Desk any time.

7.4 Import Contacts based on Excel Sheet

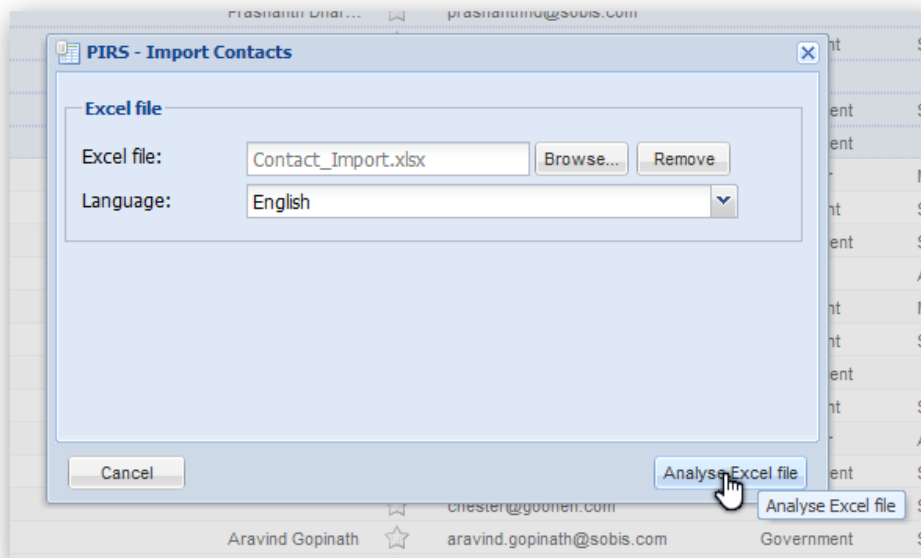
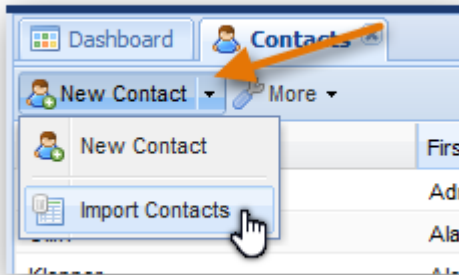
In order to allow PIRS users to quickly transfer contacts from another system to PIRS or from PIRS project to PIRS project or simply to add a list of new contacts in one go, you are able to import contacts based on an excel sheet. Hereby you are able to include all fields found within your PIRS contact form listed in detail in this manual (refer to [Create a new Contact](#)).

Generally, you can import any contact that does not already exist and for which all mandatory fields are listed within your import sheet.

7.4.1 How to import new contacts

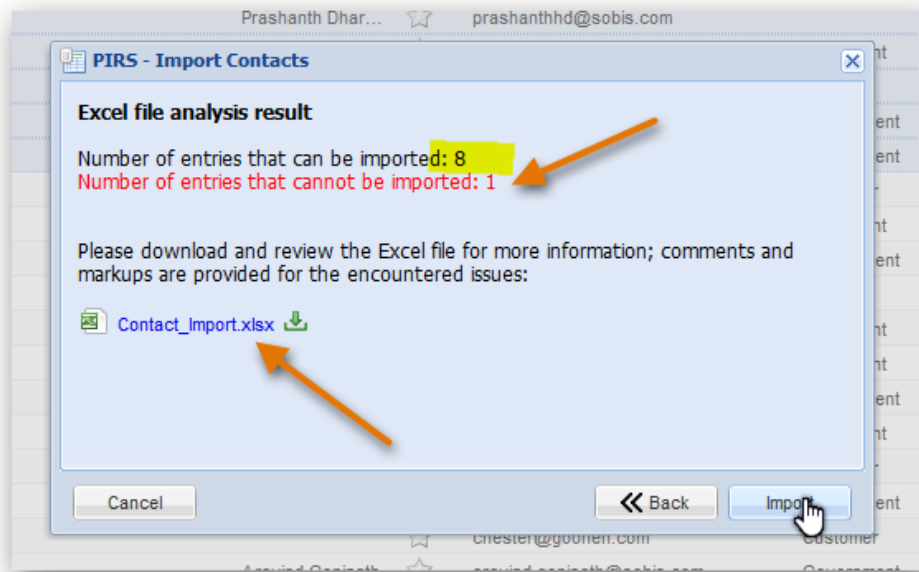
1. Use the excel sheet provided within the [template](#) chapter or export the contacts you want to transfer from one PIRS project to another by using the export feature listed under the "More" options.

2. Enter the contact information you like to upload and/ or change the project related information (e.g. Default Correspondence Codes, Notes, etc.). Values for all mandatory fields (First Name, Last Name and Company) have to be included for each listed contact.
3. Select the option Import Contact listed as second option once you unfold the new contact option.



A new window will open allowing you to select the prepared excel sheet by clicking the "Browse..." button. Click "Analyse Excel file" to continue to import process. PIRS will now analyze your import sheet and check whether or not all mandatory fields are included and search the address book for possible duplicates. In case there are any issues with the contacts listed in your excel file PIRS will inform you about the number of contacts that cannot be imported and offer a commented file which will display all

reasons why a contact cannot be imported. Compare with the following image.



4. Click "Import" to complete the import process. All entries that fit the requirements are imported and included in your project address book.

8 Tips & Tricks

This chapter will offer some guidance for your daily work with PIRS.

8.1 Tutorial Videos

Within this section we offer various tutorial videos that accompany our written guide.

- [Main PIRS features and important processes](#)
 - [File e-mails from your personal mail box in PIRS:](#)
 - [Use PIRS Filter to search for information:](#)

8.1.1 Main PIRS features and important processes

8.1.1.1 File e-mails from your personal mail box in PIRS:



Content:

- Access personal mail box from PIRS
- File an e-mail from your personal mail box
- File an e-mail as answer to an existing PIRS e-mail

8.1.1.2 Use PIRS Filter to search for information:

Content:

- Use different filter options to search within view content
- Save filter combination in new personal view
- Deselect filter or clear all set filter in one go

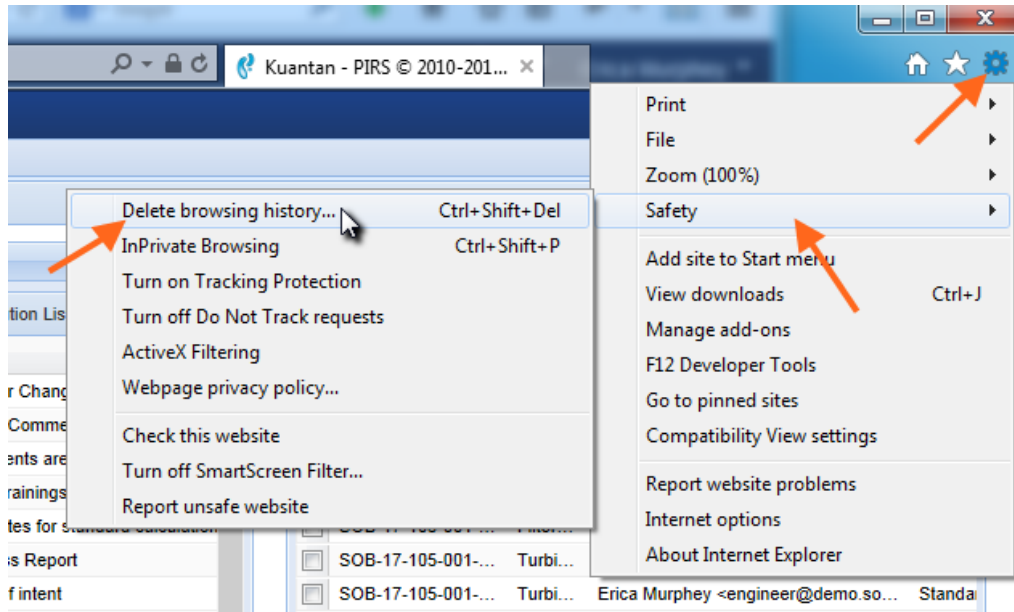
8.2 How to clear your browser cache

In general a browser's cache stores information of webpages you visit on your computer in order to load those pages quicker the next time you visit them. The cache also prevents that you download the same image multiple times while you are navigating through websites that use the same images on multiple pages. Occasionally, the automatic storing of information in your browser cache can cause functional problems because the stored content may conflict with current content.

So, in case PIRS generates an error or doesn't operate properly, the reason might be a conflict with your browser cache. This problem can be fixed simply by clearing your cache and below we will show you how you can clear the cache of your IE or your Firefox browser.

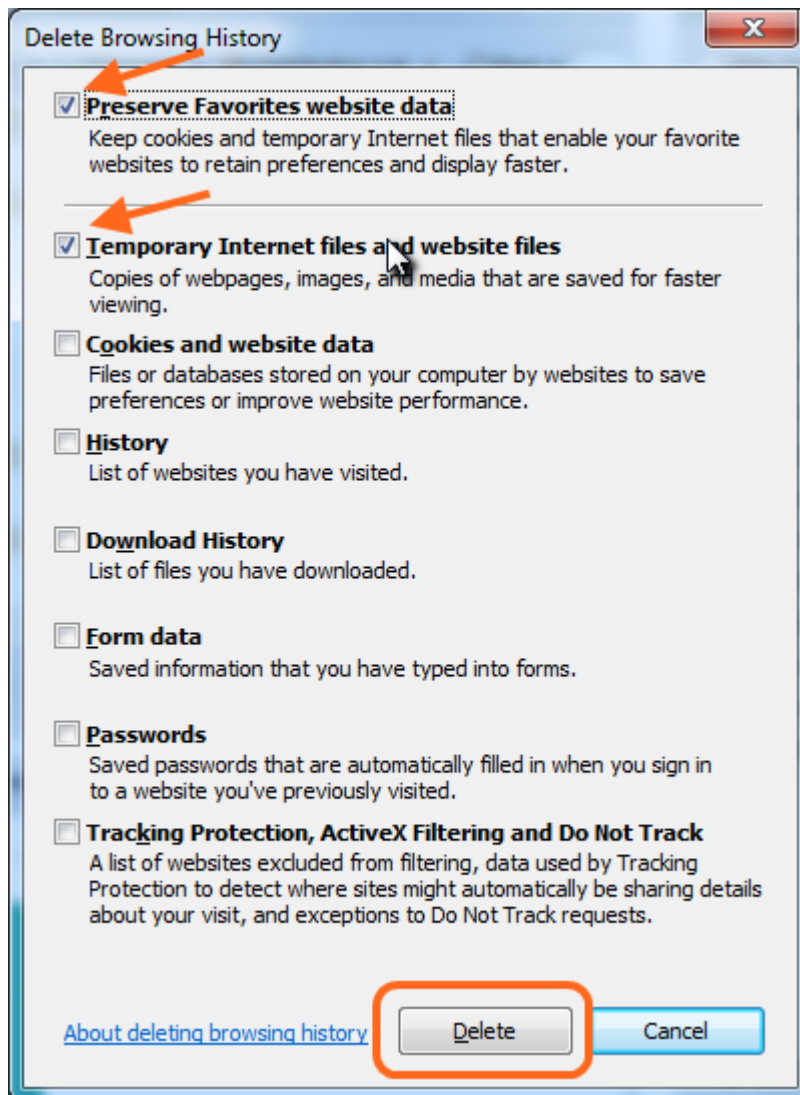
8.2.1 Step-by-step guide for clearing a IE 9/10/11 browser cache

1. Click the gear icon located at the top right of your browser window in order to open your browser settings. Then, select "Safety" and "Delete Browsing History" as indicated by the screenshot



Alternately, you can also press Ctrl + Shift + Delete. Both methods will open the Delete Browsing History window.

2. As indicated by the screenshot, select the option "Temporary Internet files and website files". By default all other boxes will be preselected as well but these options will delete information that you stored on purpose. Therefore uncheck all of the other boxes. In order to completely clear your cache you also need to delete objects from websites in your Favorites folder. Thus, it is necessary to select "Preserve Favorites website data".



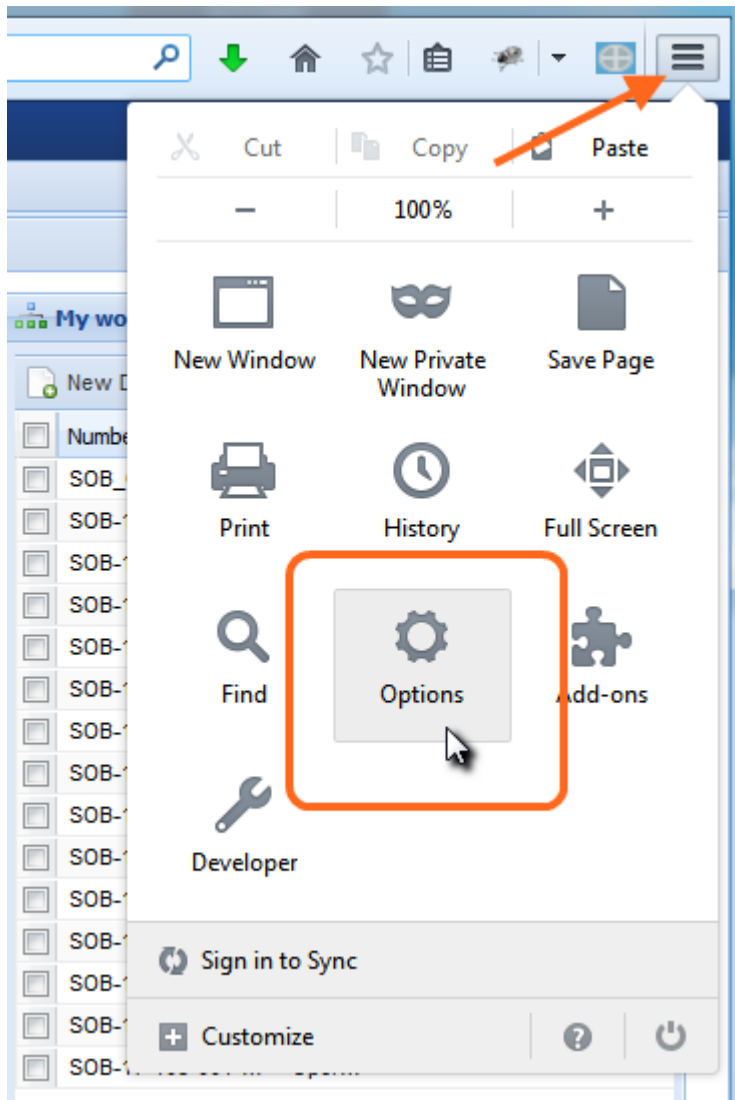
Click "Delete" and the browser will take a couple of seconds to perform the deletion procedure. After you have received the confirmation that the cache has been cleared, refresh your PIRS page and repeat your operation.

8.2.2 Step-by-step guide for clearing a Firefox browser cache

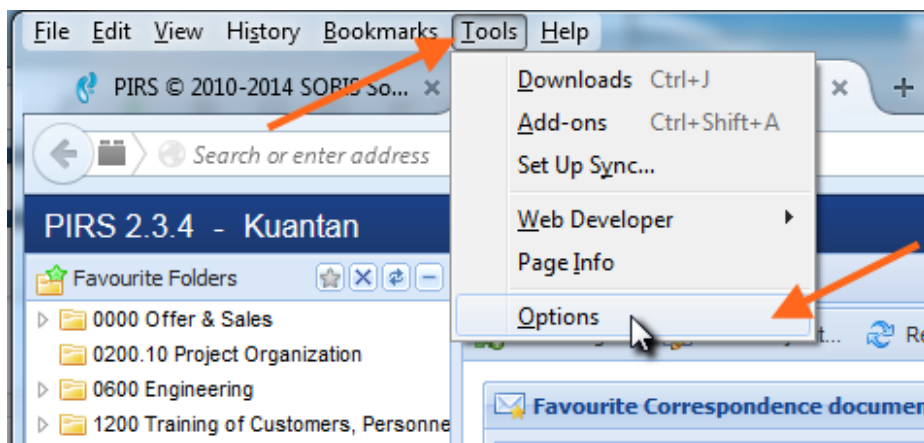
There are two options to clear your browser in Firefox. Both are relatively easy and fast and below we will describe both options. You can decide which one you prefer.

1. Using "Options":

- a. First you need to open "Options" which you can do in one of two possible ways. You can either open the menu by clicking the button with three horizontal lines in the right hand upper corner of your browser and then choose "Options"...



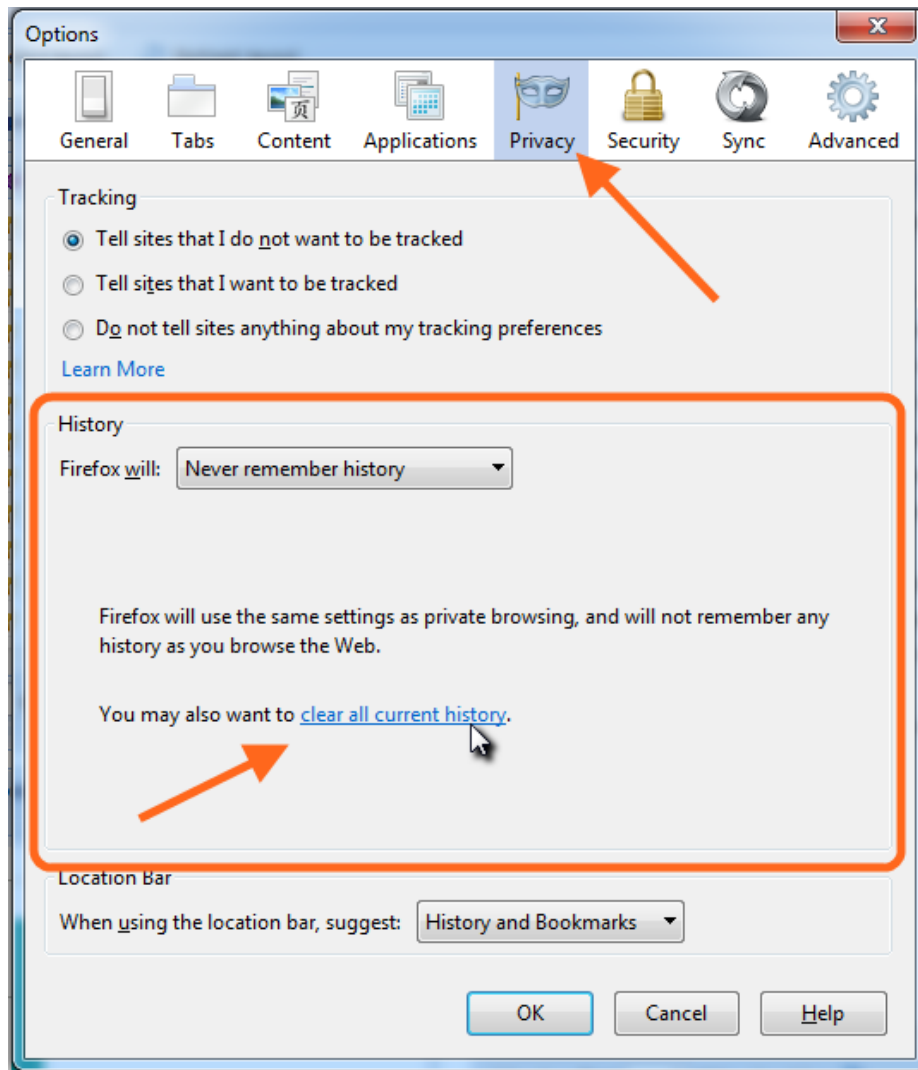
...or, if you're using the menu bar, click "Tools" and then "Options".



Both methods will open the "Firefox Options Window".

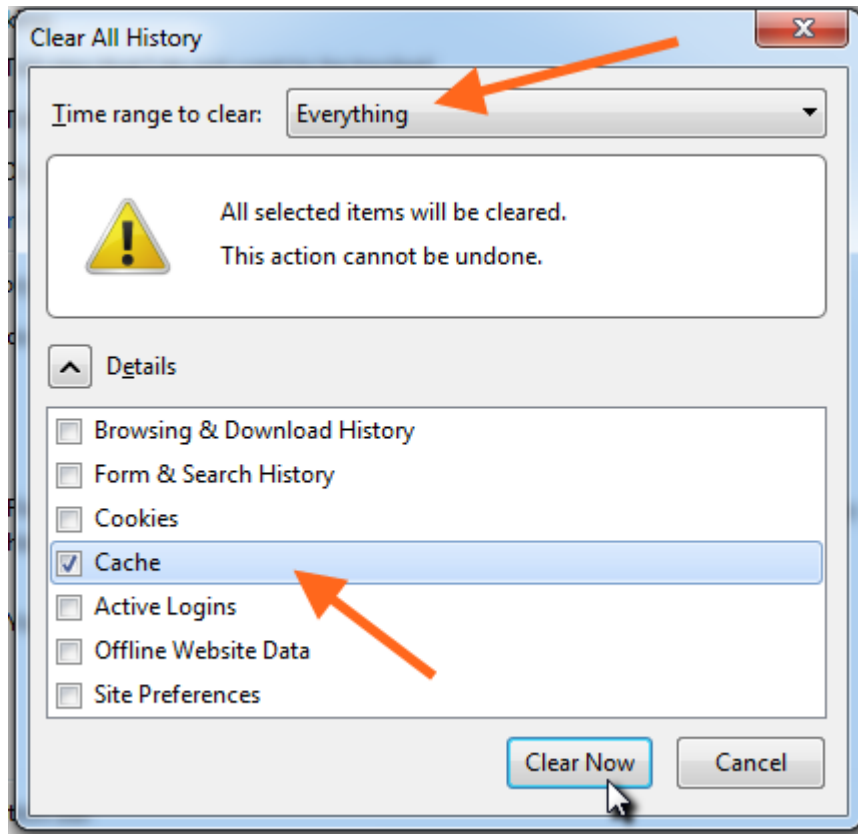
In case you are using Firefox for Mac, open "Preferences" from the Firefox menu and then continue with the steps below.

- b. Select the "Privacy" tab in your "Options" window and click the link "clear all current history" as displayed in the screenshot.



The window "Clear Recent History" will appear.

- c. Set the "Time range to clear" to "Everything" and make sure that the box "Cache" is selected in the list below "Details". Should you not see a list of data items click the arrow head.



Should you wish to clear other kinds of stored data, check the appropriate boxes and this data will be cleared alongside with the cache after you click "Clear Now".

2. Using "History":

- a. First you need to open menu area "History". Open the menu by clicking the button with three horizontal lines in the right hand upper corner of your browser and then choose "History" or click the "History" option in your menu bar.
- b. Then click the option "Clear Recent History..." and continue with step 1.c.

Should the clearing of your browser cache not resolve the issue, please contact your Service Desk (+49 621/1228 5656)

8.3 How to install spell check in your browser

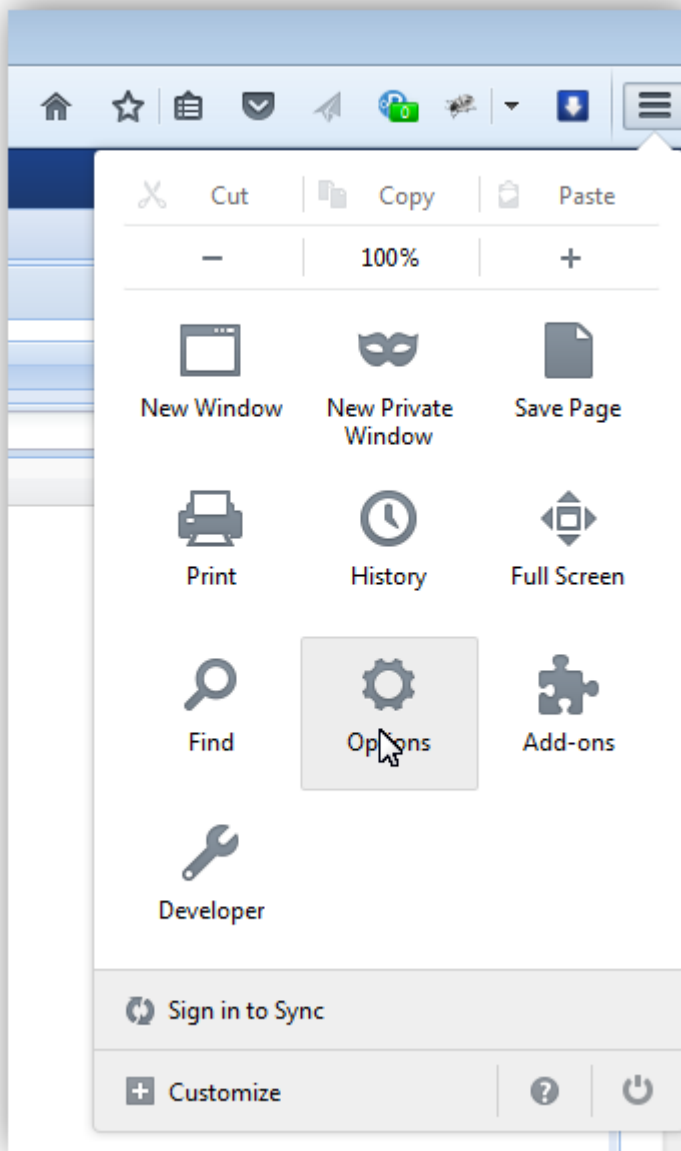
Most web browsers now-a-days offer in their standard set up to activate spell check and to install various dictionaries in order to allow you to switch between different languages. Below you will find a short instruction on how you can activate and use the spell check in your browser

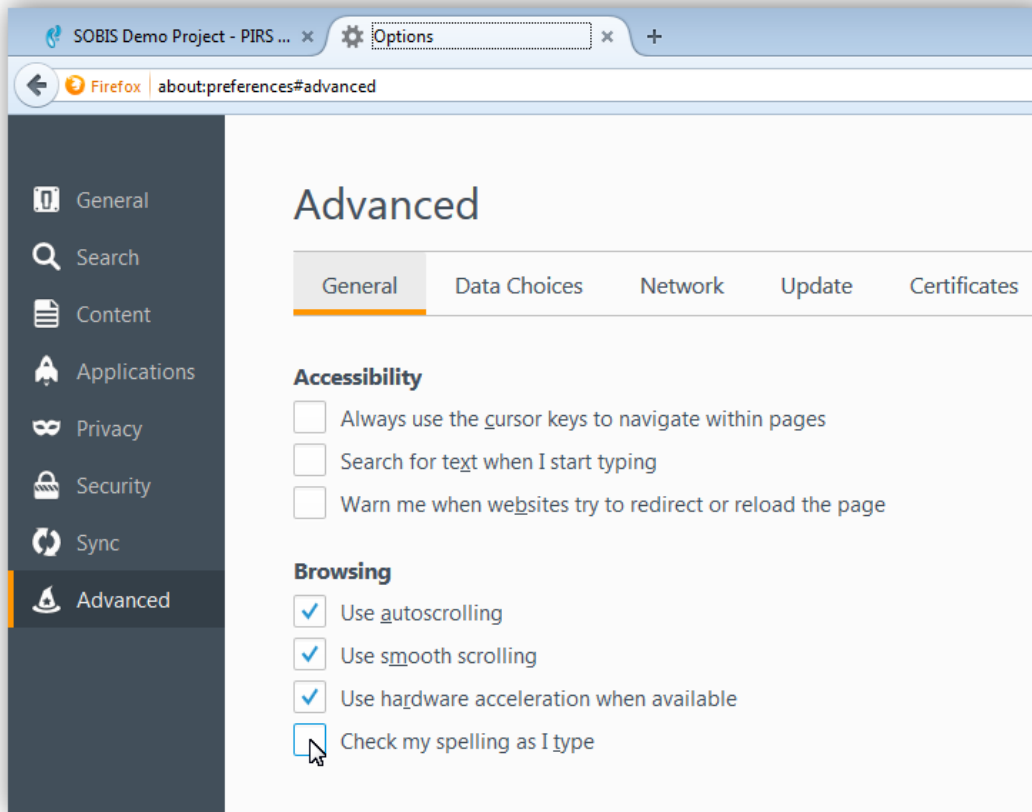
8.3.1 Firefox

- **Activate spell check:**

Usually, spell checking is automatically activated when you first install Firefox. In case you want to activate/deactivate spell check, first click the menu button in your tool bar and select Options, as illustrated in the following screenshot.

Firefox menu options will open in a new browser tab. Select "Advanced" in the left hand navigation, then check or uncheck the checkbox "Check my spelling as I type".



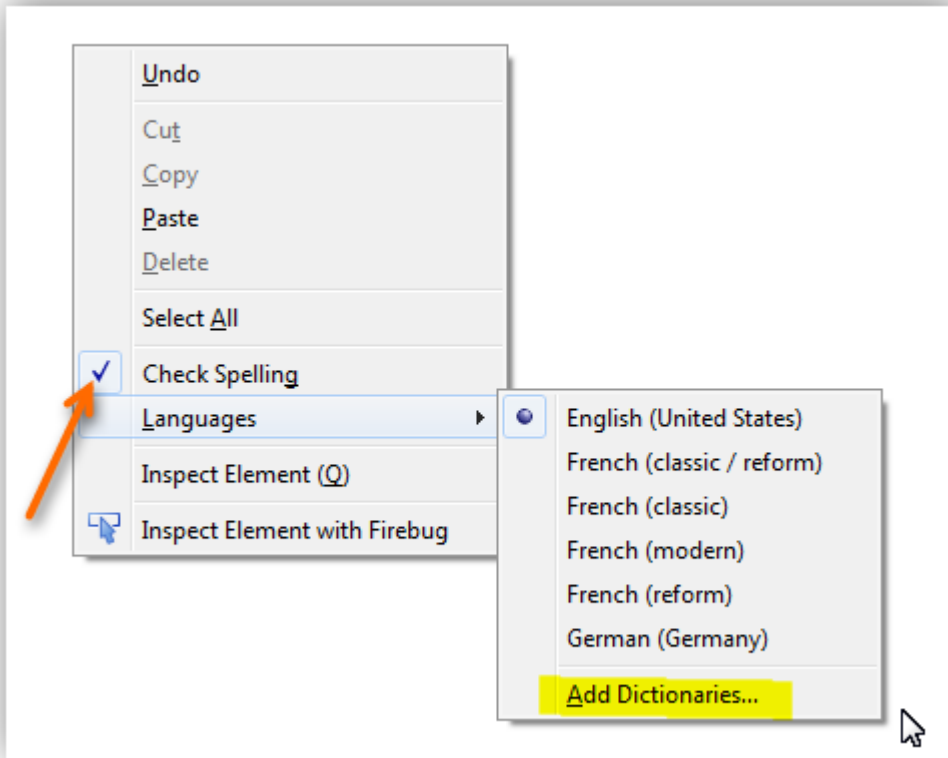


When activated, Firefox checks the spelling of words that you enter in text boxes automatically as you type. As soon as you finish typing a word, it is checked against the words in the installed dictionary. If the word is not found in the dictionary, it will be underlined in red.

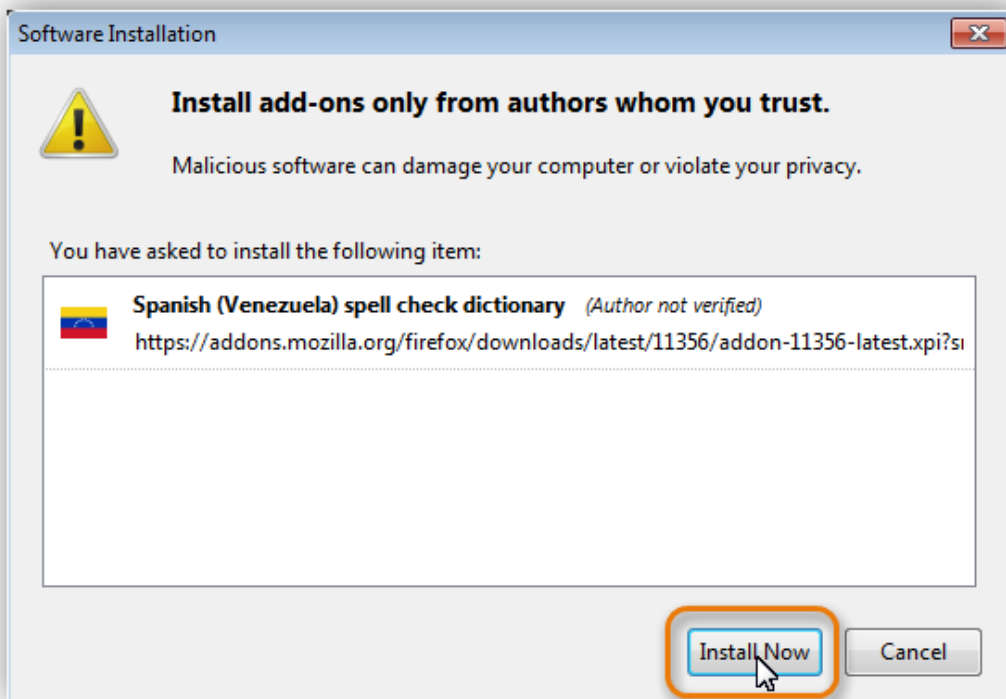
- **Add new dictionaries**

Most computers will have an English dictionary already installed for you. If necessary, you can add other dictionaries.

1. Right-click in any text box where you can enter text with more than one line
2. Make sure that "Check Spelling" is selected and go to "Languages"
3. Click "Add Dictionaries..."



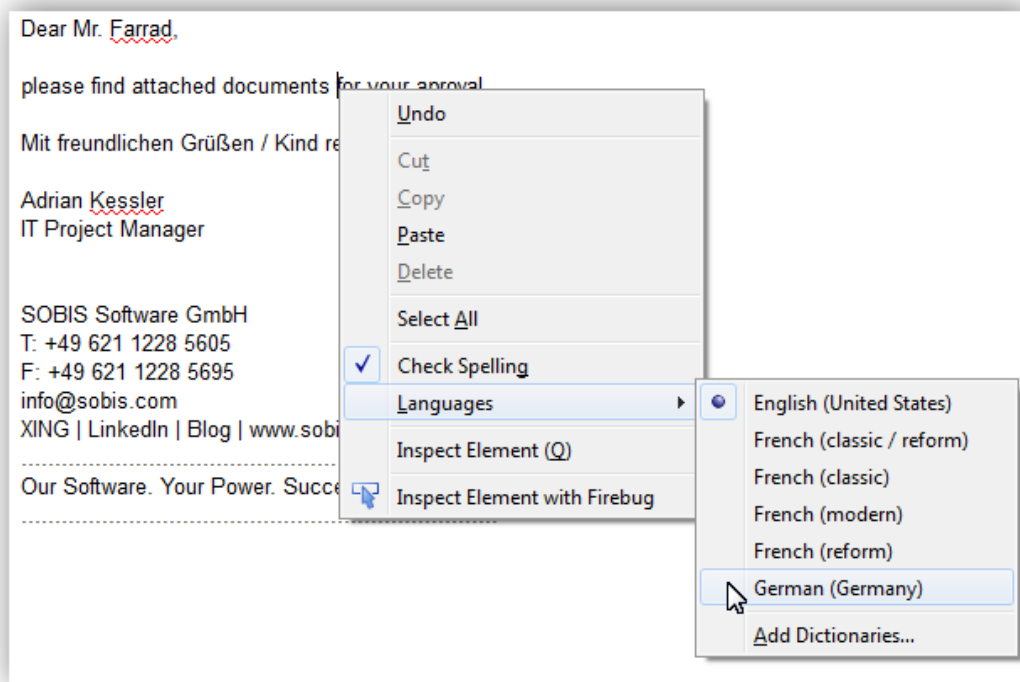
The [Mozilla Add-ons Dictionaries page](#) will be opened in a new browser tab. In order to add the dictionary, click the link "Install Dictionary" next to the dictionary you like to add. A installation window will appear, click "Install Now" to start the installation process.



After the installation is complete, you need to restart your browser to have the dictionary available for you.

- **Switch between languages**

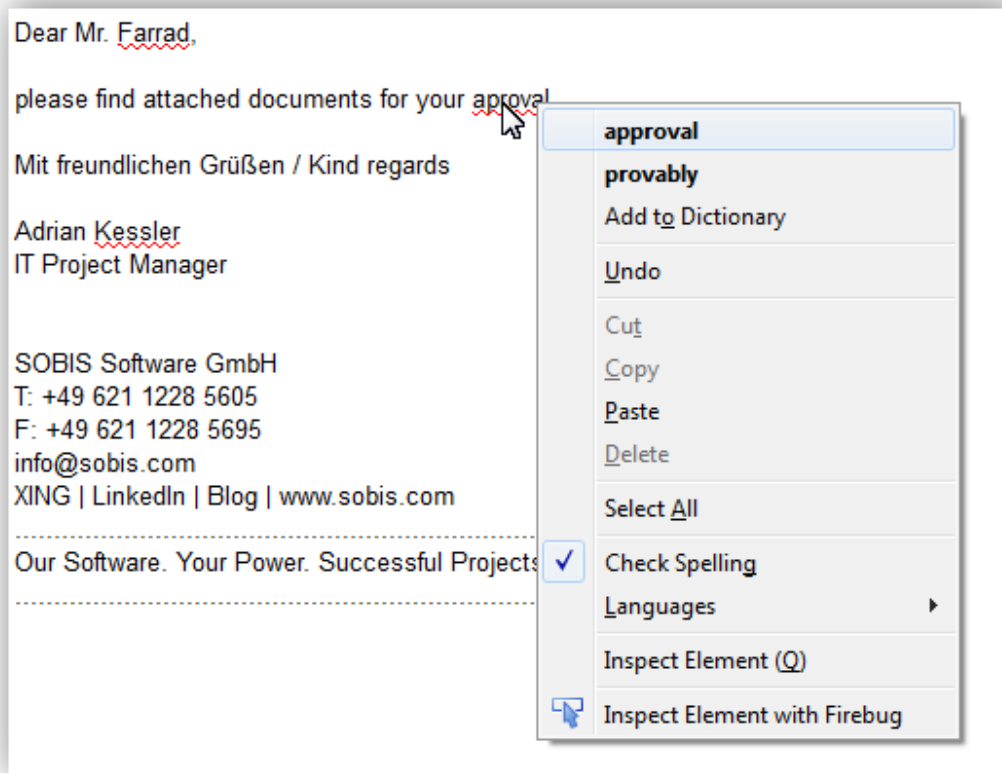
1. Right-click anywhere within the text box.
2. Click Languages and select the dictionary you like to use for your text.



- **Correct misspelled words**

When a word you typed is not listed in the dictionary you are currently using, it will be underlined in red. You can now either correct the spelling or add the word as a new word to your dictionary.

In order to correct a misspelled word, make a right-click on the word in question and select one of the suggested words at the top of the menu.




If none of the suggested words is appropriate, you can still correct the word manually. Should you wish to add the word to your dictionary, select Add to Dictionary.

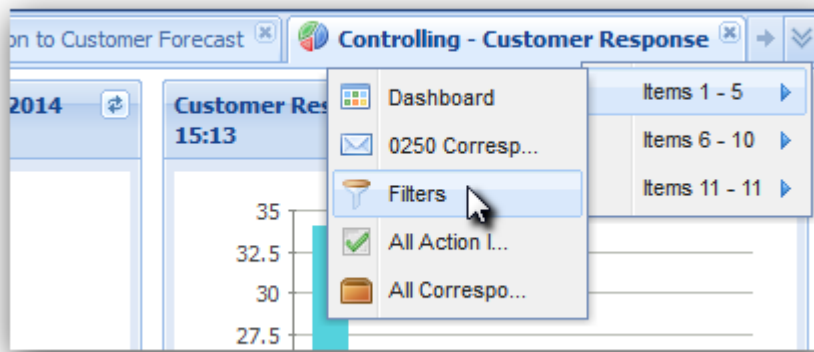
8.4 Manage your Content Tabs

When working with PIRS you might have various tabs open at the same time. Your dashboard will always be available for you as a first tab and in general only one tab is reserved for the display of folder content, but all views you select open in a new tab. Also your address book views and your controlling and reporting views create new tabs when you open them. Furthermore, all PIRS items you work on, e.g. an email, letter, document, contact, etc., will be displayed in their own tab.

It can therefore happen that you have so many tabs open at one point that it is necessary to manage them during your session. You can always move around within your open tabs and choose to delete tabs you don't need at the time, but PIRS also offers different options to support you in this situation:

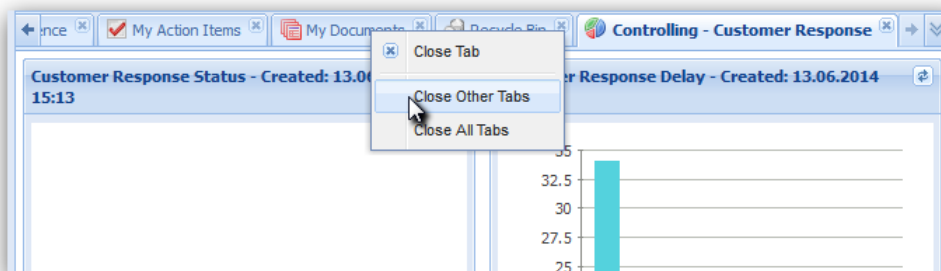
1. Quickly find the tab you need:

As soon as there are too many open tabs to display them in the limited space of your browser, a new icon with two downwards pointing arrow heads () will appear in the corner of your tab bar. By clicking the icon you will be able to see all open tabs and switch to their display quickly and easily.



2. Close tabs:

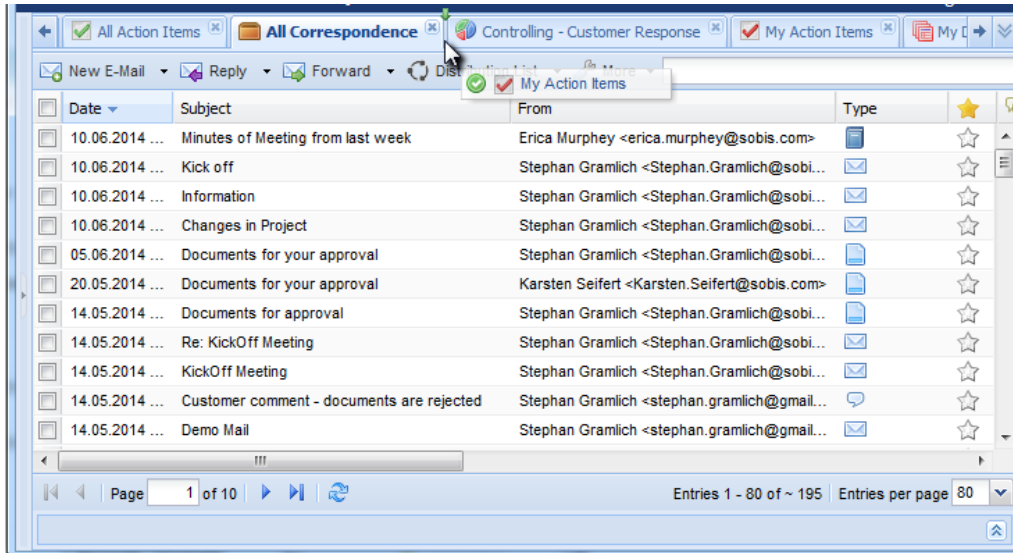
By right clicking the tab you are currently displaying you will get different options to close your tabs. You can choose to close that particular tab, although you can close it quicker by simply clicking the x in the corner of the tab. Furthermore, you will also have the choice to close all open tabs at once or close all tabs other than the one you are currently displaying.



This actions effect all tabs except the dashboard which will always remain open for you.

Rearrange your tabs:


The order in which the tabs are listed is determined by the order in which you have opened them. However, you are able to change the order via drag & drop. Simply click on the tab you like to reposition and move it to the location of your choice.

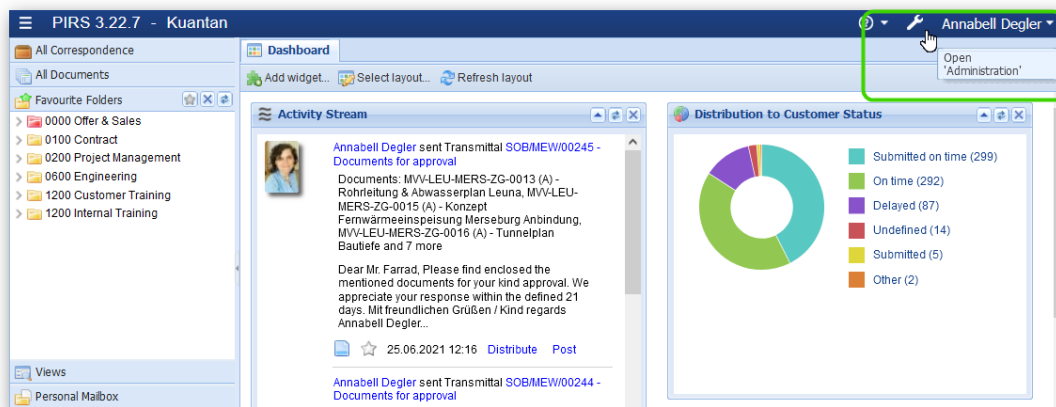


8.5 Visit our PIRS Blog

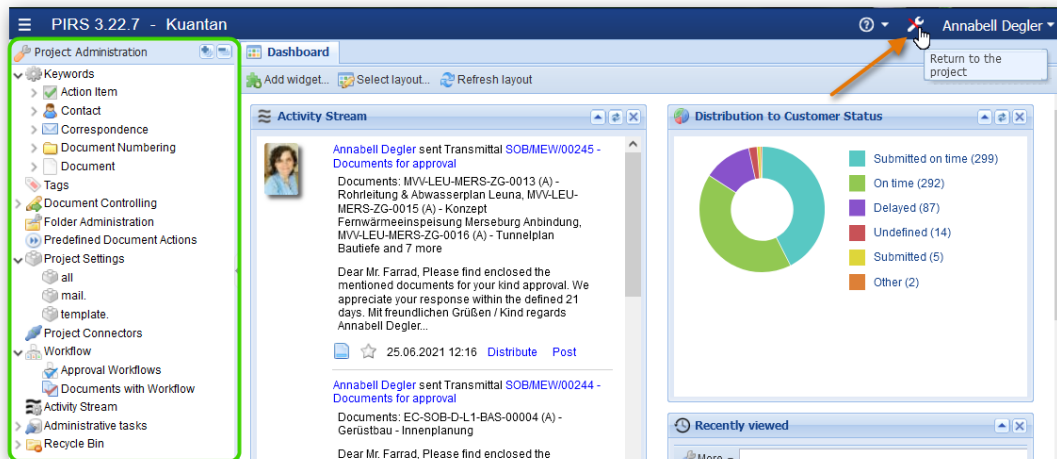
Our [PIRS Blog](#) addresses questions frequently asked by our PIRS customers as well as current topics concerning new PIRS releases, tips & tricks and helpful PIRS videos.

9 PIRS Project Administration

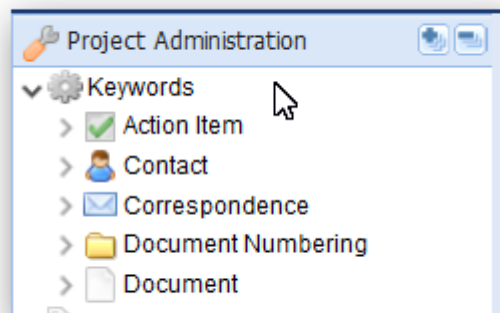
This chapter addresses all PIRS users that are assigned the role of project admin and are therefore granted access to the PIRS project administration area. Those PIRS users will have an additional symbol  in their PIRS toolbar.



By clicking this symbol the project administration will open in the navigation area on the left hand side. The views displayed in the content area will still be visible and the crossed out administration symbol will indicate that the administration area is currently active. You close the project administration by again clicking the symbol.



9.1 Manage Project Keywords



For each project you are able to define and manage a set of project specific keywords that relate to available values for fields in various PIRS items such as contacts, documents or action items.

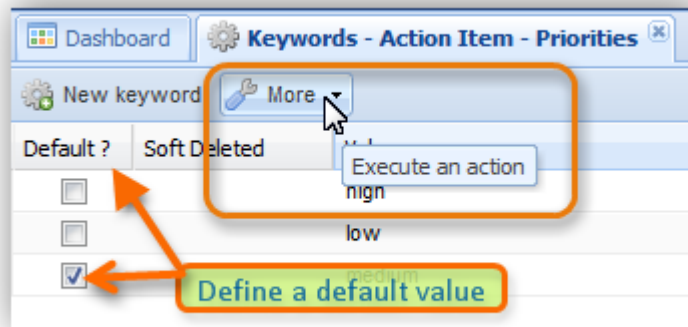
With the first project set up and implementation, these project keywords will be already defined. However, you are able to add new keywords and change, maintain or delete existing ones within the keyword section of the PIRS administration.

There are keywords available for the following PIRS items:

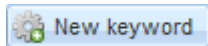
- Action Item
- Contact
- Correspondence
- Document Numbering
- Document

For each existing as well as each new keyword PIRS generates a unique ID consisting of a sequence of numbers and letters. The unique ID's will not be modified even if you change the value of an existing keyword. ID's are used in the back-end. So when you change a keyword value it will change automatically within all PIRS entities they are used in.

9.1.1 General Actions



1. Add new keywords:

You are able to add new keywords using the  button which is displayed in the upper left corner of each keyword administration view.

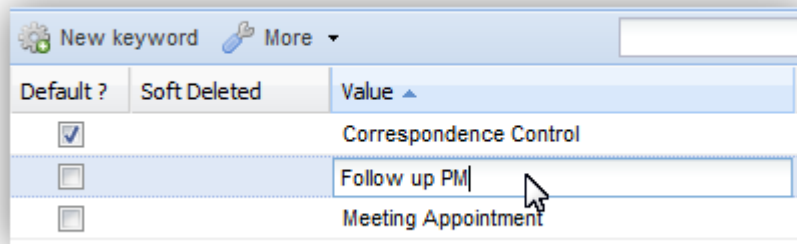
2. Declare default value:

You have the option to declare a default value for each field of a PIRS entity where a keyword is offered. In case a default value is set, it will be used as standard for each new PIRS entity this keyword is used in. Should you for example pick the value "medium" for the priorities of your PIRS Action Items, every new Action Item will have medium priority as default set up.

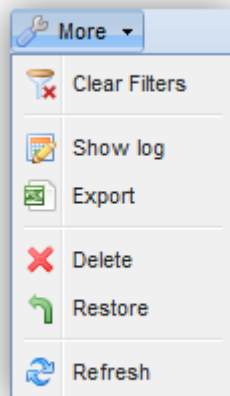
Default values can but don't necessarily have to be set.

3. Change keyword value:

In order to change the value of a keyword, simply double-click the value cell and adjust the content.



4. Actions within "More" button:



In addition to creating new keywords and defining default values there are also several other actions you can perform listed within the "More" options.

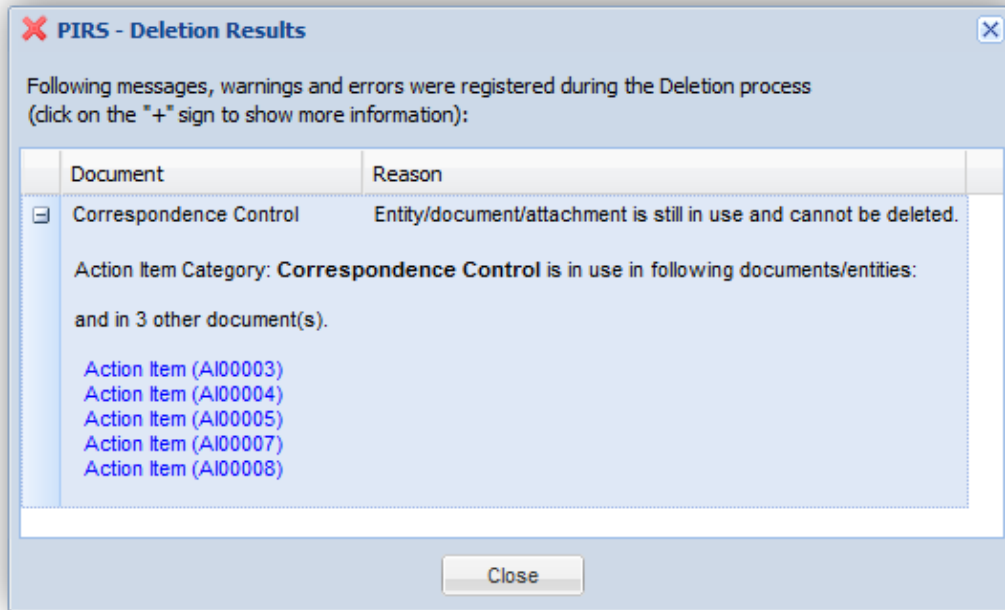
You can set and then clear filters within each keyword view.

Furthermore you are able to look at the document log of every keyword, delete and restore soft-deleted keywords and export a list of keywords as an excel file.

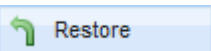
The refresh button will reload the opened keyword view.

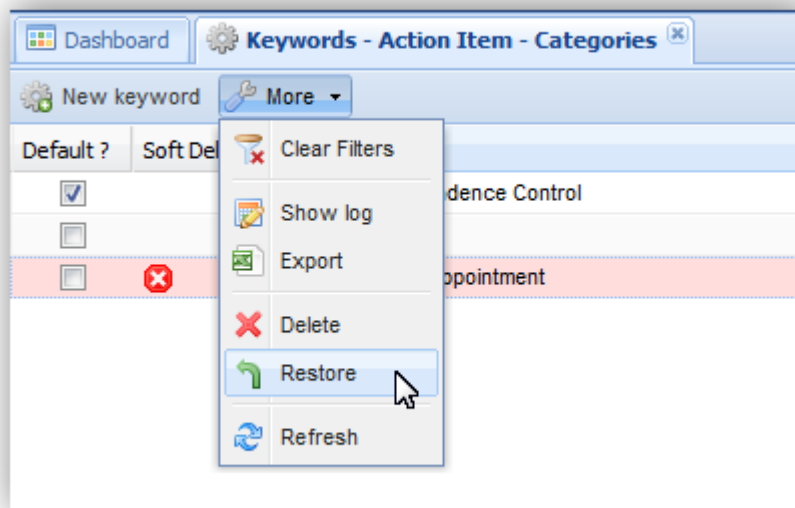
9.1.1.1 Delete, Soft-Delete and Restore

Should you want to delete a keyword that is currently used in any PIRS entity e.g. within an Action Item or an E-mail, PIRS will provide you with a list of documents/entities that use this keyword. You can either change the keyword value and/or delete the documents/entities in question.



In case you delete a keyword which is used in an entity or document that has been deleted, this keyword will only be soft-deleted and marked as such. This means that the keyword is no longer available as option to PIRS users but it is still listed in your administration and the respective keyword value is also still stored in the deleted document(s).

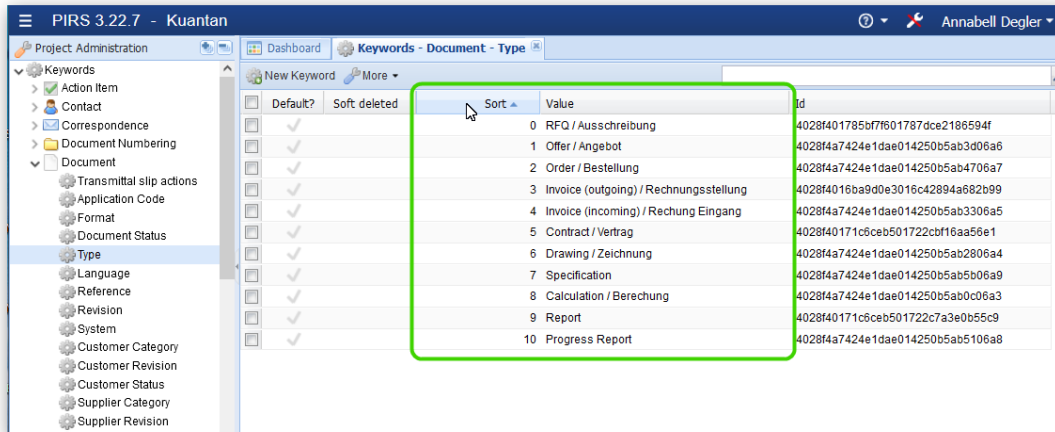
A soft-deleted keyword can be restored using the  Restore button listed in the "More" options.



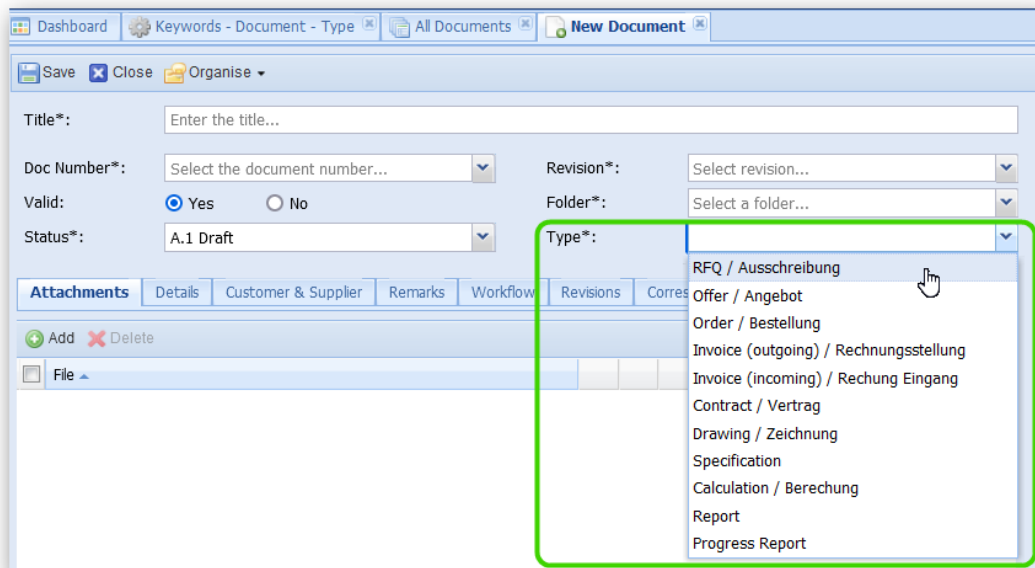
9.1.2 Sort keywords

Generally keywords will be ordered alphabetically. This means that regardless of the order which you see within the Admin view, the order with which values will be displayed within PIRS correspondence or documents is defined by the first letter or number.

This can be changed however by activating the "Sort" feature. Once it has been activated for a specific keyword e.g. document type, you can define the order by entering numbers from 0 to



Based on the order you defined within the "Sort" tab, the values will be displayed within the document.



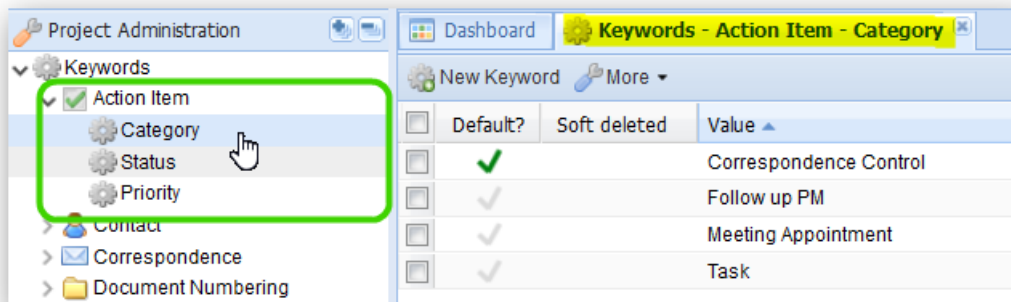
To learn more about which keyword displays can be sorted with this feature and how to activate it, please contact your service desk.

9.1.3 Action Item Keywords

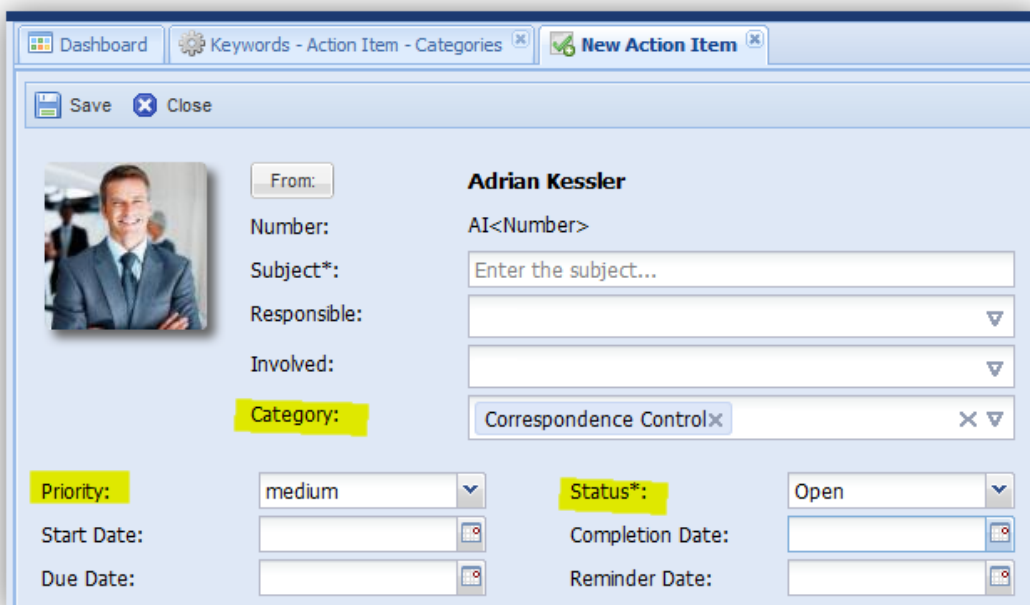
There are three fields within an Action Item that users have to pick a value for and keywords are maintained.

These fields are:

1. **Category**
This field allows users to categorize Action Items e.g. according to the expected task or responsible department.
2. **Status**
With the status users and project managers can follow up on their tasks as well as the tasks of their team members indicating for example that an item is still open or is already completed.
3. **Priority**
Here users can define how urgently a task needs to be dealt with.



For each field you need to define at least one keyword.

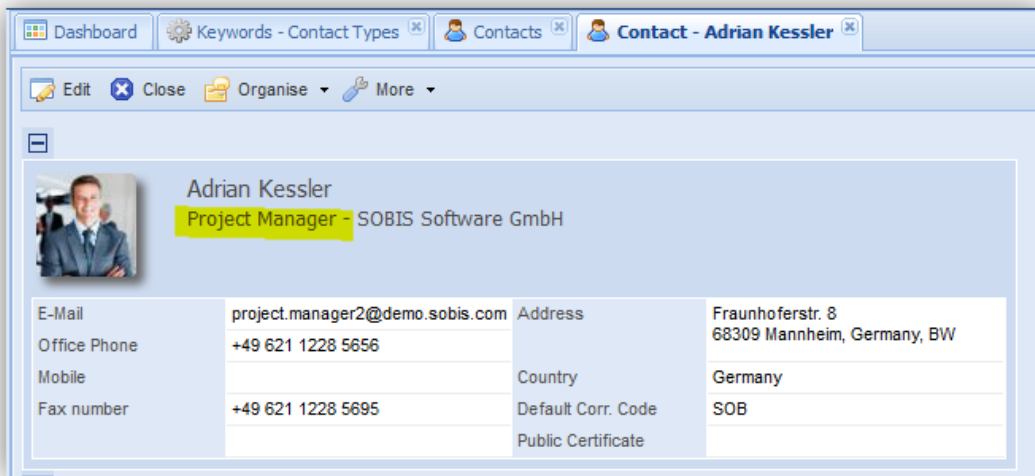


In order to change keyword values or create new keywords simply select the respective keyword list within the administration navigation and proceed as described in chapter [Manage Project Keywords](#).

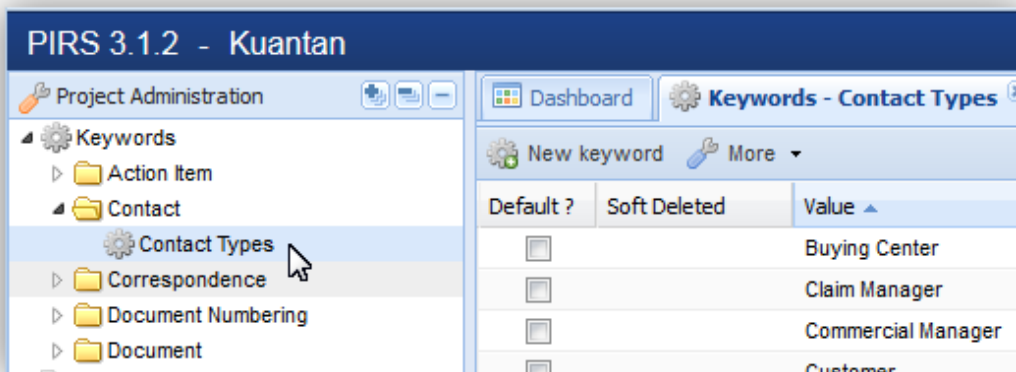
9.1.4 Contact Keywords

For contacts managed within the PIRS address book there is one field value for which you can maintain a list of keywords, the contact type.

As indicated by the screenshot of a contact in read mode below, the contact type defines the role of the respective person within the project.



You need to define at least one keyword for the contact type.



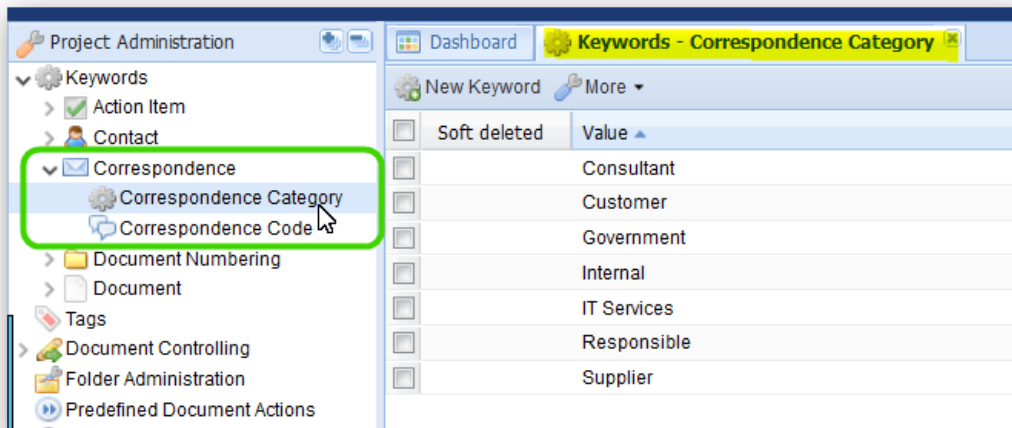
In order to change keyword values or create new keywords simply select "Contact Types" within the administration navigation and proceed as described in chapter [Manage Project Keywords](#).

9.1.5 Correspondence Keywords

Each PIRS correspondence receives a unique reference number which is usually created based on the correspondence code of the sender and recipient as well as a sequential

number. Within the correspondence keyword area you manage the information for all available project correspondence codes.

The correspondence categories refer to a value you set for correspondence codes. This means that each correspondence code is categorized according to a list of keywords that you defined within the "Correspondence Categories".

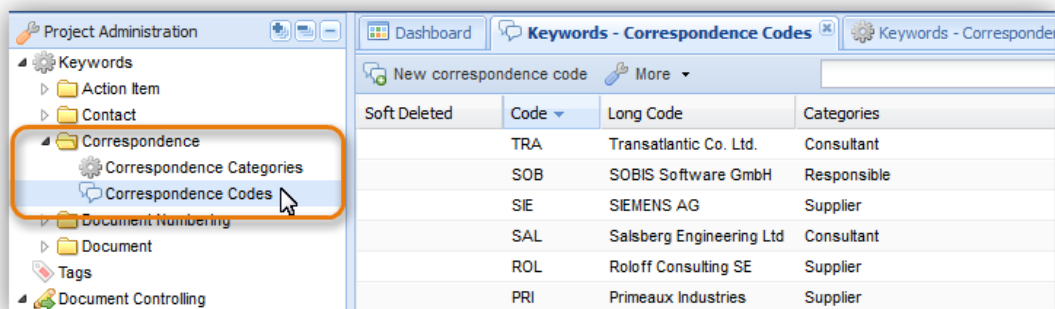


The correspondence categories could for example be "Internal", "Customer" or "Supplier".

In order to change keyword values or create new keywords simply select "Correspondence Categories" within the administration navigation and proceed as described in chapter [Manage Project Keywords](#).

9.1.5.1 Correspondence Codes

Correspondence Codes differ slightly from other general keywords because each item has several values.

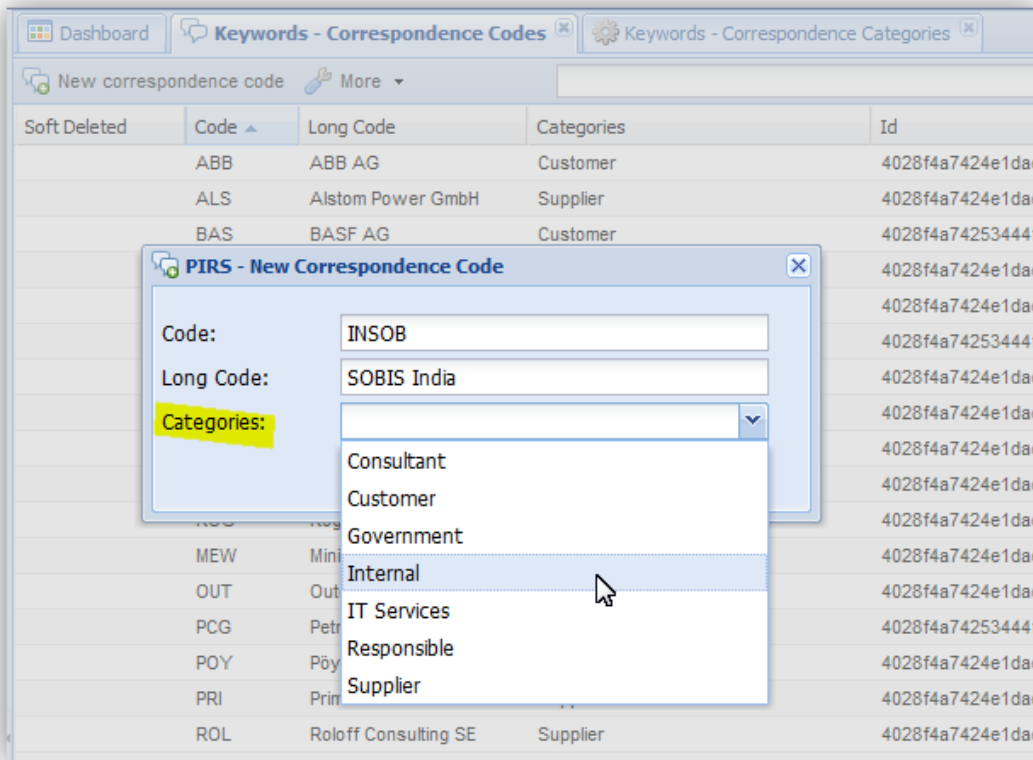


A correspondence code keyword consists of:

1. a short code which is used to create a reference number
2. a long code which should give an indication of the meaning or an explanation of the short code

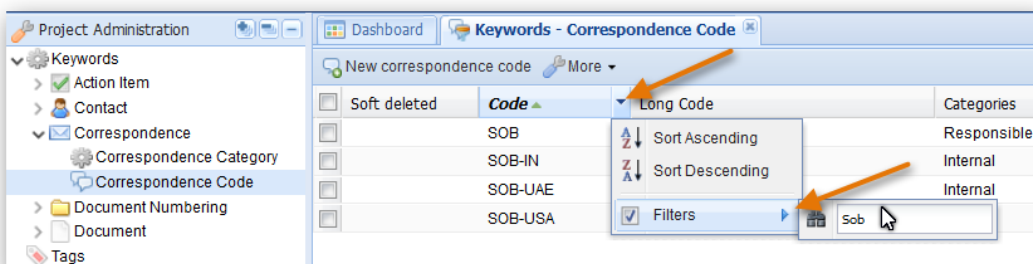
- the correspondence category picked from the list of keywords you have defined within the "Correspondence Categories"

All three values need to be entered when creating a new correspondence code keyword. In case there are no values listed within the Categories you first need to add at least one correspondence category prior to adding correspondence codes.



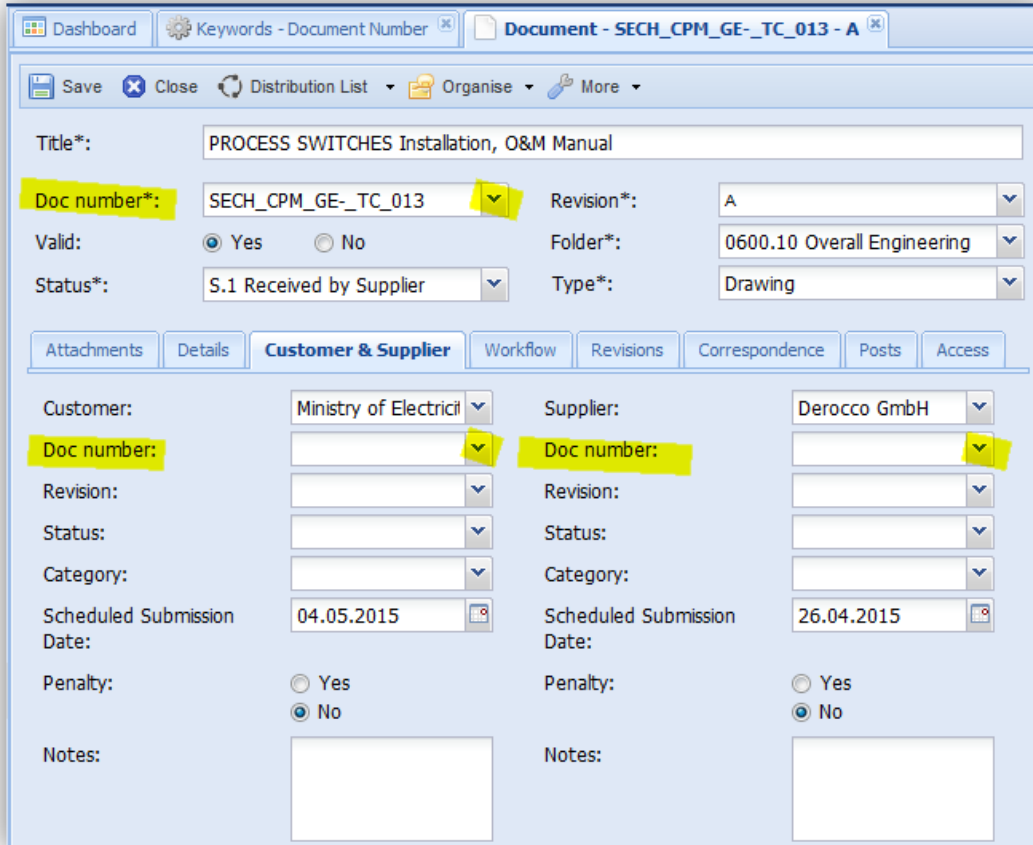
9.1.5.1.1 Use Filter

In order to help you organize and manage your Correspondence Codes, PIRS offer the option to filter existing entries e.g. the Code tab. Simply expand the options by first hovering your cursor over the tab, then select filters and start typing the Code you are looking for. PIRS will begin to filter the content after the first letter you enter.



9.1.6 Document Numbering Keywords

With the PIRS document numbering wizard users are able to easily generate document numbers for internal numbering as well as for customer and supplier numbers.



The screenshot shows the 'Document - SECH_CPM_GE_TC_013 - A' window. The main form has the following fields:

- Title*: PROCESS SWITCHES Installation, O&M Manual
- Doc number*: SECH_CPM_GE_TC_013
- Revision*: A
- Valid: Yes No
- Status*: S.1 Received by Supplier
- Folder*: 0600.10 Overall Engineering
- Type*: Drawing

The 'Customer & Supplier' tab is active, showing the following fields:

Customer	Supplier
Customer: Ministry of Electricit	Supplier: Derocco GmbH
Doc number:	Doc number:
Revision:	Revision:
Status:	Status:
Category:	Category:
Scheduled Submission Date: 04.05.2015	Scheduled Submission Date: 26.04.2015
Penalty: <input type="radio"/> Yes <input checked="" type="radio"/> No	Penalty: <input type="radio"/> Yes <input checked="" type="radio"/> No
Notes:	Notes:

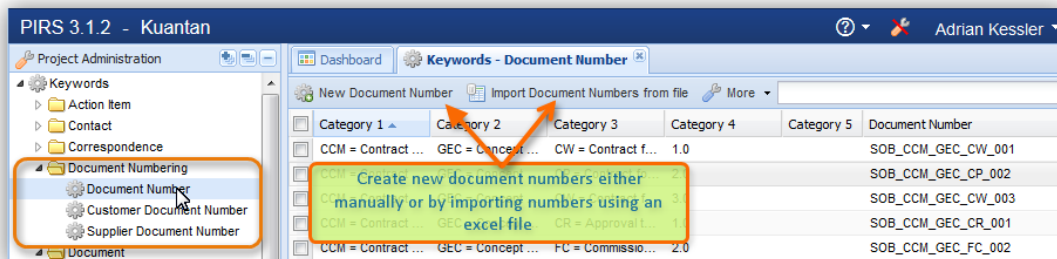
In order to allow your team to use the document numbering wizard you need to first activate the wizard within your project settings and decide which type you would like to use (regard chapter [Project Settings](#)).

You have for example the option to allow users to

1. enter a number manually,
2. only pick a number with the document wizard
3. Pick a number using the wizard and adjust or enter a number manually
4. have the number computed based on mandatory meta data entered within the document by the user. (If you would like to have the number generated automatically based on entered values, please contact your service desk to assist with the initial set up.)

In addition, you can also define the manor in which a number is created (e.g. whether there are fixed numbers to choose from or if it is generated based on categories the user selects).

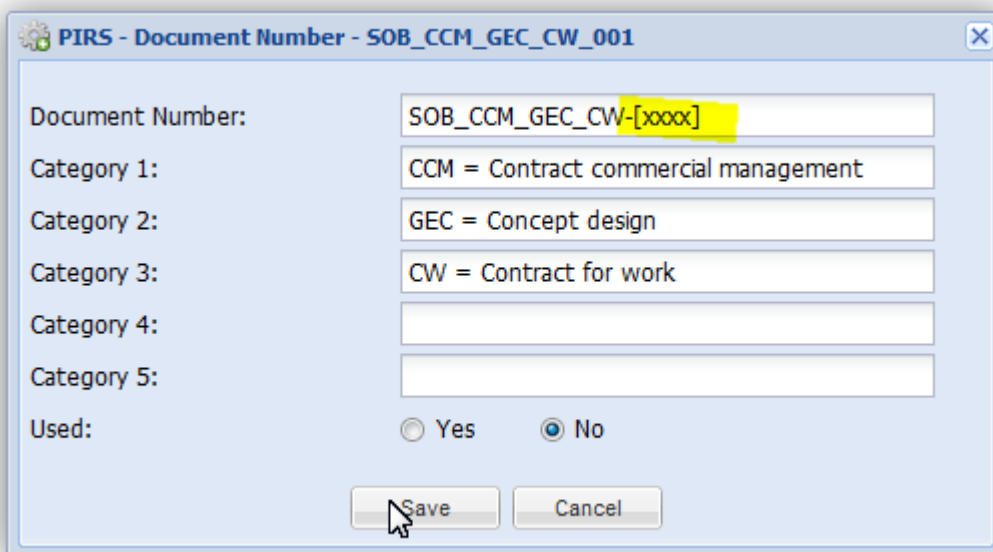
Once the numbering wizard is active and the type is defined within the settings a list of numbers need to be entered either manually or by importing them with an excel file. You can create or import numbers for internal document numbering as well as for maintaining the document numbers of your customer and suppliers. The content display and management of all document numbering keywords is identical for all three options.



9.1.6.1 Add new document numbers manually

Click the button "New Document Number" and a new box will appear allowing you to enter up to five different categories as well as the complete document number.

Each number keyword needs to be unique and you need to enter at value for at least the first category in order to save a new number keyword.



In case you would like to have a sequential number being calculated automatically, enter a placeholder. Regard the highlighted section in the above screenshot. The maximum count is indicated by the number of x you encase with square brackets e.g. [xxx] means that your number count will start with '001' and will be counted up to 999.

The placeholder for the sequential number can be added at the beginning, the end or in the middle of the document number.

Please keep in mind that should you like to use placeholders, this option needs to be selected within the project settings.

9.1.6.2 Add new document numbers via excel import

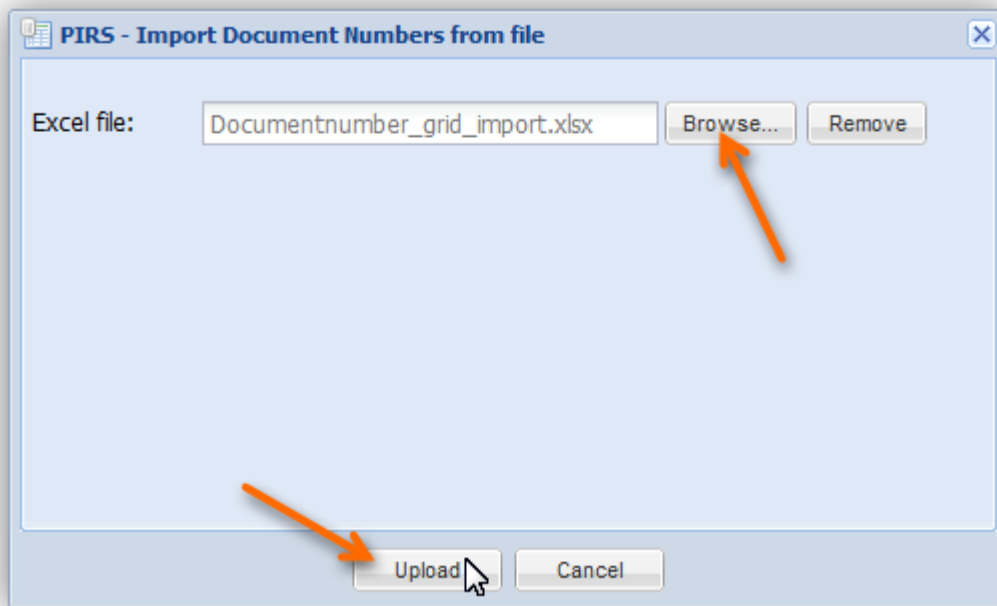
To import a list of numbers using an excel file the imported file needs to contain a value for at least the first category and can not have two identical numbers (Compare with screenshot below).

	A	B	C	D	E	F
	Category 1	Category 2	Category 3	Category 4	Category 5	Doc number
1	I - Lists	Process control engineering	I324 Installation detail dwg list			SOB-I-I324-[XXXX]
2	I - Lists	Process control engineering	I325 Assembly list			SOB-I-I325-[XXXX]
3	I - Lists	Process control engineering	I444 Cable list			SOB-I-I444-[XXXX]
4	I - Lists	Process control engineering	I451 Name plate list			SOB-I-I451-[XXXX]
5	I - Lists	Automation system engineering	J126 Equipment list			SOB-I-J126-[XXXX]
6	I - Lists	Mechanical engineering	M130 Mechanical list			SOB-I-M130-[XXXX]
7	I - Lists	Process engineering	P126 Equipment list			SOB-I-P126-[XXXX]
8	I - Lists	Process engineering	P127 Pump list			SOB-I-P127-[XXXX]
9	I - Lists	Process engineering	P128 Tank list			SOB-I-P128-[XXXX]
10	I - Lists	Piping engineering	T402 List of standard supports			SOB-I-T402-[XXXX]
11	I - Lists	Piping engineering	T403 Support material summary list			SOB-I-T403-[XXXX]
12	I - Lists	Piping engineering	T404 Support spring list			SOB-I-T404-[XXXX]
13	I - Lists	HPAC-design	V124 List of HVAC equipment			SOB-I-V124-[XXXX]
14	J - Expediting/inspection reports					SOB-J-A000-[XXXX]
15	K - Vendor documents	AVEN Common				SOB-K-AVEN-[XXXX]
16	K - Vendor documents	CVEN Civil engineering				SOB-K-CVEN-[XXXX]
17	K - Vendor documents	EVEN Electrical engineering				SOB-K-EVEN-[XXXX]
18	K - Vendor documents	IVEN Process control engineering				SOB-K-IVEN-[XXXX]
19	K - Vendor documents	LVEN Architectural design				SOB-K-LVEN-[XXXX]
20	K - Vendor documents	MVEN Mechanical engineering				SOB-K-MVEN-[XXXX]
21	K - Vendor documents	PVEN Process engineering				SOB-K-PVEN-[XXXX]
22	K - Vendor documents	TVEN Piping engineering				SOB-K-TVEN-[XXXX]
23	K - Vendor documents	VVEN HPAC-design				SOB-K-VVEN-[XXXX]
24	L - Tech. instructions, standards					SOB-L-A000-[XXXX]
25	M - Cost estimates, cost control					SOB-M-A000-[XXXX]
26	N - Site and erection reports					SOB-N-A000-[XXXX]
27	O - Start-up and operations	P420 Process description				SOB-O-P420-[XXXX]
28	O - Start-up and operations	P430 Instruction manual				SOB-O-P430-[XXXX]

Download the excel file attached below and enter all required numbers and categories. Be sure to set the value for the column "Used" to "no".

[Documentnumber_grid_import.xlsx](#)

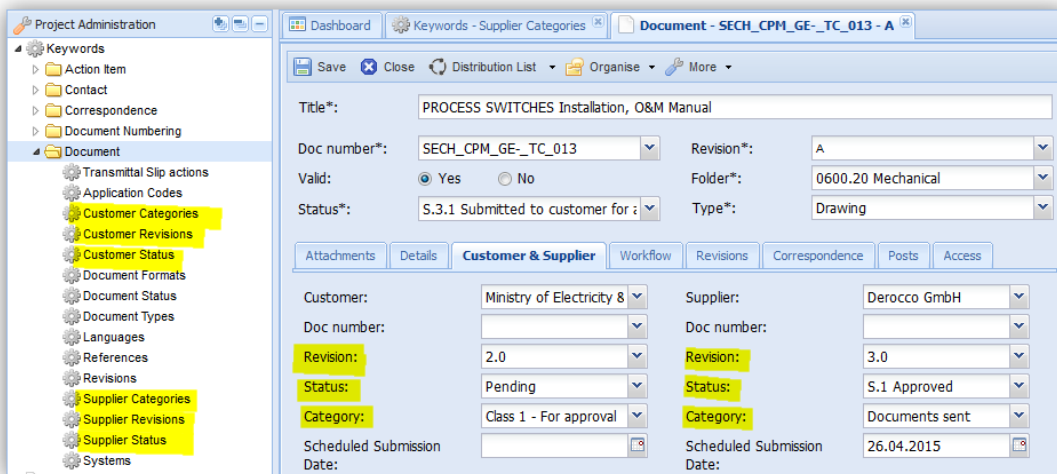
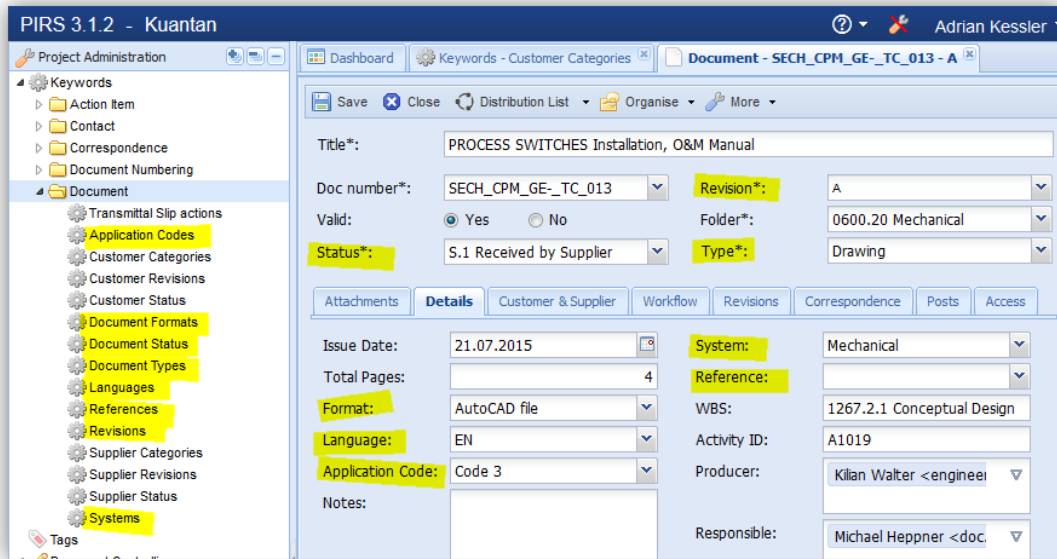
Next click the button "Import Document Numbers from file" and insert your fill out excel file from your local client by clicking the "Browse" button.



Click "Upload" to start the import.

9.1.7 Document Keywords

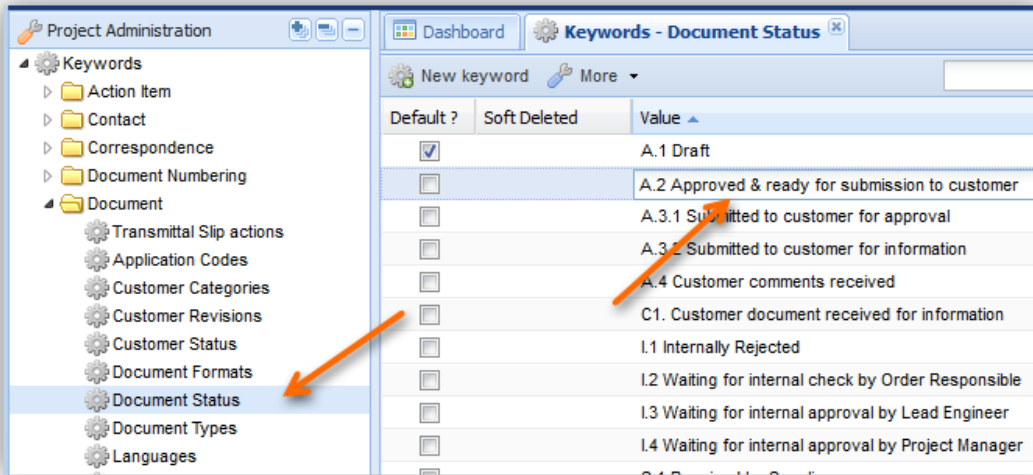
Document keywords allow you to manage meta information of your technical documents as well as the related transmittal slips. Following screenshots display all keywords relating to meta information within a PIRS document highlighting the respective fields.



The keyword value for "Transmittal Slip actions" relates to a value users can select when sending technical document with a PIRS transmittal slip. The transmittal slip action informs the recipient about the requested action that is expected from him e.g. "For Approval" or "For Review".

For each field you need to define at least one keyword.

In order to change keyword values or create new keywords simply select the respective keyword list within the administration navigation (e.g. Document Status) and proceed as described in chapter [Manage Project Keywords](#).



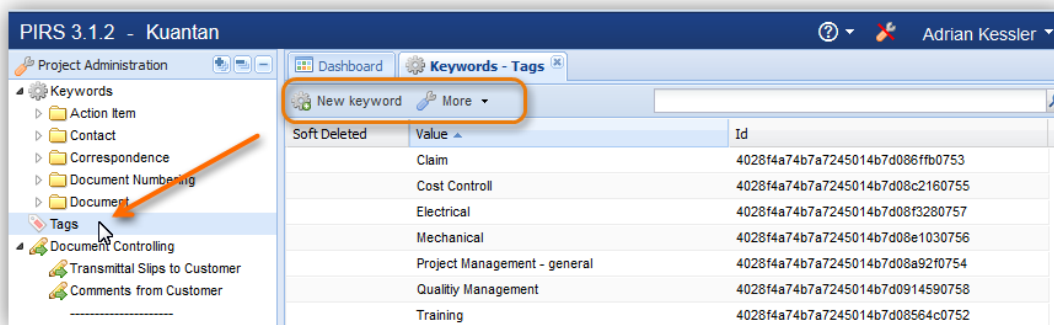
9.1.8 Manage Project Tags

Tags are a special form of keywords that PIRS users can optionally assign to correspondence and documents in order to provide additional information.

They offer a useful way to group related PIRS correspondence and/or documents together and to quickly give an insight into their topics.

Tags also make it easier for PIRS users to find content they are looking for because they can specifically search for tags or filter grid content using tags as their filter criteria.

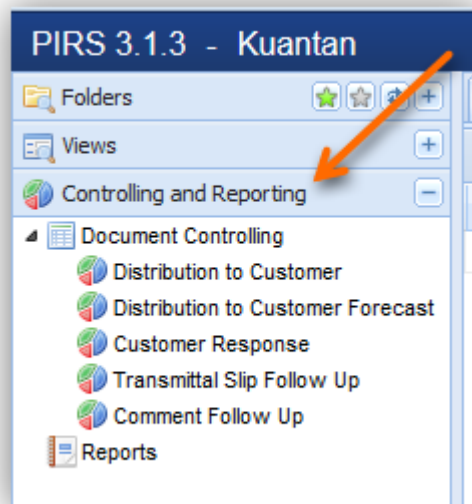
In order to add a new tag keyword and change or delete existing project tags select the "Tag" view within your PIRS project administration.



Then use the "New keyword" and "More" buttons to adjust the content; proceed as described in chapter [Manage Project Keywords](#).

9.2 Administration of Document Controlling

Within the area of "Document Controlling" you are able to manage the settings and the type of data that is used for your controlling area. In addition you also manage the data used for reports within your "Reports" area as well as the grid reports users can generate themselves.



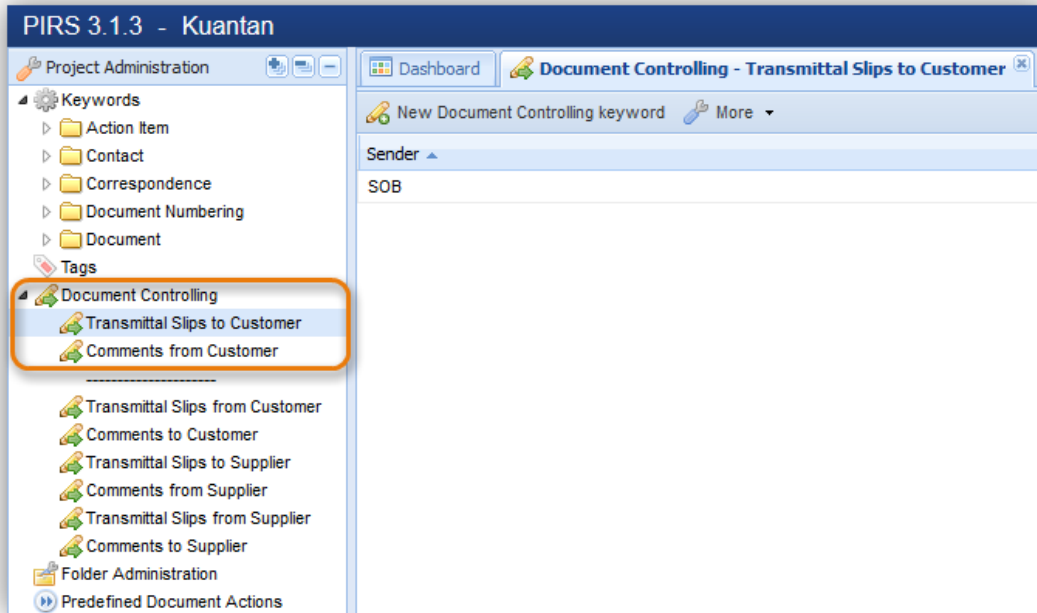
9.2.1 Management of data for your Controlling Area

The "Controlling & Reporting" within your PIRS project navigation offers five different standard views:

- The first view shows the distribution to the customer of this project. It illustrates with how many documents you are in delay or on time and how many documents have been sent on time or with delay
- The second view gives you a forecast of documents that need to be sent to the customer within a specific time frame
- The third view offers an overview of your customer responses and shows if responses have been received on time, with delay or are still outstanding
- The fourth and fifth view allow users to follow up on all sent and received transmittal slips and comments giving a quick insight into which party sent/received transmittals and comments.

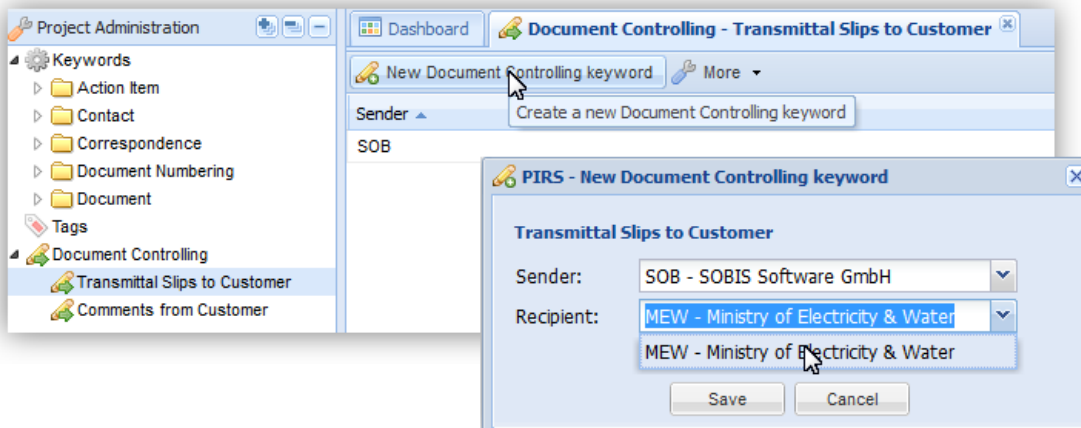
The statistical surveys generated for the controlling views are based on document related correspondence stored and generated in PIRS. This means that the surveys use data collected from sent and received transmittal slips and comments.

Which transmittal slips and comments PIRS will be using as a base for the controlling views needs to be defined within the first two administration views of the "Document Controlling".



In order to define which transmittals and which comments are considered for the document controlling you need to select keywords for all possible correspondence code combinations. Should you have more than one internal correspondence code e.g. to reflect different departments and should you also have multiple correspondence codes for your customer e.g. to reflect different locations, you need to ensure that each possible combination will be included in a new keyword.

To create a new keyword first click "New Document Controlling keyword" then select the correct sender and recipient code from your list of correspondence codes.



Please, ensure to create at least one keyword for "Transmittals Slips to Customer" as well as for "Comments from Customer". Otherwise there will be no information available within your project controlling views.

9.2.2 Management of data for project specific reports and grid reports

Beside the views of the PIRS controlling area users have two more options to gather and export data:

1. Reports within the report area
2. Grid reports

Reports within the report area are generated by SOBIS based on your requests. Should you for example need a standard report that you can run once a month, your service desk team will make this specific report available for you. A standard report could for example contain a list of all documents sent to the customer or received by your suppliers including certain meta information such as sent dates, status or delays. If you like to learn more about your option to use standard reports please contact your service desk or your responsible contact at SOBIS.

Grid reports can be generated by every PIRS user. It is an option presented within the "More" Button (regard chapter [Export grid to MS Excel](#)).

When an Excel export is generated all meta information of the selected document(s) is exported including the information about the sent and received transmittal slips and comments.

In order to export the data correctly, meaning that suppliers are identified as suppliers and it is clear when a transmittal was sent from or to a supplier as well as the customer, keywords need to be defined and maintained for all "Document Controlling" views within your "Project Administration".

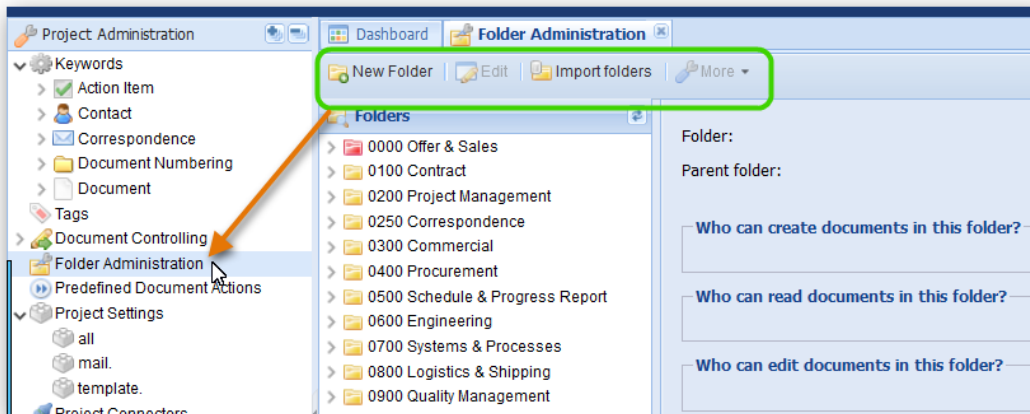
The creation process of new document controlling keywords is the same for each document controlling view (regard explanation above).

Sender	Recipient
KMG	SOB
KOG	SOB
ROL	SOB
SAL	SOB

9.3 Folder Administration

As part of the PIRS project set up using the project import sheet, the folder structure is set up based on your project requirements.

In case you need to modify or adjust this original folder structure or change access rights to folders, select the "Folder Administration" within your Project Administration area.

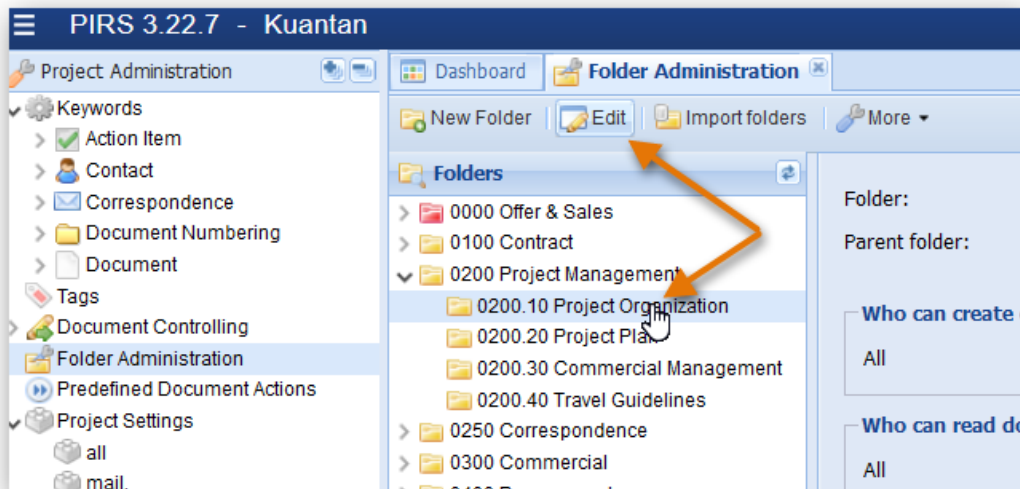


There you have the option to:

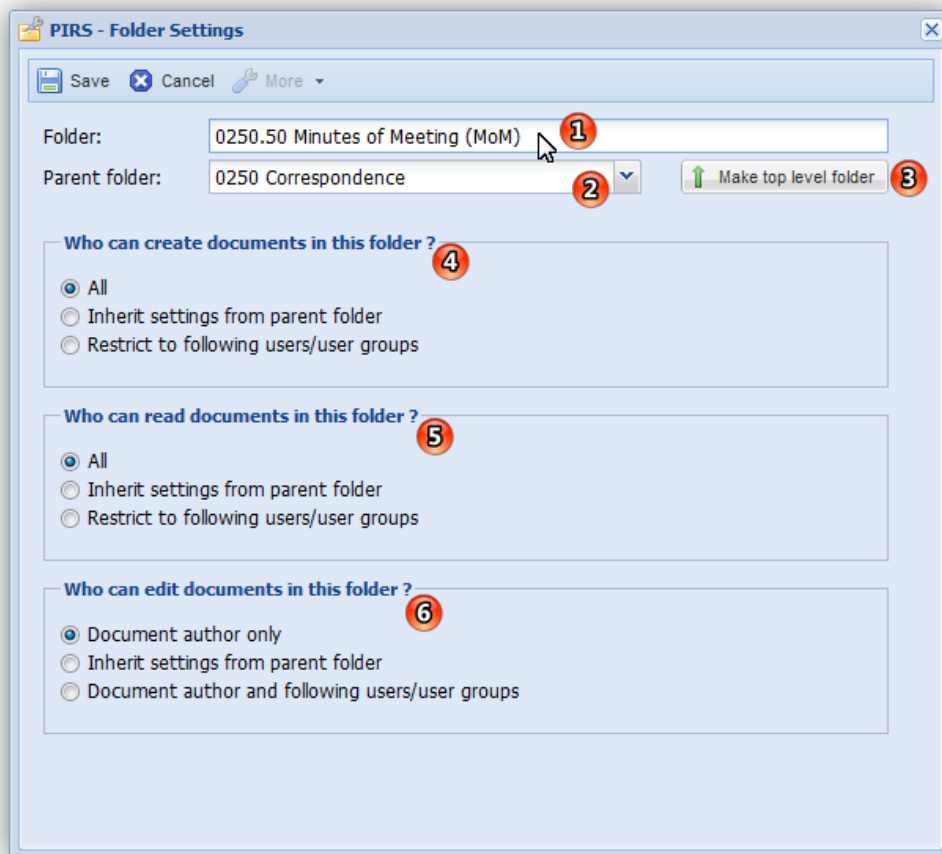
- Rename existing folders
- Delete existing folders
- Relocate existing folders
- Manage access rights to folders
- Create new folders manually
- Create new folders via Excel import

9.3.1 Rename, relocate and manage access rights to existing folders

To rename an existing folder or sub-folder, either double click the folder or first select it then click the "Edit" button.



A new window will open allowing you to edit the specific folder settings. Following screenshot with highlighted numbers and the listed explanations illustrate the editing options:



1. Within the first text field of the editing window you can modify the folder name. Simply click in the text box and change the value.
2. The second text box shows the parent folder of this folder. You can select another parent folder by clicking the small downward pointing arrow.

3. In case the folder is supposed to be on the parent folder level, click the button beside the second text box.

4. to 6. To modify user access rights to a folder you can adjust three different access settings: creator, reader and editor.

By default the access rights of each folder will equal the general access rights of a user. So if a user has creator access to a project, he has automatically creator access to all folders unless the folder set up has been modified to regulate the access in a different way.

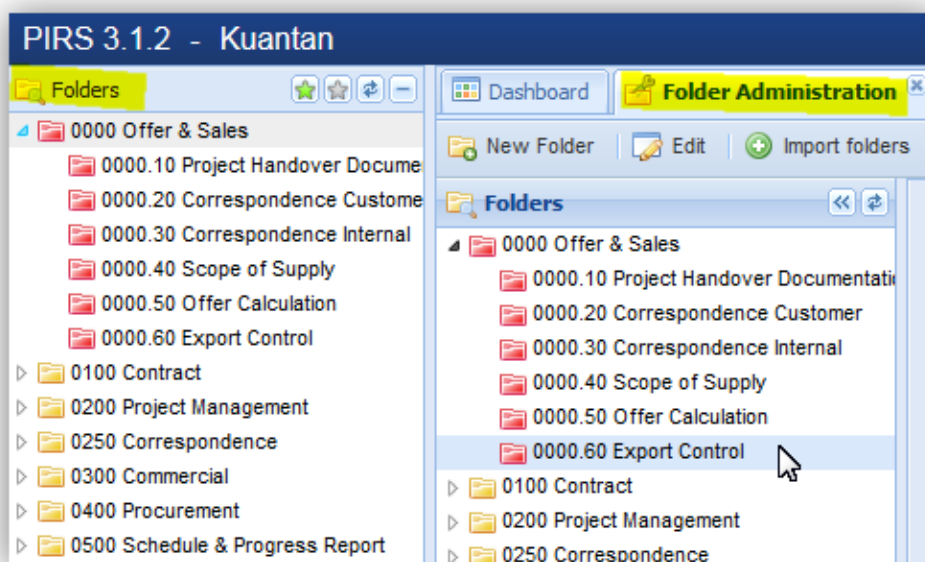
To change the access rights for each setting (indicated by number 4 - 6 in the screenshot) you can choose to inherit the settings from the parent folder if there is one. Keep in mind however that if you choose to inherit setting for one access level, all other access levels need to be inherit as well.

Furthermore, you can restrict the specific access to certain users and/or user groups.

Users/user groups will be offered in a selection based on the address book and project user groups as soon as you select the option "Restrict to following users/user groups".

If you restrict all three access levels to certain users, the folder will not be visible for those users that are not listed in any of the access lists. User that have access to restricted / confidential folders will see these folders marked in red in their navigation.

The folders are also marked within the folder administration.



9.3.2 Create new folder(s)

There are two ways you can create new folders.

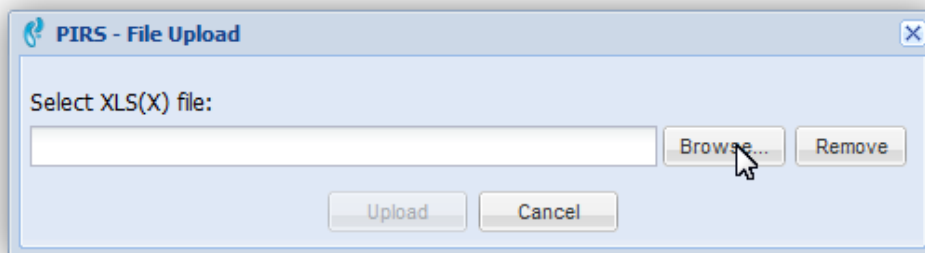
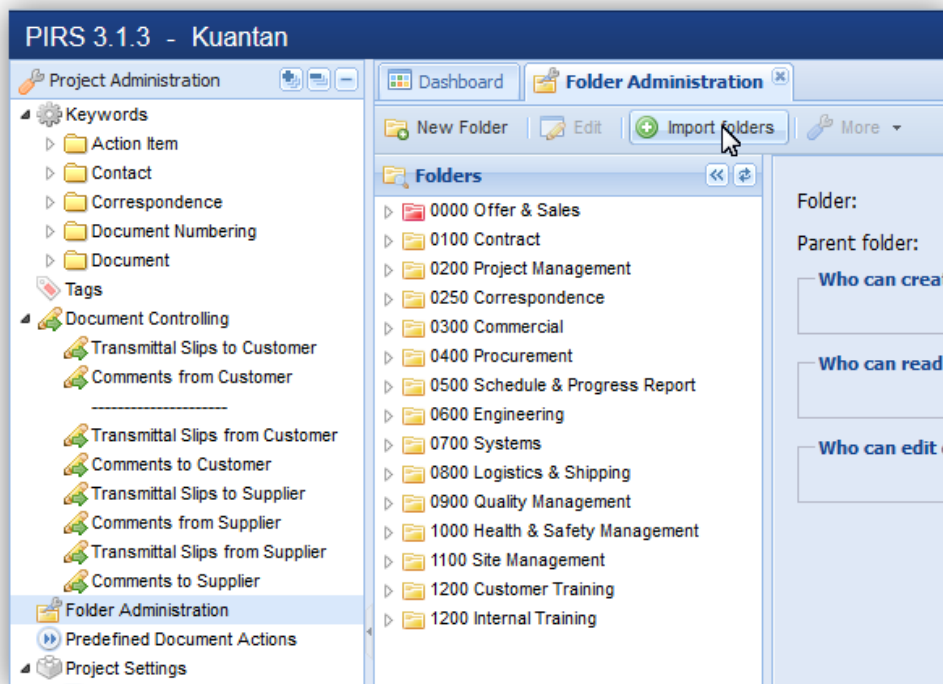
1. Create a new folder using the "New Folder" button:

After clicking the button the folder settings window will open allowing you to enter a folder name, select a parent folder if required and also set the access rights.

2. Create new folders based on an excel file:

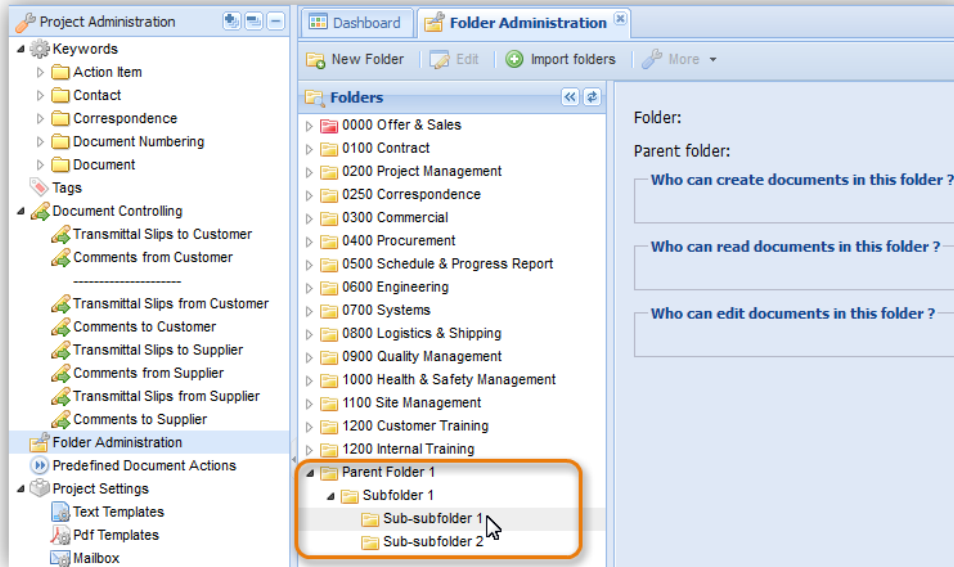
First create your folder import sheet by entering information for your new folder(s) within the table of the excel sheet provided within the [template](#) chapter. The file has an exemplary folder structure which will give you an orientation on how you need to enter and set up your folder structure for the import to be successful.

Next click the "Import Folders" button.



A message box will pop up allowing you to select the prepared excel file from your local client or server.

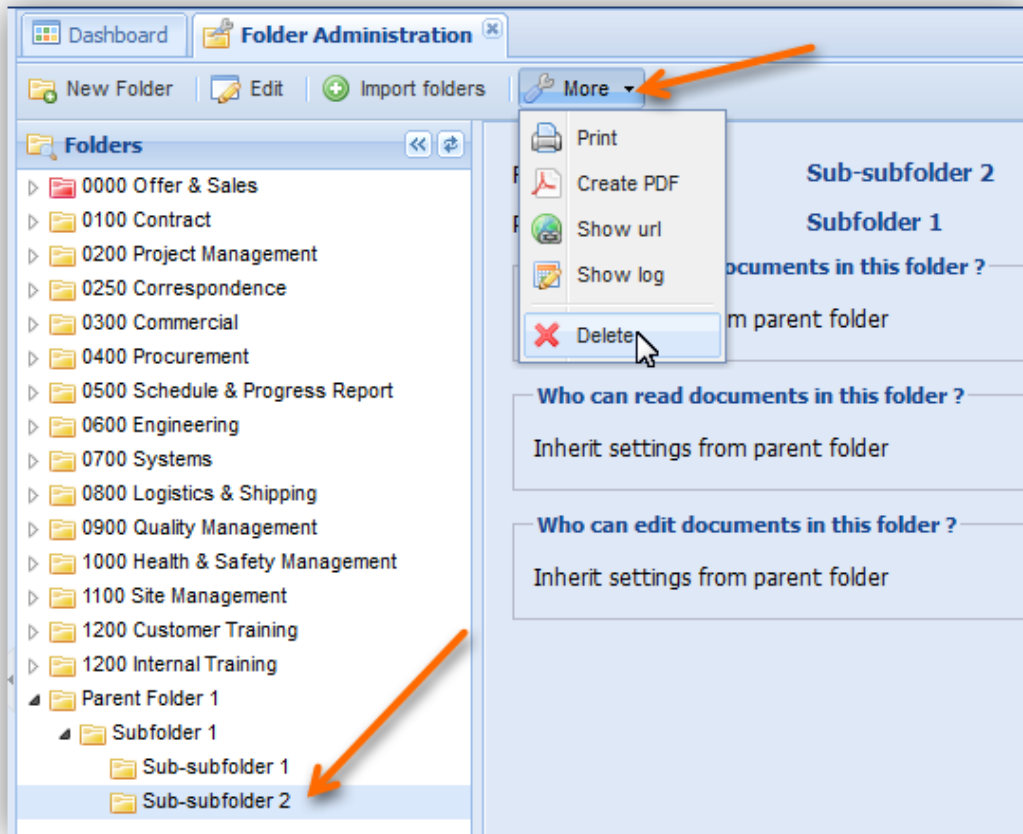
After you have selected the import sheet and clicked "Upload", PIRS will import all new folders based on the information provided in your excel file and include all new folders within your existing folder structure.



In order to adjust the location, folder names or access rights proceed as described above.

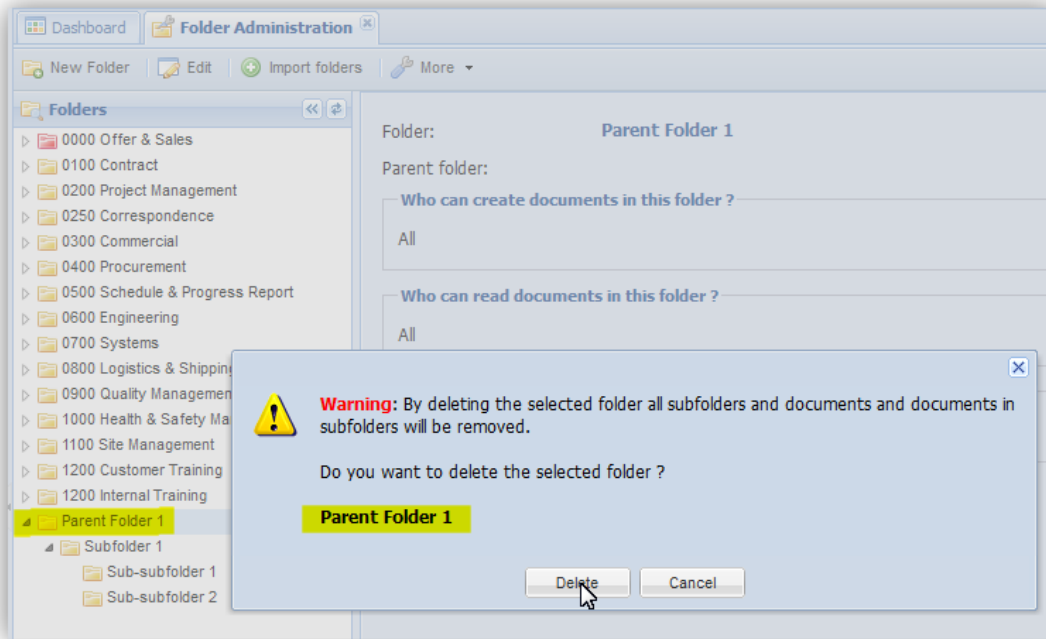
9.3.3 Delete folder(s)

In order to delete a folder first mark the folder in question then click the "More" button and select "Delete" as illustrated in the following screenshot.



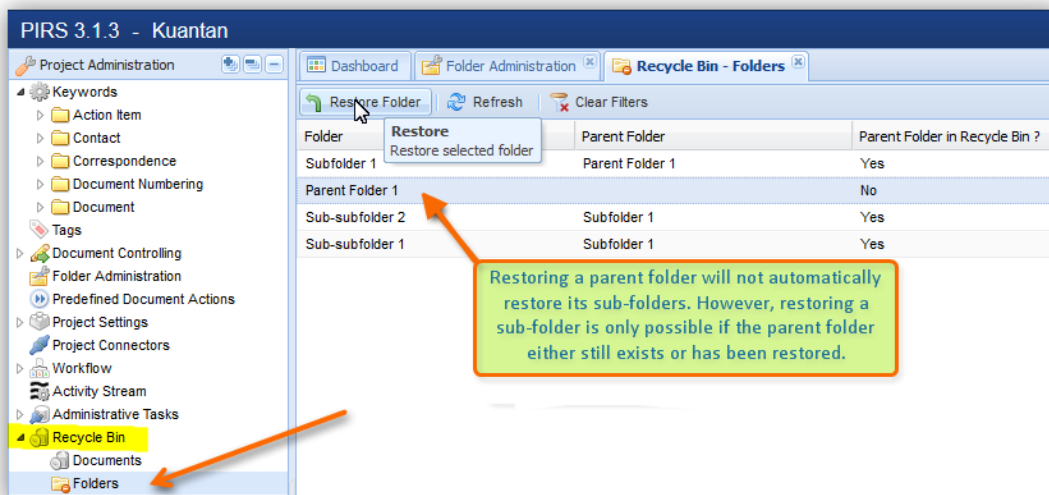
A message box will ask you if you are sure that you want to delete the selected folder.

Please be aware that by deleting a folder you automatically delete all correspondence and documents stored within this folder. In case you delete a parent folder the message box will also point out that by deleting a parent folder you automatically delete all sub-folders. So deleting a parent folder will also delete the sub-folders and the documents and correspondence stored within the parent as well as the sub-folders.



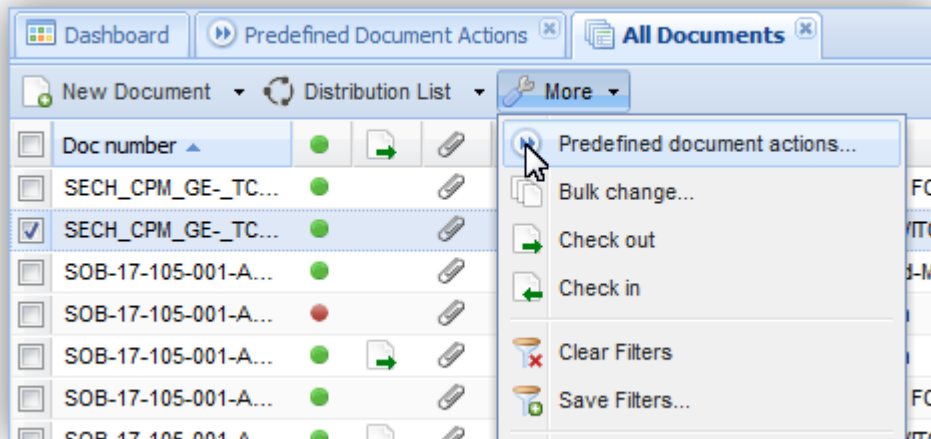
Should you have deleted a folder precipitately and need to restore it, you are able to do so at the folder section of your Project Administration Recycle Bin.

Select the recycle bin within your navigation area and click "Folders". The content area will display a list of all deleted folders and indicate whether or not the respective folder had a parent folder that was also deleted. A sub-folder can only be restored if the parent folder has been restored or wasn't deleted in the first place.



In order to restore a folder first mark the folder than click the "Restore Folder" button.

9.4 Manage Predefined Document Actions



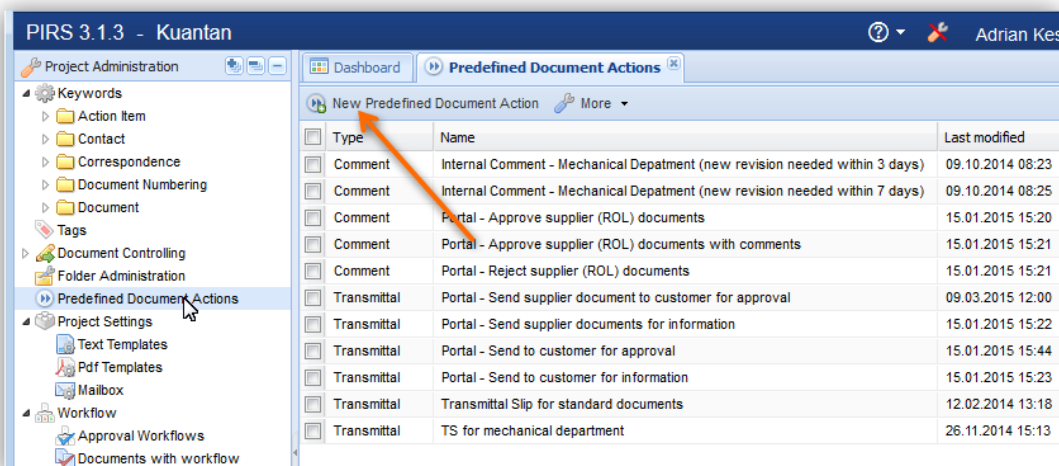
Predefined Document Actions (PDA) are a feature offered to PIRS users in order to quickly create transmittal slips, comments, letters, library items or e-mails based on project templates.

A user who wants to use a template to create a correspondence, simply selects "Predefined Document Actions" offered under the "More" button.

The templates are created and maintained within the "Predefined Document Actions" within your Project Administration.

9.4.1 Create new PDA

In order to create a new PDA enter the "Predefined Document Actions" within your Project Administration and click "New Predefined Document Action".



Next a new PIRS tab will open with an input mask. There are only two mandatory fields that you need to enter a value for: the Name and the Type.

By default a new PDA input mask will be opened with the type selection displaying "Transmittal Slip". Pick the correspondence type you would like to create a template for and manually enter a name for the new template. Next you have the option to enter as much or as little information as you find necessary.

For the recipients you can either enter recipient mail addresses manually or select them from the project address book. Please keep in mind that there can be only one recipient entered within the "To" field.

In addition you can also pre-select the subject, the reference number and the folder in which the correspondence should be stored in.

As indicated by the following screenshot of a Transmittal Slip PDA, you are able to also define the transmittal slip action and the time frame for the required response which you are communicating to the recipient(s).

Also, you are able to already pre-select the type of files that should be selected with this template. So in case you like to create a transmittal slip template with which only PDF files are sent to the recipient(s) enter "pdf" in the value field of "Attachments". Multiple values need to be separated with a comma (e.g. pdf, dwg). In case you would like to pre-select all file types enter the star symbol (*).

Besides defining the types of file formats that should be attached, you are also able to define files to be attached based on regular expressions. This means that you could e.g. define that all files that contain a certain phrase within their file name, should be attached. So for example, you would like to include all pdf files that indicate that they were annotated you could enter the command `"*.annot.*\pdf"`.

9.4.2 Creating other PDA Types

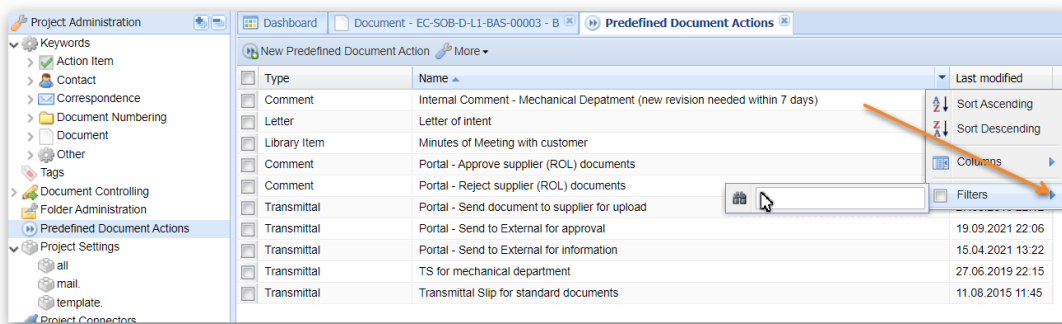
The input mask will slightly change when you create a PDA for any other correspondence. For all PDA types directly linked to one or multiple documents (TS & Comment) you can select if value fields within your PIRS documents for Document Status, Customer Status and Supplier Status should be adjusted.

Click "Save" in order to save your new template.

In order to edit an existing PDA double click the entry within the grid and the input mask will open in a new PIRS tab. You can delete a PDA by first selecting it within the grid, then use the delete option offered under the "More" button.

9.4.3 Use Filters to find specific PDA

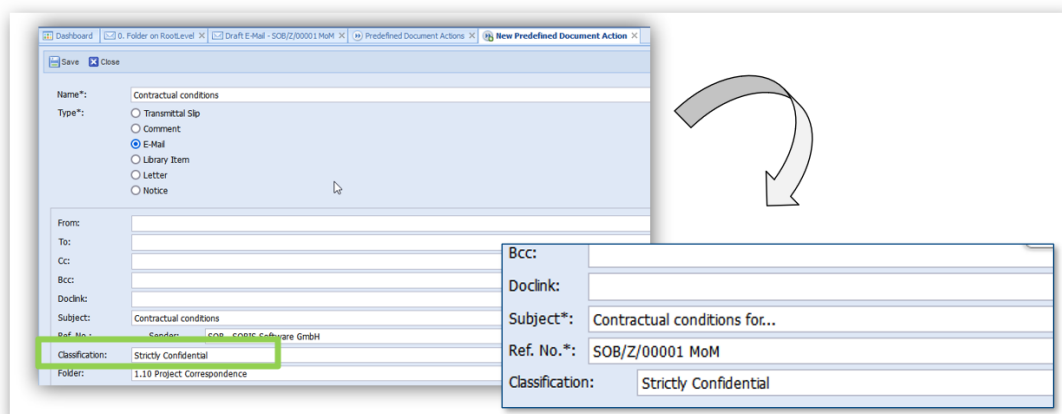
Within the PDA grid you are also able to sort all entries or use filters to look for specific entries.



9.4.4 Optional Features

Optionally you can add an additional field within the header information of a correspondence in order to categorize the correspondence (e.g. invoice, notification, claim notice...).

Once this feature is activated you are also able to edit the predefined settings within your PDA.



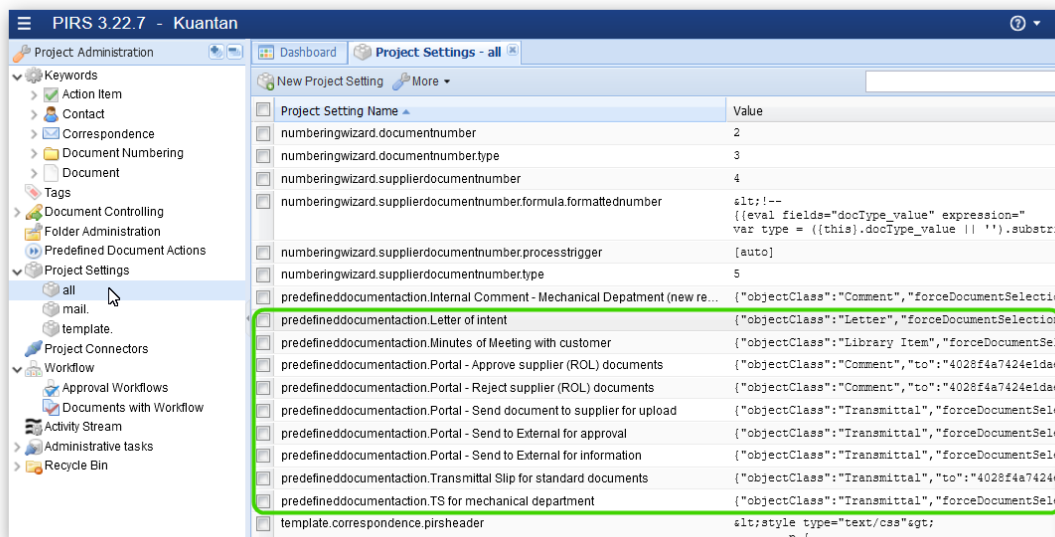
9.5 Project Settings

For each PIRS environment several global settings define general standards used for all PIRS projects. For some of these standards you are able to set different values.

You can, for example, manage project specific text templates (e.g. to include a specific standard for minutes of meetings or certain tables used in various documents or correspondence) and print templates (e.g. for your project letter, transmittal slip or browser printer). Furthermore you are able to manage your project mail setting.

To open your project settings and get a general overview of all existing entries open the "Project Administration" and select "Project Settings". To see all existing project setting open the "all" section.

If this area is empty, there have not been any project specific settings created yet, and your project is falling back to the global settings.



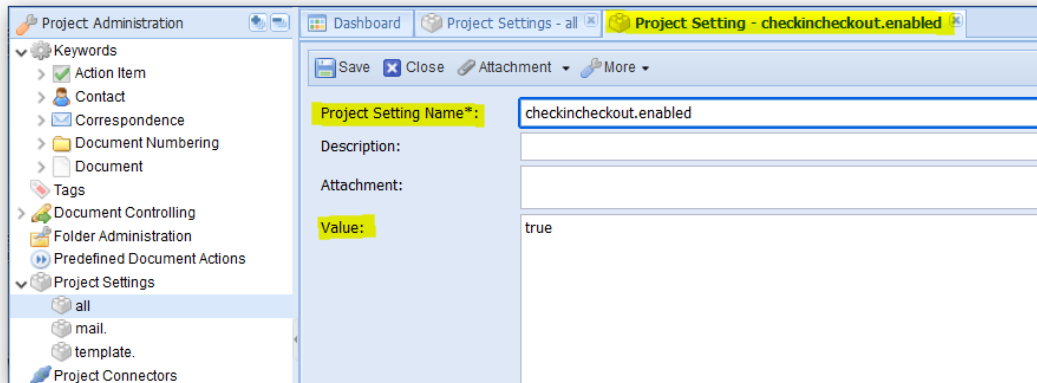
As illustrated by the screenshot above, PIRS generates a new project setting for each "Predefined Document Action" (PDA). To edit or create a PDA, please use the standard input mask offered within the view "Predefined Document Actions" of your "Project Administration".

In order to specifically display existing text, pdf or print templates managed in your project settings open the section "Templates".

The section "mail" listed under "Project Settings" enables you to manage your project mailbox settings.

There are several general settings influencing e.g. whether or not within your project users can check-in and check-out documents or how your document numbering wizards will be displayed and which format will be used to generate the document numbers.

To open an existing project setting double click it. In the screenshot below you see the setting that defines whether or not document check-in & check-out is activated within your project.

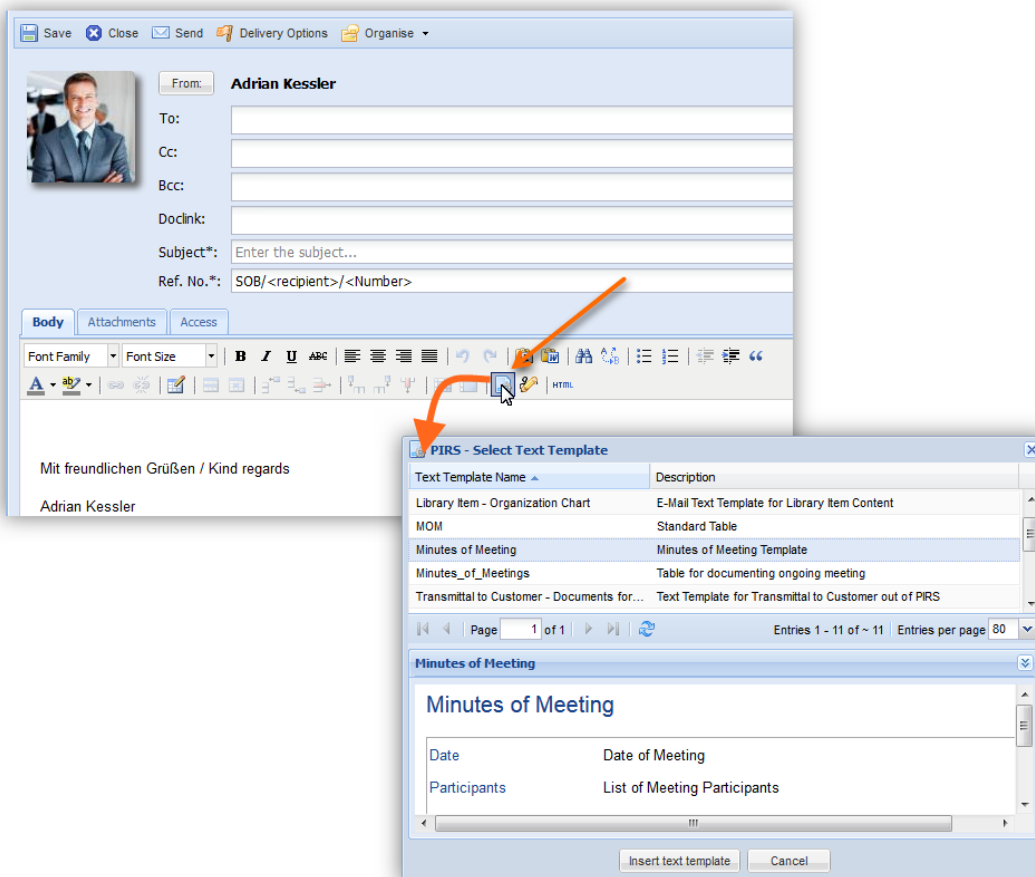


A project setting needs to have a specific name in order to influence the required PIRS parameters. The value field defines how the setting will influence your PIRS parameters.

To learn more about general document settings and which parameters you can influence within your project settings, please contact your service desk or your responsible contact at SOBIS.

9.5.1 Create or edit Text Templates

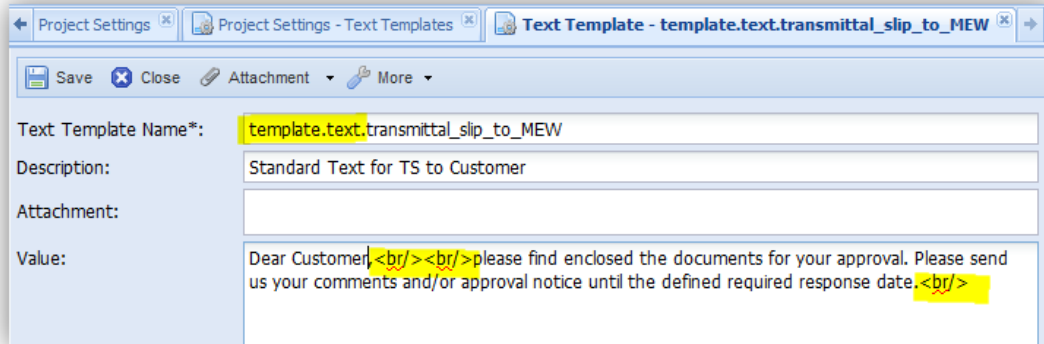
Text Templates are available for PIRS users within all text fields of PIRS entries. Below you see an example for inserting a Text Template in an email body field.



In order to edit an existing Text Template double click the entry within your content grid. Should you like to create a new Text Template, click the button "New Project Setting". An empty new project setting will open in a new tab in PIRS.

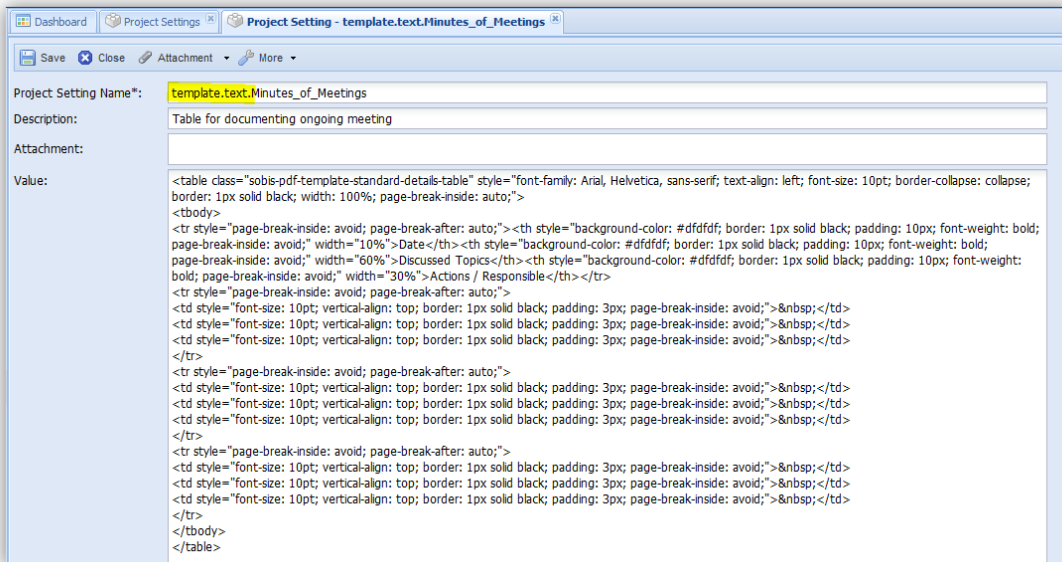
To indicate that this new text template, you need to enter the prefix "template.text." in front of the title of the new template. Within the description field you can optionally enter an explanation to the template, so users will know in which situation this template is to be used.

Next enter your text into the value field.



As indicated by the highlighted HTML code in the value field of the screenshot above, the value inserted into a text template must be entered in HTML format.

Below you see a more complex example of a text template created in HTML that will create a standard table for meetings.



If you like to learn more on how to create your own text templates contact your service desk or your responsible contact at SOBIS.

9.5.2 PDF Templates

PDF templates are used to create PDF files based on a PIRS entries in order for example to store it locally or print it. For each correspondence and document PIRS offers at least one global PDF Template. These templates are created and maintained by your service desk.

The most important PDF Templates are those used for the creation of your Transmittal Slips and your project Letter. Your responsible contact at SOBIS creates these templates for you based on your requirements, either as general or project based templates.

In order to edit a PDF Template double click the respective project setting within your content grid.

Please contact your service desk or responsible contact at SOBIS, should you need to create a new PDF Template.

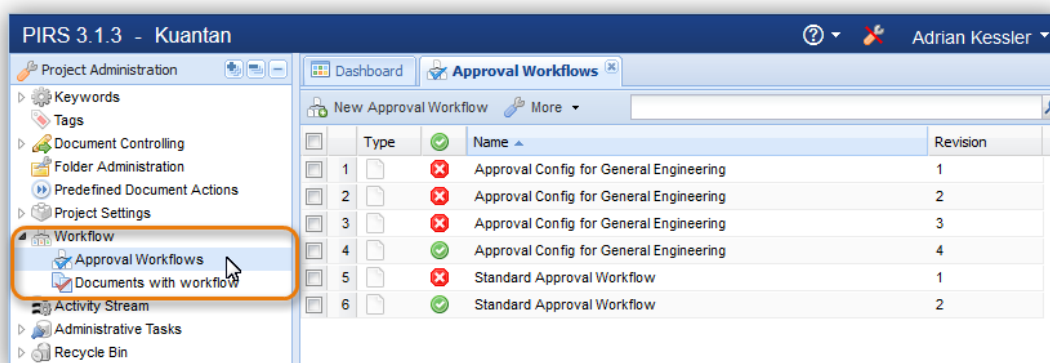
9.5.3 Project Mailbox Setting

In case a project mailbox has been set up for your project, the area "mail" will allow you to manage its settings.

In order to learn more about the setup of your project mailbox, please contact your service desk or your responsible contact at SOBIS.

9.6 Approval Workflows

If approval workflows are activated for your project, you will be able to create new workflows, edit existing workflows and manage the different workflow revisions within the "Workflow" section of your "Project Administration". In order to learn more about how to manage your workflows contact your service desk or your responsible contact person.



In case you don't have an approval workflow section within your "Project Administration", it has not been activated for your project. Should you like to use this feature, please get in touch with your service desk or your responsible contact within SOBIS.

9.6.1 Sequential / Parallel Workflow Configurations

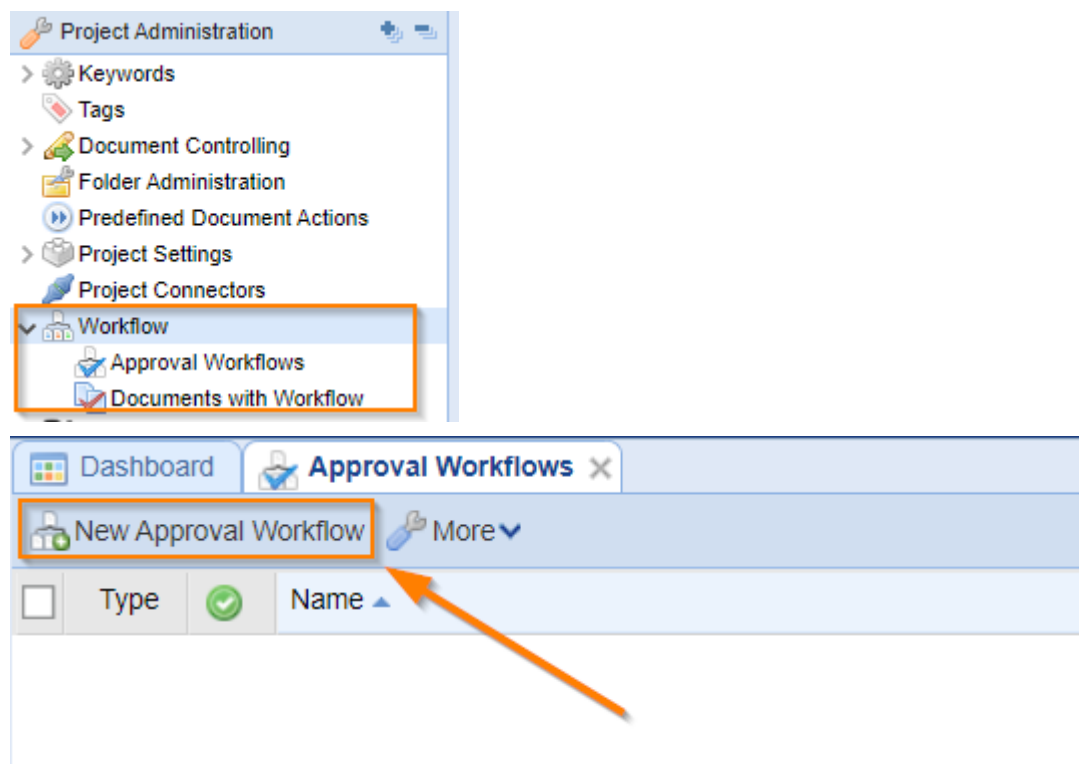
Approval Workflows are a powerful solution to simplify and streamline document approval processes.

With this feature, you can configure both sequential and parallel steps, ensuring Documents or Events pass through the right hands efficiently.

The Workflow configuration settings can be found in the Project Administration (Note: restricted access - for authorized users only).

Here new Approval Workflows can be created. An overview grid displaying the type, validity, name and revision number can be found and existing Workflows can be managed and revised.

Under "Documents with Workflow" all Meta Documents are displayed, which are linked to Workflows.



9.6.1.1 Approval Process Definition

The Approval Workflows are structured by single Approval Configuration Items. The order is displayed in column "Step".

Sequential Workflow Items are on the highest order (0→1→2→ ...), while Parallel Workflow Items are subordinated (1.1↔1.2↔1.3↔...).

By arranging the single Approval items, dependencies and workflows can be created which fit to the relevant business process.

The user-friendly interface ensures a seamless experience for users, facilitating smooth collaboration and timely document approvals.

Each Approval Item can be configured to define:

- Choose Workflow responsible users / user groups
- Trigger changes of the Document or Event Status (or other fields)
- Set Due Dates for each Step to maintain accountability
- Set acceptance and rejection actions
- Initiate automated notifications to all relevant team members

Step			Function / Group	Responsible	Days to complete
0	⌵	✗	Start Workflow		
1	⌵ ⌴	✗	Review		5
1.1	⌵ ⌴	✗	└ R - System Planner / Coordinator		5
1.2	⌵ ⌴	✗	└ C - Welding Engineer		5
1.3	⌵ ⌴	✗	└ I - Document Controller		5
1.4	⌵ ⌴	✗	└ I - Engineering Manager		5
2	⌵ ⌴	✗	A - Engineering Manager		2
3	⌴	✗	Project Manager		2

9.6.2 Set Due Dates

9.6.2.1 Set Workflow Due Date

To create a new Workflow simply click the corresponding button, which will open the configuration page.

After entering the name and workflow type (Document or Event) there are more advanced settings available.

An important setting is the "Enable days to complete" function. Enabling this setting allows the definition of Due Dates which can be given to different approval Steps.

If this option is enabled then users are forced to set "Days to complete" for each step in **Sequential Workflow**:

Step	Function / Group	Responsible	Days to complete
0	START		
1	Engineering	PIRS Approver 2 <pirs.approver2@test.sobis.com>	2
2	Management	PIRS Approver 3 <pirs.approver3@test.sobis.com>	1
3	CEO	PIRS Admin Workflow 1 <pirs.admin.workflow1@test.sobis.com>	1

or for each single step and Group in *parallel* Workflow:

Step	Function / Group	Responsible	Days to complete
0	Function 0	MAX_ACCESS_CREATE_First Project	
1	Group with sequence 1		3
1.1	Function with sequence 2 for g...	PIRS Approver 1 <pirs.approver1@test.sobis.com>, PI...	3
1.2	Function with sequence 3 for g...	PIRS Approver 2 <pirs.approver2@test.sobis.com>	3
2	Group with sequence 4		3
2.1	Function with sequence 5 for g...	PIRS Approver 1 <pirs.approver1@test.sobis.com>, PI...	3
2.2			3
3			3

9.6.2.2 Overdue

If a Workflow with Due Dates is selected in a Meta Document then two additional columns are displayed:

Function	Respo...	Due Date	Overdue	Status	Date	Signature
Start						
Review						
Approval						

The due dates for the workflow are calculated when the workflow is **started** (based on the set Due Dates in the workflow configuration):

Workflow - Engineering 3-Step with Due Dates (Revision 1)

Start Workflow Reset Workflow

Function	R...	Status	Date	Due Date	Overdue
Start	T...	Completed	07.08.2023 13:35		
Review	T... ✔ ✘			12.08.2023	
Approval	T...			14.08.2023	

9.6.2.2.1 Overall Overdue and Single Step Overdue

It is important to be aware of the difference of the **overall** "Workflow Overdue" and the "Next approval step Overdue". Even if a step is overdue it does not necessary mean that the entire workflow is overdue.

In this example one step is overdue but the overall workflow date has been given in time:

Workflow - Default - AK (Revision 1) - Due Date: 05.08.2023

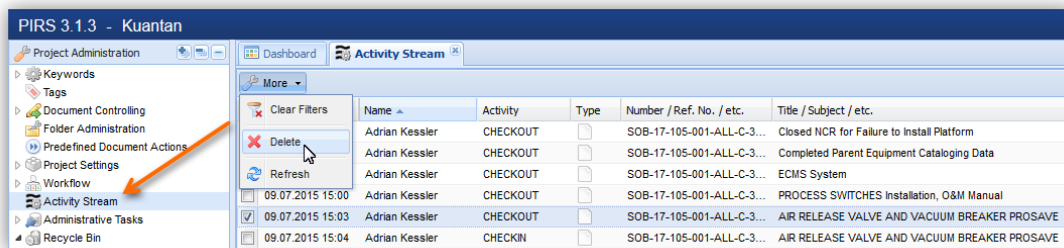
Start Workflow Reset Workflow

Function	Responsible	Due Date	Overdue	Status	Date
Function 0	MAX_ACCESS_CREATE_First Project			Approved	26.07.2023 15:18
Function 1	PIRS Approver 2 <pirs.approver2@test.sobis.com>	31.07.2023	Yes	Approved	03.08.2023 17:40
Function 2	PIRS Approver 2 <pirs.approver2@test.sobis.com>, PIRS Approver 1 <pirs.appro...	03.08.2023		Approved	03.08.2023 17:40
Function 3	PIRS Approver 3 <pirs.approver3@test.sobis.com>	05.08.2023		Approved	03.08.2023 17:40

9.7 Activity Stream

Within the area "Activity Stream" of your "Project Administration" a list of all activity entries is displayed ordered by date.

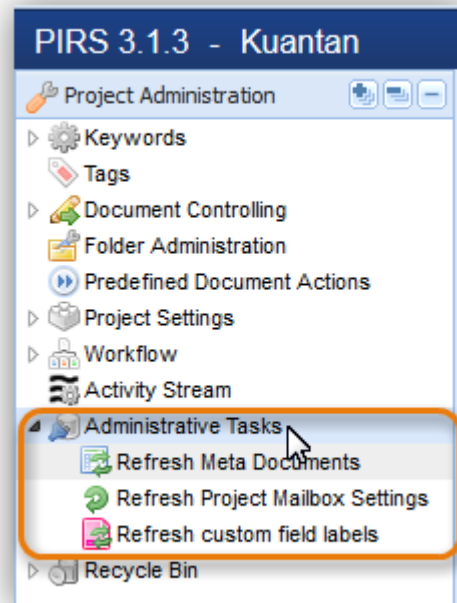
By double clicking an entry you will open the document or correspondence it refers to.



In case you wish remove an entry within the project Activity Stream you are able to delete the entry in question by first marking it within the grid and then selecting the "Delete" option within the "More" button.

The deletion of an activity stream entry will not delete the document or correspondence it refers to. Deleted activity stream entries cannot be restored within the "Project Administration". Should you need to restore an entry please contact your service desk team or your responsible contact within SOBIS.

9.8 Administrative Tasks



Administrative Tasks are jobs that can be started manually. They include updates for meta documents, project mailbox settings and your custom fields.

In case you are using custom fields within your project, you will have an additional project tab within your meta documents that has been created for you by SOBIS.

Please don't initiate any refresh options before consulting your service desk or your responsible contact at SOBIS.

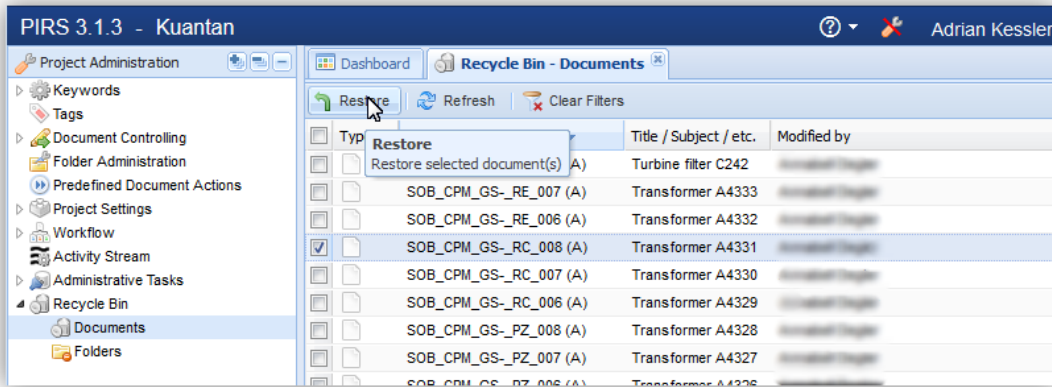
9.9 Recycle Bin

According to the PIRS deletion concept described within chapter [Deletion concept](#) PIRS entities are generally soft deleted.

Therefore, the project recycle bin allows you to recover all types of PIRS entities such as documents, correspondence, contacts or action items. Furthermore you are also able to reactivate deleted folders.

9.9.1 Restore deleted PIRS entity

In order to restore PIRS entities go to the "Recycle Bin" and open the view "Documents".



You can now use filters in order to find the correct PIRS entity.

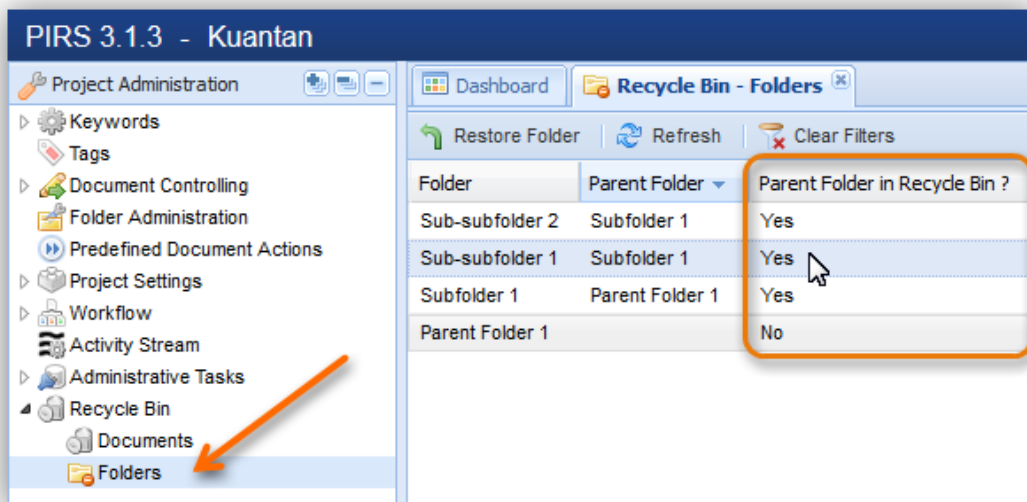
Select the PIRS entity you wish to recover and click the "Restore" button located in the upper left corner of your PIRS content display. You can also restore multiple entities at once. Simply select all PIRS entities you wish to recover before clicking the restore button.

Should you restore a document or correspondence, it will be saved within the folder it was last stored in.

In case the original folder has been deleted as well, PIRS will give you the option to select another folder from the list of available folders and sub-folders.

9.9.2 Restore deleted folder

To reactivate deleted folders open the "Folders" section within the "Recycle Bin". In the content grid you will see all deleted folders. You can use filters to search for the folder you would like to restore.



The restore process is identical to the above described restoring of PIRS entities. You first need to select the folder in question, then click "Restore Folder".

Unlike PIRS entities, you are only able to restore one folder at a time.

Please keep in mind that sub-folders can only be recovered if their parent folder is still available within your project folder structure.

The column "Parent Folder" will allow you to establish directly if the folder you like to restore is a sub-folder. If that is the case the column "Parent Folder in Recycle Bin" will inform you whether or not the parent folder has been deleted.

Note

If a folder is deleted while documents and correspondence are still stored within the folder, all these documents and correspondence will be deleted as well. However, when you restore a folder which originally contained documents and correspondence, these PIRS entities will not be recovered automatically when restoring the folder.

9.10 Set up new projects

PIRS is a project based system which offers to set up separate, individually configurable spaces for each of your projects.

To set up a new project, you need to define the basic configurations used for your new project. These configurations (e.g. list of contacts, companies, keywords, correspondence codes etc) can of course be adjusted after project set up and are not set in stone.

When a new PIRS project should be created, e.g. the first one you will work with, your SOBIS responsible will send you the PIRS project import sheet and will ask you to enter all project specific values. You can also find a current copy of the import sheet with examples within the [Templates](#) chapter.

Following, we will go through this sheet step by step and explain which information is required, how you need to enter values and also at where the values refer to in PIRS.

9.10.1 How to fill out the Project Import Sheet

The first tab within the Excel file has no intimidate influence on a successful project set up. It would however be helpful to provide our team with the project specific information, marked within the screenshot below.

PIRS Setup	
Project Information	
Project	
Project Manager	
Phone	
E-Mail	
Worksheets	
	Description
1. Folder	Define the folder structure of the project
2. Correspondence Codes	Create correspondence codes for all involved functions, departments and companies
3. Companies	All companies involved in the project
4. Contacts	The project Address Book
5. Document Settings	Keywords for document management
6. Action Item Settings	Keywords for action items

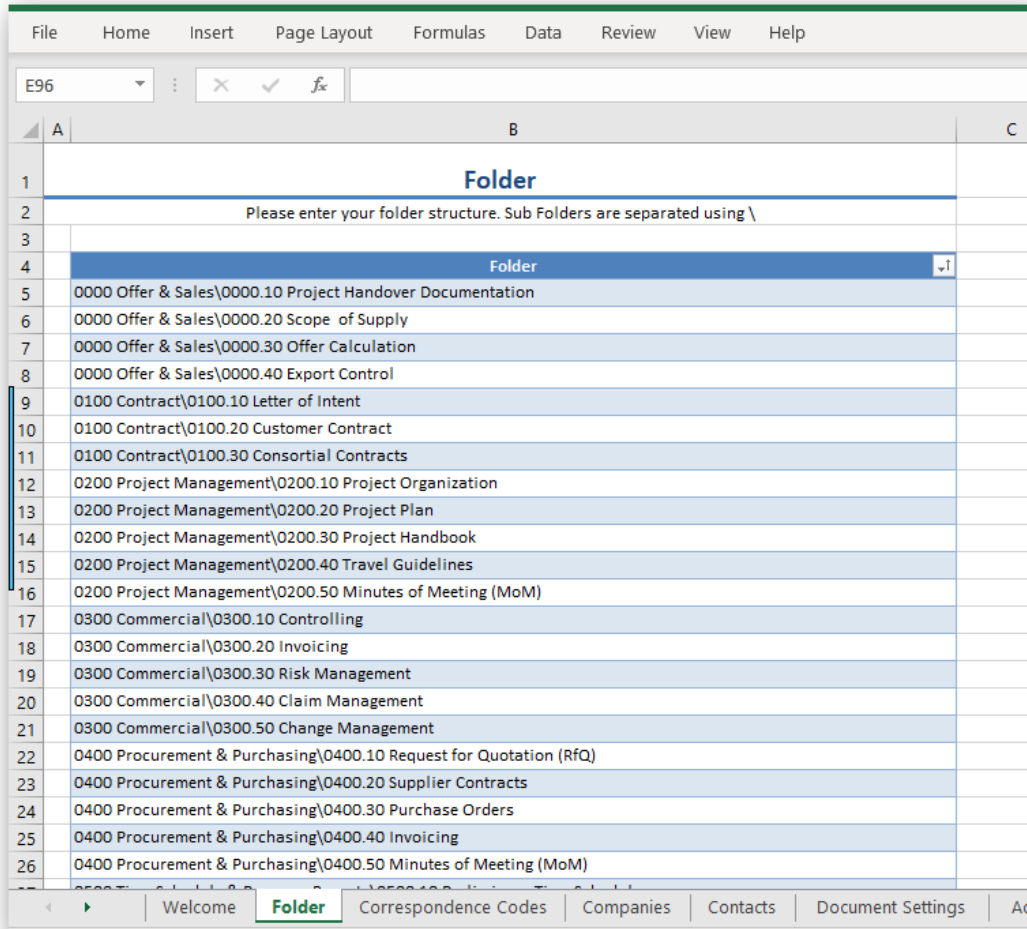
Navigation: Welcome | Folder | Correspondence Codes | Companies | Contacts | Document Settings | Ac ...

9.10.1.1 Folder Tab

Within the folder tab you need to define the set up of your folder structure.

There are three things that you need to consider when entering values within the folder table:

1. Please always enter the entire folder path for each folder
2. Use the backslash (\) to separate the parent folder from the sub folders (e.g. 0600 Engineering\0600.10 Overall Engineering\0600.10.01 General)
3. You don't need to list a separate entry for the parent folders. They will be created automatically. So when entering the sub folder value "0600 Engineering\0600.10 Overall Engineering\0600.10.01 General" a total of three folders will be created:
 - a. 0600 Engineering
 - b. 0600.10 Overall Engineering
 - c. 0600.10.01 General



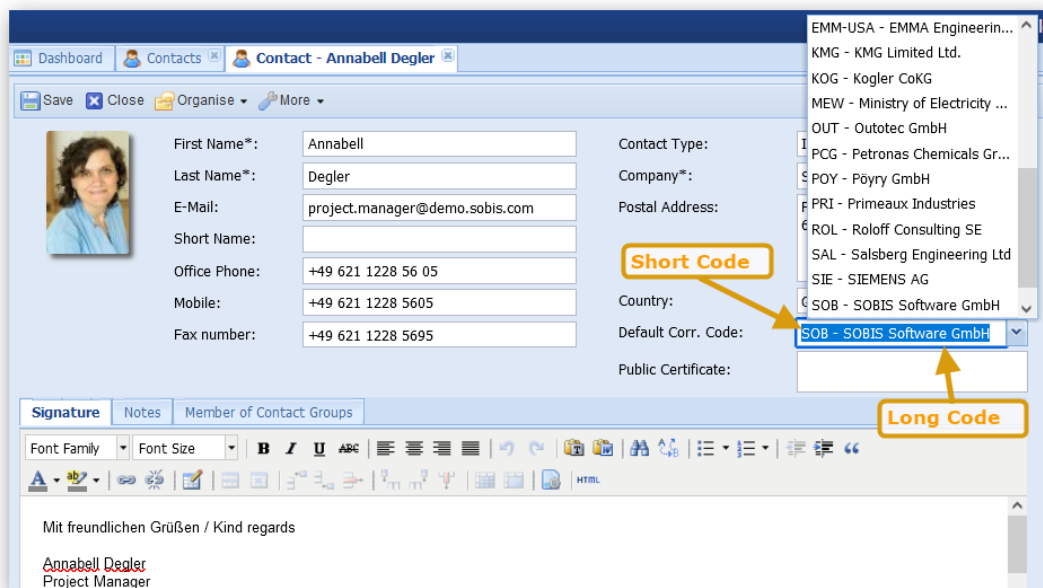
9.10.1.2 Correspondence Codes Tab

Correspondence Codes are used to create the unique reference number when saving and/or sending information from PIRS (e.g e-mails, transmittal slips, letter, etc.). They are usually assigned to contacts listed within your project address book and the reference number is then created automatically when saving or sending a correspondence.

Correspondence Codes			
All Correspondence Code Categories	Short Code	Long Code	Category
Consultant	DESOB	SOBIS Software GmbH	Internal
Customer	ITXYZ	XYZ AG	Customer
Government	ITMEX	Ministry of Electricity	Government
Internal	DESUP	SOBIS Components	Internal
IT Services			
Supplier			

Within the violet column you can enter different categories for your correspondence codes. The Correspondence Code Categories can help you within the project administration to filter sort and better manage your correspondence codes. They are not displayed within a PIRS contact form.

Within the blue columns you need to enter the actual code values. The short code is the letter and/or number combination used for creating the reference number. You could e.g. use two digits for the country and then an abbreviation of the company name. The long code will help you and other users to better identify what the short code stands for. Within the contact form the long code will be displayed after the short code in brakes or separated by a minus symbol.



When entering values for the Code Category, please make sure that you only pick values that you **have also listed within the violet column (All Correspondence Code Categories)**!

9.10.1.3 Companies Tab

Within this tab you need to list all companies involved within the project. Alternatively, you can of course also list all companies maintained within your central address book. Generally, we would recommend to go for a shorter list, since it is more user friendly.

To import a company entry successful, you only need to enter values for the column "Name", "Code" and "Type". The column code refers to the correspondence code. Please make sure that you only enter values that you have already listed within the correspondence code tab.

Companies					
[Explanation of...]					
Name	Code	Type	Website	Notes	
Your company name	YOUR COMPANY CODE	Internal	www.yourwebsite.com		
SOBIS Software GmbH	DESOB	Supplier	http://www.sobis.de	SOBIS Software is a leading Provider of Software Solutions for Projects	

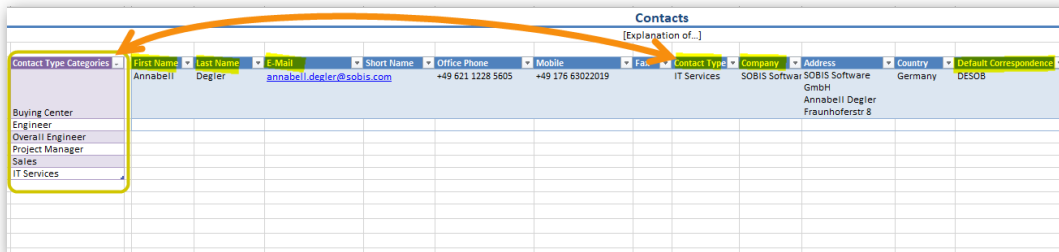
Don't forget to list your own company.

9.10.1.4 **Contacts Tab**

The only mandatory information that you need to provide for each contact listed within the contact table are:

- First Name
- Last Name
- E-mail
- Contact Type
- Correspondence Code

Please be aware that the values for Contact Types need to be defined within the violet column "Contact Type Categories". If you enter a contact type value that is not listed within "Contact Type Categories" the project import will not be possible.



Contact Type Categories	First Name	Last Name	E-Mail	Short Name	Office Phone	Mobile	Fax	Contact Type	Company	Address	Country	Default Correspondence
IT Services	Annabell	Degler	annabell.degler@sobis.com		+49 621 1228 5605	+49 176 63022019		IT Services	SOBIS Software GmbH	Annabell Degler Fraunhoferstr 8	Germany	DES08

The values entered as default correspondence code must also always be listed within the correspondence code tab described above.

9.10.1.5 **Document Settings Tab**

There are a lot of options within the PIRS document to enter and maintain meta information. This aims to allow you, the users and the managers to better find information, stay on track and be able to better analyze project performance.

Within the tab document settings all available meta data fields are listed. You might not need all of them or only at a later point of the project. At this point, we also want to remind you that it is also possible to hide certain document meta data tabs (e.g. customer & supplier information tab) within your project.

However, it is necessary to enter values for all mandatory fields (all document header fields) and we recommend to take a look at the position of each field within your PIRS document (or transmittal slip) to evaluate whether or not you need to maintain information here and if so, what values you would like to provide. Take a look at the following screenshots to get a better understanding.

Revisions	Document Types	Document Status	Document Format	Application Code	Languages	References	Systems	Transmittal Slip Actions	Customer Categories	Customer Revisions
A	Calculation	Approved	DIN A0	Code 1	DE	Reference 1	Engineering	For Approval	Class 1 - For approval	1
B	Drawing	As built	DIN A1	Code 2	EN	Reference 2	I&C	For Construction	Class 2 - For information	2
C	Map	Cancelled	DIN A2	Code 3	FR	Reference 3	Mechanical	For Information		3
D	Offer	Draft	DIN A3	Code 4	SP	Reference 4	Quality	For Review		4
E	Order	For Construction	DIN A4							
F	Progress Report	Redmarked								
G	Specification	Waiting for approval								
H										
I										

As mentioned above, values need to be provided for the mandatory fields listed within the document header (Revision, Document Types, Document Status).

The fields Document Format, Application Code, Languages, References and Systems are all listed within the "Details" tab within the PIRS document.

Dashboard | Document - SOB-17-105-001-ALL-C-310V70 - D

Save | Close | Distribution List | Organise | More

Title*: Staircase Cooling Tower Layout

Doc Number*: SOB-17-105-001-ALL-C-310V70 | Revision*: D

Valid: Yes No | Folder*: 0600.21 Supplier Roloff

Status*: A.1.2 Waiting for submission from supplier | Type*: Drawing / Zeichnung

Attachments (3) | **Details** | Customer & Supplier | Remarks | Workflow | Revisions (4) | Correspondence (2) | Posts | Access

Issue Date: | System: Mechanical

Total Pages: | Reference:

Format: AutoCAD file | WBS:

Language: DE | Activity ID:

Application Code: | Producer:

Notes: | Responsible:

Owner:

Application Code, System and Reference can be used to maintain internal meta information that you have been working with already. In case you would like to change label names to make it easier on you users to work with PIRS and better recognize your traditional work process, please contact your PIRS responsible.

The following screenshot shows you the keyword lists offered within the Customer & Supplier tab.

Systems	Transmittal Slip Actions	Customer Categories	Customer Revisions	Customer Status	Supplier Categories	Supplier Revisions	Supplier Status
Engineering	For Approval	Class 1 - For approval	1	Approved	Class 1	1	Approved
I&C	For Construction	Class 2 - For information	2	Approved with comments	Class 2	2	Approved with comments
Mechanical	For Information		3	Rejected		3	Rejected
Quality	For Review		4			4	
						5	

Besides different document numbers, you are able to maintain different values on customer or supplier related document categories, status, and revisions.

Generally, you can always enter a minus symbols within the list of values and develop or adjust the setting after project set up, if needed.

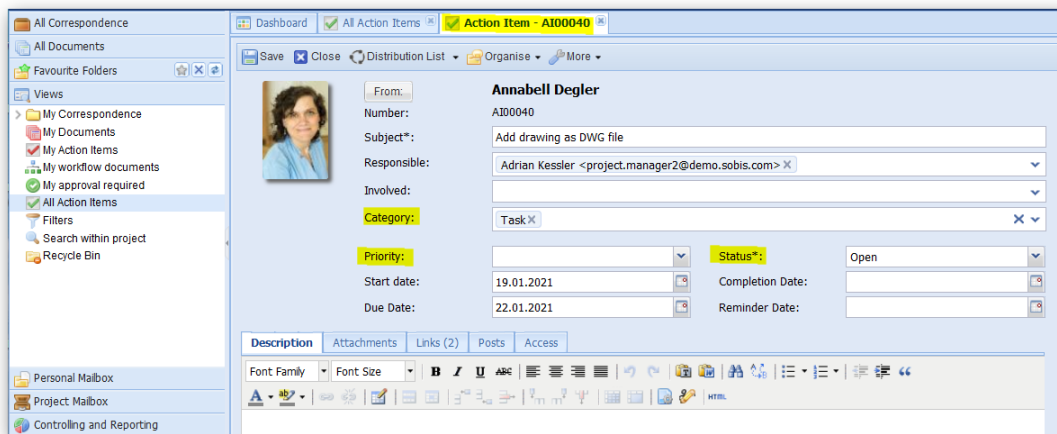
9.10.1.6 Action Item Settings Tab

Action Items allow PIRS users to set reminders, manage tasks for themselves as well as for their team members and follow up on open issues or create punch lists.

Within the import sheet you can set values to define the priority of an Action Item, assign a category and manage status settings.

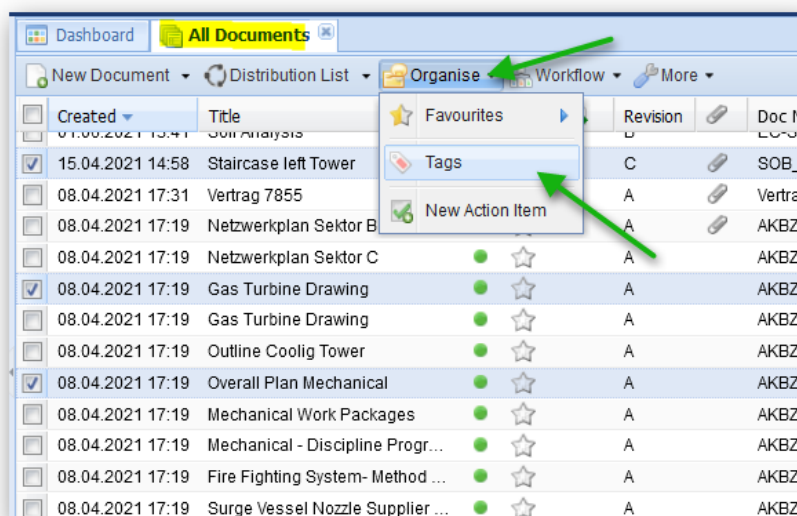
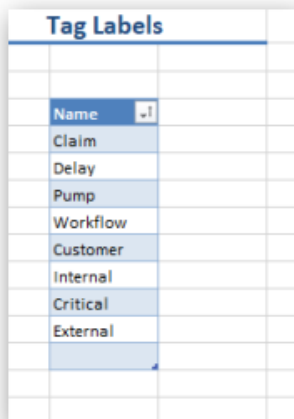
Action Item Settings		
Category	Priority	Status
Follow Up	A - High	Open
Correspondence Control	B - Medium	In Progress
Task	C - High	Closed

Following screenshot will illustrate where the values will be displayed within the Action Item.

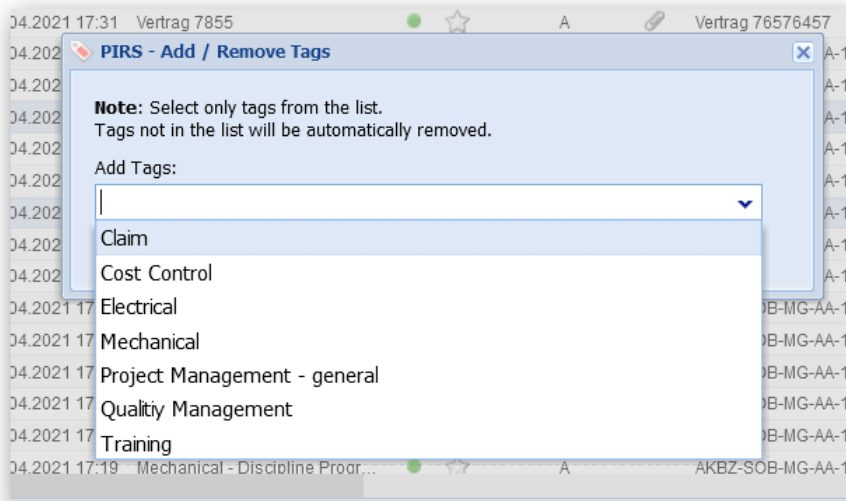


9.10.1.7 Tag Labels Tab

Tags can be set for all PIRS documents and correspondence entries. They offer an additional set of keywords that can help categories, manage and filter information.



The assigning of tags is a rather simple process. The list can be edited any time within the project administration.



Please don't hesitate to contact our service desk or you SOBIS responsible if you need any assistance.

Also, in case you have an existing PIRS project that you would like to use as a base to create a new project, let us know. We can use existing projects to transfer setting into a new project. In this case, you are not required to fill out the import sheet from scratch.

10 Release Notes

In this chapter you will find a list of release notes that will be maintained and adjusted with every new release and that will give you the opportunity to follow PIRS newest features.

Regard slide in overview presentation listed above

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.68	Presentation Overview	PIRS Highlights 3.68	
	Event	Use working days for Estimated Delay in Event(s)	
	Notifications	New options for summary notification	
3.67	Presentation Overview	PIRS Highlights 3.67	
	Predefined Document Actions	<ul style="list-style-type: none"> Allow working days for Transmittals created via PDA 	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
		<ul style="list-style-type: none"> Allow working days for Notices created via PDA Allow working days for Action Items created via PDA 	
3.66	Presentation Overview	PIRS Highlights 3.66	
	Workflow	Define working days for workflow due date calculation	
	Interfaces	Allow synchronisation of additional fields with Active Directory	
3.65	Presentation Overview	PIRS Highlights 3.65	
	Workflow	Allow administrators to add responsables to pending workflow	
	Address Book	Introduction of new job title field in Contacts	
	Others	Add customer and Supplier Status to Query & Response Dialog	
3.63	Presentation Overview	PIRS Highlights 3.63	
	Workflow	Define project time zone for overdue flag and auto completion	
	Document	New number option allows direct input also for auto number fields	
	Correspondence	Identify recipients copied from correspondence history	
3.62	Presentation Overview	PIRS Highlight 3.62	
	Workflow	Implementation of a mail reminder that notifies responsible(s) about pending workflow steps	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Document	New options to generate the document number	
	File Viewer	Minor File Viewer Upgrade with UI improvements	
3.61	Presentation Overview	PIRS Highlights 3.61	
	Document Controlling	Use field values from Document in Reply or Forward of a Transmittal	
	File Viewer	Show user name in File Viewer Annotations	
3.60	Presentation Overview	PIRS Highlights 3.60	
	Workflow	Workflow due dates - Auto complete when overdue	
	Event	Implement optional category to manage costs for Events	
	Action Items	Show link button in Action Items	
3.59	Presentation Overview	PIRS Highlights 3.59	
	Workflow	<ul style="list-style-type: none"> • Introduction of workflow due date • Workflow due dates are displayed in grids and exports • Administration of due days in workflow configuration 	Set Due Dates
	General	Added Chinese Date and Time notation format	
	API	Enhance REST API to get all companies of a project	
3.58	Presentation Overview	PIRS Highlights 3.58	
	Document Import	The document import has been extended by a new option to	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
		<ul style="list-style-type: none"> • Create new documents based on a file name • Upload files into document based on file name 	
	Transmittal	Set Document Status as default value in Transmittal Slip Actions	
3.57	Presentation Overview	PIRS Highlights 3.57	
	Export	Document Excel Export provides a link to valid document revision	
	General	<ul style="list-style-type: none"> • Improved labels in French language • Increase the number of characters in the WBS field of Documents • Define tab order in Action Items • Show CRS status and CRS responsible in Document grids 	
3.56	Presentation Overview	PIRS Highlights 3.56	
	General	<ul style="list-style-type: none"> • Add required response date for linked Event(s) in a Notice • Improve bulk change validation for multi value fields 	
3.55	Presentation Overview	PIRS Highlights 3.55	
	General	<ul style="list-style-type: none"> • New workflow option for document distribution • New optional column Application Code in TS Actions • Show CC fields in mail preview 	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.54	Presentation Overview	PIRS Highlights 3.54	
	General	<ul style="list-style-type: none"> • Send & Receive custom fields for Correspondences • Usage of Bookmarks in Text templates • Allow customization of Digital stamps • Automatism to map users with contacts 	
3.53	Presentation Overview	PIRS Highlights 3.53	
	General	<ul style="list-style-type: none"> • Show Action Items in Recently Viewed • Enable sorting of Comment Review Sheet column grids 	
3.52	Presentation Overview	PIRS Highlights 3.52	
	Portal	Provide Reply and Forward link to Portal users	
3.51	Presentation Overview	PIRS Highlights 3.51	
	Document Numbering	<ul style="list-style-type: none"> • Generate global document numbers • Enhance history for auto generated document numbers 	
	General	Remove Doclink in Forward and Reply History	
3.50	Presentation Overview	PIRS Highlights 3.50	
	Bulk Changes	Provide append and remove operations for multi value fields	
	Documents	Transfer Tags to new Revision	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	General	Add history entry in Contact when modification was done by sync job	
3.47	Presentation Overview	PIRS Highlights 3.47	
	Workflow	List additional recipients in copy of workflow notifications	
	Rich Text Editor	Update of integrated Rich Text Editor to provide following improvements: <ul style="list-style-type: none"> • Show different colors for text and background • Indicator of current color selection • Set default background color to yellow • Provide option to set default colors 	
	General	Update Reference Number with default correspondence code also when recipients in To field are removed	
3.45	Presentation Overview	PIRS Highlights 3.45	
	Predefined Action	Reply and Forward with predefined Document Actions	
	General UI	Possibility to optimize/reduce Forward & Reply Button Menu	
	Filing	Filing of Draft E-Mails possible	
	Document Import	Inherit fields from previous revisions in documents received from Portal	
	File Viewer	New style options	
3.44	Presentation Overview	PIRS Highlights 3.44	
	Document Import	Inherit fields from previous revisions in imported documents	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Filing	Define display mode for mails filed via drag&drop or wizard	
	File Viewer	New annotations to insert and to replace text	
	API Improvement	Synchronize contacts with MS Graph API	
3.43	Presentation Overview	PIRS Highlights 3.43	
	General UI	Highlight number of entries that can be imported	
	File management	Define default names for: <ul style="list-style-type: none"> • Rename • Create and Re-attach 	
3.42	Presentation Overview	PIRS Highlights 3.42	
	Search	Improve field search (finds any match)	
	Filter	New filter for correspondence thread	
	Duplicate check	Check for duplicate e-mail addresses	
	General Improvements	<ul style="list-style-type: none"> • Autofiling > Improved handling of duplicate contacts • File Viewer > Silent "check out / check in" of a file annoated in File Viewer • Portal > Store new revision in parent folder also if previous revision is not available in portal • Correspondence > From field allows selection of internal users only • Security > Prevent opening PIRS if browser is outdated 	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.40	Presentation Overview	PIRS Highlights 3.40	
	General UI	<ul style="list-style-type: none"> • Show preview panel on the right side • New view showing all the user's approved documents 	
	File Viewer	<ul style="list-style-type: none"> • Process multiple annotations / comments • Group annotations / comments 	
3.39	Presentation Overview	PIRS Highlights 3.39	
	Document Import	New option that allows users to link imported Documents to Action Items	
	Correspondence	Warn user if correspondence size exceeds allowed limit	
	Action Items	Define templates (PDA) for Action Items	
	UI improvements	<ul style="list-style-type: none"> • New option to add Contacts to Contact Groups • Improve scrolling • New widgets and view for Events 	
3.38	Presentation Overview	PIRS Highlights 3.38	
	Workflow	<ul style="list-style-type: none"> • Design parallel workflow(s) • Combine sequential and parallel workflow steps • Improved workflow notification 	Workflow, Approval Workflows
	File Viewer	<ul style="list-style-type: none"> • New Arc Shape Tool • New Line Style Options • Improved filter dialog 	PIRS File Viewer

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	General	Improved e-mail notification for Posts	Please contact your service desk for further information
3.37	Presentation Overview	PIRS Highlights 3.37	
	UI improvements	<ul style="list-style-type: none"> Added Type and Status as optional columns to Revisions grid New attachment column in workflow grids 	Workflow Create new document
	Mobile UI	New grid to show "My Action Items"	Please contact your service desk for further information.
3.35	Presentation Overview	PIRS Highlights 3.35	
	Correspondence	Attach cover page to Transmittals and Comments	Submit documents - Transmittal Slip
	Documents	<ul style="list-style-type: none"> Provide link to valid document revision Improve visibility of the valid documents column Use default document status in new revisions 	Create new revision
	Tags	Tags are tracked in the log history of Correspondence, Documents and Action Items	Document log
3.34	Presentation Overview	PIRS Highlights 3.34	
	File Viewer	Measurement tool in File Viewer	PIRS File Viewer
	Improve Exports	<ul style="list-style-type: none"> Export formatted text and pictures to MS Word or MS Excel templates Include Tags to Action Item export 	Create file from template Export grid to MS Excel

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.33	Presentation Overview	PIRS Highlights 3.33	
	UI Improvements	<ul style="list-style-type: none"> Optimize display of Predefined Document Actions Tags in Action Items 	Predefined Document Actions Tags
	Address Book	<ul style="list-style-type: none"> Provide option to validate contact group names Provide option to prohibit creation of new companies 	Create a new Contact Group Add a new Company
3.32	Presentation Overview	PIRS Highlights 3.32	
	File Viewer	<ul style="list-style-type: none"> Hide all comments in viewer Improve handling of stamps 	PIRS File Viewer
	General Improvements	<ul style="list-style-type: none"> Clear document status for new revision Provide option to disable correspondence type "Comment" 	Create new revision Correspondence & Documents & Events Create an internal or file external comments
	Interfaces	Support of Client Credentials Flow	Please get in touch with your Service Desk for further information
3.31	Presentation Overview	PIRS Highlights 3.31	
	New Features	<ul style="list-style-type: none"> New External Link tab (optional) New Image Viewer 	External Link Tab Image Viewer
	UI Improvements	Optimize color selection in Editor	Rich Text Editor
	File Viewer	New options to extend access permission	Please get in touch with your Service Desk for further information
3.30	Presentation Overview	PIRS Highlights 3.30	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	UI Improvements	<ul style="list-style-type: none"> • Display context specific menu items only • Define editor preferences in your personal settings • New validation for Document Import via zip • New option to use PIRS without folders • New options to enhance project navigator • Hide version info in header 	User Preferences and Set-up User Interface and Navigation Import Documents PIRS Folder Structure
	Notifications	Added further recipients to Post notifications	Posts
	Interfaces	Synchronize Users and User Groups via MS Azure AD	Please contact your PIRS responsible or your SOBIS Service Desk for more information.
3.29	Presentation Overview	PIRS Highlights 3.29	
	General improvements	<ul style="list-style-type: none"> • Allow sorting of members in Contact Groups • Remove "File is used" flag if (draft) Transmittal is deleted • Hide FTP Document Import 	Create a new Contact Group Import Documents
3.28	Presentation Overview	PIRS Highlights 3.28	
	New Rich Text Editor	<ul style="list-style-type: none"> • Modernized Rich Text Editor • Additional formatting options • Toolbar fits seamlessly into PIRS 	Rich Text Editor
	Enhance Create File from Template	This feature is now also available in Correspondence	Create file from template

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Enhance Mobile UI	Display Action Items in Mobile UI	Please contact your SOBIS Service Desk for further information
	File Viewer Improvement	File Viewer opens in "read-only" if underlying Document is checked out by someone else	PIRS File Viewer
3.27	Presentation Overview	PIRS Highlights 3.27	
	Enhance access concept	Provide additional access roles to enhance privileges for team members	Please contact your SOBIS Service Desk for further information
	Enhance notification feature	Send summary list of Action Items (daily, weekly or monthly)	Please contact your SOBIS Service Desk to enable this feature
	UI improvements	<ul style="list-style-type: none"> • paste multiple e-mail addresses at once within contact group settings • copy folder fullname • add saved filter as bookmark in browser • classification flag in Predefined Document Action 	Create a new Contact Group Filter data Manage Predefined Document Actions
	Layout improvements	Improve visibility and scalability of buttons and menu items	Please regard the presentation and contact your SOBIS Service Desk for further information
	Interface	Several small enhancements on the existing APIs	Please regard the presentation and contact your SOBIS Service Desk for further information
3.26	Presentation Overview	PIRS Highlights 3.26	
	General improvements	<ul style="list-style-type: none"> • Enhance Document Log History • Copy linked "Action Items" to new Revision • Disable default switch of Correspondence Codes in Replies 	Document log Action Items

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.25	Presentation Overview	PIRS Highlights 3.25	
	UI improvements	<ul style="list-style-type: none"> • Duplicate check for drag & drop filing • Load all folder levels from Office365 mail box by default 	File via Drag & Drop Personal Mailbox
	Reports	<ul style="list-style-type: none"> • Provided a new option that allows users to open always the valid revision of a Document via link 	Please contact your SOBIS Service Desk for further information
3.24	Presentation Overview	PIRS Highlights 3.24	
	Check in / Check out	<ul style="list-style-type: none"> • New view "My checked out documents" • Check in and check out multiple documents in one step 	Check-out & check-in
	New File Viewer Features	<ul style="list-style-type: none"> • Free Hand Highlight tool • Rotate stamps or pictures • Sort comments by color • Show company stamps only and hide default stamps 	PIRS File Viewer
	UI improvements	<ul style="list-style-type: none"> • Introduce search history • Define default UI settings for new users • Improved used icon set 	Search documents with full-text search Customize your project dashboard
3.23	Presentation Overview	PIRS Highlights 3.23	
	Correspondence Follow Up	<ul style="list-style-type: none"> • Optional follow up tab available for Correspondence (customizable on demand) 	Correspondence Follow Up
	Correspondence Grids	<ul style="list-style-type: none"> • Added To, Cc, Bcc and DoLink columns to grids 	Customize a grid

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	New File Viewer Features	<ul style="list-style-type: none"> • Use custom dynamic project stamps in File Viewer • Save personal signatures 	PIRS File Viewer
	UI Improvements	<ul style="list-style-type: none"> • Create Action Items in full mode • New prompt when filing a Transmittal or Comment • Display time stamp in approval steps • Add filter for PDA in project administration 	Action Items Workflow Manage Predefined Document Actions
	Excel Export	<ul style="list-style-type: none"> • Added new columns to correspondence export (To, CC, BCC, DocLink, Tags, and more) 	Export grid to MS Excel
3.22	Presentation Overview	PIRS Highlights 3.22	
	Correspondence	<ul style="list-style-type: none"> • Create correspondence thread in PIRS if mail is filed automatically or via drag&drop 	File via Drag & Drop Autofiling
	UI improvements	<ul style="list-style-type: none"> • Show All Action Items in main navigator • Remove some icons in Transmittal Slips to clean up user interface • Remove additional download button to clean up user interface 	Project Views User Interface and Navigation
	Auto Filing	<ul style="list-style-type: none"> • Send notification when a mail has automatically been filed into PIRS 	Autofiling
	Action Items	<ul style="list-style-type: none"> • Correspondence and Documents contain new option to link (or to unlink) Action Items 	Action Items
	Reporting	<ul style="list-style-type: none"> • Display charts, pivot tables and others • Integration of company specific Excel 	Reports based on templates

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
		templates and macros possible	
3.21	Presentation Overview	PIRS Highlights 3.21	
	Improve file handling	<ul style="list-style-type: none"> Download only submitted files of selected documents in Transmittal when using the "Download attachments" option within the TS Allow non-admin users to remove files from Document as long as the file has not been submitted PIRS:Portal – Auto check for duplicate files in Documents 	Receive/Access Transmittal Slips Read Mode vs Edit Mode
	UI improvements	<ul style="list-style-type: none"> New View and a new Widget to display all pending workflow documents 	Workflow
	New option for PDA	<ul style="list-style-type: none"> In the Predefined Document Action (PDA) it is possible to define a default From 	Manage Predefined Document Actions
3.20	Presentation Overview	PIRS Highlights 3.20	
	Support of OAuth 2.0	<ul style="list-style-type: none"> Allows a seamless integration of PIRS in the environment of your organization Allows access to your mailfile independent of selected verification method 	To learn more about OAuth protocol and how it can be introduced in your company please contact the PIRS service desk. Additional information can also be found here .
	Auto clean up of Replies	<ul style="list-style-type: none"> Automatic removal of multiple RE/FW (or similar) entries in correspondence subject Can be activated optionally 	Please contact the PIRS service desk for more information.
	UI improvements	<ul style="list-style-type: none"> Display of "New Correspondence" and 	Submit documents - Transmittal Slip

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
		"File From" buttons in Document	Create an internal or file external comments
3.19	Presentation Overview	PIRS Highlights 3.19	
	UI improvements	<ul style="list-style-type: none"> Cleaned up attachment table in read mode Display all entries in project navigator collapsed 	User Interface and Navigation
	Enhance filter options	<ul style="list-style-type: none"> New filter to search for blank values Implement filter option for text templates 	Filter data Use text templates
	Enhance options for bulk actions	<ul style="list-style-type: none"> Introduce Bulk Changes for Contacts Define visibility of bulk workflow approval options 	Create & Edit Contacts Workflow & PIRS Symbolleisten
3.18	Presentation Overview	PIRS Highlights 3.18	
	Faster filing of emails (via drag and drop)	<ul style="list-style-type: none"> Drag and drop mails directly to a folder Skip final Preview Window in Filing Wizard 	File via Drag & Drop Personal Mailbox
	Improved navigation	<ul style="list-style-type: none"> Show "All Correspondence" and "All Documents" and mail boxes in main navigation Cleared up view entries Navigator and views can be customized 	User Interface and Navigation PIRS Views
	Define sort order for selection fields	<ul style="list-style-type: none"> Choose the order your keywords are displayed in for all selection fields e.g. define the order of values displayed within the status field 	Contact your PM for more information and assistance on setting up the desired orders.

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Improved new Revision option	<ul style="list-style-type: none"> Create new revision directly within a document 	Create new revision
	Access all files of linked items within Action Item	<ul style="list-style-type: none"> Show and access attachments of linked PIRS items e.g. correspondence & documents within cross references 	Action Items
	Improved sending process for TS	<ul style="list-style-type: none"> Display links to documents with missing approvals To allow direct removal or corrective action for respective document(s) without extensive investigation 	Submit documents - Transmittal Slip
	Privacy statements available	<ul style="list-style-type: none"> Allow privacy or other statements on start page 	Help & Privacy Statements
3.17	Presentation Overview	PIRS Highlights 3.17	
	Workflow Bulk Processing	<ul style="list-style-type: none"> Assign Start Approve / Decline Reset 	Workflow
	New workflow configuration options	<ul style="list-style-type: none"> Each workflow step requires a different approver Document creator my reset workflow Workflow starter my reset workflow 	Please contact your Service Desk for additional information
	New sort options	Allow sorting of check in / check out column in document grids	
	File Viewer Improvements	<ul style="list-style-type: none"> Improved UI Dynamic Stamps 	PIRS File Viewer
3.16	Presentation Overview	PIRS Highlights 3.16	

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Improved Auto Filing	<ul style="list-style-type: none"> Define rules for auto filing Define code / company mapping definitions Avoid auto creation of correspondence code / company 	Please contact your Service Desk for additional information
	File Viewer Improvements	<ul style="list-style-type: none"> Full support of IE11 browser Display theme preferences within File Viewer 	PIRS File Viewer
3.15	Presentation Overview	PIRS Highlights 3.15	
	File Viewer	New File Viewer User Interface with many new features	PIRS File Viewer
3.14	Presentation Overview	PIRS Highlights 3.14	
	REST API for Office365	Support of MS Graph REST API for Office365	Please contact your service desk for further information
	Project visibility	Global Scope for Projects	
	Display of fields in Document	Hide Customer or Supplier details in Documents	
	Display of tabs in Document	Customize the tab order in Documents	
	Extend mobile UI	Approve/Reject Documents in PIRS mobile UI	
3.13	Technical Release	Bugfixes, Performance, Security, Support of additional fonts in PDF	Please contact your service desk for further information
3.12	Presentation Overview	PIRS Highlights 3.12	
	COMOS Interface	Automated import of COMOS meta data and files based on xml	Interfaces with CAD, PDM or ERP systems Please also contact your service desk for further information

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.11	Presentation Overview	PIRS Highlights 3.11	
	New options for document numbering	Compute the document number based on any meta data	Create new document
	Keep Downloads	Keep all downloads in „Files in Progress“ window	PIRS Downloads
3.10	Presentation Overview	PIRS Highlights 3.10	
	Zip upload	Enable the upload of all document files via zip file. FTP server is not needed anymore.	Import Documents with attachments
3.9	Presentation Overview	PIRS Highlights 3.9	
	Implement Comment Review Sheet in Portal	<p>Create Comment Review Sheet for any Document in PIRS:Portal.</p> <p>Transfer your Comment Review Sheet Items to PIRS:Portal and vice versa.</p> <p>Share and track feedback to Documents with all project partners.</p>	Comment Review Sheet (CRS)
	New Option for Predefined Action	Predefined Action is available also for Library Items.	Predefined Document Actions
3.8	Presentation Overview	PIRS Highlights 3.8	
	Layout of the Document header	Redesigned the layout of the Document header. Display all field labels.	Create new document
	New option for Predefined Action	Predefined Action is available also for Letters.	Create and send a letter
	Easier organizing	<p>Mark multiple items as Favorite in one step. Tag several items in one step.</p> <p>Create a new Action Item for several Documents or Correspondence in one step.</p>	PIRS Tool Bar Actions Organise
	New view	"My Correspondence > Send (Distribution List)" shows all notifications send via Distribution List	Project Views

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Define default display of sections	In the user settings you can define that PIRS keeps the display of the sections.	User Preferences and Set-up
3.7	Presentation Overview	PIRS Highlights 3.7	
	Introduce Comment Review Sheet	<p>Review documents internally before sending them to partners</p> <p>Share comments between all parties</p> <p>Follow up the whole commenting process</p> <p>Give feedback to documents in a uniform way</p> <p>Perform exhaustive commenting within PIRS (centralized)</p>	Comment Review Sheet (CRS)
3.6	Presentation Overview	PIRS Highlights 3.6	
	Import contacts	Import contacts into the address book via MS Excel	Import Contacts based on Excel Sheet
	Improve notification of Action Items	Inform responsible or other users if Action Item is created	Action Items
	Improve the mail box search	Ignore quotes and asterisk in mailbox searches	Search documents with full-text search Use Full Text Search within Mailbox Views
3.5	Presentation Overview	PIRS Highlights 3.5	
	Move recipients of a correspondence	Move recipients of a correspondence easily between TO/CC/BCC/Doclink via mouse click	Create and send an email
	Customizable new button	Define preferences for news buttons in personal settings	User Preferences and Set-up
	Additional sort options	Allow sorting within grids of correspondence in read mode of a document	Read Mode vs Edit Mode

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Optimize Actions	Allow execution of documents actions within a Transmittal or Comment	Submit documents - Transmittal Slip
	Additional tab information	Show number of available entries in every tab	Regard respective slide in overview presentation listed above
	Add Send By field to Thread	In addition to the From field we also display the Send By field in correspondence thread/timeline	Regard respective slide in overview presentation listed above
	Improve the display of sent documents	Improve the display of sent document files in Transmittals and Comments	Regard respective slide in overview presentation listed above
	Display of delete button	The delete button will be visible for a single record to facilitate	Deletion concept
	Predefined Document Actions (Default Values)	Predefined Document Actions will support now default values (if no other value has been defined)	Predefined Document Actions
	Smart pre-selection when Filing	Smart pre-selection of default correspondence types during filing helps to avoid mistakes	Personal Mailbox , Create a Comment using a sent Transmittal Slip
	Enable context menu in navigator views	Display additional menu options if you click the right mouse button in navigation	Customize your project dashboard
	Predefined Document Actions (Display)	Open Predefined Document Action directly from Meta Document	Predefined Document Actions
3.4	Presentation Overview	PIRS Highlights 3.4	
	Improve page navigation	Show number of selected records within page navigation	Regard respective slide in overview presentation listed above
	Bulk Changes for Action Items	Modify multiple Action Items in one step via Bulk Changes	Action Items
	Additional filter in administration	Allow to set filter in Correspondence Code administration	Correspondence Keywords
	Improve Predefined Document Actions	Use definition of Predefined Document Actions also if documents are added afterwards	Predefined Document Actions
	New filter	A new "Select All" option in column filter to allow easier and faster selections	Regard respective slide in overview presentation listed above

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Computed numbers	Allow Customer- and Supplier Document Number to be generated automatically by external systems.	Please, ask your PIRS contact or your Service Desk for more information.
	Improve file upload	Files can be dropped almost anywhere to upload. The "Drop files here to upload..." section is not required anymore.	Manage Attachments
	Enhance Create File from Template	Additional search wizard allows to generate template based on found documents.	Create file from template
	New API for Action Items	Allow creation of Action Items via API.	Please, ask your PIRS contact or your Service Desk for more information.
	SSO / FIMS	Single Sign On via Federated Identity Management Service.	Please, ask your PIRS contact or your Service Desk for more information.
3.3			
	Overview	PIRS 3.3 Highlights	
	Check for mail duplicates	PIRS filing wizard checks whether or not an email has already been filed	Prevent duplicates
	"Expand all" / "Collapse all"	"Expand all" and "Collapse all" function is available within Documents and Correspondence	Regard PIRS 3.3 Highlights
	Recently viewed	A new view shows all recently viewed documents and correspondences for easy and quick access	Project Views
	Date Filter in Mailbox View	Set a time frame for emails to be loaded when accessing your personal or project mailbox to optimize loading performance	Personal Mailbox
	Edit recipients of groups	Prior to sending or saving a new mail you are able to remove recipients that were included by adding a PIRS group	Create and send an email
	"My Action Items" view on global dashboard	Access Action Items for all projects on your global dashboard	Global Views

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
3.1	Document Check-in/ Check-out	Users are able to check-out and check-in documents. The document will be locked and only available in edit mode for this user.	Document check-in & check-out
	Print Button	Correspondence, documents and action items can now be printed via direct browser print without creating a PDF version first	Print without print template
	Filter Attachment Column	Attachment column does now support filter (Yes/No)	Filter data
	Transmittal Slip Check	New feature will check if the user selected at least one attachment per document within a transmittal slip	Submit documents - Transmittal Slip
	Edit Correspondence Dates	New optional feature that allows users to update the date of draft letters and library items. Project Admins can update all correspondence dates.	Update date
	Rename Attachments	Allows user to modify attachment names without downloading the file	Manage Attachments
	Multi-Value Keywords for Bulk Change	Bulk change for documents does now support super-box items, multi-value keywords can be adjusted as well.	Bulk Change
	Integrate Active Directory	Optional function allowing to synchronize PIRS users and PIRS access groups with Active Directory	Please, ask your PIRS contact or your Service Desk for more information
LDAP integration	Optional feature that allows to import and update the PIRS address book via LDAP	Please, ask your PIRS contact or your Service Desk for more information	
3.0	File Viewer	PIRS File Viewer allows to use several common annotation and flag functions such as red lining, notes or underlining.	PIRS File Viewer
	Social Networking	PIRS Activity Stream displays actions and activities of all PIRS users. Actions and activities listed in the Activity Stream can be commented by creating Posts.	Activity Stream

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	Encrypt E-mails	Send encrypted e-mails to recipients using S/MIME. Filling of encrypted mail form the project inbox is also supported.	Sending encrypted E-Mails
	PIRS Tags	Organize PIRS correspondence and documents by defining special keywords (Tags)	Tags
2.4			
	View Files	Directly open files (pictures and PDF) in your browser window without downloading them first	View Files within your Browser
	Save and manage filters	Save personal and public filters for correspondence and document grids	Filter data
	New Correspondence view	Follow your received correspondence sent to you as Distribution List	Correspondence received via Distribution Lists
	Drag & Drop of Tabs	Arrange the open tabs within your PIRS project content display	Manage your Content Tabs
	Action Items	Manage your tasks and meetings, create tasks for yourself and your team and sent reminders	Action Items
	Portal	Integrate your customers and suppliers in your PIRS project using the PIRS Portal environment	For more information ask your PIRS project manager, contact the SOBIS Service Desk or read our related blog posts .
2.3			
	Improved preview pane	Download the attachments and copy any text from preview pane	Correspondence Preview Pane
	Bulk change	Modify the value of multiple documents in one step.	Bulk Change
	Download multiple files in one step	Download all files of one or multiple correspondence / documents in one step as a zip file.	Download Attachments
	Predefined document actions	Use templates for transmittal slips / comments with predefined field values and document actions	Predefined Document Actions

PIRS Release	New feature / Component	Short Description	Link to Chapter in this Guide
	New options to select document number	Step by step selection in document numbering wizard	Create new document
	Send Transmittal Slip without document attachments	Transmittal Slip is send without the attachments of the linked technical documents	Submit documents - Transmittal Slip
	New report configurations + new report download	Dialog box before report is started with additional report query properties + continue working while report is generated in the background.	Reports
	PIRS Archive Solution	Export of all project data from PIRS e.g. for project handover to customer / access all project correspondence and documents without using PIRS	Optional Feature
2.2	Favorite Entries	Select your favorite correspondence, documents, contacts, companies and contact groups and access them form views or widgets	Favor Entries
	Global Views	Access all your correspondence and documents from the global dashboard	Global Views
	Global Search	Full-text search function cross-project	Global Views
	Global Reports	Run reports cross-project	Reports
	Search Attachment Content	Include all attachments in your full-text search	Search documents with full-text search
	Reply to TS	Use new preselect function for sent documents replying to a Transmittal Slip	Create a Comment using a sent Transmittal Slip

11 Templates

Following you will find a list of all useful templates offered within this manual. To learn more about how to use each template, follow the provided link to the chapter within this manual.

Template	Used for	Link to chapter
Contact-List-Import-Template.xlsx	Importing contacts within the project address book	Import Contacts based on Excel Sheet
Folder Import Template.xls	Importing folders	Folder Administration

Template	Used for	Link to chapter
Template_Document Import.xlsx Template_Document Import with Files.xlsx	Import meta documents	Import Documents
Document Number Import_Example.xlsx	Import document numbers	Document Numbering Keywords
Project Import Template 3.18 - Example.xlsx	Set of new PIRS project	Set up new projects