PIRS:Claim Web Guide EN

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Content

1 Welcome to the PIRS:Claim Web Guide

PIRS:Claim is a management system for events, changes and claims. PIRS:Claim documents and controls the process of your project from the beginning of the contract negotiations until the delivery to the client.

Besides the documentation, the central management of events supported by automatic notifications, instructions, cost and time sheets, as well as the commercial reaction including budget variations, change orders and claims, have top priority.

This user manual will guide you through the features of PIRS:Claim. The following pages include a description of the system functions and capabilities, contingencies and alternate modes of operation, as well as step-by-step procedures for system access and use.

If you have any further questions, please do not hesitate to contact our service desk!

1.1 Table of Contents

Do you have questions concerning PIRS:Claim? Then contact us now!

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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!

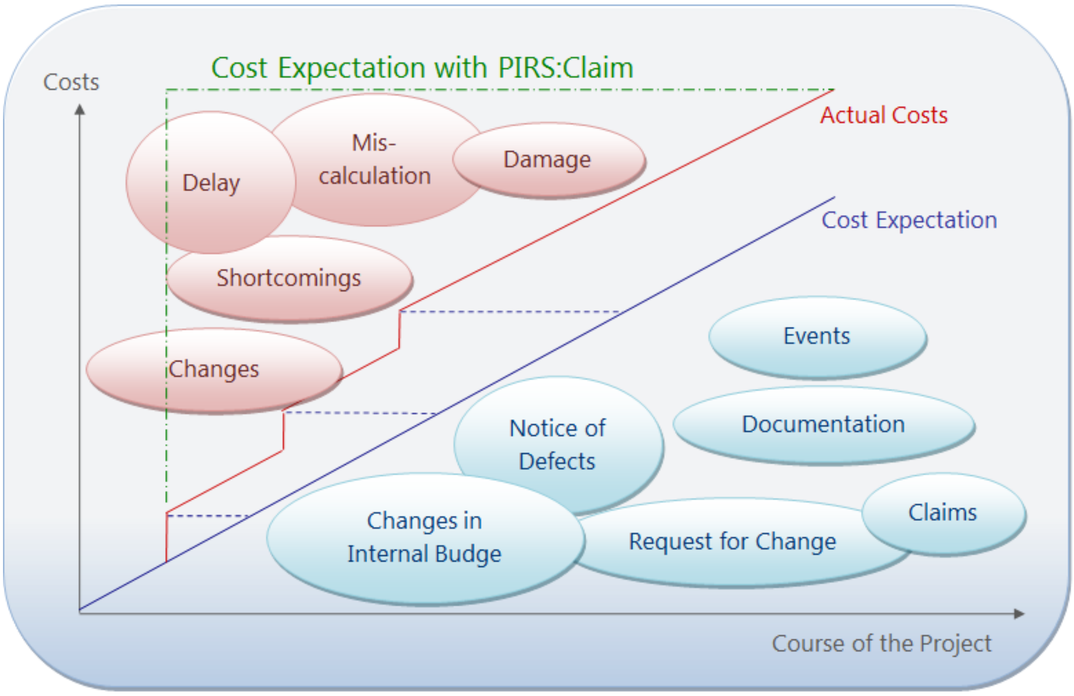
2 PIRS:Claim Web Basics

The following chapter will give you an overview of the general features and functionality of PIRS:Claim Web 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:claim Web is able to offer to you, the user interface as well as the general navigation will be explained.

2.1 What is PIRS:Claim Web

PIRS is an abbreviation for **P**roject **I**nformation **R**etrieval **S**ystem. Similar to PIRS Web our project correspondence and document management system, PIRS:Claim Web is a web based information management system that was developed to support project managers and their teams during their daily work processes throughout their various projects.

As all project managers know, each project is faced with various challenges. Probably the most important challenge of all is too keep the project on track and manage the fine balance between the expected, calculated costs and the actual costs that might not all have been anticipated. PIRS:Claim Web was created to support claim and project manager on a daily bases and to provide a sufficient and effective tool that helps to ensure a successful outcome of their projects.



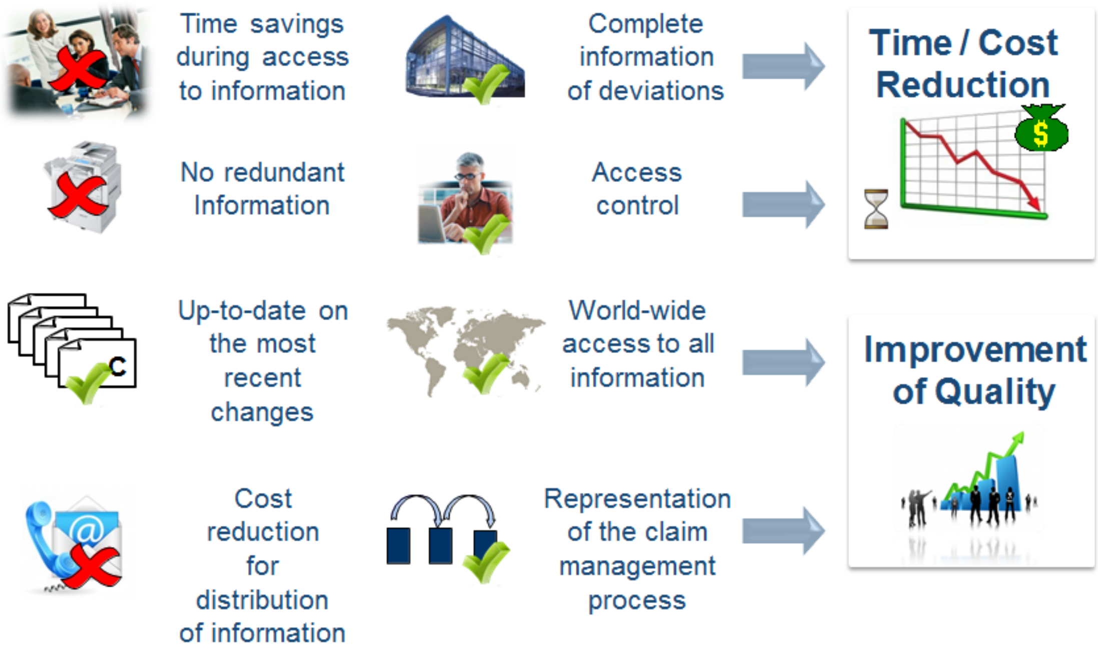
PIRS:Claim Web offers a platform to document, monitor and evaluate all events, deviations, variations and internal as well as external changes that occur in the course of a project. Based on these documents, impacts can be assessed, countermeasures can be taken, claims can be filed and incoming claims can be defended.

2.2 Advantages

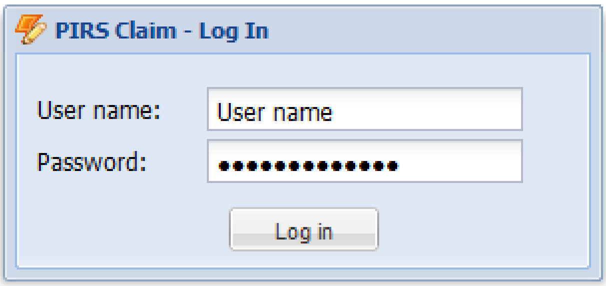
With PIRS:Claim Web you achieve the following benefits:

- Central repository for consistent documentation of events and changes
- Identification and evaluation of possible additional costs
- Easy creation and defending of claims based on existing documentation
- Sharing best practices via lessons learned documents
- No redundant information and always up-to-date including most recent changes
- Standardizes methodologies for claim management strategies
- World-wide access to all information and most recent changes
- Intuitive and user-friendly interface
- Easy assignment of access rights

By using PIRS:Claim Web you facilitate the importance to document all changes thoroughly, save time, reduce costs and improve the quality of your documentation as well as workflow processes.



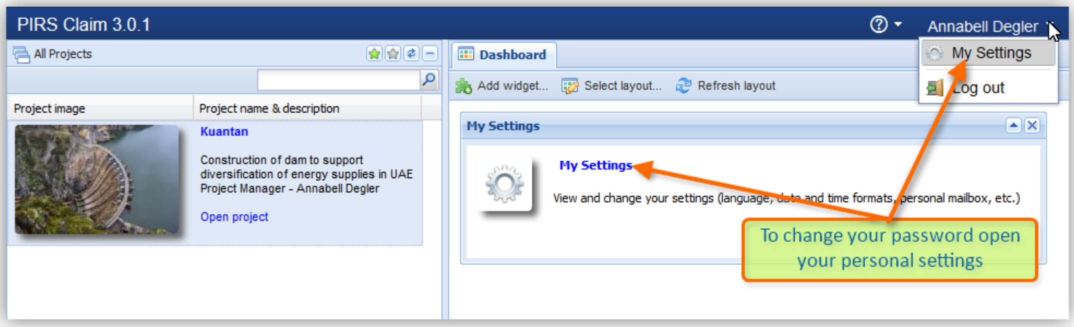
3 Getting Started



After you have opened the URL of PIRS:Claim in your browser you need to enter your username and password, then click the “Log In” button. In case PIRS:Claim is syncronized with your Active Directory, your user name and password will be identical to your windows settings. Otherwise your credentials have been sent to you by your SOBIS service desk.

Each PIRS:Claim user has his own individual user name and password in order to ensure the highest security standards. The connection is established via SSL. After you have logged into the application for the first time using the user name and password that was provided to you by your PIRS support team, it is highly recommended that you change your password. In case, your settings are syncronized with your company user settings, the resetting of your password is not nessecary.

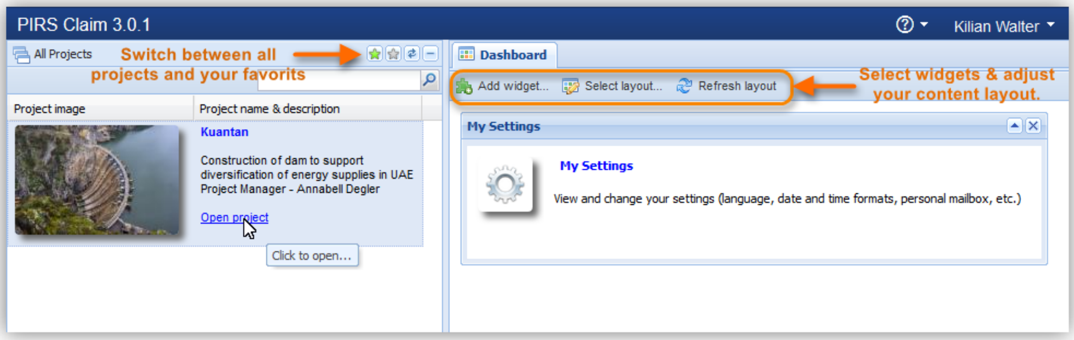
You can change your password by entering the "My Settings" as illustrated below.



3.1 The Global Dashboard

PIRS:Claim Web is equipped with a global dashboard displaying all currently active projects and a project dashboard individually adjustable for each project.

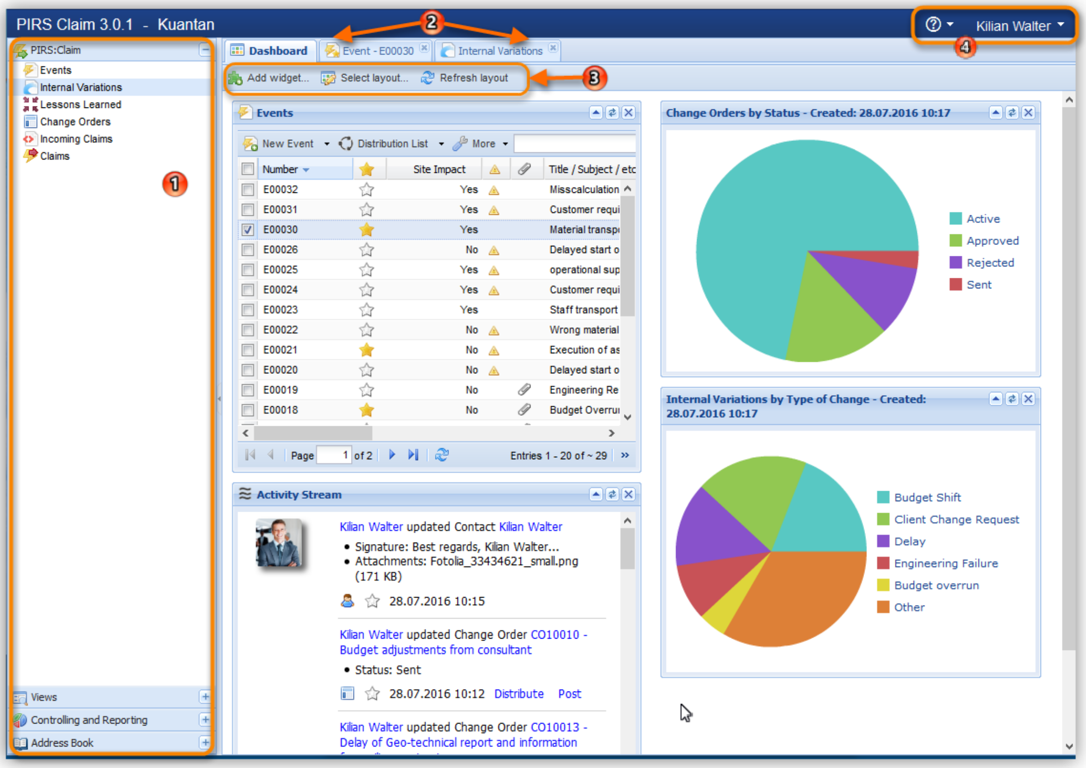
After having logged into PIRS:Claim the global dashboard will be displayed listing all currently existing company projects in a navigation area on the left hand side and a collection of various widgets that you can adjust to fit your needs on the right hand side. As illustrated by the following screenshot, you can adjust the layout of the content area and also select favorite project and switch between the views in order to quickly find the project(s) you are currently involved in.



In order to open the project you need to access, simply click on “Open project” underneath the project description. The project will open in a new tab in your browser.

3.2 The Project Dashboard

For each PIRS:Claim Web project you have an individually adjustable project dashboard.The user interface of each project will display a navigation area at the left hand side and a content area at the center and right hand side of the screen. By default your project dashboard will be empty. However, you can adjust it for each project individually to contain and display a collection of widgets that will present you with your personal project overview when opening a project (compare with the screenshot).



1. On the left hand side of the screen you'll find the navigation area which allows you to manage the application. There are four different navigation categories in PIRS:Claim:

PIRS:Claim documents

There are various document types within PIRS:Claim. The parent document is always an Event. Follow up documents are either documents meant for internal documentation such as Internal Variations or Lessons Learned or documents that can have external interfaces such as Claims, Incoming Claims and Change Orders.

Views

The application provides different views for the tracking and displaying of your own personal documents. In addition, you can search for documents using the "search within a project" view.

Controlling

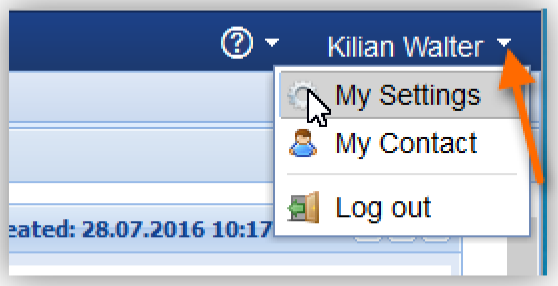
Within the Controlling area you can track and trace all PIRS:Claim documents according to the information you seek to extract.

Address Book

The address book offers the possibility to manage business contacts, contact groups and companies.

2. By using **the tab bar** you can switch between open documents, views and your project dashboard.
3. The dashboard of each project can be modified individually. It can display a collection of views presented as widgets that you can insert by using the "Add Widget" button. Furthermore the layout of the dashboard itself can be adjusted as pointed out in the image.
4. In the upper right hand corner you can define your personal settings, log out and access the PIRS:Claim online guide. In case you have administration rights to this particular project you are also able to enter the administration area.

3.3 User Preferences and Set-up

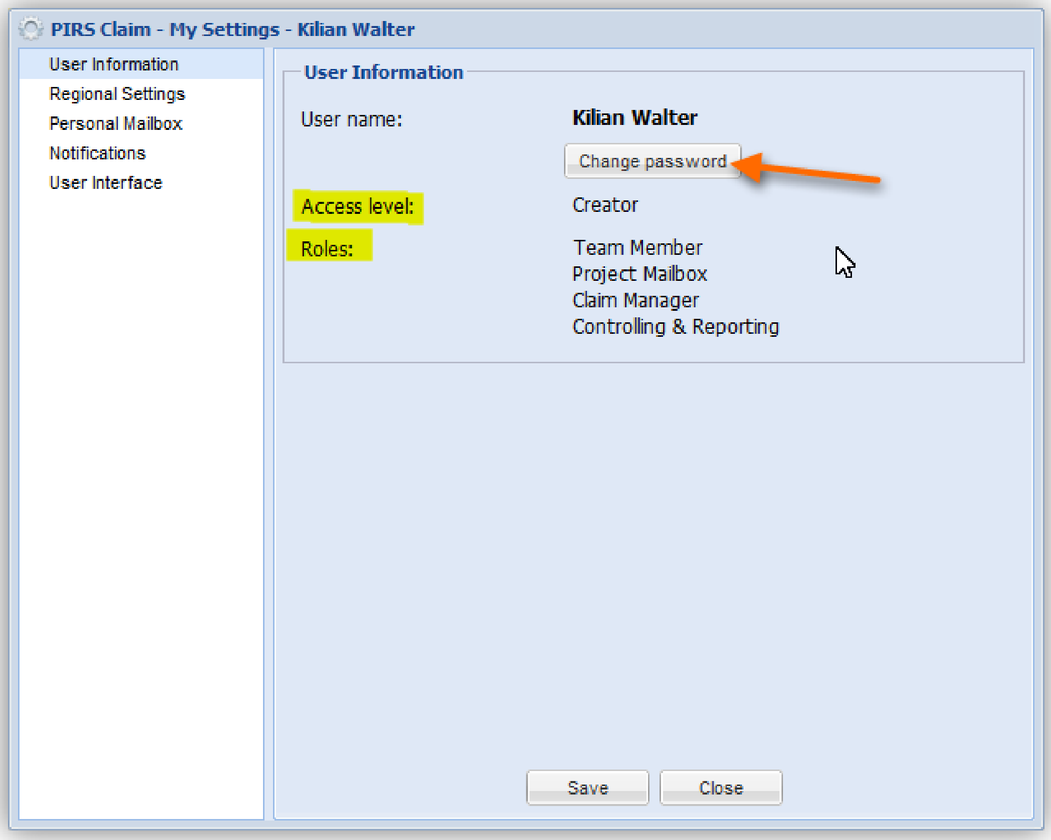


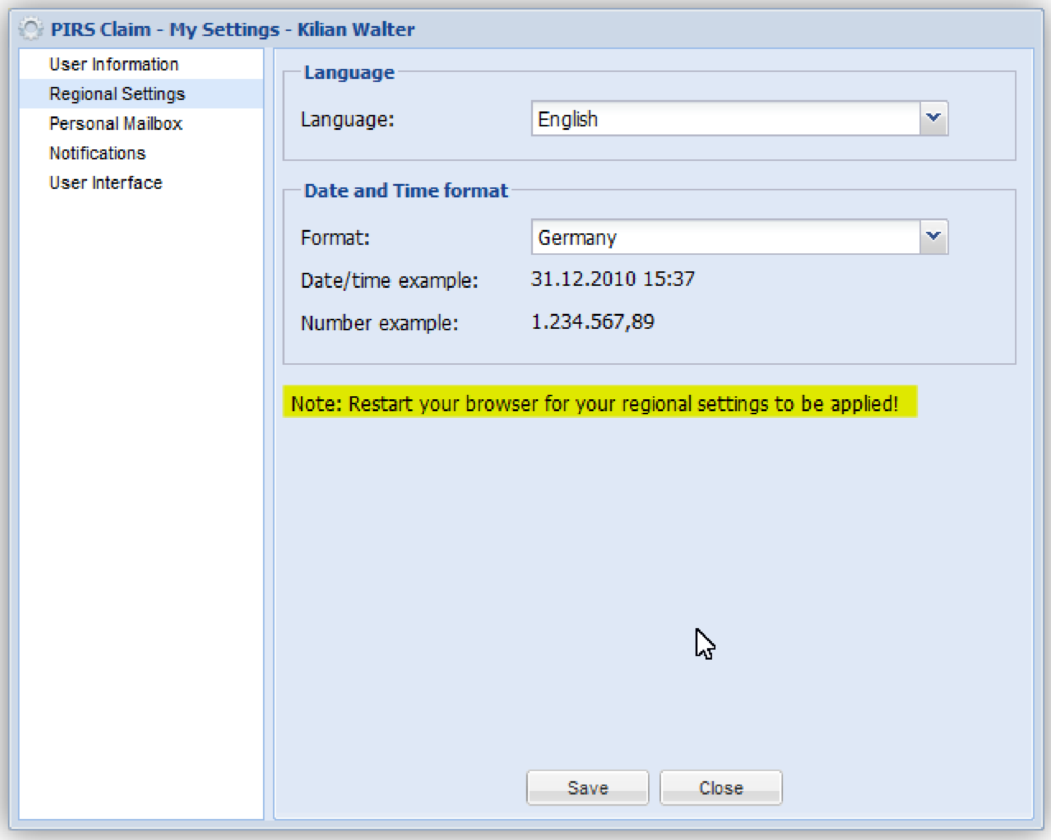
PIRS:Claim offers its users the opportunity to modify their settings in order to fit their personal preferences. There are two different ways to open the "My Settings" window. You can enter your settings by clicking the "My Settings" widget within your global dashboard.

In addition you can also access your settings while working within a PIRS project. As indicated by the image you will find the action "My Settings" listed as option in the top right corner of your project tab once you click the arrow head beside you user name. By selecting this action you will access the same settings window as you would using the widget on the global dashboard.

After having selected the "My Settings", a window with five functional areas opens as displayed by the following screenshots. Besides providing you with information about your assigned role and your access rights the first area also allows you to change your personal password simply by entering and confirming your new password. If PIRS:Claim is linked to your company Active Directory, your account is linked to your Windows account and will be synchronized automatically. Manually changing your password is not required in this case.

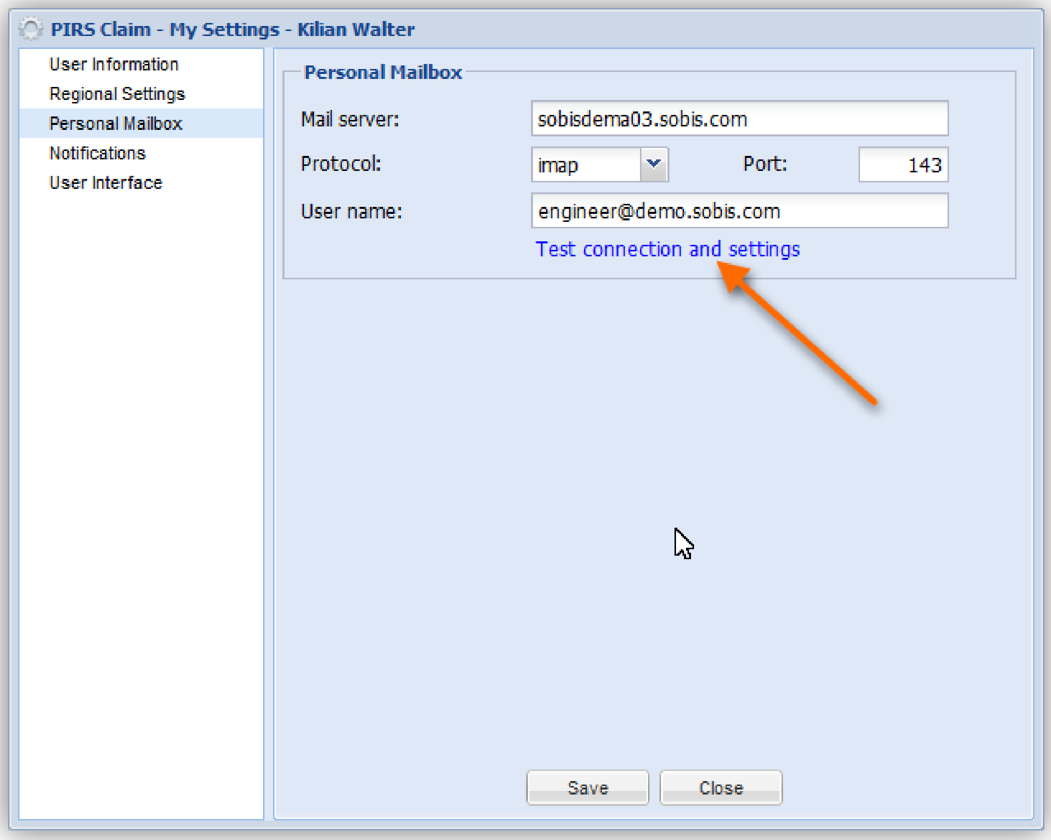
With the second area you will be able to switch between the application language (English, French or German are available) as well as the date and time format. By choosing your preferred language all existing labels will be adjusted as soon as you refresh your page.

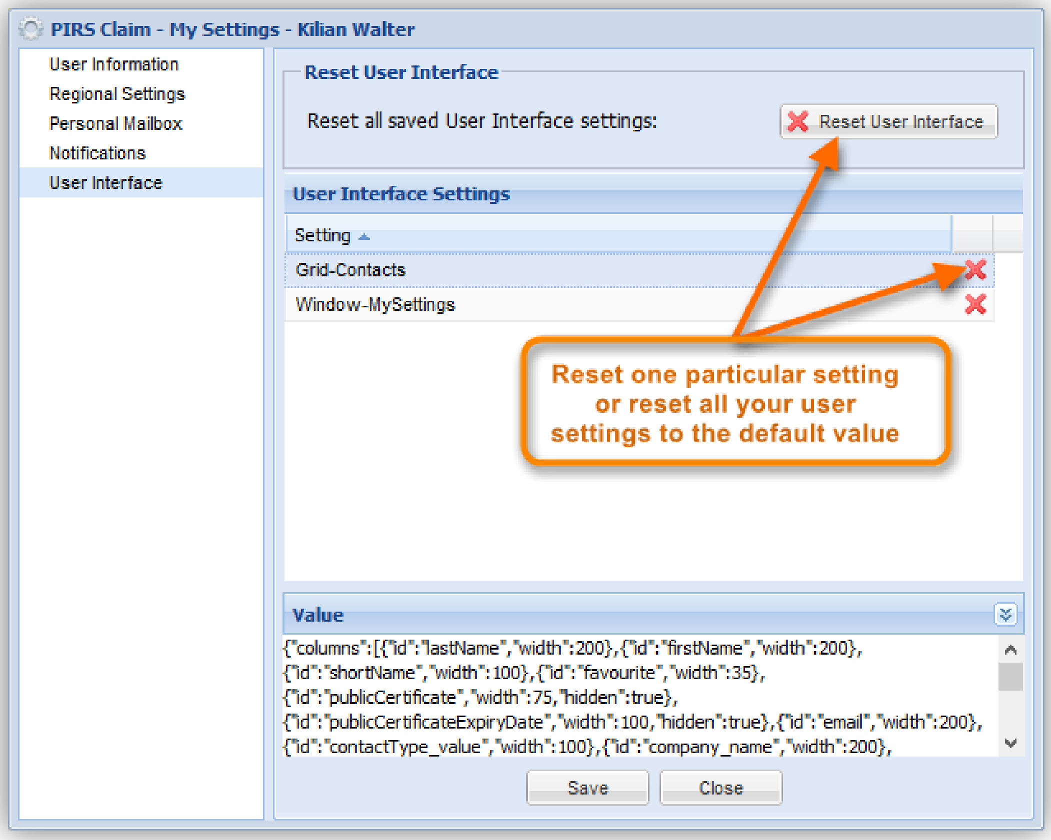

PIRS Claim - My Settings - Kilian Walter
User Information
Regional Settings
Personal Mailbox
Notifications
User Interface
User Information
User name:
Kilian Walter
Change password
Access level:
Creator
Roles:
Team Member
Project Mailbox
Claim Manager
Controlling & Reporting
Save
Close


PIRS Claim - My Settings - Kilian Walter
User Information
Regional Settings
Personal Mailbox
Notifications
User Interface
Language
Language:
English
Date and Time format
Format:
Germany
Date/time example:
31.12.2010 15:37
Number example:
1.234.567,89
Note: Restart your browser for your regional settings to be applied!
Save
Close

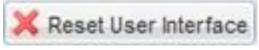
The third area gives you the possibility to integrate your personal mailbox into the PIRS:Claim application by entering your mail server, the used port, your username respectively your email address and selecting the used protocol. This connection allows you to attach important e-mails directly to a related PIRS:Claim document.

In general these settings will already be set for you by your IT administrator. To test the correct settings you can do a test run as indicated by the image below. Should the connection fail, please contact your SOBIS Service Desk or your internal IT Administrator.


PIRS Claim - My Settings - Kilian Walter
User Information
Regional Settings
Personal Mailbox
Notifications
User Interface
Personal Mailbox
Mail server:
sobisdema03.sobis.com
Protocol:
imap
Port:
143
User name:
engineer@demo.sobis.com
Test connection and settings
Save
Close


PIRS Claim - My Settings - Kilian Walter
User Information
Regional Settings
Personal Mailbox
Notifications
User Interface
Reset User Interface
Reset all saved User Interface settings:
Reset User Interface
User Interface Settings
Setting
Grid-Contacts
Window-MySettings
Reset one particular setting or reset all your user settings to the default value
Value
{"columns":[{"id":"lastName","width":200},{"id":"firstName","width":200},
{"id":"shortName","width":100},{"id":"favourite","width":35},
{"id":"publicCertificate","width":75,"hidden":true},
{"id":"publicCertificateExpiryDate","width":100,"hidden":true},{"id":"email","width":200},
{"id":"contactType_value","width":100},{"id":"company_name","width":200},
Save
Close

Another great feature that supports you in managing your personal settings is presented to you in the last area "User Interface". As indicated by the image above, you are able to reset all 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 "Contacts" view.

Please be aware that if you click the button 

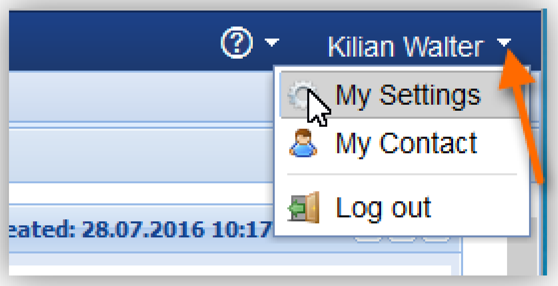
all your personal customization will be reset to default.

Within the forth area you can select whether or not you wish to receive notifications from PIRS:Claim. In case you enable notifications, the application will inform you about changes regarding your documents. So, if for example another user writes a comment to one of your documents, the system will drop you an email.

3.4 Customizing PIRS:Claim

There are several ways offered in PIRS:Claim that allow you to customize your project views and your general settings. The follow chapter will give you a brief overview of these options.

3.4.1 User preferences



PIRS:Claim offers its users the opportunity to modify their settings in order to fit their personal preferences. There are two different ways to open the "My Settings" window. You can enter your settings by clicking the "My Settings" widget within your global dashboard.

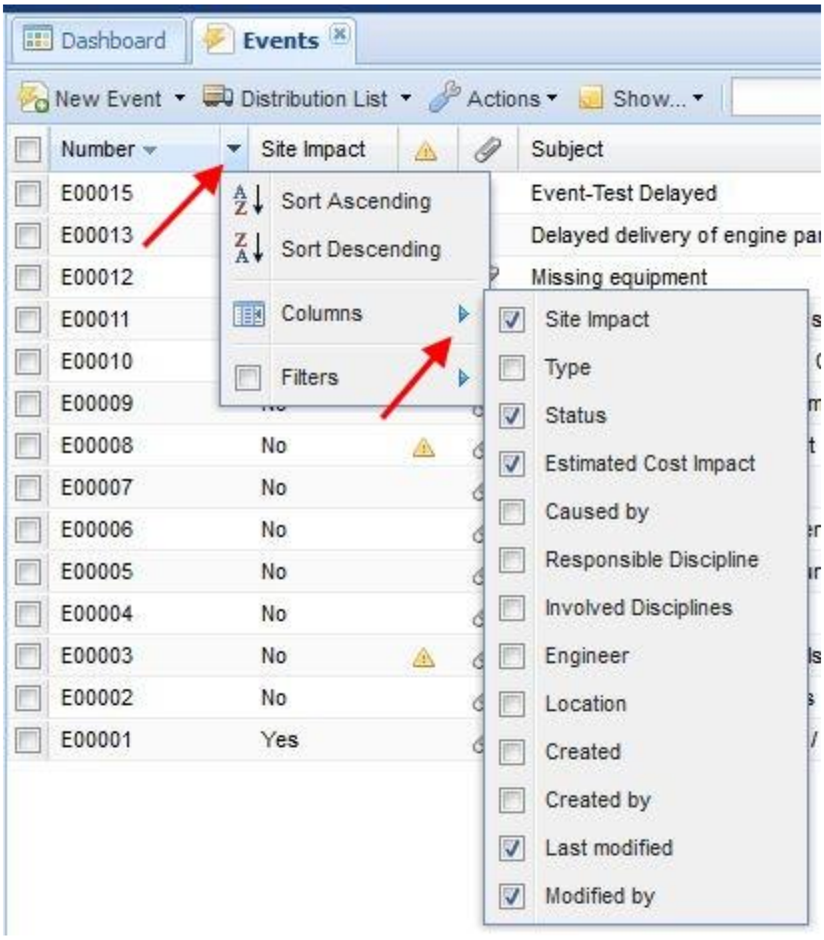
In addition you can also access your settings while working within a PIRS project. As indicated by the image you will find the action "My Settings" listed as option in the top right corner of your project tab once you click the arrow head beside you user name. By selecting this action you will access the same settings window as you would using the widget on the global dashboard.

To learn more about the options offered to you within your settings refer to chapter User Preferences and Set-up.

3.4.2 Customize your grids

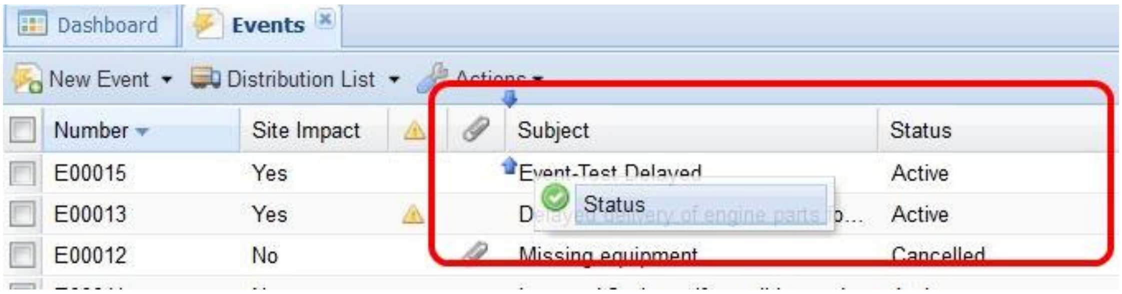
PIRS:Claim enables you to customize the grid of each table within a view display. The following chapter will illustrate how to modify a grid using the example of the view "Events".

All within a view available columns can be added or removed easily. First you need to move your cursor over any of the displayed columns. In reaction a small arrow head pointing downwards will appear in the corner of the column.



As indicated by the screenshot to the right, a small window listing several options will unfold as soon as you click on the arrow head. If you next select the option "Columns" a list of all the possible columns will be offered. Those columns currently displayed in the view are indicated by check marks. You can select additional columns you'd like to be visible in your view and deselect those that are unnecessary to you.

In a next step you can restructure the order of the columns via drag and drop. Exemplary the column "Status" is moved from its initial position following the column "Subject" to a new position.



Your changes will be stored for each view individually and won't be lost when you close the application but will be presented to you the way you customized it. Therefore, all modifications you make within a specific view will be remembered and saved by PIRS:Claim as your new view settings. This means that the view will be structured in the same manner next time you open it.

All customization can be reset, however, within your personal settings (compare with the chapter User Preferences and Set-up).

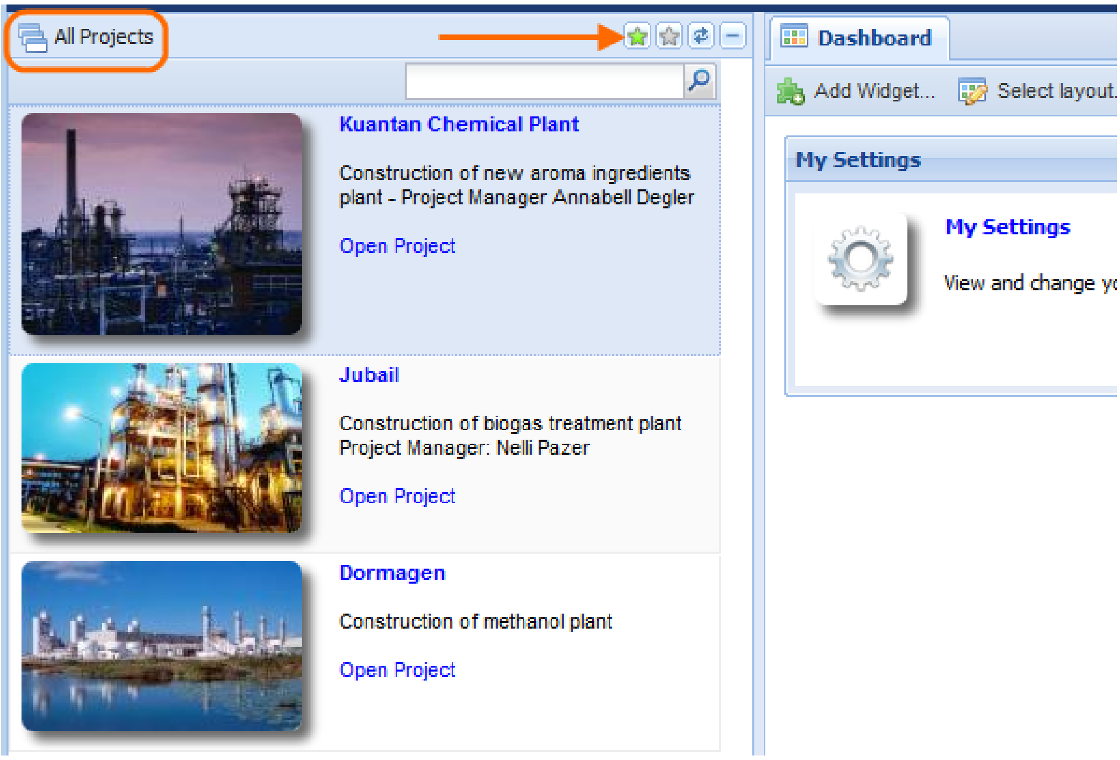
3.4.3 Favorites

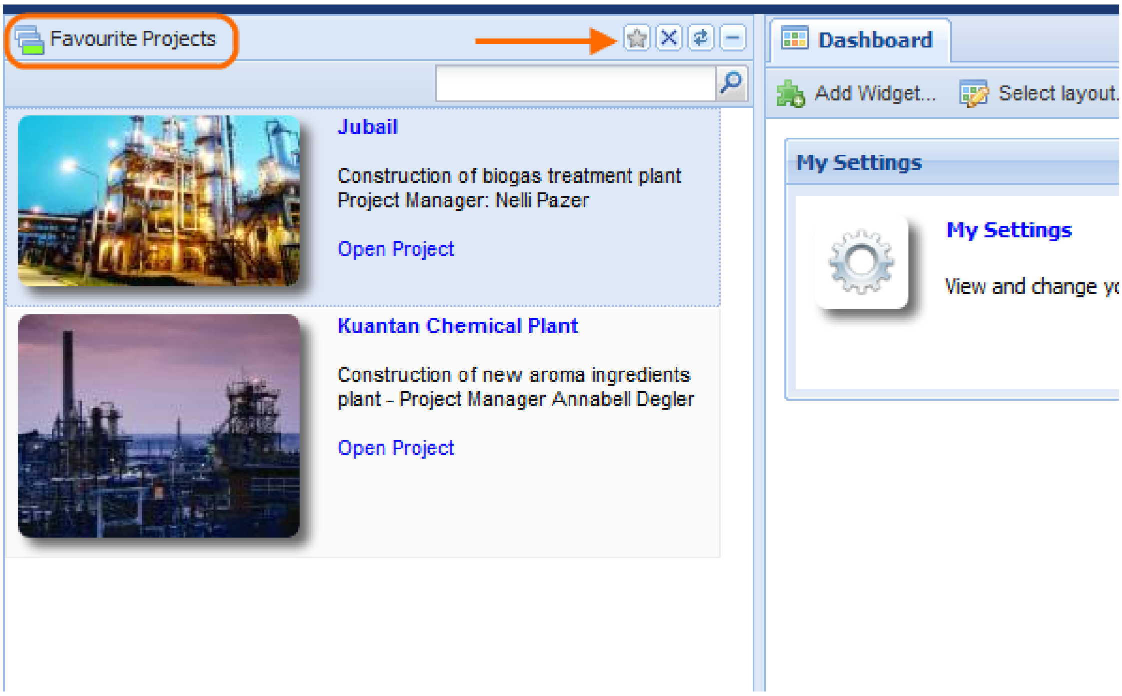
PIRS:Claim enables you to create a list of favorite projects as well as favorite entries allowing you to select and display only those projects and those entries that you are involved in or that you need to access quickly.

By favoring projects you are able to quickly and easily find and open the projects you need to access. Within each project you can then also favor the entries you regularly work with.

3.4.3.1 Favor Projects

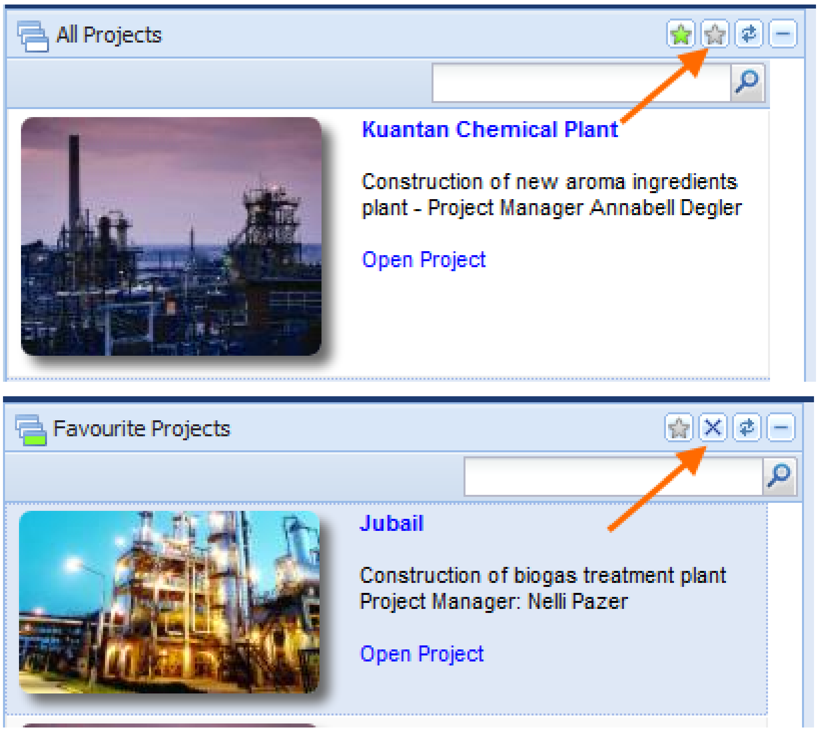
After having logged into PIRS:Claim your company's global user interface that displays **all** current projects, is presented in your browser window. If you have already chosen favorite projects however the application will list only your favorite projects by default. Should you need to access a project that has not or not yet been added to your favorites 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 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.



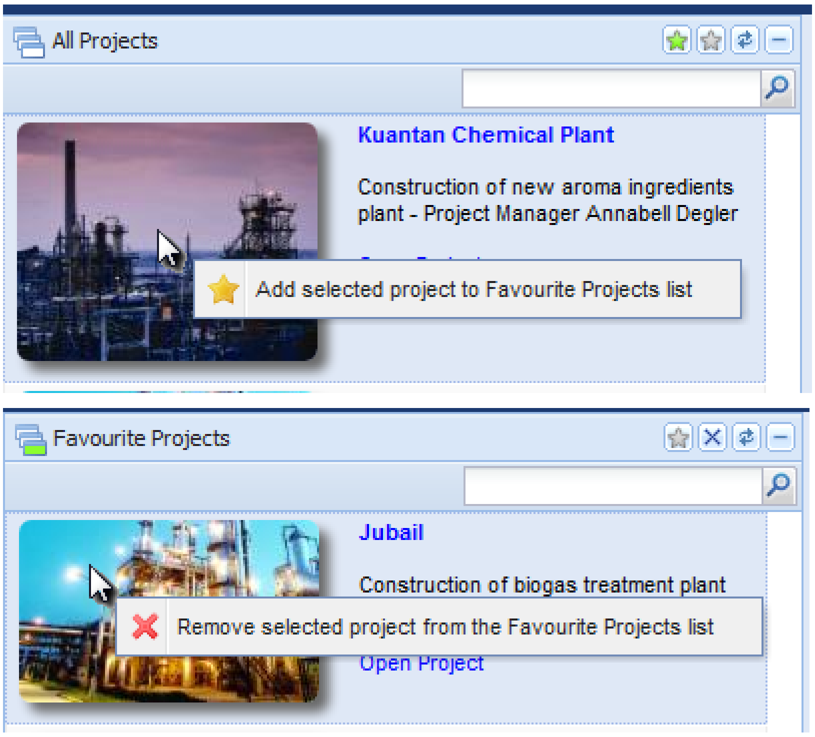


Selecting and removing favorite projects

There are two easy ways to select or remove projects from your favorite list. Your first option is to simply click 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. (Please compare with the following screenshots.)

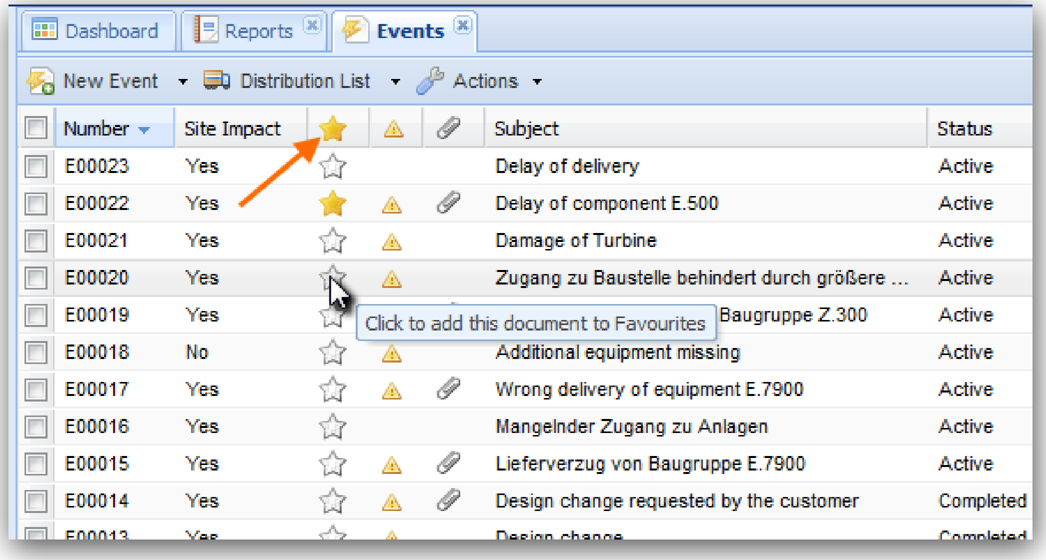


3.4.3.2 Favor Entries

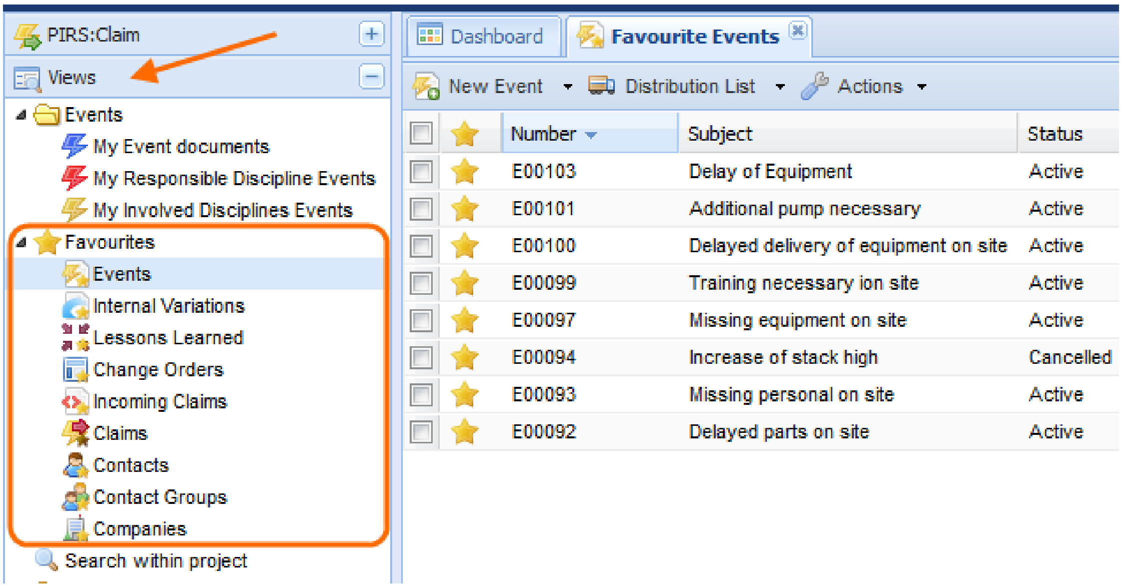
For each project there might be certain events, change orders, internal variations, claims or any other kind of entry that you need to access on a regular basis. In order to open them as quickly as possible, PIRS:Claim allows you to mark entries as your favorites.

The process of selecting your favorites is very simple. No matter what view you are currently working in, 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 gird item as one of your favorites, you only need to click the white star which will then turn yellow. The yellow star indicates that this particular item can also be found listed in your favorites.



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



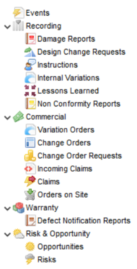
4 PIRS:Claim Processes & Documentation

There are several different entity types used in PIRS:Claim:

Each PIRS:Claim entity type has a header area where all essentially important information can be entered and all types have a similar look and feel in order to ensure a high user friendliness and intuitive usage.

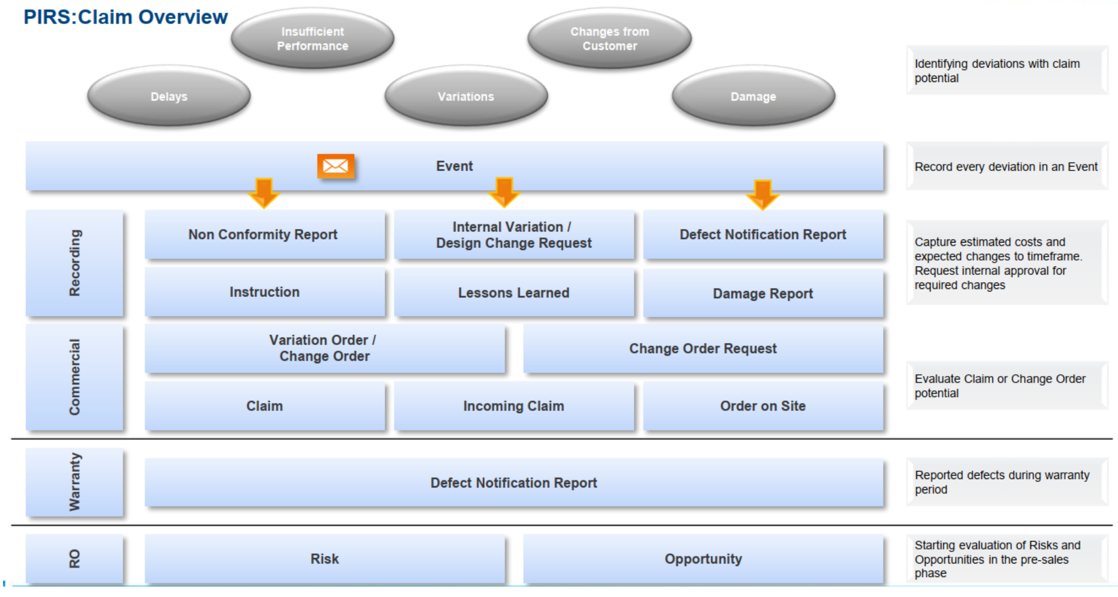
For every new document saved, PIRS:Claim will automatically assign a new unique document number that consists of a letter sequence indicating the type and a sequential number, including (if required) the involved company code.

Mandatory fields will be highlighted in red in case you try to save a document without having provided all the necessary information.

Overview	**Document Type**	**Short Description**	**Team**
	Events	Documentation of any event, deviation or change which might have an impact on the project scope, time or budget. The responsible person(s) will be notified automatically. Event is for internal use only and forms the basis for follow-up documents.	Everybody
	Damage Reports	Record and evaluate identified loss events, damages or accidents that may become an insurance case.	Everybody
	Design Change Requests	Record and evaluate identified changes after design freeze to be officially approved and track impact of changes to add and remove impact for each category with a comment. Design Change	Everybody

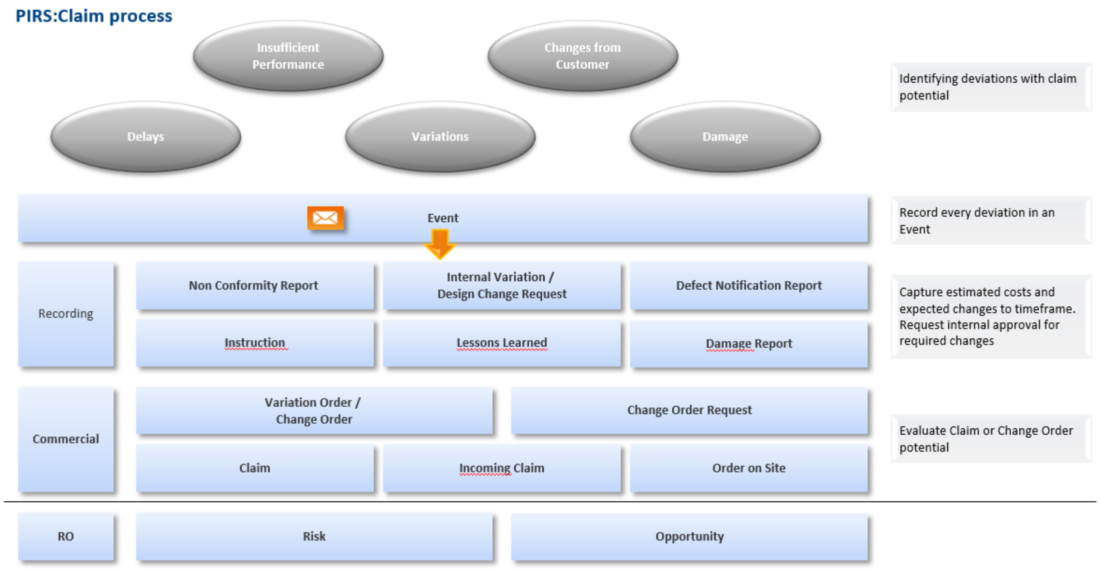
Overview	Document Type	Short Description	Team
		Requests are the simplified version of an Internal Variation.	
	Instructions	Additional instruction to the supplier or contractor to perfom work within or in addition to an existing contract. Instructions are not commercial documents and do not cause or allow changing an existing contract.	Everybody
	Internal Variations	Record and evaluate all internal changes related to scope, time and budget compared to the original planning. Control and approve time and budget impact of changes. It provides a basis to forecast the estimated impact on the project outcome. This document is for internal use only. Original planning should be followed until Internal Variation has been approved by internal responsible. Different levels of approval processes can be used.	Everybody
	Lessons Learned	All experiences and observations made during the course of a project can be recorded and summarized using Lessons Learned. Proposed actions can be discussed within this document to avoid having similar problems during on-going or future projects.	Everybody
	Non Conformity Reports	Track and report deviations to product specifications, also deviations from contractual (clients, partners, suppliers) or legal requirements as impact of event.	Everybody
	Variation Orders	Record order changes by the customer to track the increase or decrease of the order volume. Similar to Change Order but without CN, CO and CP tabs.	Commercial & Project Manager
	Change Orders	Record contractual changes towards your client using Change Order. Different stages can be documented and exported using your company template starting with the estimated Change Notice, followed by the submitted Change Proposal and finalized with the settled Change Order.	Commercial & Project Manager
	Change Order Requests	Record all Change Order Requests coming from suppliers. They might have an commercial impact.	Commercial & Project Manager
	Incoming Claims	Preparation and recording of incoming claims received by external companies with details about background, claim effect, contract basis and claim strategy. Document and track the status of analyzed, received, retracted and settled incoming claims with information about the maximum and settled claim amount.	Commercial & Project Manager
	Claims	Preparation and recording of claims against external companies with details about background, claim effect, contract basis and claim strategy. Document and track the status of draft, sent and settled claims with information about the maximum and settled claim amount.	Commercial & Project Manager

Overview	Document Type	Short Description	Team
	Orders on Site	Record and assign execution of additional equipment / work towards construction companies on measured or lump sum basis. An Order on Site is used to define cost and deliveries of small changes to the original order.	Commercial & Project Manager
	Defect Notification Reports	Record identified defects reported by the client according to the contractor in scope of delivery during warranty period.	Commercial & Project Manager
	Opportunities	Opportunity management is an integral part of the claim management process. Opportunity covers the identification, evaluation, probability of occurrence and monitoring of opportunities before, during and after the project.	Commercial & Project Manager
	Risks	Risk management is an integral part of the claim management process. Risk covers the identification, evaluation, probability of occurrence and monitoring of potential risks before, during and after the project.	Commercial & Project Manager



4.1 Events

Events are the basic entity type that needs to be created in order to create any other type of PIRS:Claim document. The reason behind this philosophy is that in general prior to creating a new Claim, Lessons Learned, Internal Variation etc. an incident or *Event* occurs that this new document relates to. For example, the Event “Delayed delivery of engine parts for turbine alpha” could lead to the creation of a Claim. The following image will illustrate the relation of Events as parent entity to all other PIRS:Claim Follow-up documents.

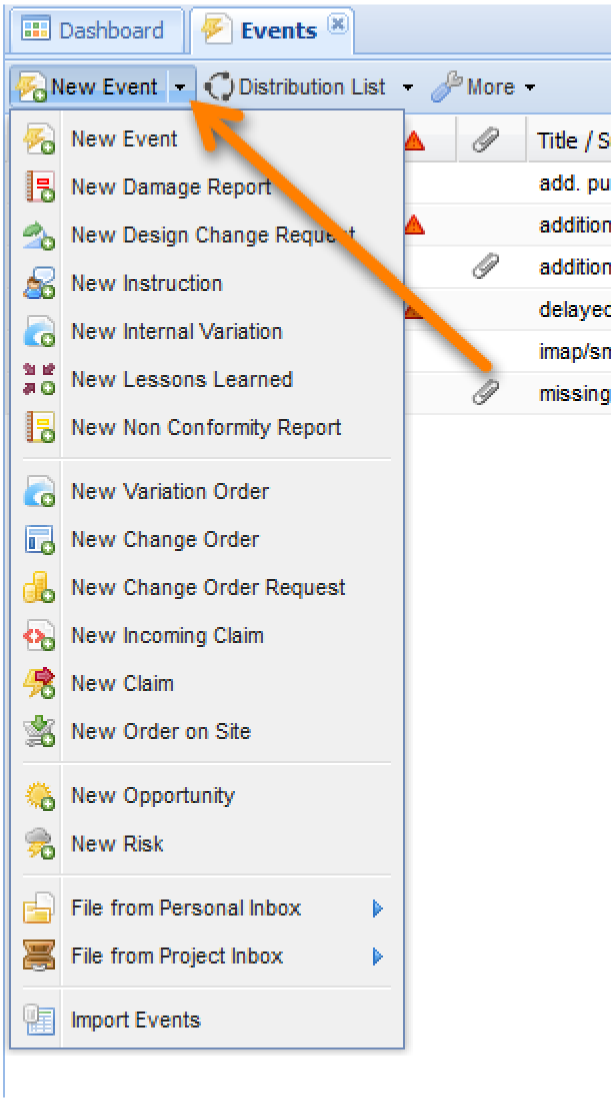


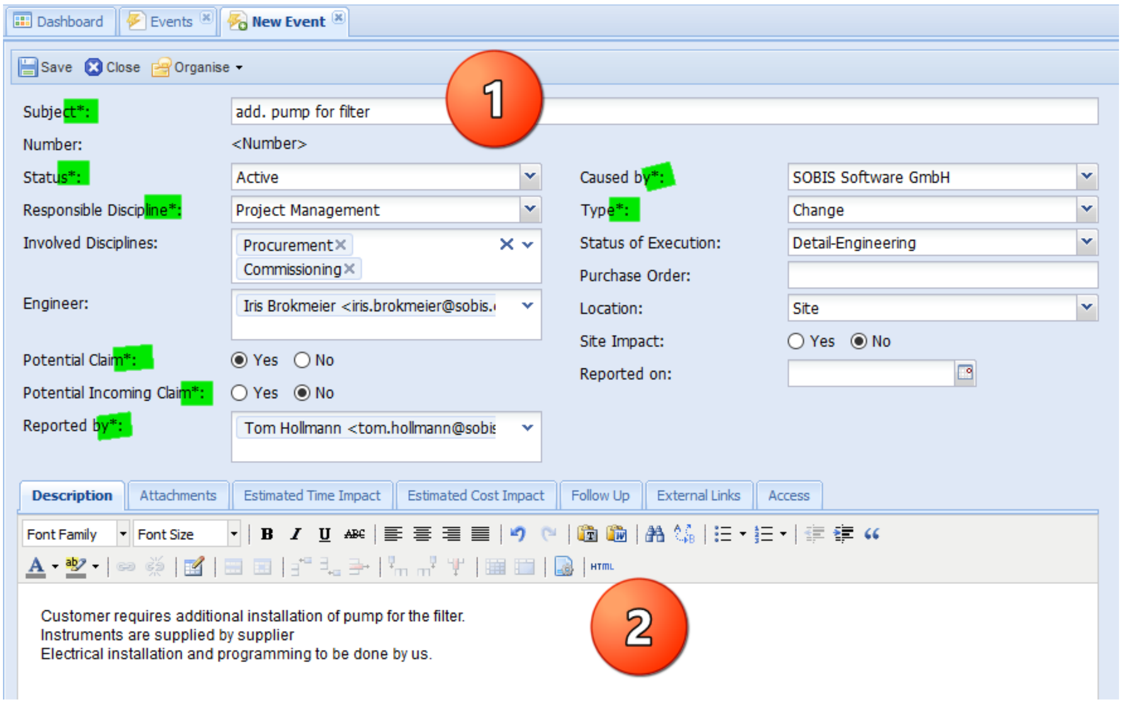
As indicated by the image, Internal Variations, Lessons Learned, Change Orders as well as Incoming Claims and Claims are meant to result from one or more Events. The Event allows PIRS:Claim users to document events or incidents that occur, to categorize and assign them and also to evaluate and assess possible impacts. Based on this identification process Follow-up forms can then be created with precision.

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.

In order to create an event you simply click the “New Event” button that is presented to you in every view either directly in the upper left corner or as one of the options to choose from 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.


Dashboard
Events
New Event
Distribution List
More
New Event
New Damage Report
New Design Change Request
New Instruction
New Internal Variation
New Lessons Learned
New Non Conformity Report
New Variation Order
New Change Order
New Change Order Request
New Incoming Claim
New Claim
New Order on Site
New Opportunity
New Risk
File from Personal Inbox
File from Project Inbox
Import Events


Dashboard
Events
New Event
Save
Close
Organise
Subject*:
add. pump for filter
1
Number:
<Number>
Status*:
Active
Responsible Discipline*:
Project Management
Involved Disciplines:
Procurement
Commissioning
Engineer:
Iris Brokmeier <iris.brokmeier@sobis.
Potential Claim*:
Yes No
Potential Incoming Claim*:
Yes No
Reported by*:
Tom Hollmann <tom.hollmann@sobis
Caused by*:
SOBIS Software GmbH
Type*:
Change
Status of Execution:
Detail-Engineering
Purchase Order:
Location:
Site
Site Impact:
Yes No
Reported on:
Description
Attachments
Estimated Time Impact
Estimated Cost Impact
Follow Up
External Links
Access
Font Family
Font Size
2
Customer requires additional installation of pump for the filter.
Instruments are supplied by supplier
Electrical installation and programming to be done by us.

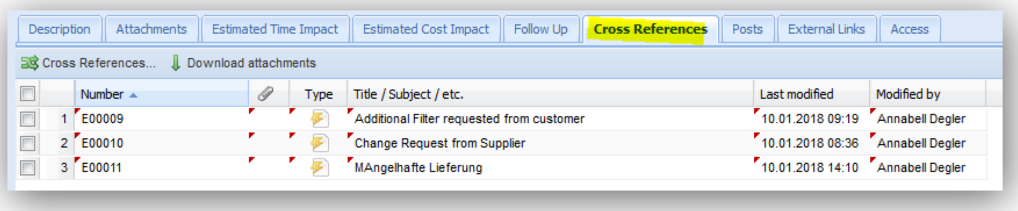
1) This area is the header of the Event. Here the main Event documentation and categorization e.g. in form of a short description (Subject), the event status and type as well as the responsible and involved disciplines can or must be entered. All mandatory fields are marked with a * symbol, highlighted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

If your PIRS:Claim has an interface to your internal ERP system, you can also link the event to a purchase order. In addition a location and the party who caused the event can be entered. This information will be especially interesting for the project overview and controlling.

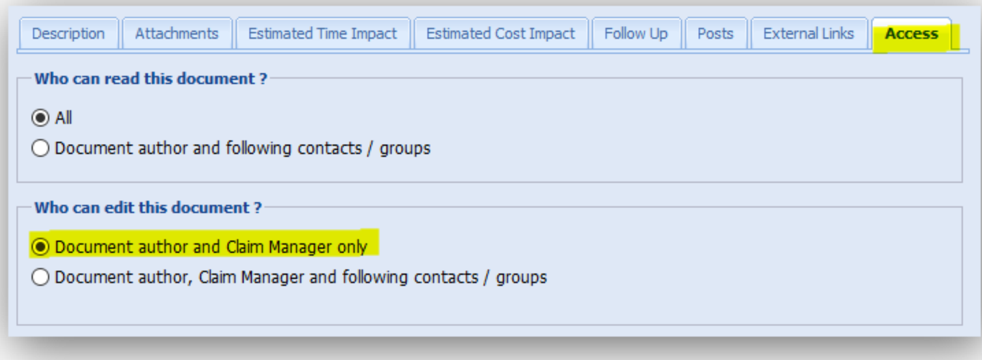
Furthermore it is possible evaluate the Event by marking it as a potential claim and forecast impending site impacts. If an event is marked as a potential claim it will be visible in the Event view by the display of this symbol .

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. The predicted or recorded time and cost impact of the event can be calculated and documented in the third and fourth tab. The “Follow Up” tab will display all follow up documents such as Internal Variations or Claims that were created as a result of this Event.

The “Cross References” tab will appear once an email has been attached to the Event or another PIRS:Claim document has been linked with this Event. Cross References allow you to show relations between PIRS:Claim documents or upload important emails that have a similar background or might in any way be helpful for the evaluations of the Event or any further steps.To learn more about Cross References please also refer to chapter Create Cross References.



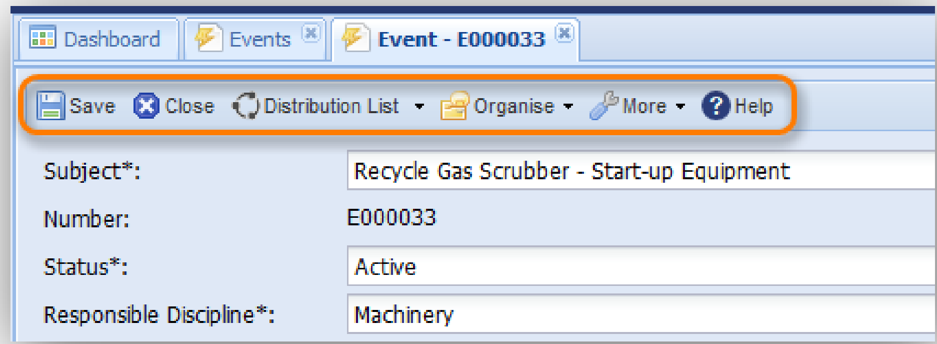
The last tab offers you the option to define or limit the access other team members will have to the Event. By default all team members will be able to read your document. However you will be the only person with author rights which means that other than you only team members that have general editor rights such as claim manager will be able to edit this document. (Compare with the image below.)



Save your Event

If you have entered all important and required information click save in order to save the Event. Depending on your PIRS:Claim configuration, your project manager or internal responsible will be notified automatically about this new Event and can react immediately.

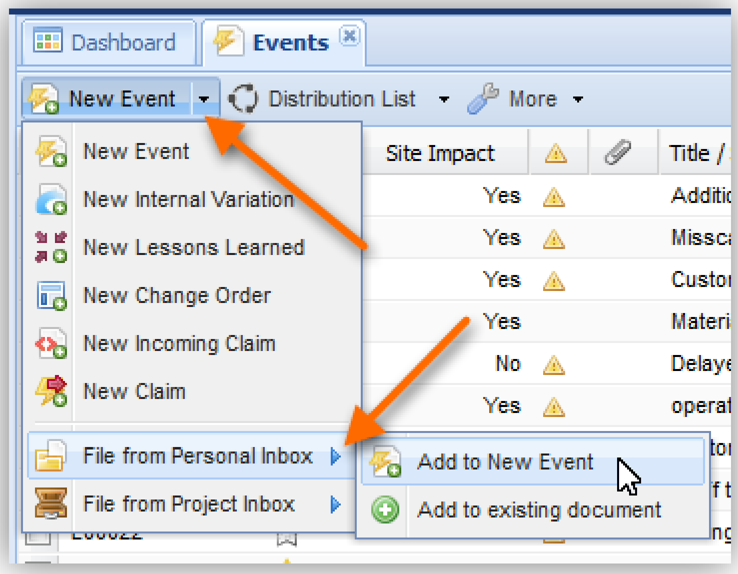
Once an Event is saved, it automatically receives a unique document number. Compare with highlighted area in the screenshot below. Furthermore, additional buttons appear within the document action bar.



All new options and actions offered within the action bar of your PIRS:Claim entities are described within the chapter Common Functions.

Create an Event based on an email

Many times an event is initiated, caused or linked to an email that you have received or written. In order to ensure that the information within this email is included in the Event without having to write it down again, PIRS:Claim enables you to created an Event that is already linked to the respective email.

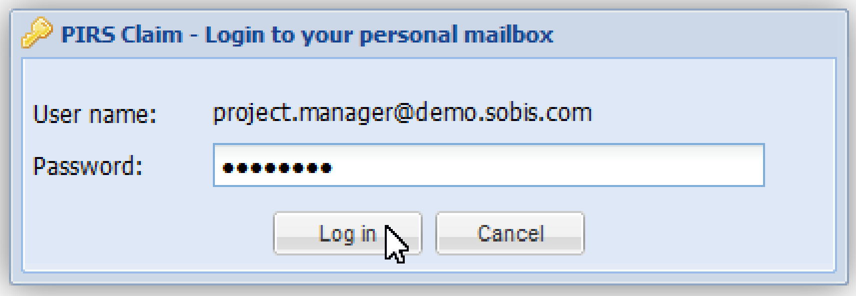


Instead of clicking the "New Event" button directly, expand the "New-" options and select the option "Add to New Event" listed under "File from Personal Inbox".

As illustrated by the screenshot, you also have the option to add mails to an existing document. In both cases you are able to enter your personal mail file in order to link mails to a PIRS:Claim entity. When choosing to add mails to an existing PIRS:Claim document (e.g. Event, Claim, Change Oder, Internal Variation etc.) you will be able to add to any existing document that you have at least read access to.

After the adding process the mail(s) will be listed as a cross reference and all PIRS:Claim users with the necessary access rights will be able to open the linked mail. Besides the content of the mail, all other important information such as the sender, recipient(s) as well as the date the mail was received will be documented and can therefore be tracked.

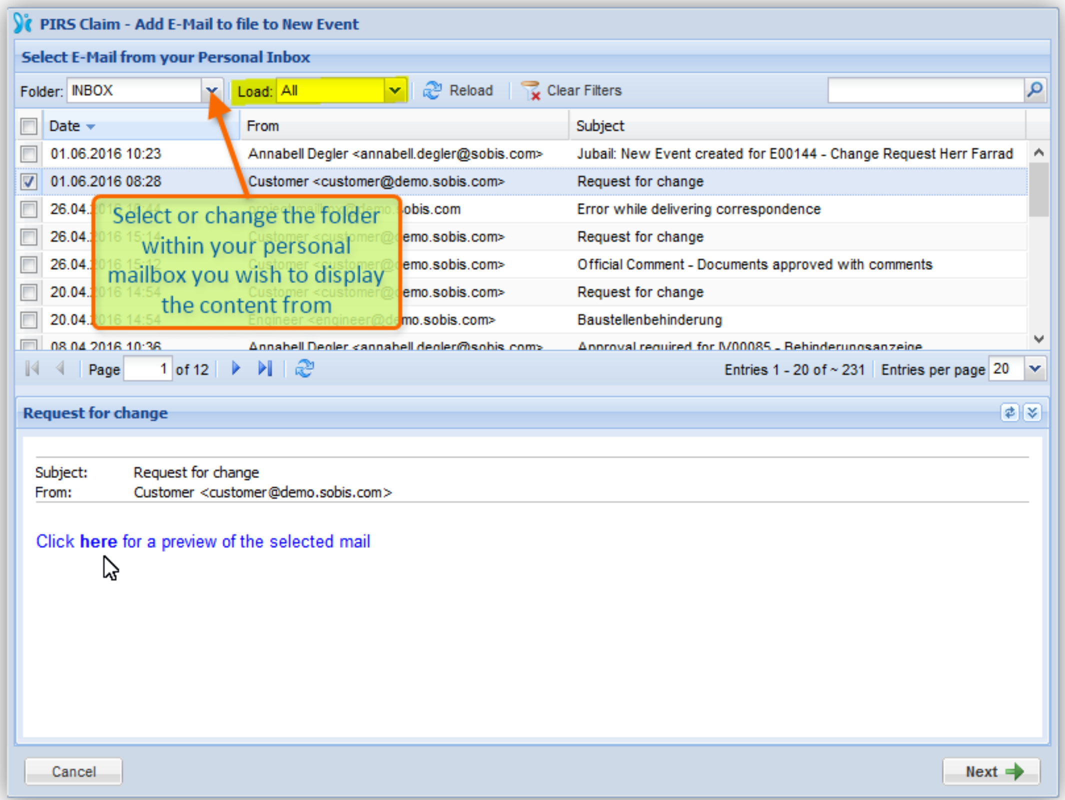
The process for filing an email in both cases is very similar. The process how to create an Event from an email will be described in detail.

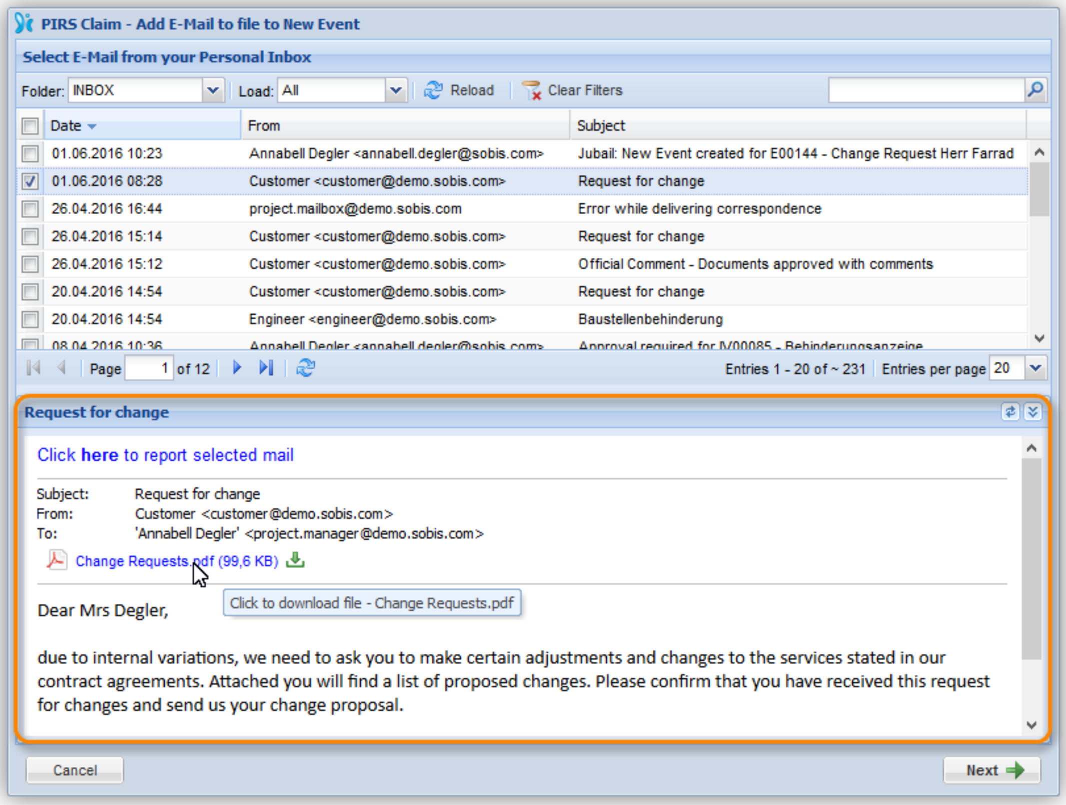


After you have selected the above mention "Add to New Event" option, PIRS:Claim will open a connection to your personal inbox. A dialog box opens, displaying your email address and asking you to enter your personal log-in information.

In case a message box informing you that a connection is not possible appears, the necessary information to connect with your inbox haven't been inserted in your personal settings and you won't be able to access your inbox. Should this be the case, please contact your IT administrator and/or your SOBIS Service Desk.

After PIRS:Claim established the connection to your inbox, the entire content of your mail file including all mails stored within your personal folders will be displayed in a new pop-up window in PIRS:Claim. You can now switch between your mail folders, decide how many mails should be displayed and how far back the received mails should be presented. In case there are a couple of thousand emails within your inbox, we would recommend to load only the most recent mails. To select the time period that should be displayed adjust the setting "Load" highlighted in the screenshot below.





In addition, you are also able to preview the content of the email you like to add to the Event within the preview area. Select the email you are looking for, then click the blue text within the preview pane. Besides the email content, all files attached to the selected email will be displayed and can be downloaded if necessary.

After clicking next you will have to enter the information that is mandatory in order to save a new Event. Depending on the configurations of your PIRS:Claim certain information, such as the subject, will already be entered for you based on the email.

PIRS:Claim will then present a preview of the finished Event and after you have confirmed it, the new Event will be created, saved and displayed in read mode.

The newly created Event will display the selected email as cross reference.

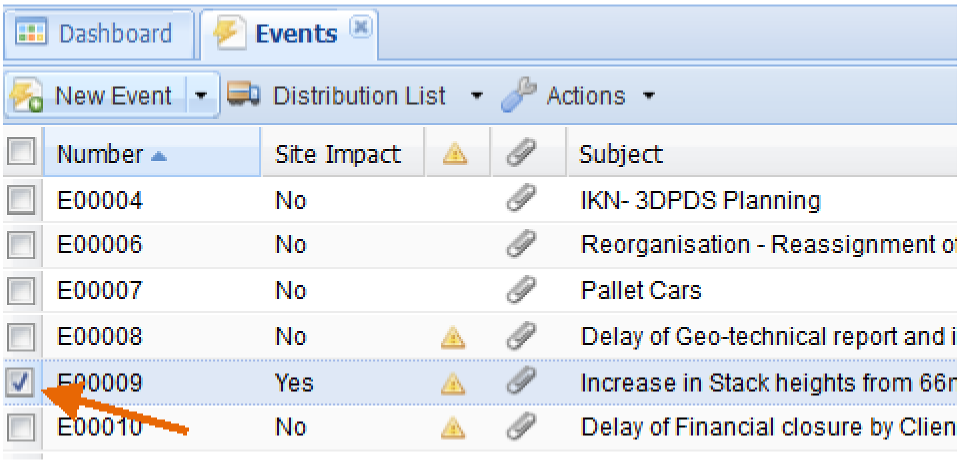
4.2 Create follow-up documents from an Event

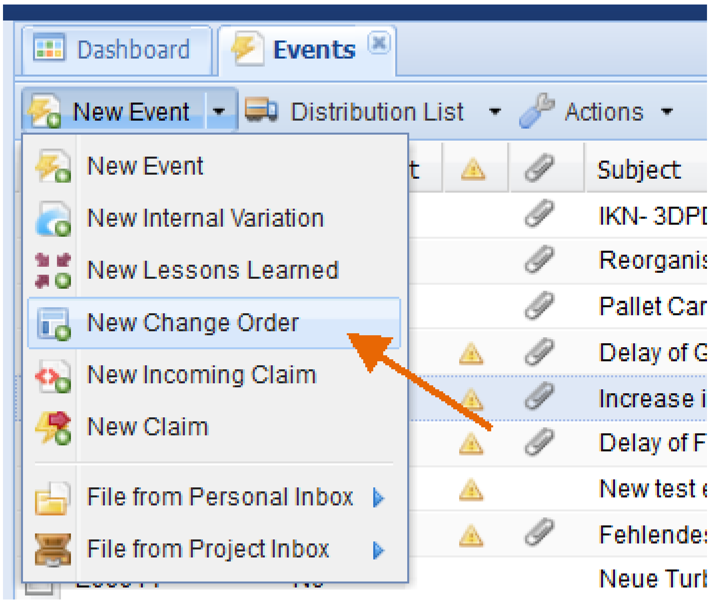
Usually an event or an incident stands at the beginning of each process in Claim Management. Following our Claim Management Standard, those events and incidents are supposed to be recorded as an Event in PIRS:Claim regardless of its appeared severity.

Therefore, when creating an Internal Variation, a Change Order, a new Claim or any of the other follow-up forms it is general standard within PIRS:Claim that they refer to an Event. Obviously the already existing Event will share some or a lot of information with each of its follow-up forms. In order to save you time and effort to enter redundant information, you are able to create each follow-up form from one or multiple Events.

You simple select the Event(s) that contain the relevant information in the Events-View prior to clicking the respective "New-" button.

Should you for example wish to create a Change Order using one specific Event, you first select the Event and then click "New Change Order".





All information that both documents might share (e.g. Subject, Description etc.) will be copied to the new form before it will be displayed to you in edit mode. The field values that will be copied automatically are defined by your company.

Please be aware that should you select more than one Event all field values that can be added together (e.g. Expected Costs) will be added up, field values however where many different options could be entered (e.g. Involved Discipline(s)) will remain empty.

4.3 Recording

All PIRS:Claim entities except Events are categorized and grouped together according to their purpose, internal use and potential external interfaces. Recording documents are generally used only internally, are therefore not shared with external partners, customer or supplier, and help to manage, track and approve internal changes, damages, incidents etc.

4.3.1 Internal Variations

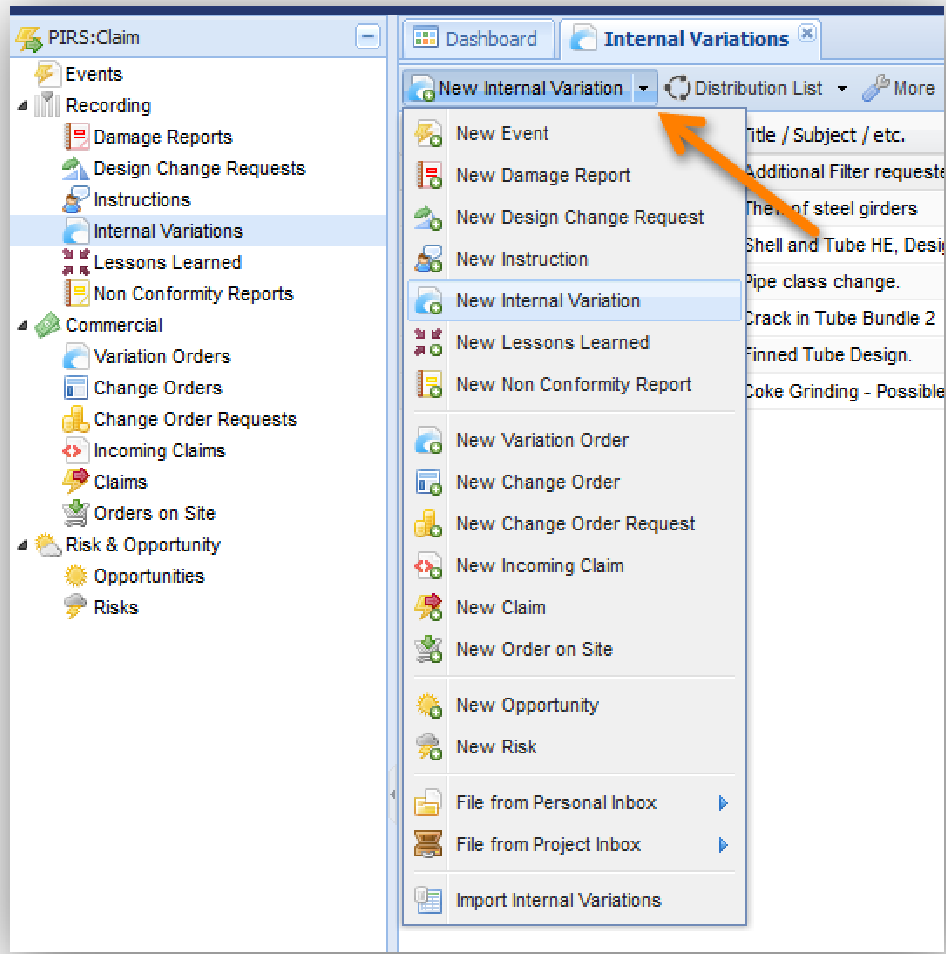
Internal Variations are one of the PIRS:Claim follow up documents that are used to document deviations and variations that effect internal processes and calculations.

It is mostly used to record internal changes that require an approval process such as the employment of additional personal or the change in engineering plans due to an error in planning.

In order to create a new Internal Variation you simply click “New Internal Variation” as displayed in the screenshot. When you are currently working within the Internal Variation grid, as it is the case in the exemplary screenshot, there is no need to expand the "New..."-options in order to create a new Internal Variation; otherwise in all other grids it will be the second option listed.

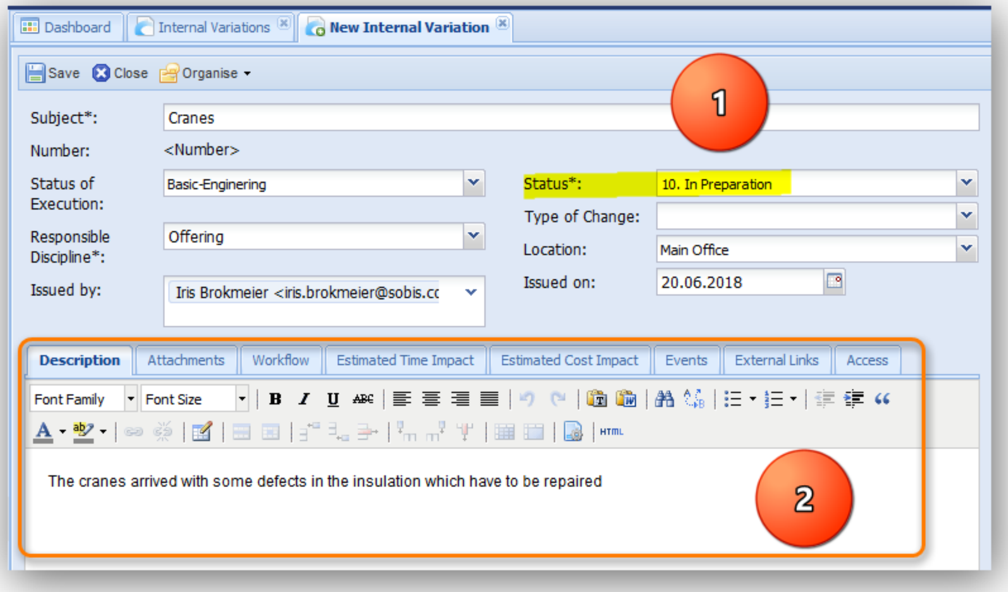
Since PIRS:Claim requires all follow up documents to be linked to an Event, it is recommended that you create the Internal Variation directly based on an Event. Simply select the related Event within the Event grid, prior to selecting the "New Internal Variation" option.

By using an Event as basis for a follow up document, certain information such as the subject, responsible discipline, description or cost calculations will automatically be transferred to the new document.



Similar to the Event the new Internal Variation will open in a new tab. It also consists of a header as well as a content area.

The following screenshot displays an exemplary Internal Variation followed by a short description of its value fields.

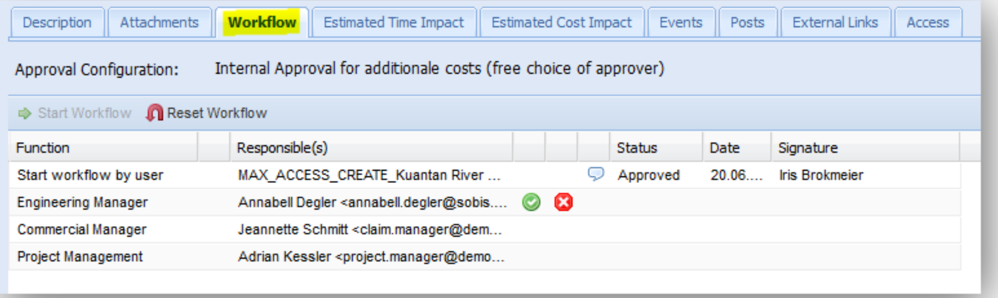


1) Similar to the Event, the header displays the essential information of the Internal Variation such as a short description (Subject), the type of change etc. In case you have created the new Internal Variation based on an Event as recommended above, certain information within the header as well as the content area will already be filled with content from the Event document.

Some fields like the status, the issuer as well as the issuing date will be set automatically.

2) The content area also resembles the content area of the Event. The differences are firstly that while Events can be created on their own without the relation to any other PIRS:Claim document, each Internal Variation must be linked to at least one Event in the "Event" tab. Cross References to additional PIRS:Claim documents can be inserted but are not required.

Secondly, Internal Variations include a workflow process which can be used to execute and document internal approval processes. The status of the each Internal Variation document will reflect the current step of the internal approval workflow.



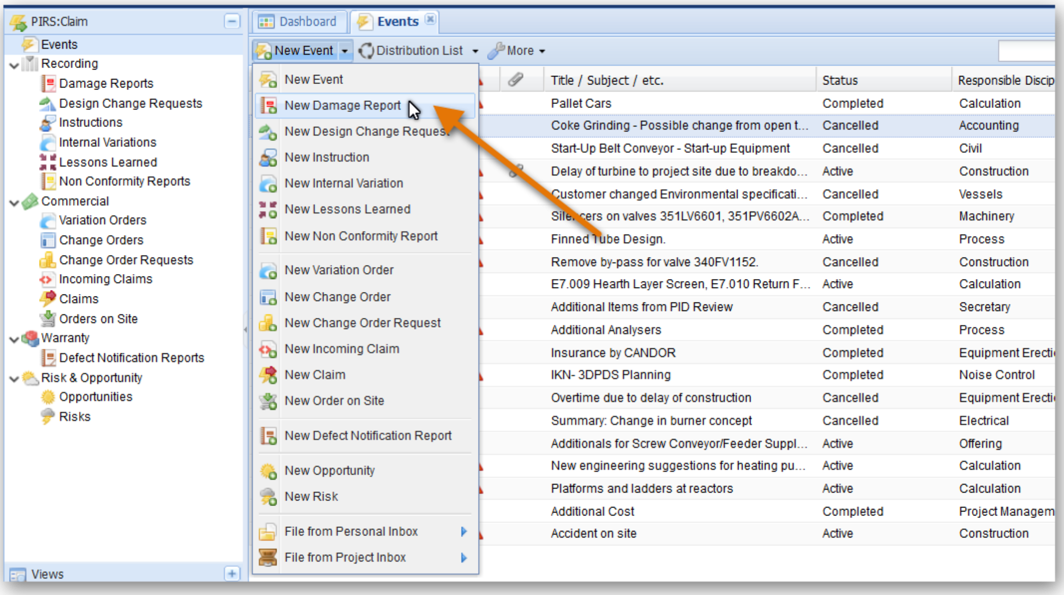
4.3.2 Damage Report (DR)

The PIRS:Claim Damage Report is used to record and track damages or accidents for possible insurance case processing.

It is grouped under the section "Recording" and can be created by all users with general author access. Users that observe a damage can create a Damage Report and assign it to the responsible person. Like any other PIRS:Claim entity, a Damage Report has to be linked to at least one or more event(s). It is therefore advisable to create a DR using an Event by first selecting the Event in question within the Event grid and then

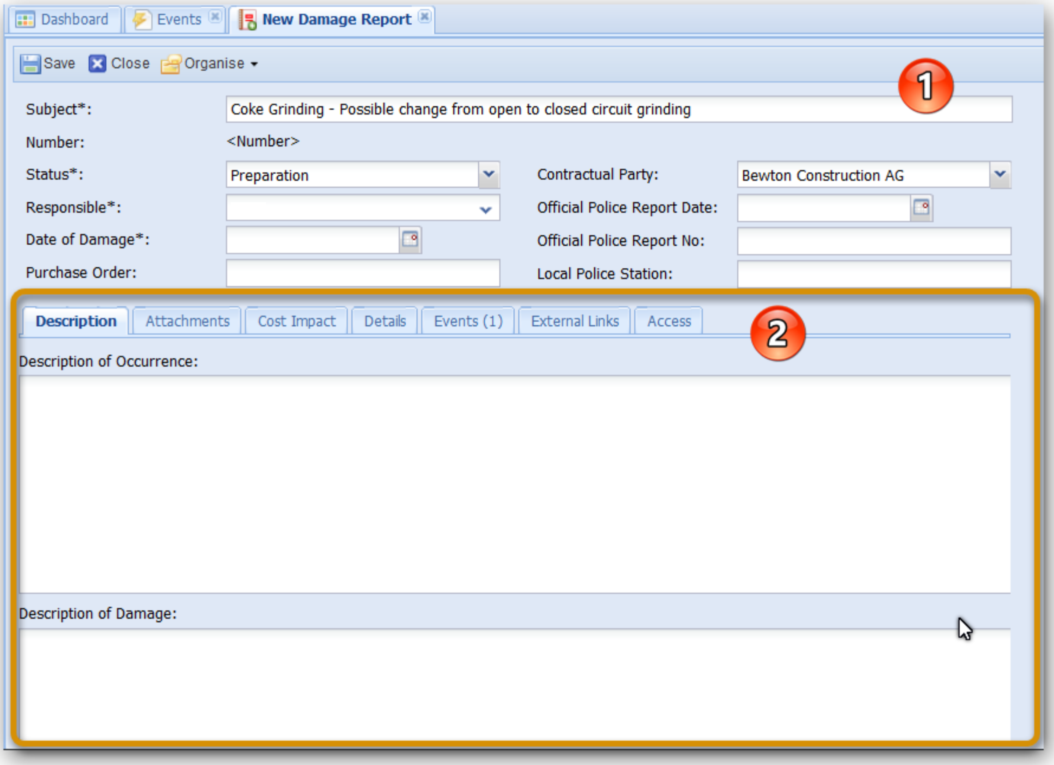
clicking 

button listed under the "New..."-options. Compare with the following screenshot.



You can of course also create a new DR within any other grid. Keep in mind however that you need to link it to an existing Event in order to save the new DR.

A new plain DR opens in a separate tab like shown below.



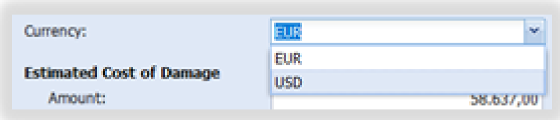
1) Like any other PIRS:Claim entity, the header displays the essential information like Subject, Status, Contractual party, Responsible person, date of damage etc. Once you save a new DR, the application will generate a unique number, which can be used for future reference.

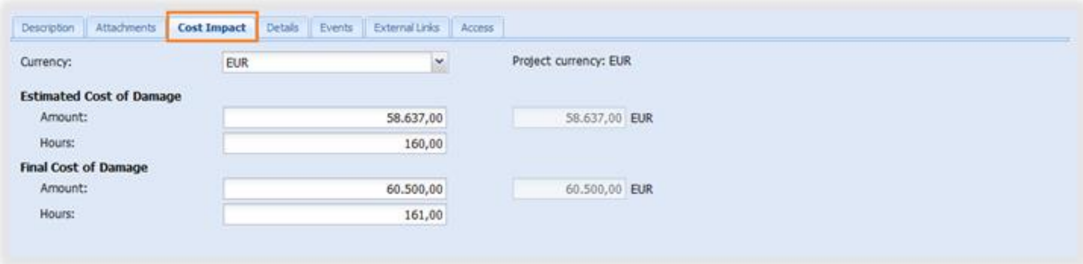
Certain fields such as Subject, Status, Responsible etc , which are marked with a * symbol are mandatory fields.

2) Below the header there are several tabs that allow you to maintain additional information. Certain tabs such as "Events", External Links"and "Access" are available in every PIRS:Claim entity and are therefore explained in a separate article within the Common Functions of this manual.

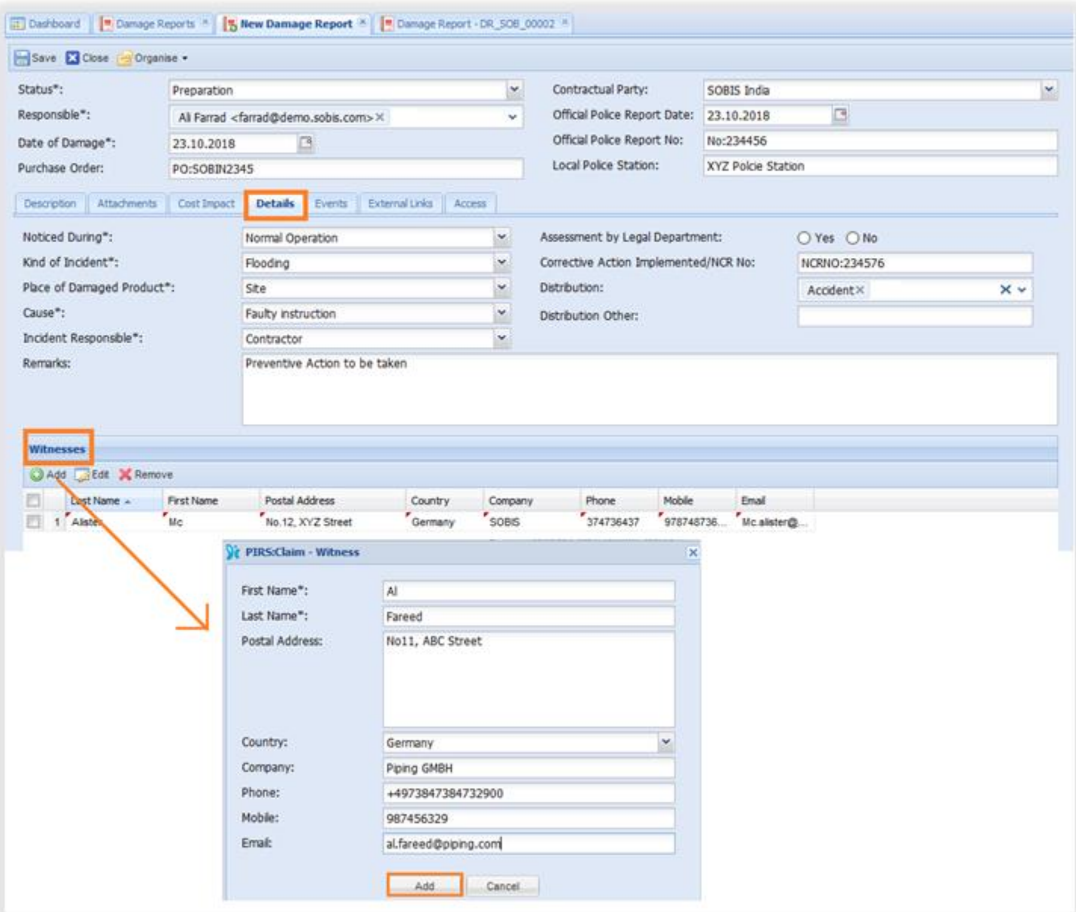
Within the content area under the tab ‘Description’ , you can enter a more detailed description of the occurrence or damage. The tab Attachments allows you to provide an image or existing documentation.

The next tab "Cost Impact" reflects the commercial side of the recorded damage or incident. Both estimated & final cost of the damage can be entered. Futhermore, you can select the applicable currency from a drop down list.



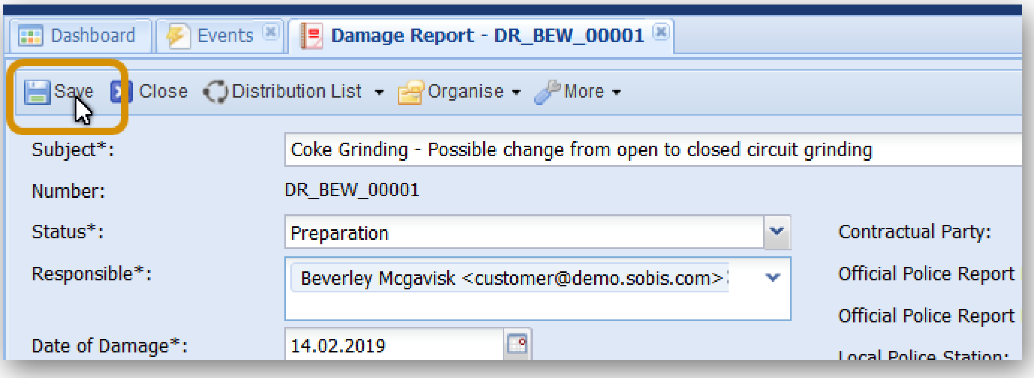


"Details" tab will allow you to enter additional information such as noticed during, kind of incident, cause etc. Regard the screenshot below. Also, you can add, adjust or remove any number of witnesses within the separate witnesses section at the bottom of the Details tab. Please be aware that there are **additional mandatory fields** within the "Details" tab that need to be maintained prior to saving a new DR.

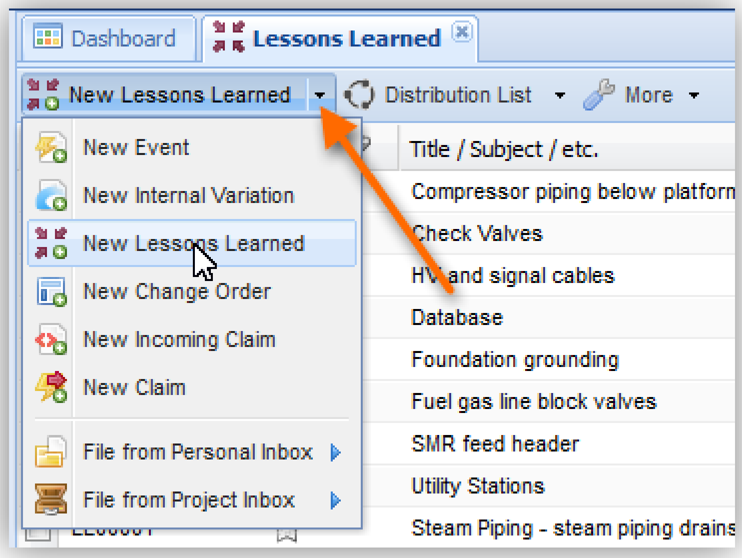


Save Damage Report

After you have entered or selected values for all the mandatory fields, you are able to save the DR. Once a Damage Report is saved, it automatically receives a unique document number as shown in the below screen shot.



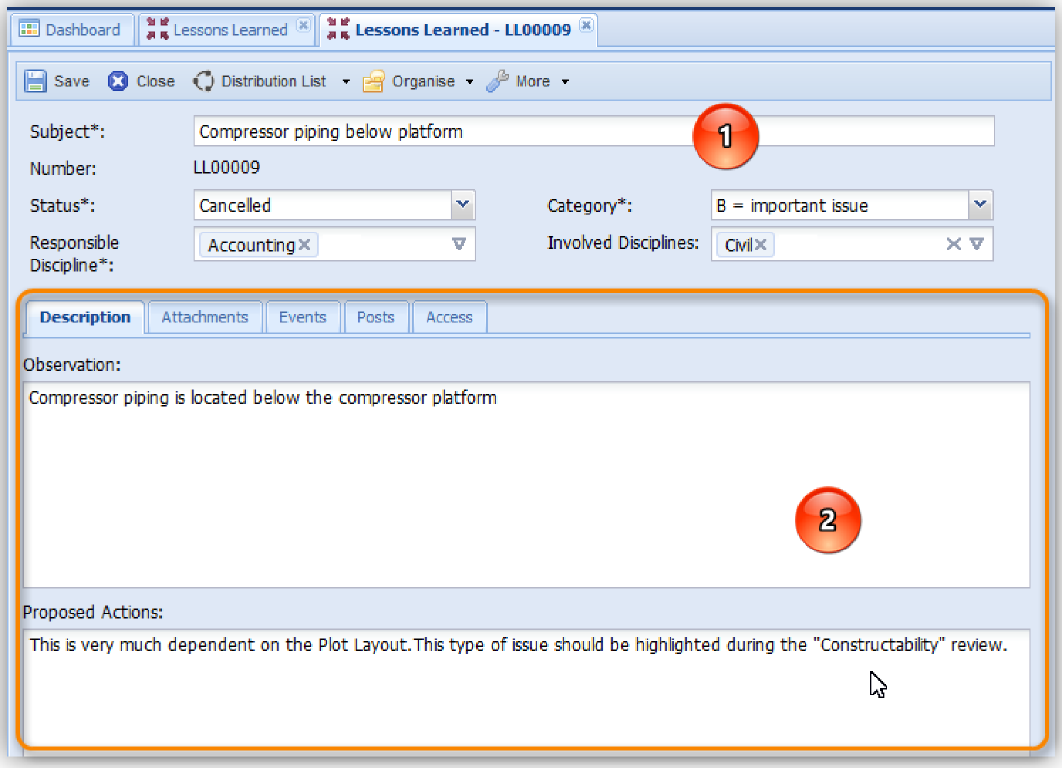
4.3.3 Lessons Learned



Lessons Learned is a document type used to record and promote best practices. As a follow up form, Lessons Learned also need to be linked to at least one Event.

They can for example be used to share experiences made during the course of a project with other project team members or to ensure that a supplier who failed to be reliable is not used again for another project.

As indicated by the screenshot to the left, the creation process of a new Lessons Learned is the same as described above for the Event and the Internal Variation. The new document will again be opened in a new tab.



1) The header area is comparable to the above presented document types, with the addition of the category field that lets you assign a degree of importance to the Lessons Learned. The unique document number is generated automatically once you save a new Lessons Learned.

2) The main difference in the content area is the division of the description area in two separate fields, one documenting the observations and the other leaving room for proposed actions to be taken.

In addition to the description, you are able to attach files that might be important for the documentation or support the points made within the description. Besides the linked Event document you can of course also show relations to other PIRS:Claim documents such as Claims or Internal Variations by using the "Cross Reference" option, offered within the actions listed under "Organise" within the document action bar. For more information on the actions offered to you within the document action bar refer to chapter Common Functions.

Furthermore, you are able to add comments within the "Posts" tab and restrict or limit user access within the "Access" tab.

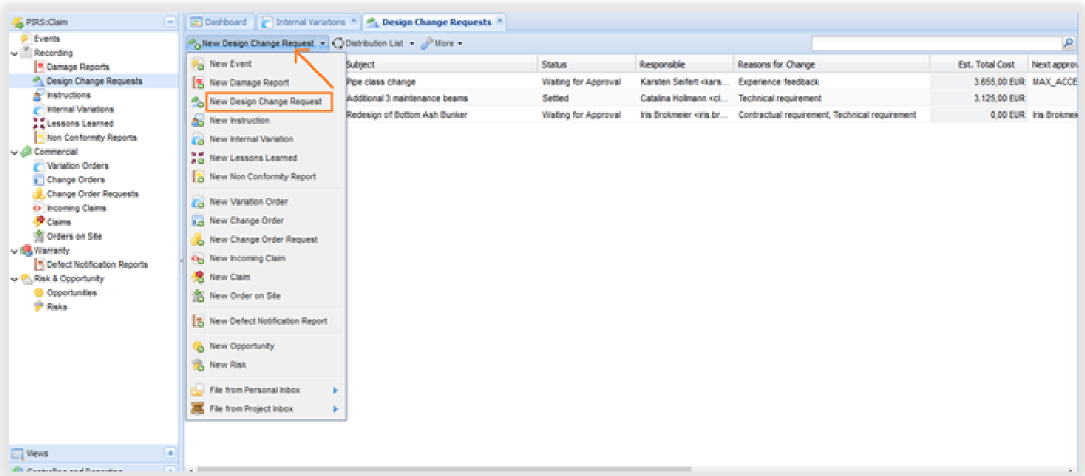
4.3.4 Design Change Request (DCR)

A Design Change Request (DCR) is usually created when :

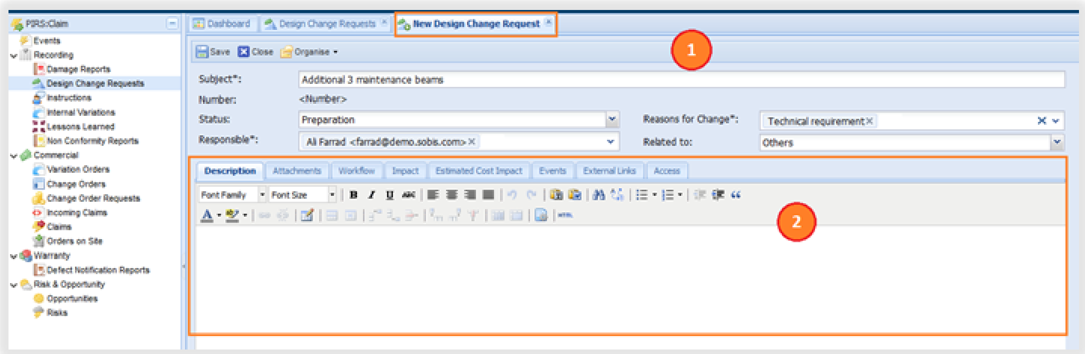
- Modifications are made to data or to the design which go beyond the tolerance values defined in the preceding design freeze.
- Modifications to existing standards are planned, needed or requested.

In addition a DCR offers the frame to record and evaluate identified changes after design freeze. Changes and impacts can be officially approved and track and the impact of changes can be added and removed for each category with a comment. DCRs are the simplified version of an Internal Variation.

In order to create a new DCR, click on 'New Design Change Request' as shown in the screen shot below. If you are currently working within the Design Change Request grid, as it is the case in the exemplary screenshot, there is no need to expand the "New..."-options in order to create a new DCR; otherwise it will be the second option listed.



Once selected, a new DCR form opens in a separate tab like shown below.



1) The header displays the essential information such as Subject, Status, Reason for change etc. Mandatory fields which must contain a value before the DCR can be saved are marked with a * symbol. Once the DCR is saved, PIRS:Claim will automatically generate a unique number, which could be used for future reference.

2) **Description & Attachments:**

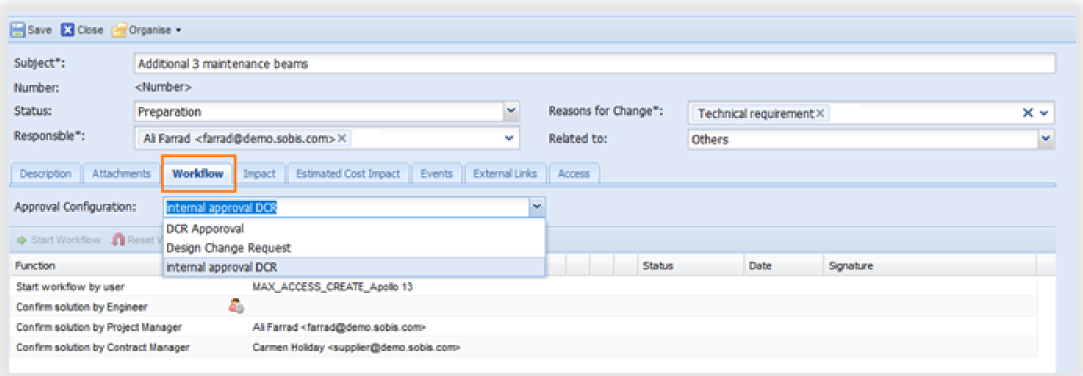
The 'Description' tab in the content area of the DCR gives you room to enter details of design change request. Any existing documents, images or other related files can be included using the tab 'Attachments'.

Workflow:

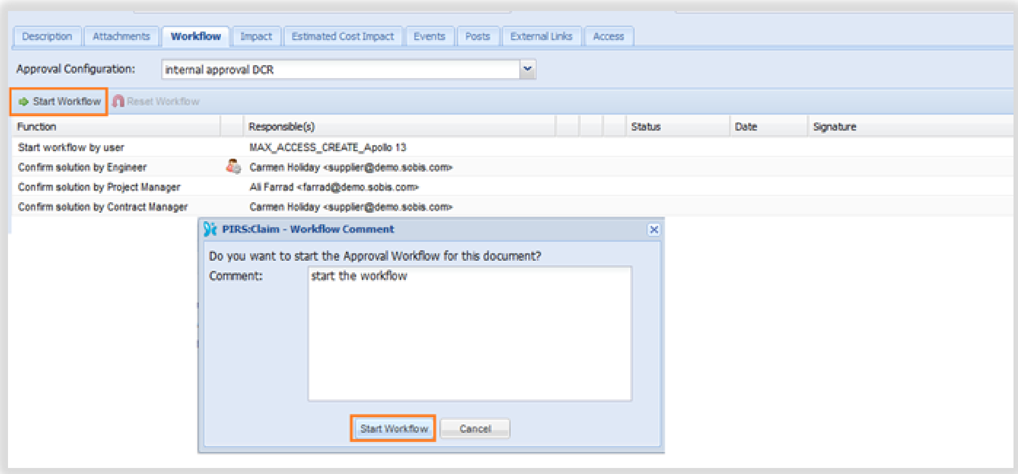
The third tab of the content area 'Workflow' is intended to support and track your internal approval processes. Within this tab all the predefined workflows for your project will be presented for you to choose from. There is no limit on the number of workflows that can be created for each document type. However you need to have administrator access to create new or edit existing workflows. If you find that there isn't the workflow you need available, please contact your project manager.

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 as shown in the screen shot below. At any point of the workflow, it is possible for the document owner 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 document creator 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.

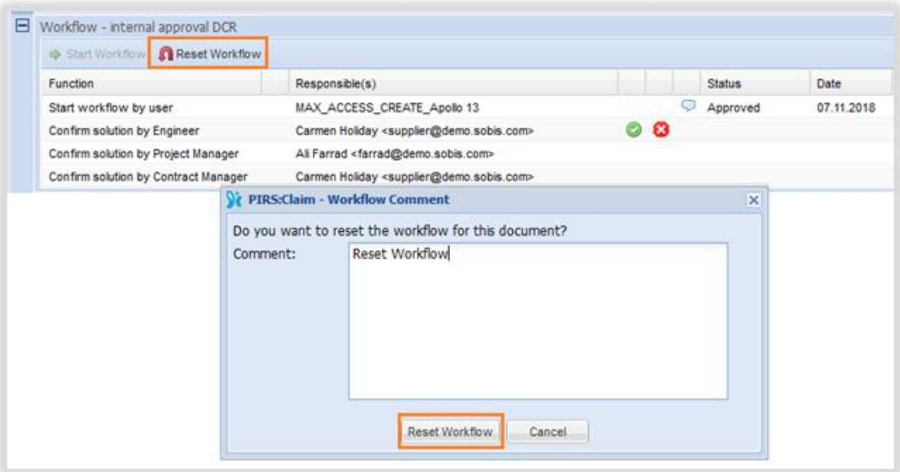
Please be aware that once a workflow is started the DCR is frozen. It cannot be edited during the approval process.



- **Start Workflow**



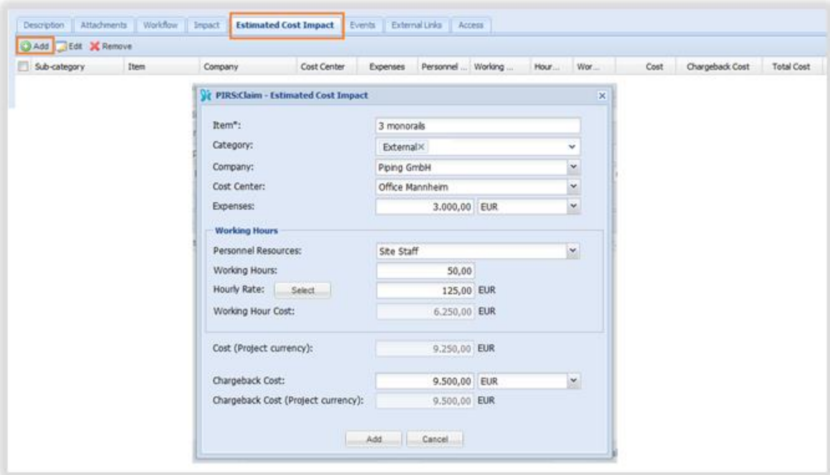
- **Reset Workflow**

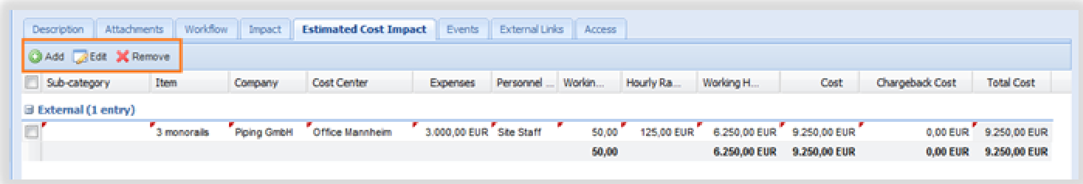


Impact & Estimated Cost Impact

The Impact tab allows you to maintain and track any changes to the schedule and your milestone plan.

Within the tab 'Estimated Cost Impact' you are able to calculate and add details concerning expected cost as depicted in the screen below. The details can be edited or removed until the workflow is started.



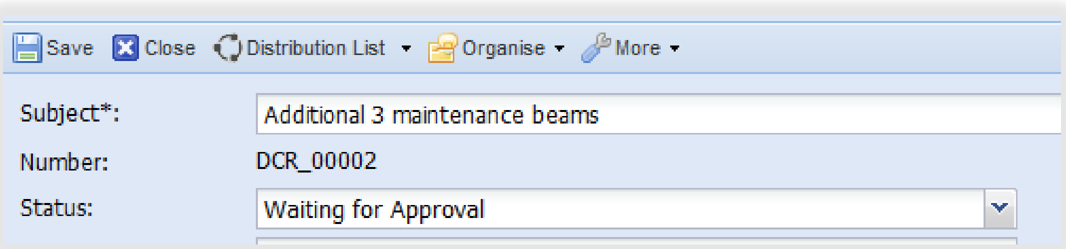


Events & External Links & Access

These are common functions offered to you in every PIRS:Claim entity. Please refere to the respective articles in this manual.

4.3.4.1 Save Design Change Request

After you have entered or selected values for all mandatory fields, click save in order to save the Design Change Request. Once a DCR is saved, it automatically receives a unique document number as shown in the below screen shot.



4.3.5 Non Conformity Report (NCR)

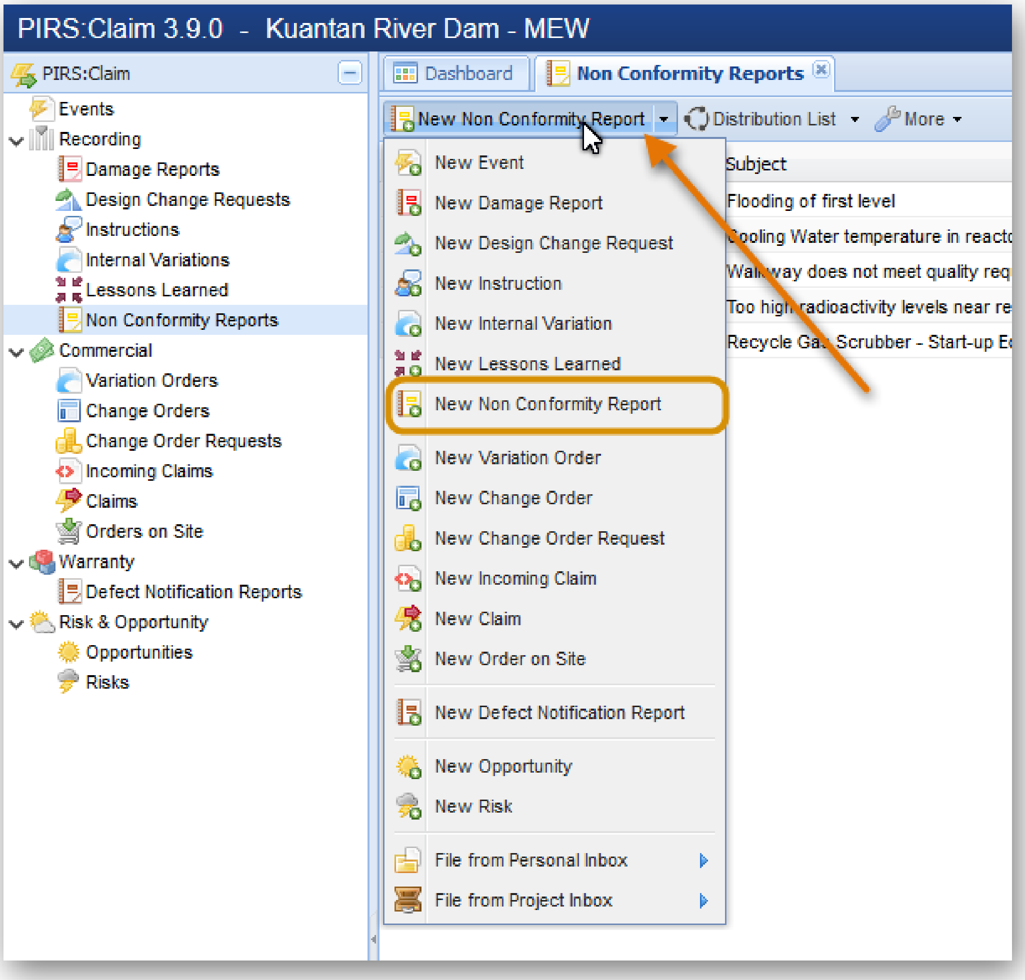
A Non Conformity Report (NCR) is used to record and track technical deviation in relation to quality specifications and allows for the documentation and overview of necessary corrections. All corrective measures are clearly defined within the NCR and their expected execution is documented.

NCR is created based on an event and listed under 'recording'.

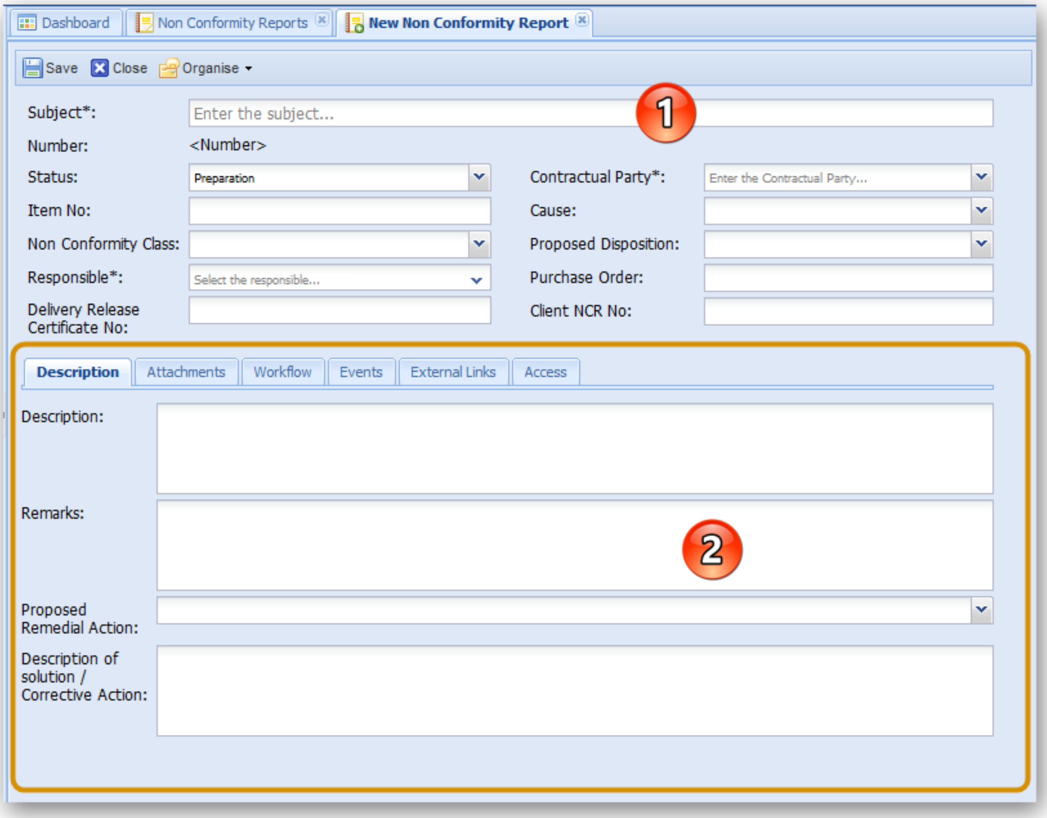
4.3.5.1 Create a new NCR

In order to create a new NCR, click

listed under the "New-" options within your tool bar (compare with the screen shot below). When you are currently working within the Non Conformity Report grid, as it is the case in the exemplary screenshot, there is no need to expand the "New..."-options in order to create a new NCR.



The new NCR opens in a separate tab as shown below.

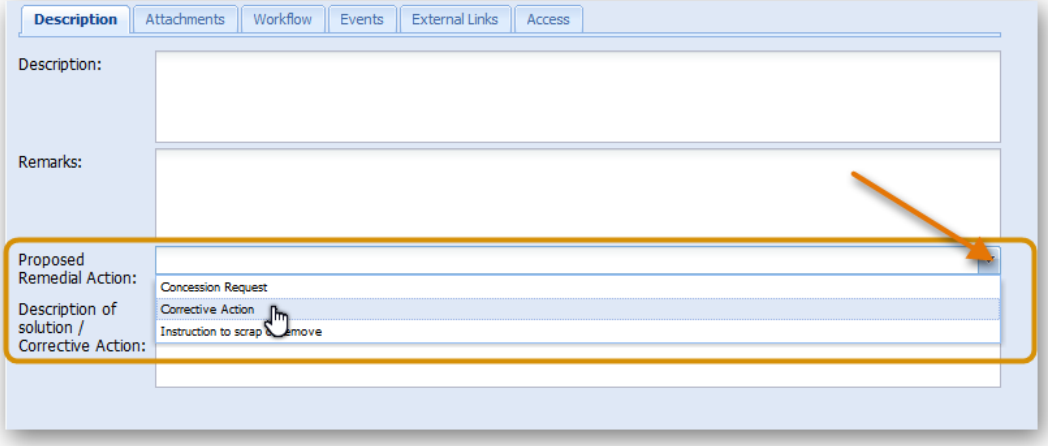


1

Like any other report in PIRS:Claim, the header displays the essential information like Subject, Status, Reason for change etc. On saving, the application will generate a unique number, which can be used for future reference. Some fields like Subject, Responsible etc , which are marked with an asterix symbol are mandatory fields. All mandatory fields have to carry a value in order to save the NCR.

2

In the content area under the tab 'Description', background information concerning the NCR can be entered and an additional free text field allows you to record any remarks. In the the 'Proposed Remedial Action' tab, you can select a suitable option from the predefined drop down list, as shown below. Any values offered within this list are set by your project manager. If the right keyword is not offered, please refer to your PM.

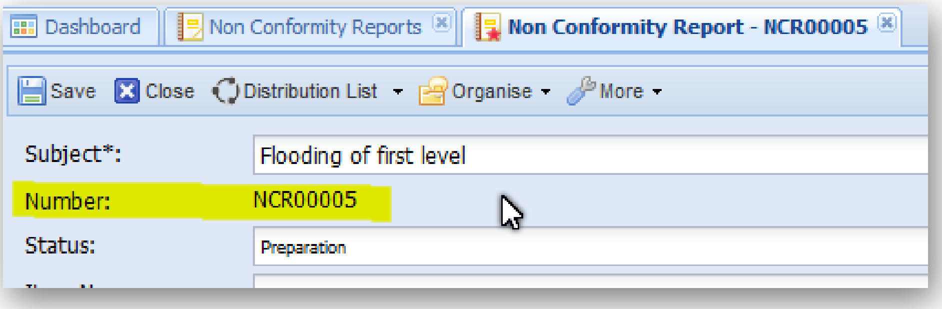


Within the tab ‘Attachments’, you are able to add any files such as an image or other document that is required for the management of the NCR.

For more information on the Workflow, Events, External Links & Access, please refer to our chapters under ‘Common Functions’.

Save Non Conformity Report (NCR)

After you have entered all the mandatory fields, click save. Once the NCR is saved, it automatically receives a unique document number as shown in the below screen shot.

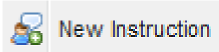


4.3.6 Instructions

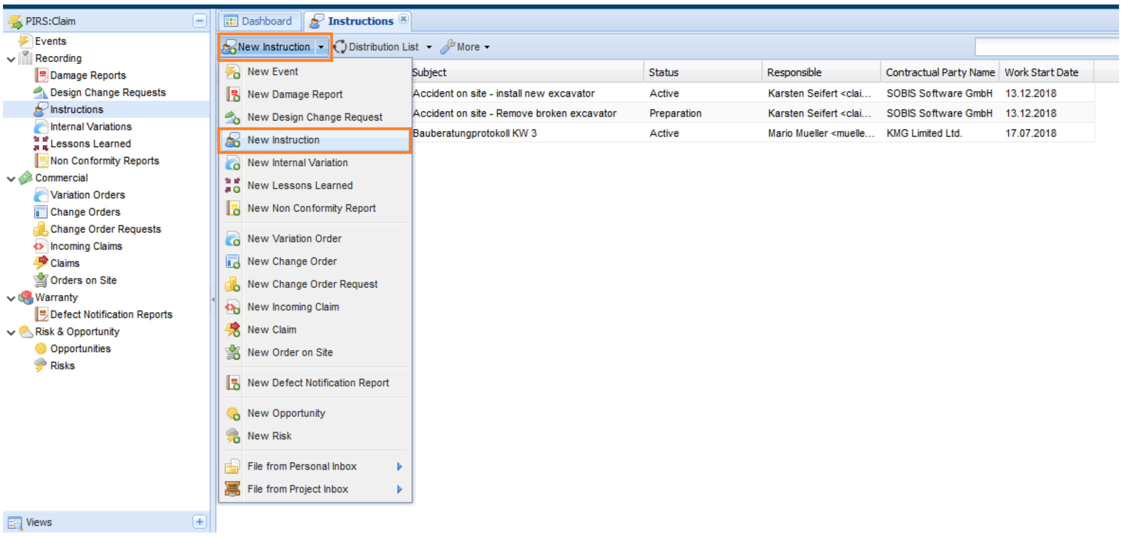
The purpose of the follow document "Instruction" is to record binding work instructions to contractors or suppliers without contract adjustments.

An instruction documents the request to a supplier/contractor concerning services without prompting a change of contract with the third party. As follow up document the Instruction is created based on an event. It is a document type used for recording.

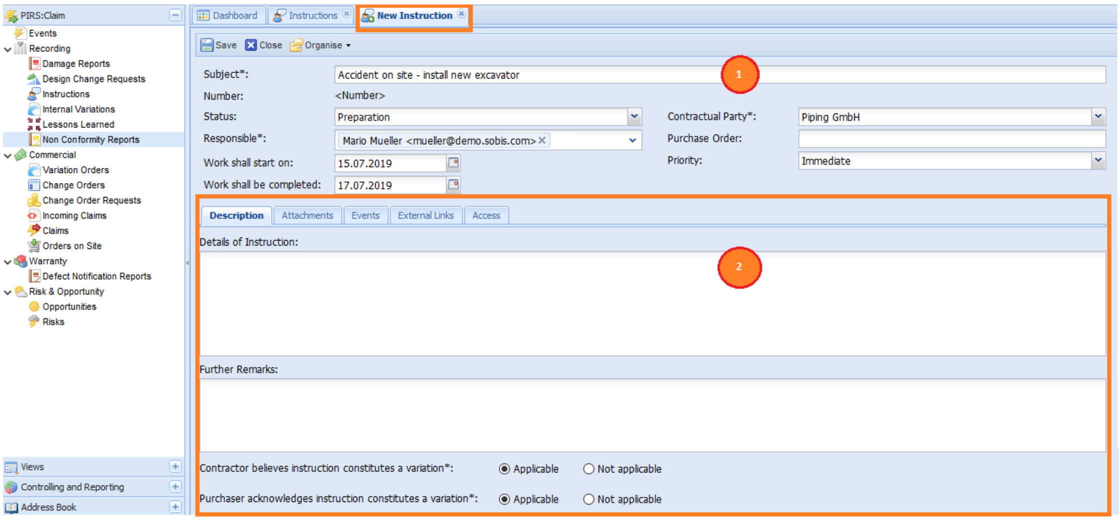
Create a New Instruction

In order to create a new Instruction, click 

as shown in the screen shot below. When you are currently working within the Instruction grid, as it is the case in the exemplary screenshot, there is no need to expand the "New..."-options in order to create a new Instruction; otherwise in all other grids it will be the second option listed.



When clicked on 'New Instruction' a new report opens in a separate tab like shown below.



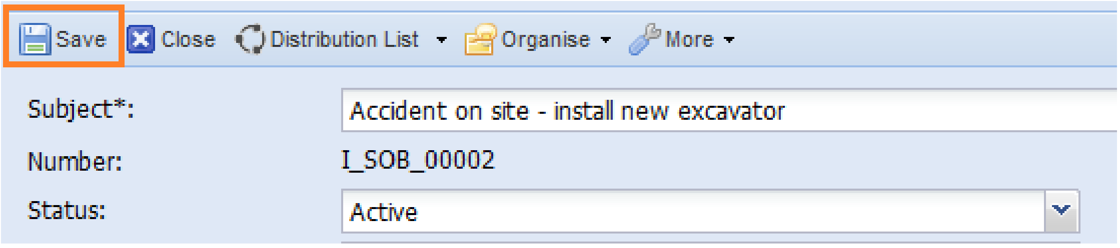
1 Like any other entity in PIRS:Claim, the header of an Instruction displays the essential information such as Subject, Status, Responsible etc. On saving, the application will generate a unique number, which can be used for future reference. Fields marked with an asterix symbol are mandatory fields and a value must be entered prior to saving the document in PIRS:Claim.

2 In the content area under the tab 'Description', details of Instructions as well as additional remarks can be documented. The tabs 'Attachments', 'Events', 'External Links' & 'Access' are standard tabs available in most PIRS:Claim document types. Please refer to

respective chapters under ‘Common Functions’ to learn more about the purpose and functionality offered by these tabs.

Save Instruction

After you have entered all the mandatory fields, click 'Save' in order to save the Instruction. Once the Instruction is saved, it automatically receives a unique document number as shown in the below screen shot.

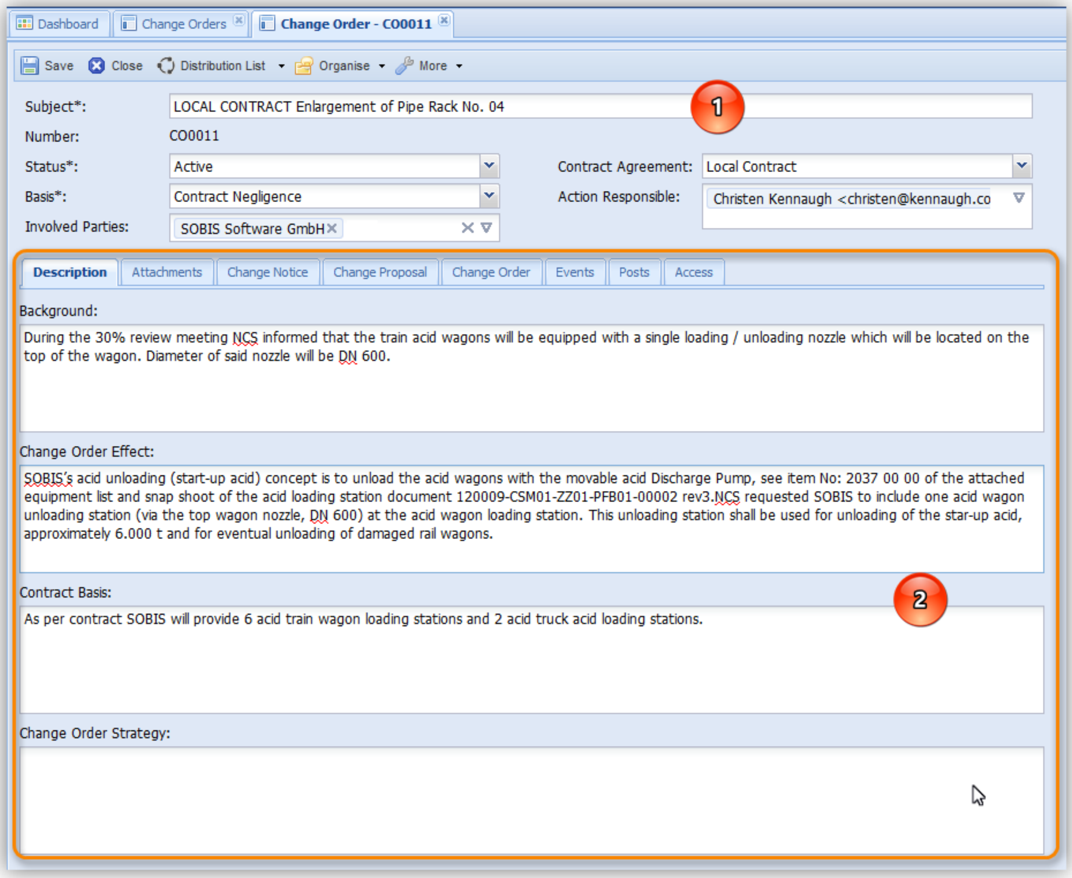


4.4 Commercial

Commercial PIRS:Claim entities are characterized by their links to external partners. They document changes, requests, damages or incidents caused and most likely also payed by external sources such as the customer or a supplier. These documents can usually also be used as official documents.

4.4.1 Change Order

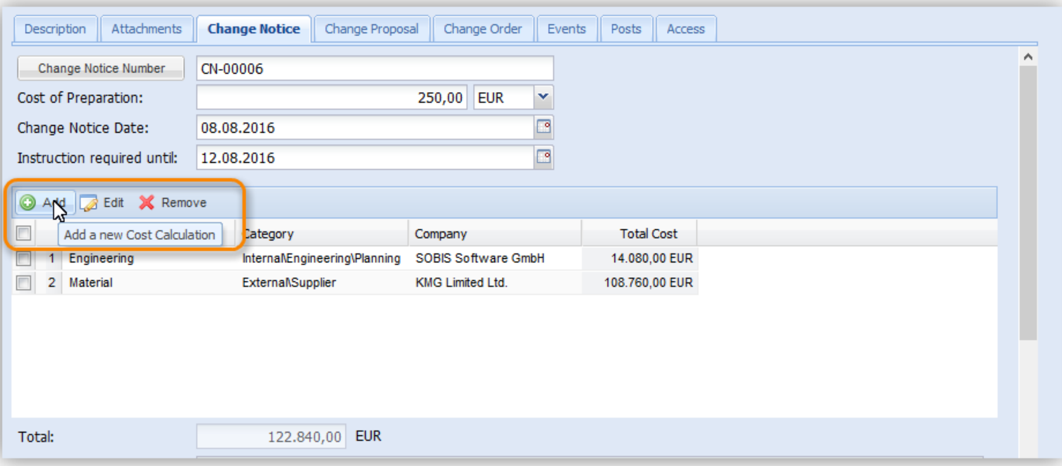
Change Orders are used to document, manage and trace external changes or modifications of any kind that will cause additional costs. A Change Order document could e.g. be used to document the requested enlargement of a pipe rack which is the example used in the screenshots below. After having created a new Change Order following the same steps as with the above described PIRS:Claim forms, the new form will open in a new tab.

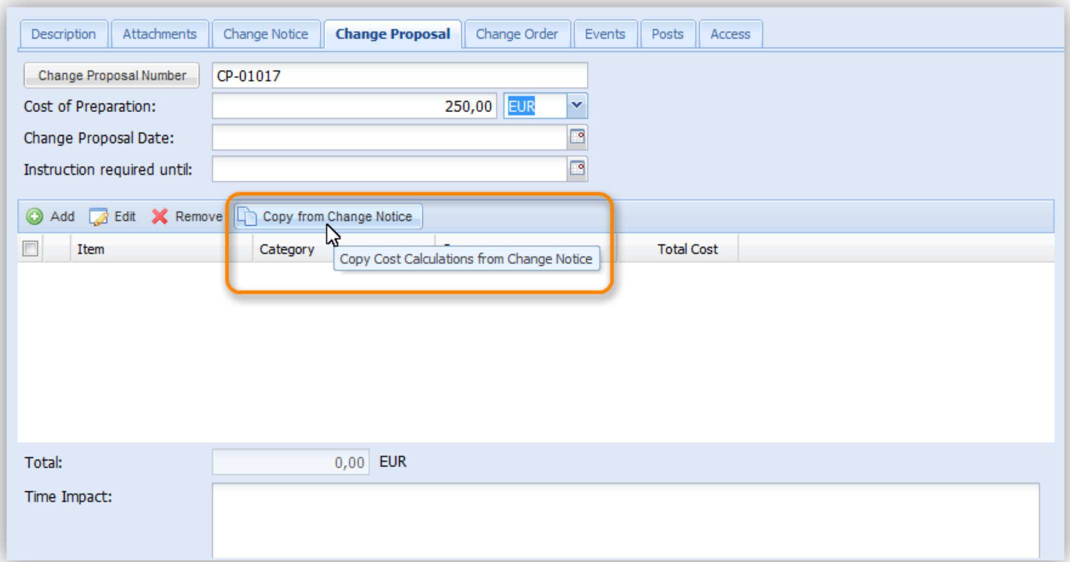


1) The header of a Change Order is structured in the same manner bearing similar information as all other PIRS:Claim document types. It enables you to insert the basic information such as the status, the subject as well as the basis and the responsible person who filed the order. In addition you are also able to provide the basis of the order and the contract agreement if available. The unique document number will be generated automatically as soon as you save a new Change Order.

2) To the contrary of the previously introduced document types the content area of a Change Order is more elaborate. The description tab allows you to document the background and the course of action concerning the Change Order. Furthermore, there are three steps that a change order process consists of and that can closely be documented with the PIRS:Claim change order form. First of all there is the “Change Notice” followed by the “Change Proposal” which leads to the “Change Order”. All three steps are represented by a separate tab in the content area and for each step a separate reference number can be created.

Additionally, it is possible to create different cost calculations for each of the change order steps. As illustrated in the following images, and in order to save time, the cost calculations of the preceding tab can be easily inserted into the following one by using the action “Copy from…”.

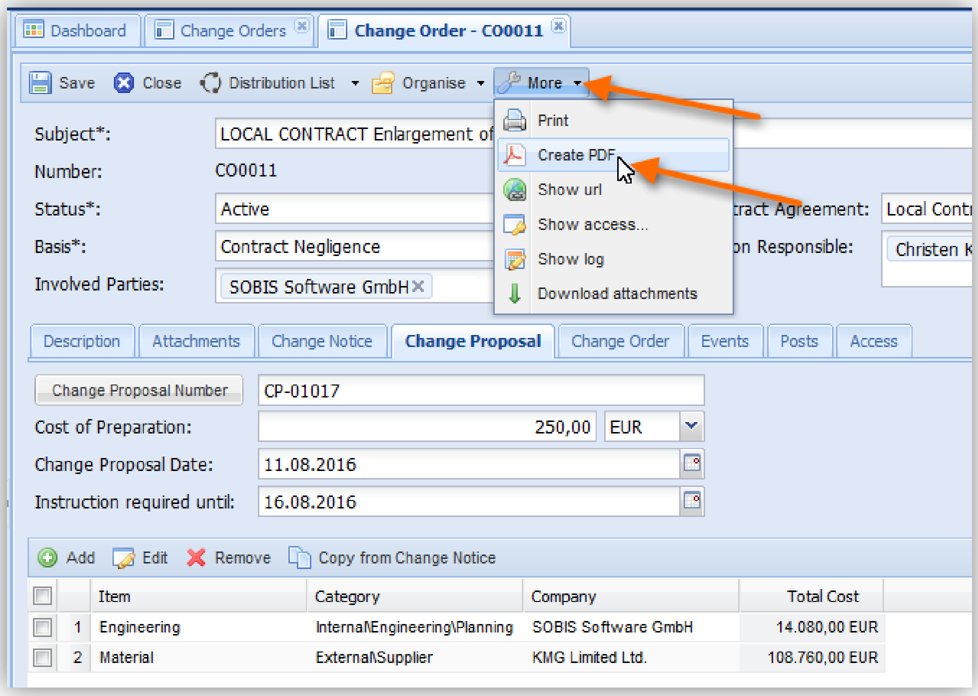


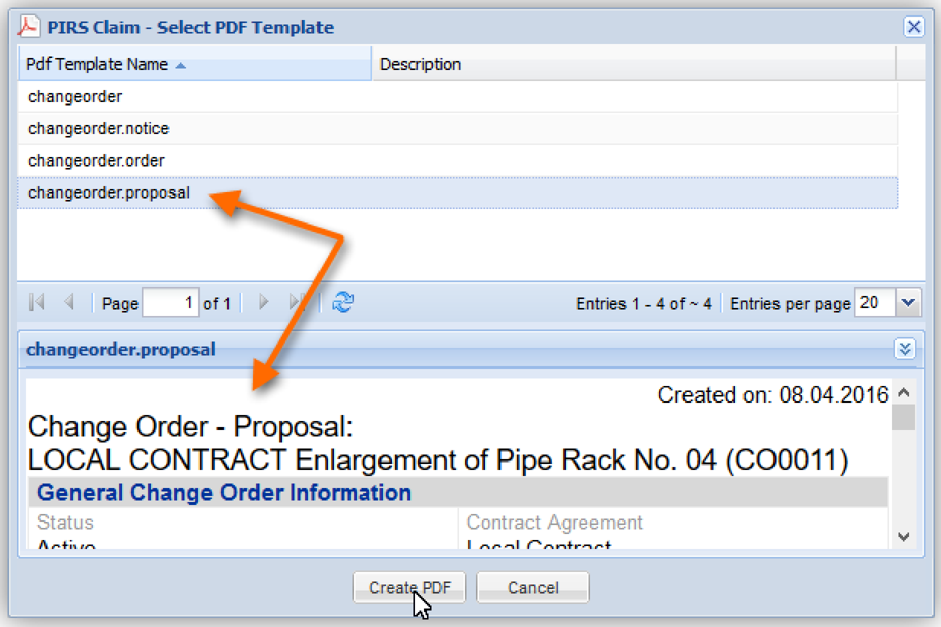


In addition to the cost calculations you are also able to document the time impact, possible change concerning the guarantee agreement or any other contract agreements. Furthermore, the terms of payment can be noted.

Export a Change Notice, Change Proposal or Change Order

Since external changes usually need to have a commercial interface to external parties, you are able to export your change notice, proposal or change order based on the entered information. Using your company design and set up, all entered cost calculations and any other within PIRS:Claim recorded information will be considered.





In order to create a commercial document for your change notice, change proposal or change order, unfold the options listed under the "More" actions within your document action bar and select "Create PDF".

A pop-up window will open allowing you to select which document you would like to create based on which company template. Once you selected a template, a preview will be displayed. By clicking "Create PDF" the document will be created and opened in a new window.

Since the Change Order is also a follow up form it is a necessity that at least one Event will be linked to it within the Event tab.

As already introduced in previous chapters, you are able add comments to a Change Order within the "Posts" tab and manage or limit access rights to this documents within the "Access" tab.

4.4.2 Variation Order

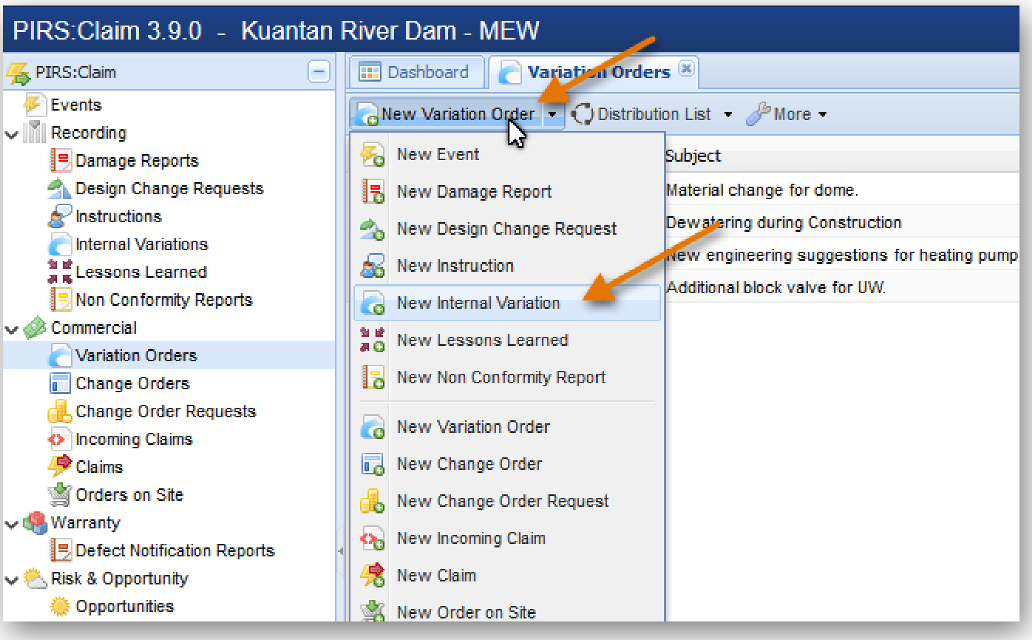
A "Variation Order" (VO) covers order changes received by the customer. Usually, these changes involve a supplementary contract or an addition to the contract, e.g to increase or decrease the order volume.

The purpose of a "Variation Order" is similar to a "Change Order". However it doesn't include separate tabs for Change Notice (CN), Change Proposal (CP) and Change Order (CO).

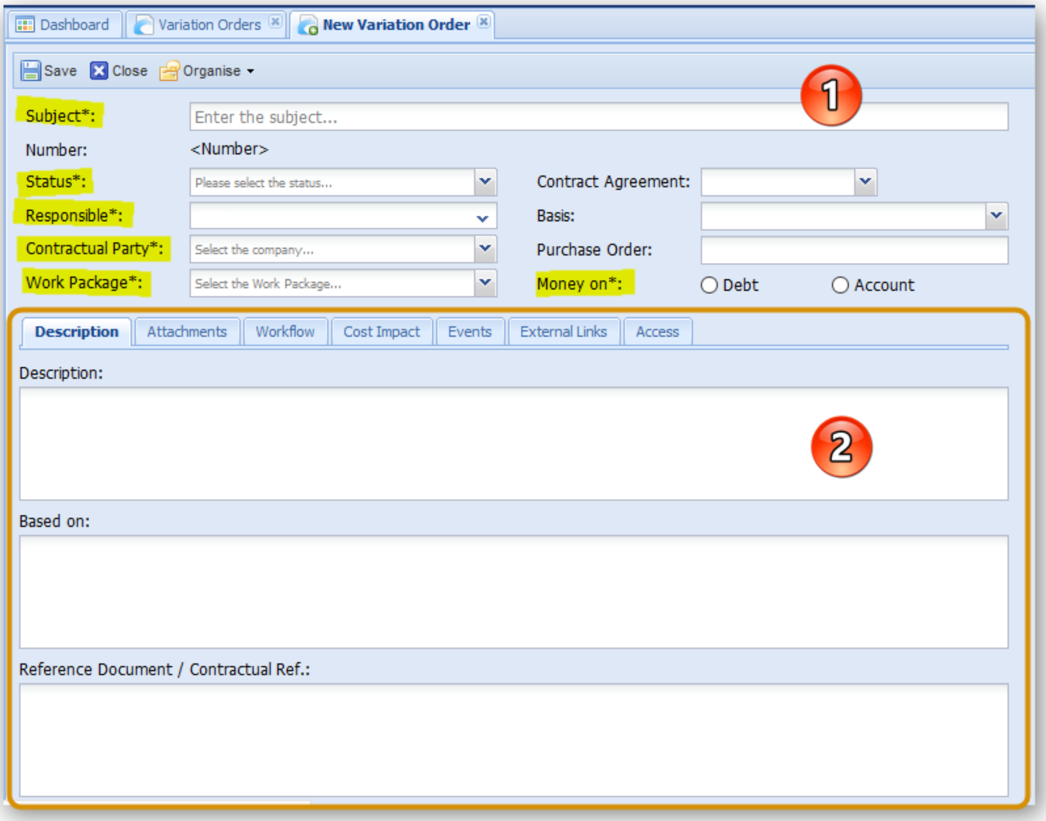
We recommend that only one of the two types is used during a project. Therefore don't be alarmed if you don't have both document types offered within your project.

4.4.2.1 Create a new Variation Order (VO)

In order to create a new VO click  offered either directly within the tool bar of the Variation Orders view or within the "New-"options of all other views.



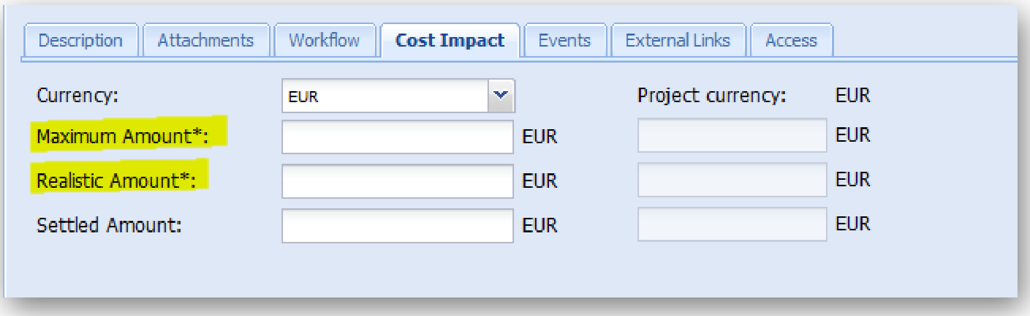
The new VO will open in a new tab.



Within the header of the VO you are able to enter all basic information such as a subject that offers a quick insight, the status, responsible, work package ect. All fields marked with the * symbol (highlighted in the screenshot above) are mandatory fields. Here a value must be selected or entered.

The tabs below the header allow you to enter additional information concerning the detailed description, uploading of related files (e.g. orders, written agreements, ect.), to select a workflow, include external links and manage access rights. For detailed information on the tabs "Attachments", "Workflow", "Events", "External Links" and "Access" refer to the respective chapters within this manual.

Within the tab "Cost Impact" you are able to manage and track the related costs to this specific customer request. You are able to enter costs with a different currency, the costs will always be calculated and display with the project currency in addition to other currencies you might be entering. As indicated below the fields "Maximum Amount" and "Realistic Amount" are mandatory fields. **You therefore always need to enter a value within the "Cost Impact" tab before you are able to save a new VO.**



Once all mandatory fields contain a value you are able to save the new VO by clicking Save. A unique document number will be created by PIRS:Claim automatically.

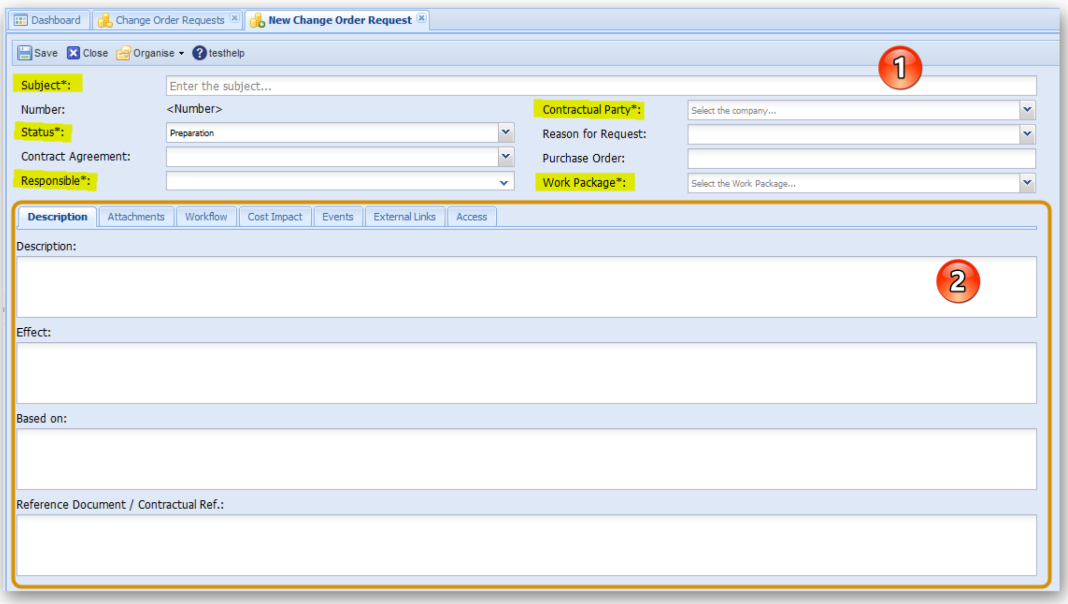
4.4.3 Change Order Request

A Change Order Request (COR) is used to record change orders concerning additional services which are usually raised by the supplier. The COR allows for a transparent presentation of project-specifc approval processes and a detailed listing of estimated maximum costs, as well as realistic and settled expenses.

4.4.3.1 Create a new COR

Change Order Requests must be created based on an Event and can therefore only be saved if they are linked to an existing Event.

To create a new COR select an Event within an Event grid or open any other grid and select the option New Change Order Request offered to you within the "New-" options in your tool bar.



Fields marked with a * symbol are mandatory fields where you need to enter or select a value prior to saving the new COR. All keywords that you can choose from within the selection fields are set specifically to match your company processes and project specifics. In case there are values missing, please contact your project manager.

1 This area contains the header information of you COR. Please select or enter values for all mandatory fields highlighted yellow in the screenshot above.

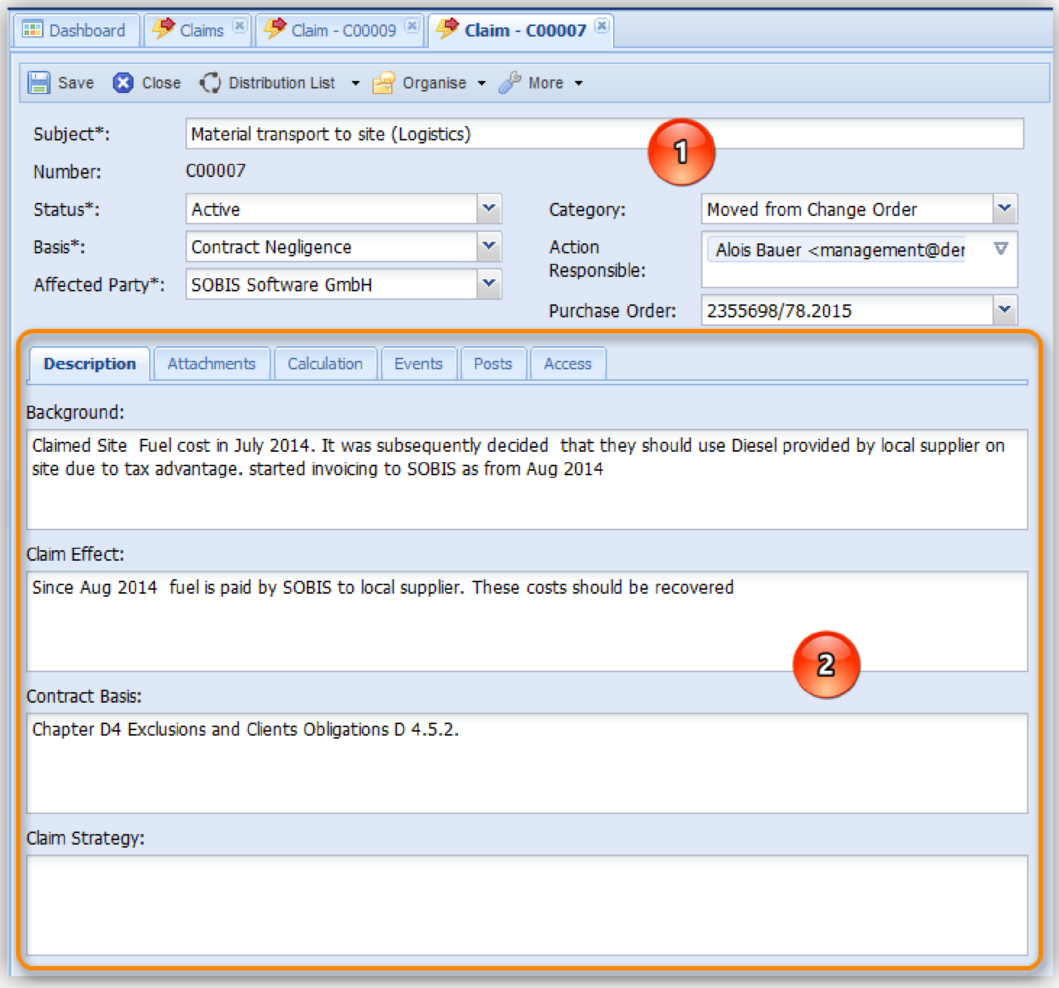
2 The bottom area contains, as it is common with all other PIRS:Claim entities several tabs that allow you to enter additional information concerning the background of the request, its effects and costs, as well as all related events. In addition, you can select an approval workflow or upload files such as PDF, Word documents or pictures. To learn more about the common tabs offered within the content area refer to the respective chapters listed under Common Functions.

4.4.4 Incoming Claim & Claim

Claims as well as Incoming Claims document mostly financially driven demands a company can have towards its customer, supplier or partners based on their failure to uphold or accomplish appointed services or fulfill agreements stipulated by contract.

While the Incoming Claim's functionality is to record all actual as well as all possible claims that are, or could be raised towards your company, a Claim document represents demands that your company could, or will have concerning your suppliers, customers or other external parties.

Since both these document types are structured in exactly the same way they will be described together. After opening a new Claim/Incoming Claim you can precede in entering the basic information in the header area. As an example, in this case a Claim will be presented in the following screenshot.

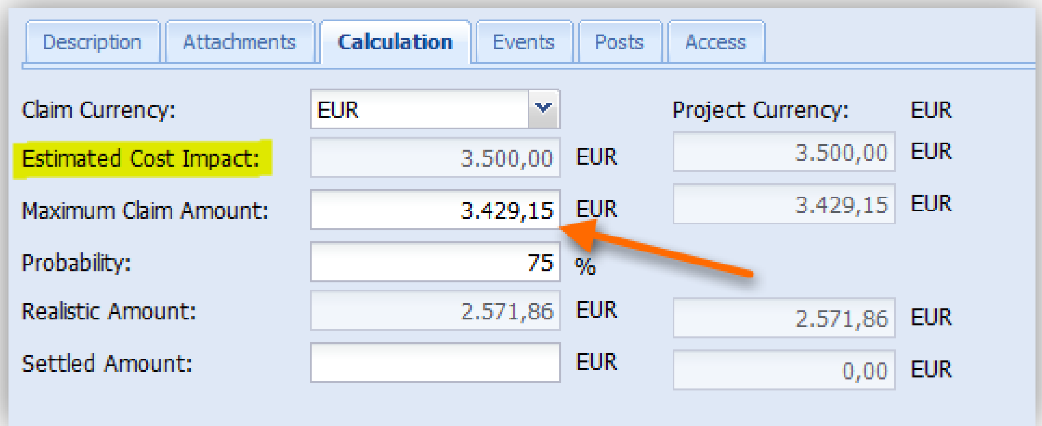


1) The header area will allow you to enter the basic information concerning the Incoming Claim or Claim. Similar to the above presented document headers, information that can be entered manually or chosen from a selection of options that is provided to you. Mandatory fields are marked by a * symbol.

2) Information entered in the content area allows for a much more detailed approach. The description tab offers the most elaborate collection of information out of all PIRS:Claim document types. Besides the background story to the Incoming Claim or Claim you are also able to describe its effects as well as its contractual basis. In addition, you can also define a strategy that should be followed in order to deal with the situation or decide how to treat a potential claim that could be raised towards a second party.

Most of the content tabs are identical to those of the other PIRS:Claim document types. The exception, the “Calculation” tab, is used to estimate the possible costs that could be caused by an Incoming Claim respectively the height of the amount that could be requested as a result of a Claim.

PIRS:Claim will automatically add up all the costs documented in the linked Events and represent the result as the “Estimated Cost Impact”, pointed out in the screenshot below.



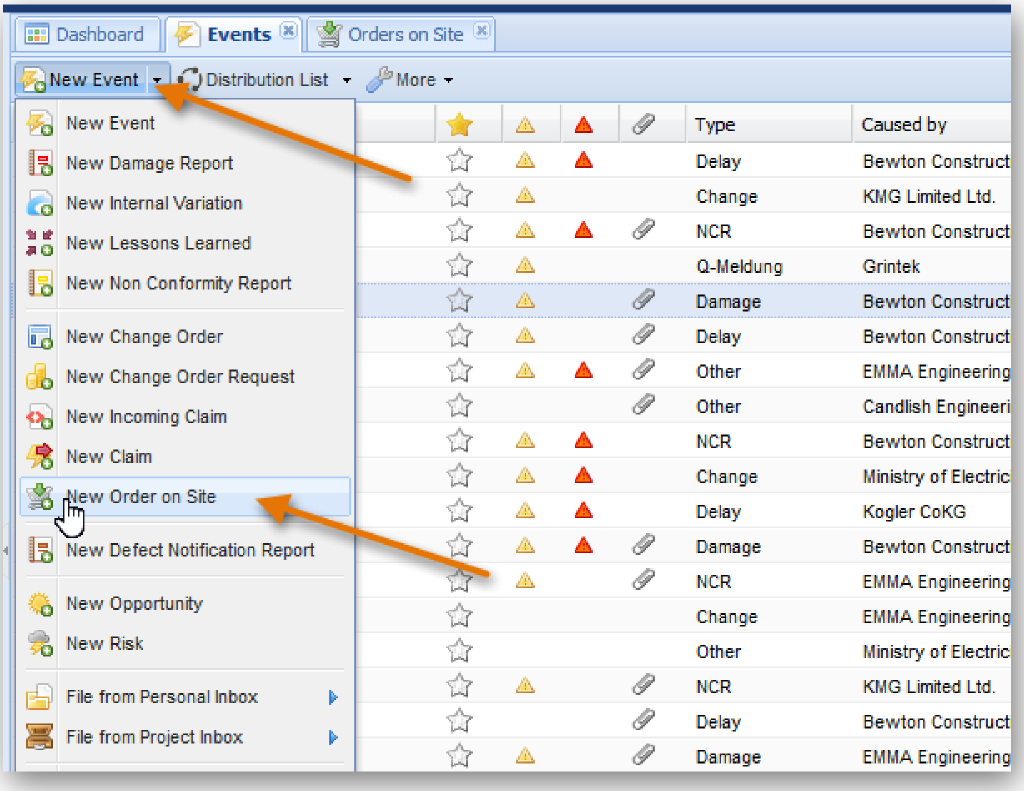
As illustrated by the screenshot the claim or project manager will then be able to insert the value of the maximum claim amount, the probability with which this amount might be reached and also the amount of the final settlement. In the case that different currencies are being used to calculate the amounts, all values will also be displayed in the project currency. PIRS:Claim will then always display all amounts in the selected project currency together with the used currency of the respective Claim / Incoming Claim.

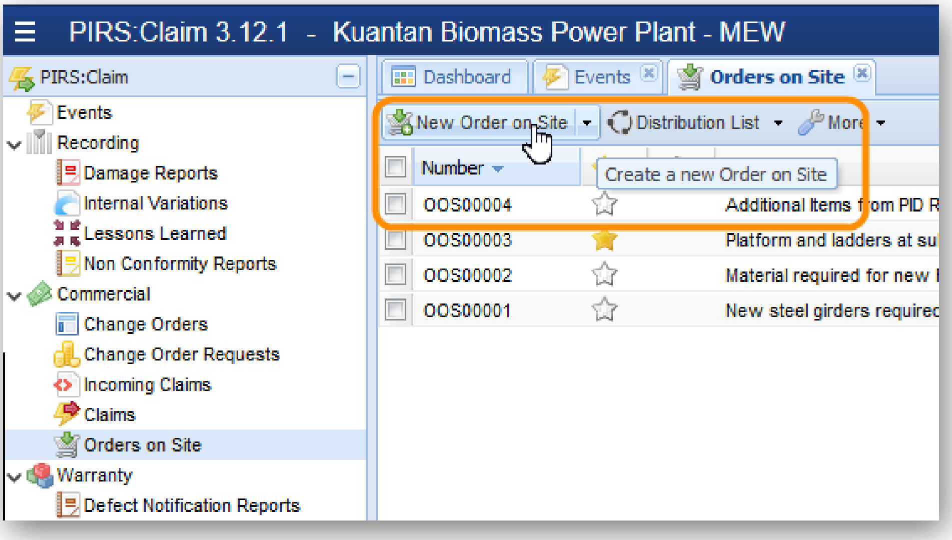
4.4.5 Order on Site

The Order on Site is used to record, assign and order the execution of additional equipment and / or work regarding construction on a measured or lump sum basis. With an Order on Site you are able to document and define additional costs and execution of small changes to the original order.

4.4.5.1 Create a new Order on Site (OOC)

As it is the case with nearly all PIRS:Claim document types you need to base an OOS on an existing Event. Therefore, to create a new OOS, first select the Event it relates to within the Event grid, next open the "New..." actions and then click "New Order on Site", as illustrated in the screenshot below.



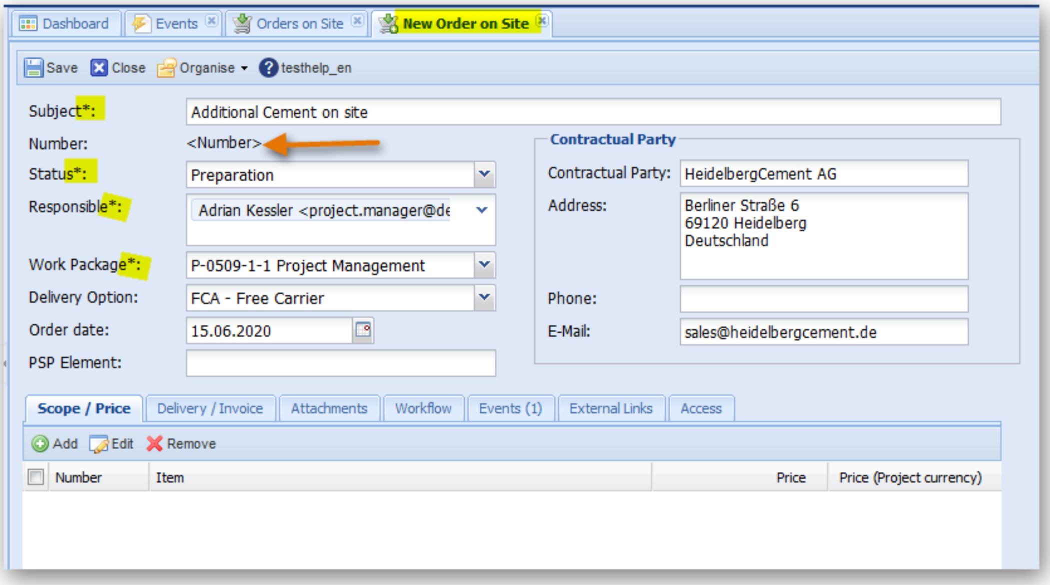


Alternatively, you can also create a new OOC within the OOC grid directly and link the related Event afterwards.

The new OOC will open in a new tab within your content area.

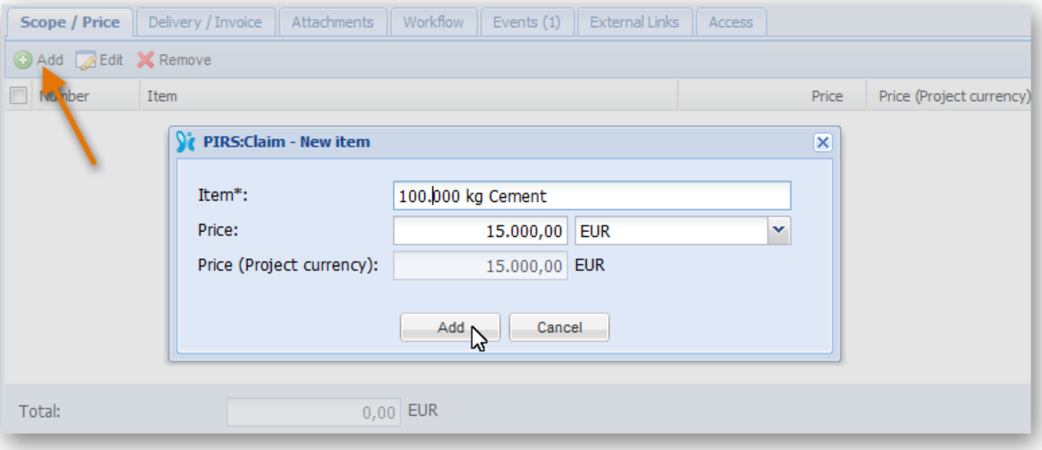
4.4.5.2 Information documented with OOC

All mandatory fields are marked with an asterisk symbol. You need to enter or select values for these fields in order to save the OOC. If you created the OOC based on an Event certain field values such as the Subject can be inherited from the Event. The unique entry number will be created automatically once you save the new OOC.



The mandatory fields might differ however, in case your company has adjusted the settings accordingly.

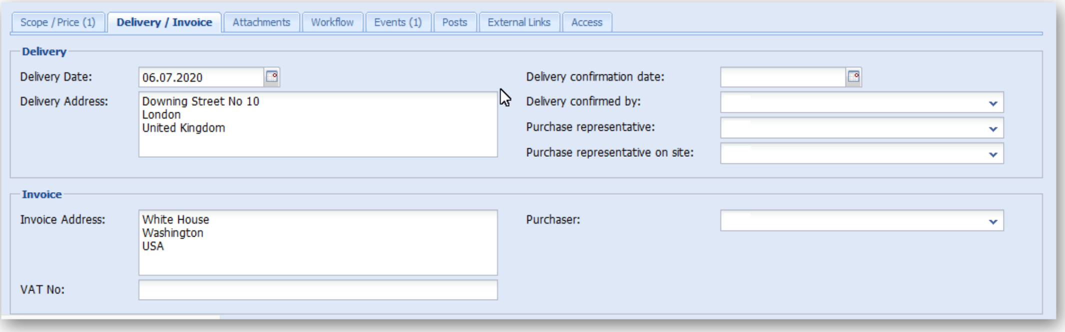
Within the tabs underneath the document header you are able to record costs or the scope of the order. In order to add new cost items click on "Add".



For each item you can select different currencies. The costs will be also calculated in your project currency.

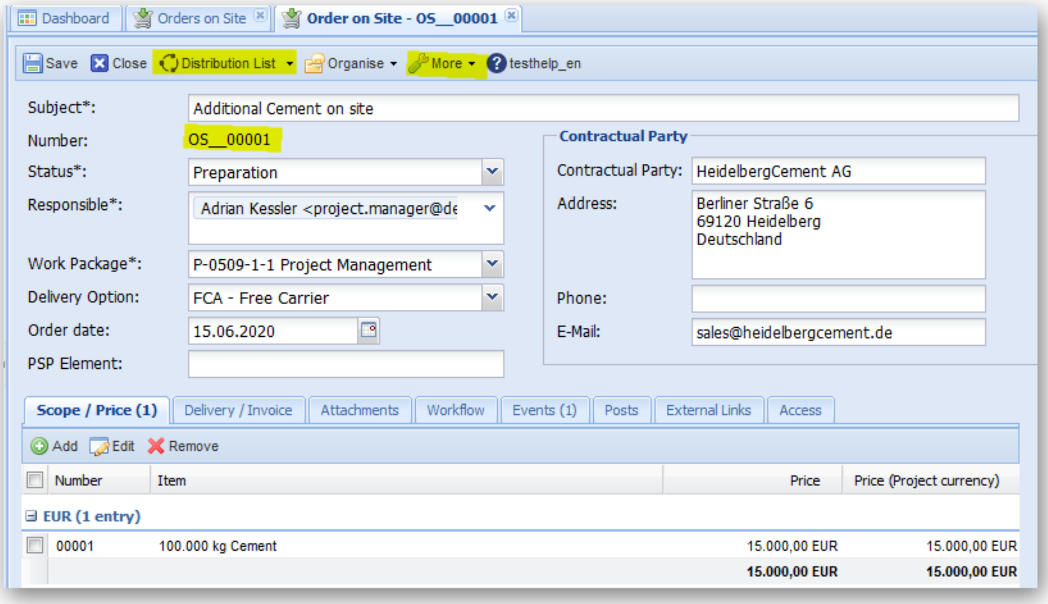
Within the tab Delivery/Invoice you are able to document information such as the planned as well as the confirmed delivery date, the delivery address or information concerning the invoice. Of course the actual invoice file you can also add within the tab "Attachments".

The linked Event(s) can be edited and accessed directly using the tab Events.



Generally, the also displayed tabs Attachments, Workflow, Posts, External Links and Access serve the same functionality as explained for other PIRS:Claim entries. Please refer to the respective chapters with this manual.

Once you saved the new OOC the document number will be generated. In addition, there will be more functions listed within the action bar.



4.5 Warranty

After project completion, your company will probably enter a warranty period during which certain requests regarding incidents covered by your warranty might be filed.

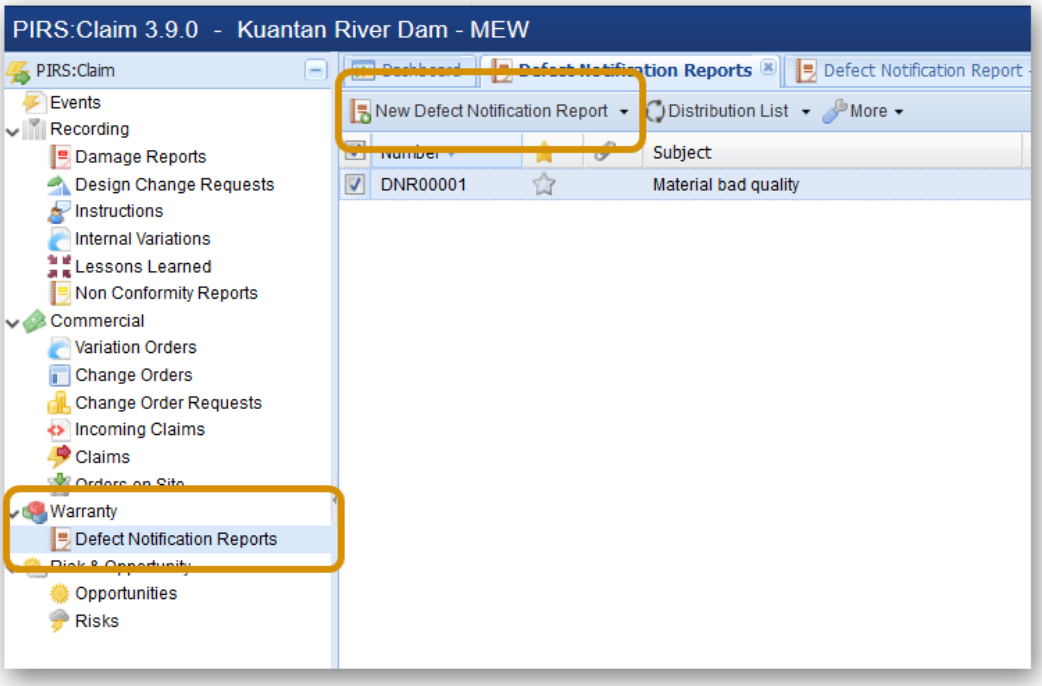
To allow for a detailed documentation and refer to existing event documentation, PIRS:Claim offers the "Warranty" section.

4.5.1 Defect Notification Report - DNR

The Defect Notification Report (DNR) supports the tracking of defects during the warranty period of a project. Other than all other PIRS:Claim entities, the DNR is an independent report and must not be linked to an event.

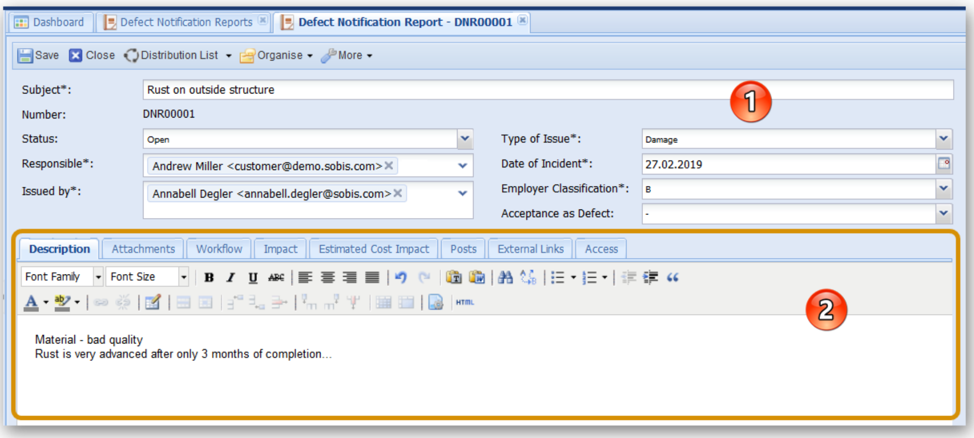
With Defect Notification Report PIRS:Claim offers a central repository to record all the defects after project completion. DNRs allow your company to track all defects and customer complaints under warranty and act immediately.

The DNR is listed under" Warranty" in the navigation area as shown in the screen shot below. In order to create a DNR, click the 'New Defect Notification Report'-button listed under the new options in your tool bar.



Report in detail:

1. The Defect Notification report captures all the most important details of the identified defect such as responsible person, type of issue, date of incident or type of issue within the header. Mandatory fields are marked with the * symbol. Compare below screenshot



2. Within the content area there are several tabs that allow you to enter a details description of the defect as well as record the impact and also the estimated cost which might occur due to the defect.
   The user will also be able to select an internal approval or notification workflow allowing authorized persons to decide on next steps or how to handle the situation.
   For more information on the tabs Workflow, Posts, External Links and Access, please refer to the respective chapters within this manual.

4.6 Risk & Opportunity

4.7 Risk & Opportunities

The area of Risk & Opportunity offers the option to include evaluations made prior to the execution of a project concerning possible events that might have a financial or time related impact on the project execution and outcome.

Since usually risks and opportunities are potential events and their evaluation precedes any actual action, you are able to create new Risk and Opportunity items within PIRS:Claim without having to link an Event to each item. Of course you are still able to link Event(s) to your risks and opportunities once they occur, allowing you also to better document and rely on the analysis and the measures that need to be taken in order to minimize or optimize the outcome of this particular already foreseen event.

In case your Risk & Opportunity manager(s) have summed up their evaluation as lists (e.g. within an excel sheet) you are able to upload the items in one go. Please contact your service desk or project manager for further information.

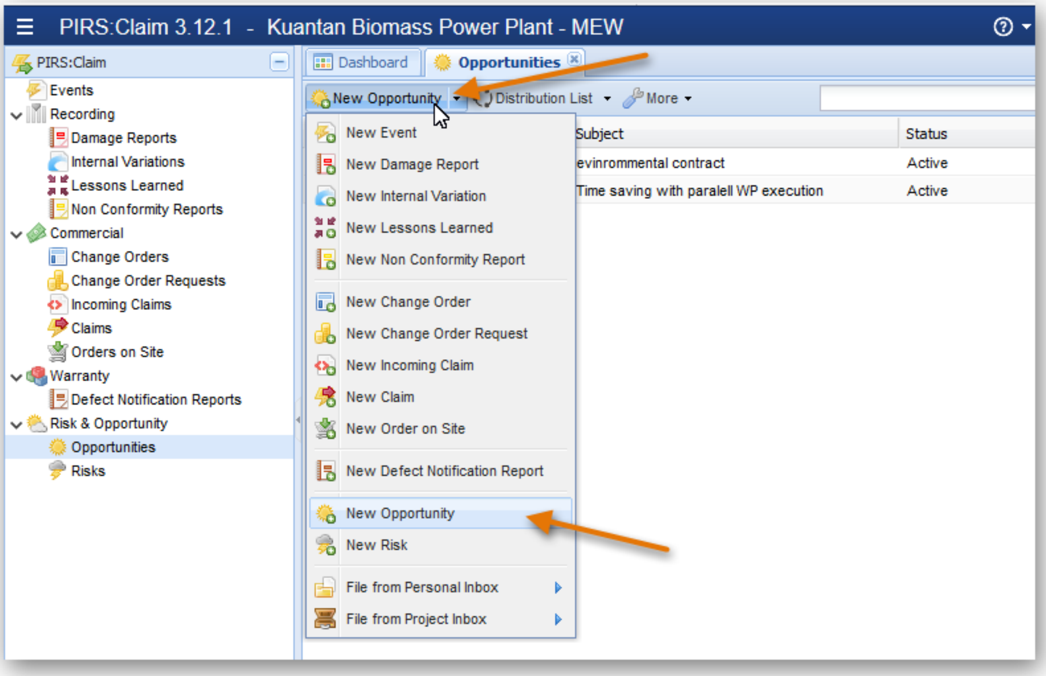
4.7.1 Opportunities

PIRS:Claim’s Opportunity Management provides a comprehensive set of capabilities to streamline the project opportunities and improve a project’s performance. Opportunity management is an integral part of the claim management process.

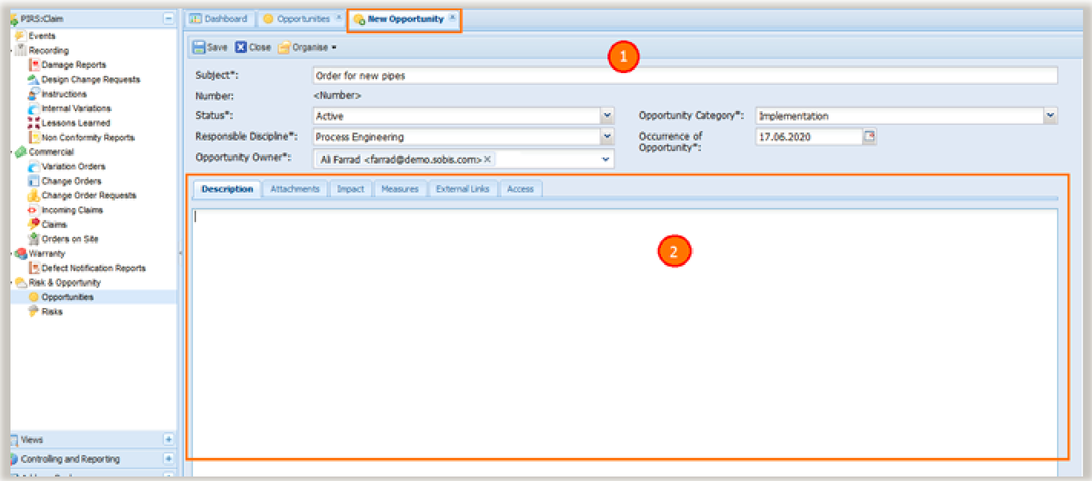
Unlike all other PIRS:Claim document types, the Opportunity documents do not have to be linked to an Event. Since the evaluation of opportunities usually precede the actual event.

4.7.1.1 Create a new Opportunity

In order to create a new Opportunity, click ‘New Opportunity’ as shown in the screen shot below. When you are currently working within the Opportunities grid, as it is the case in the exemplary screenshot, there is no need to expand the "New..."-options in order to create a new opportunity; otherwise in all other grids it will be listed within the options.



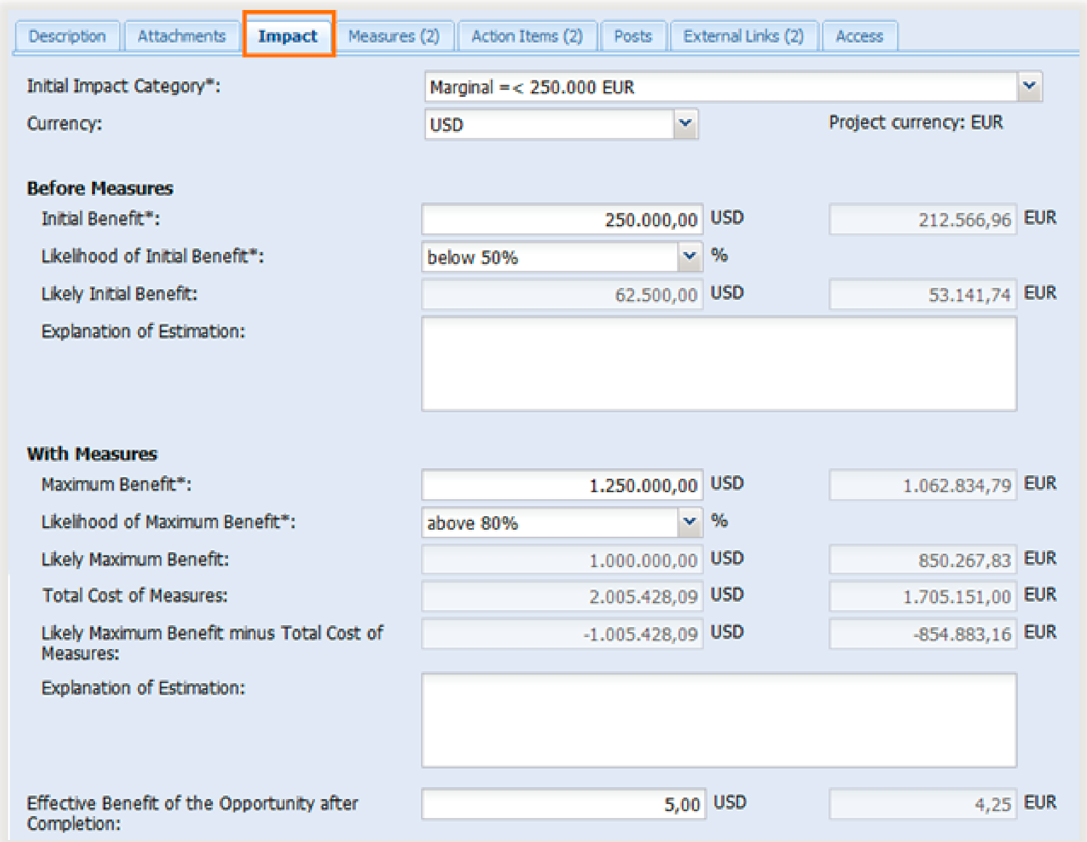
The new report opens in a separate tab like shown below.



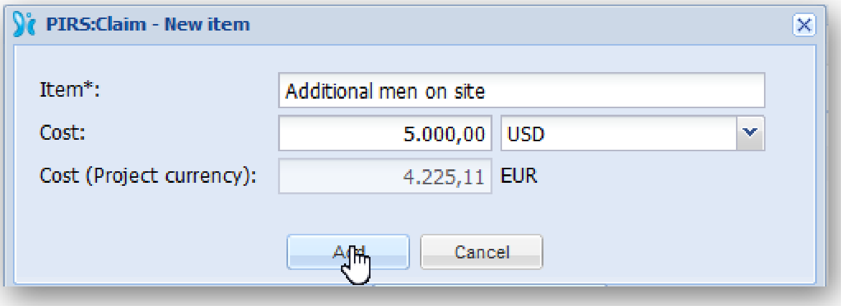
1. Like any other report in PIRS:Claim, the header displays the essential information such as Subject, Status, Opportunity Owner etc. On saving, the application will generate a unique number, which can be used for future reference. Some fields like Subject, Opportunity Category etc , which are marked with an asterisk symbol are mandatory fields and must carry a value before you are able to save the document.
2. In the content area under the tab ‘Description’, detailed information concerning the potential opportunity can be documented. Within the next tab ‘Attachments’, you can upload an image or other files such as excel reports, plans or detailed calculations.

Impact: Within the Impact tab you are able to capture cost details. You are able to split your assumptions in two categories:

1. Expected benefits in case no measures are taken prior to the occurrence of the opportunity in combination of the likelihood of the event to occur.
2. Expected benefits of the opportunity event in case measures are taken prior to its potential occurrence as well as the cost for such measures and the potential of the event to happen if measures are being executed. In addition you can also capture the actual benefits in case of the opportunity coming true.

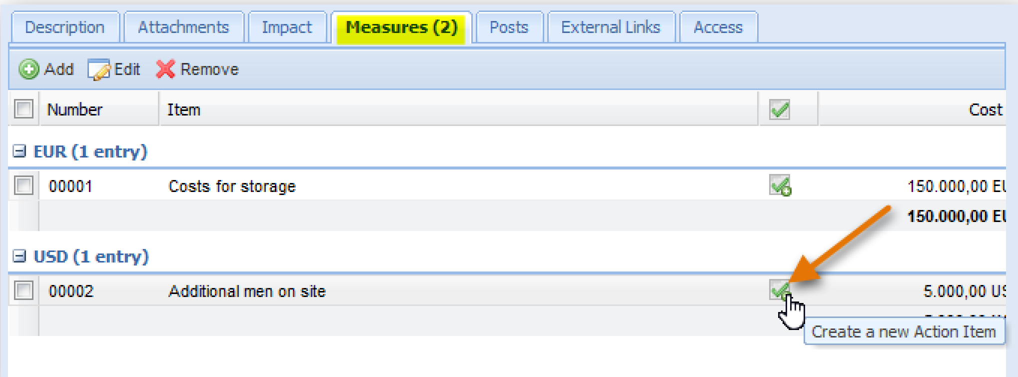


Measures: The measures tab enables you to add, edit or remove the items concerning the measures you can take. Measures are documented with a title and the related costs. Details of the measure itself can be added within the description or as separate file within the attachments tab.

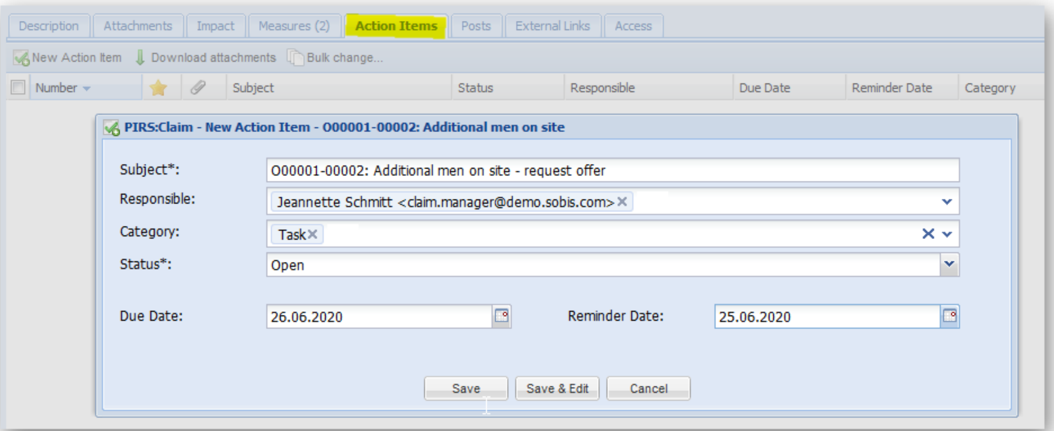


In addition to recording the costs of potential measures, you are also able to create related tasks for each measure in form of separate Action Items. Simply click the icon with the green check-mark (

) as shown in the below image.



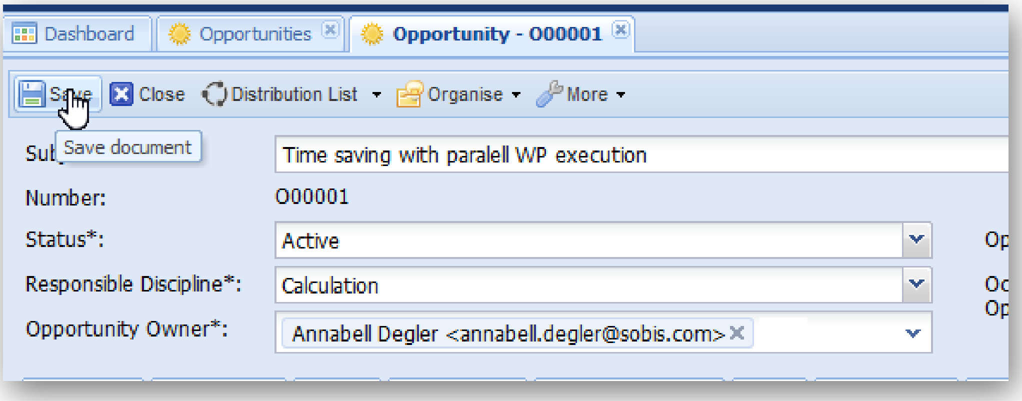
The new Action Item will be listed within the next tab "Action Items".



The tabs External Links, Posts & Access offer general features available within all PIRS:Claim documents. Please refer to the respective chapters listed under 'Common Functions' for more information.

4.7.1.2 Save Opportunity

After you have entered all the mandatory fields, click on save in order to save the Opportunity. Once the opportunity is saved, it automatically receives a unique document number as shown in the below screen shot.



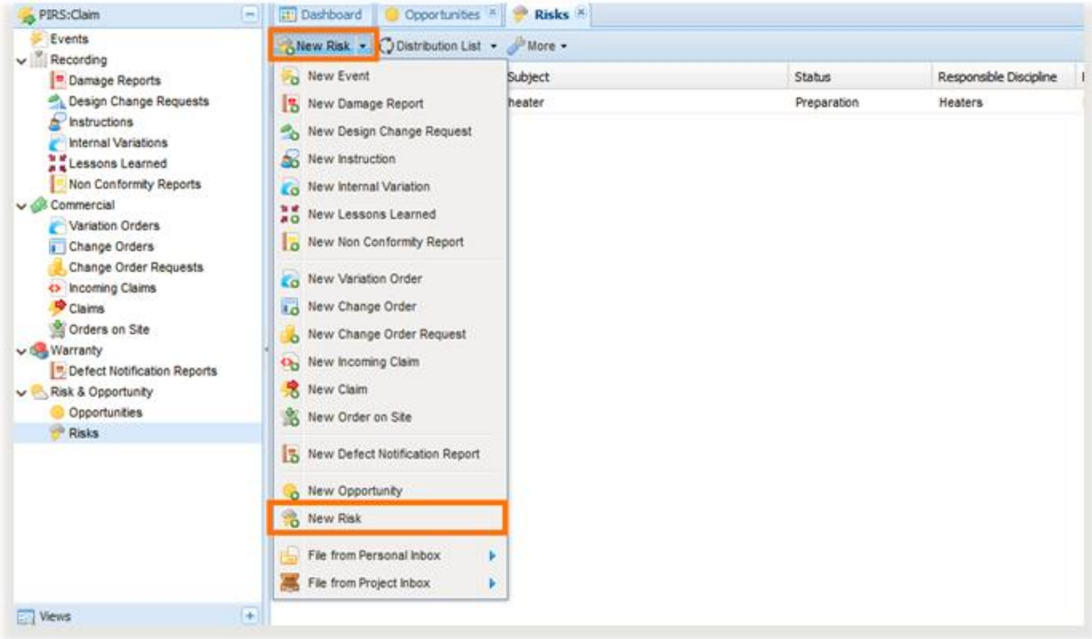
4.7.2 Risk

PIRS:Claim's Risk Management provides a comprehensive set of capabilities to streamline the project risks and improve a project's performance. Risk management is an integral part of the claim management process. It covers the identification, evaluation, probability of occurrence and monitoring of potential risks before, during and after the project. Unlike all other PIRS:Claim document types, the Risk documents do not have to be linked to an Event. since the evaluation of risks usually precede the actual event and in best case scenario are never followed by such an event.

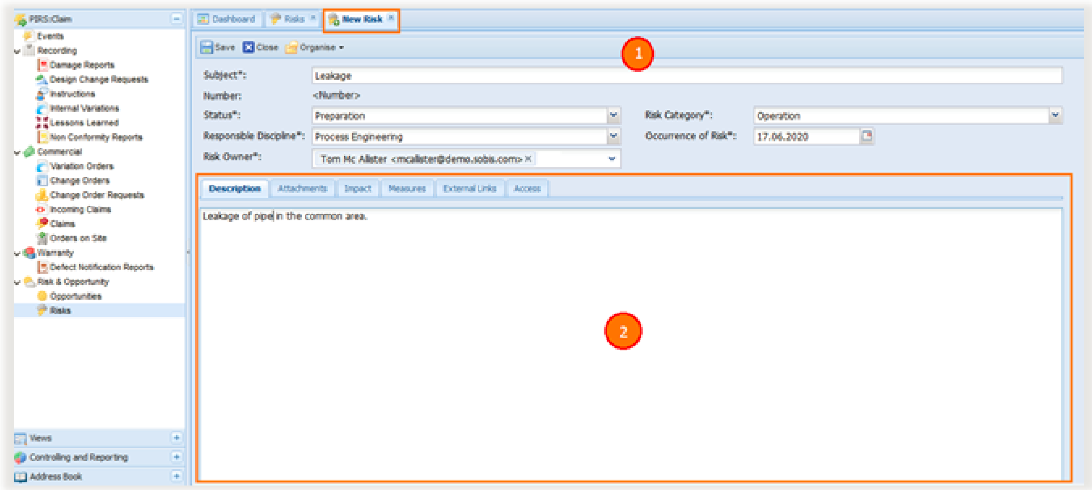
In case you already have a list of risks documented e.g. in an excel sheet, this list can you uploaded during or after the PIRS:Claim project has been set up. To learn more about the upload of multiple risk documents, please contact your project manager or service desk.

4.7.2.1 Create a new Risk

In order to create a new Risk, click 'New Risk' as shown in the screen shot below. If you are currently working within the Risk grid, as it is the case in the exemplary screenshot, there is no need to expand the "New..."-options in order to create a new Risk; otherwise in all other grids it will be listed within the options.



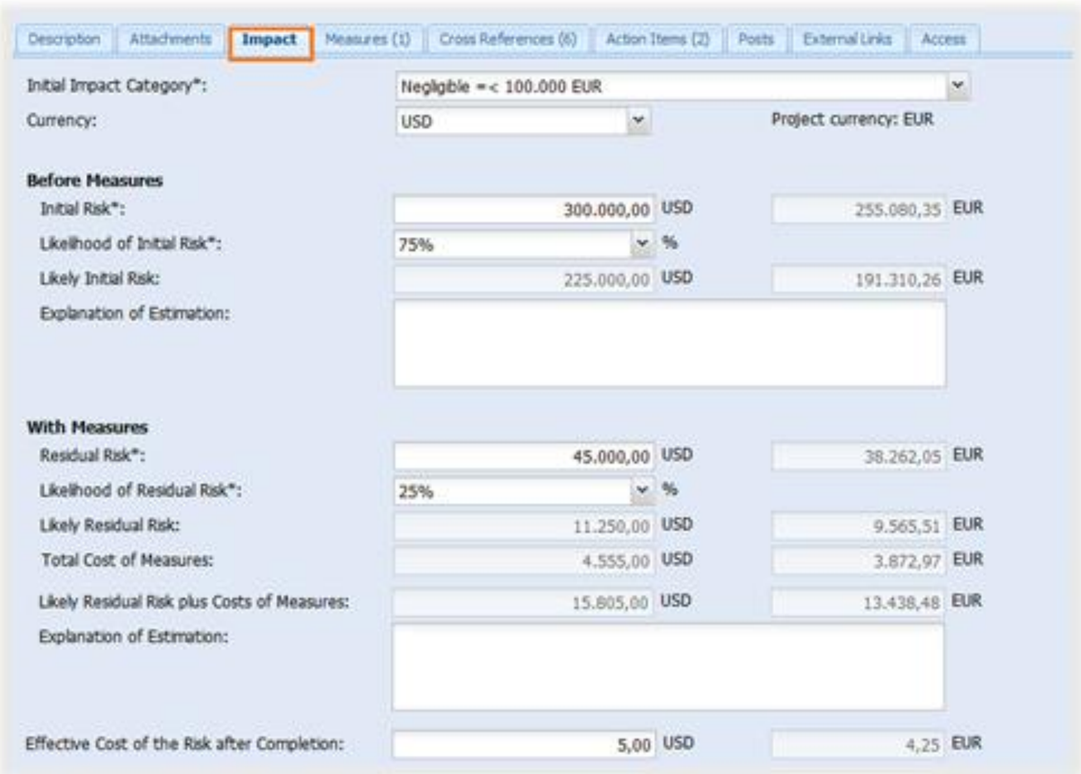
After selecting ‘New Risk’, a new report opens in a separate tab like shown below.



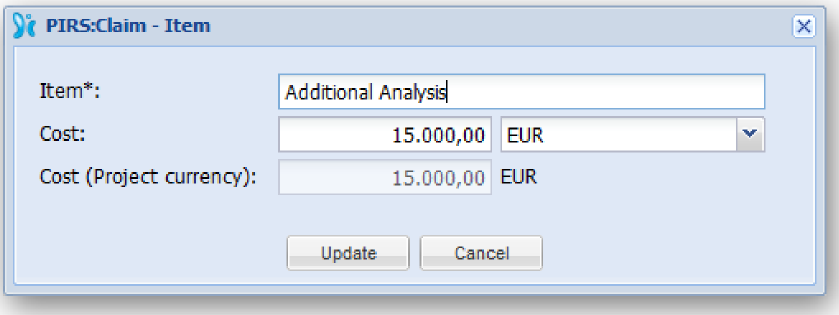
1. Like any other report in PIRS:Claim, the header displays the essential information like Subject, Status, Risk Owner etc. On saving, the application will generate a unique number, which could be used for future reference. Some fields like Subject, Risk Category etc , which are marked with an asterisk symbol are mandatory fields and must contain a value.
2. In the content area under the tab ‘Description’, detailed information concerning the potential Risk can be documented. By clicking the next tab ‘Attachments’, you may attach an image or other files such as excel reports, plans or detailed calculations.

Impact: Here you are able to capture cost details. You are able to split your assumptions in two categories:

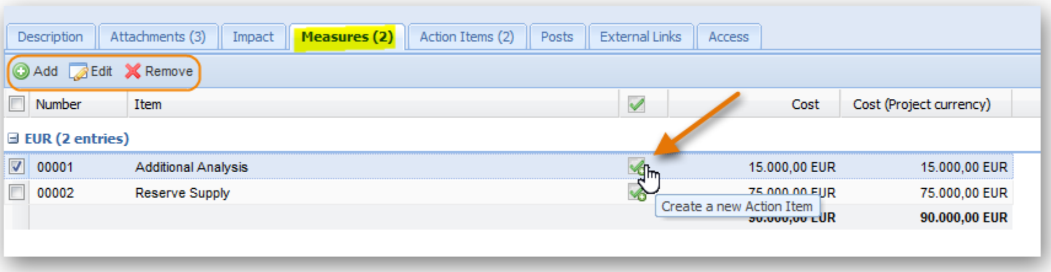
1. Expected costs in case no measures are taken prior to the occurrence of the risk in combination of the likelihood of the risk to occur.
2. Expected costs of the risk event in case measures are taken prior to its occurrence as well as the cost for such measures and the potential of the risk still to happen even measures are being executed. In addition you can also capture the actual costs that occur in case of the risk coming true.



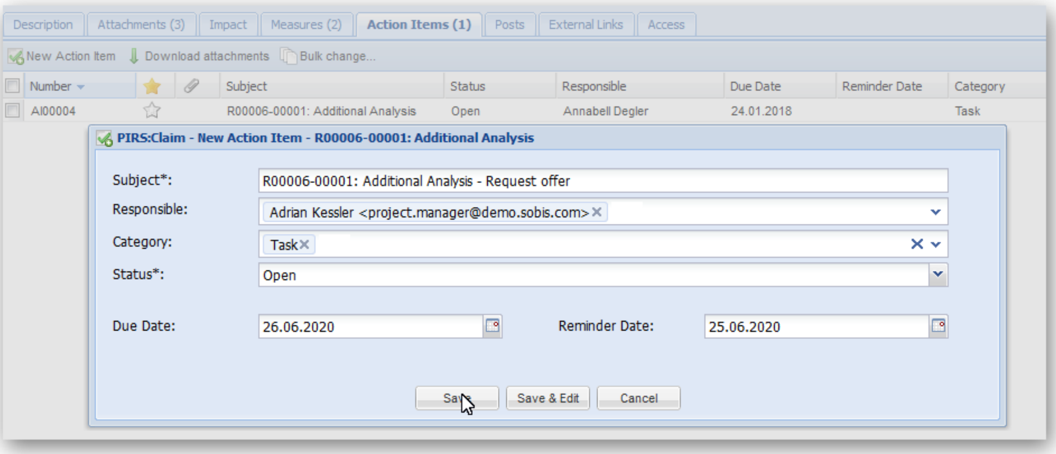
Measures: The measures tab enables you to add, edit or remove the items concerning the measures you can take. Measures are documented with a title and the related costs. Details of the measure itself can be added within the description or as separate file within the attachments tab.



In addition to recording the costs of potential measures, you are also able to create related tasks for each measure in form of separate [Action Items](). Simply click the icon with the green check-mark () as shown in the below image.



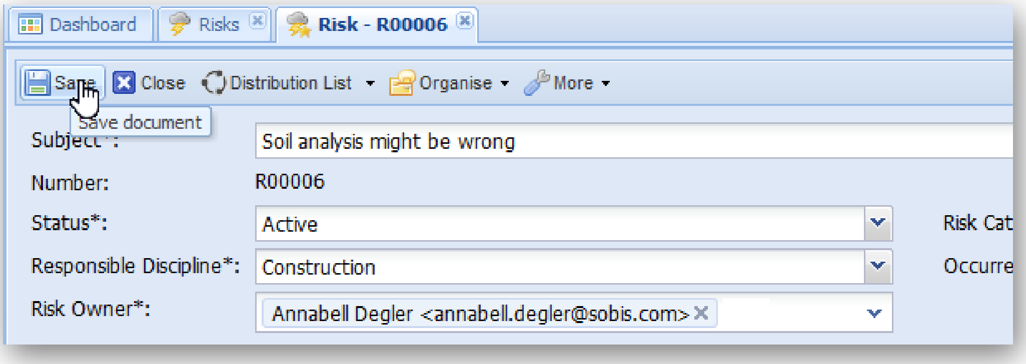
The new Action Item will be listed within the next tab "Action Items".



The tabs External Links, Posts & Access offer general features available within all PIRS:Claim documents. Please refer to the respective chapters listed under ‘Common Functions’ for more information.

4.7.2.2 Save Risk

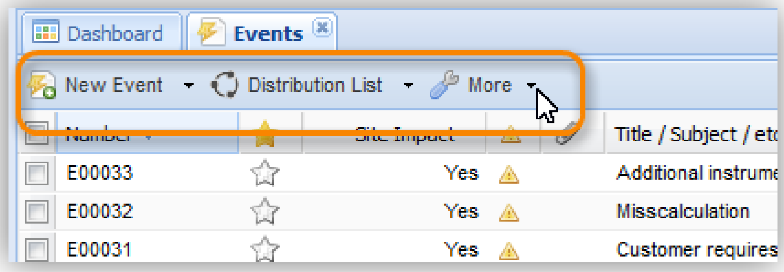
After you have entered values at least for all the mandatory fields, click save in order to save the Risk. Once the Risk is saved, it automatically receives a unique document number as shown in the below screen shot.

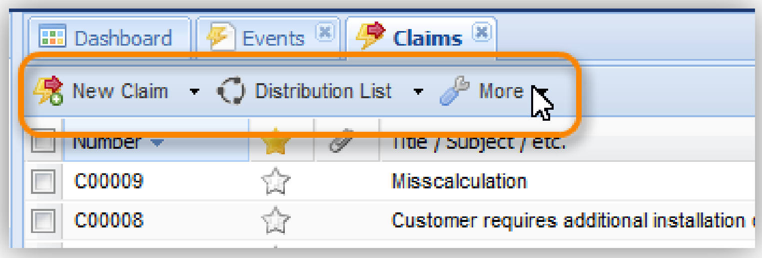


5 Common Functions

There are several features offered to you on a general level that are not restricted to a specific entity or view and that simplify the use of PIRS:Claim, such as the Access Tab, the option to generate a PDF document from your PIRS:Claim documents or the distribution of information via distribution lists.

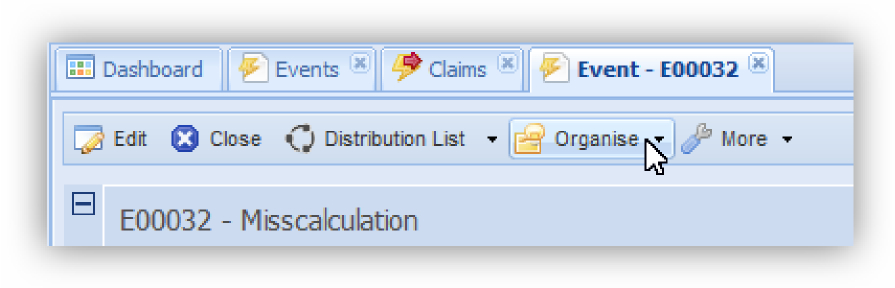
These features will be explain in the following chapters. As indicated in the following screenshots, some of the common functions are to be found within the tool bars in the left hand upper corner of the view of all PIRS:Claim document types as well as the documents individually.



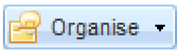


Within the PIRS:Claim views there is always a "New..." button, a "Distribution List" button and the "More" button.

You are able to use the "New..." action to create new documents of any PIRS:Claim document type or to import e-mails from your personal or project mailbox in order to complete your event documentation. Furthermore, you can send a PIRS:Claim document listed within a view via the "Distribution List" option. Listed under the "More" actions you will find additional options such as the creation of PDF documents or the export of selected PIRS:Claim documents as Excel file. Compare the following chapters for details information.



Besides the three different action options offered within the views there are additional great features available to you within all PIRS:Claim documents. The



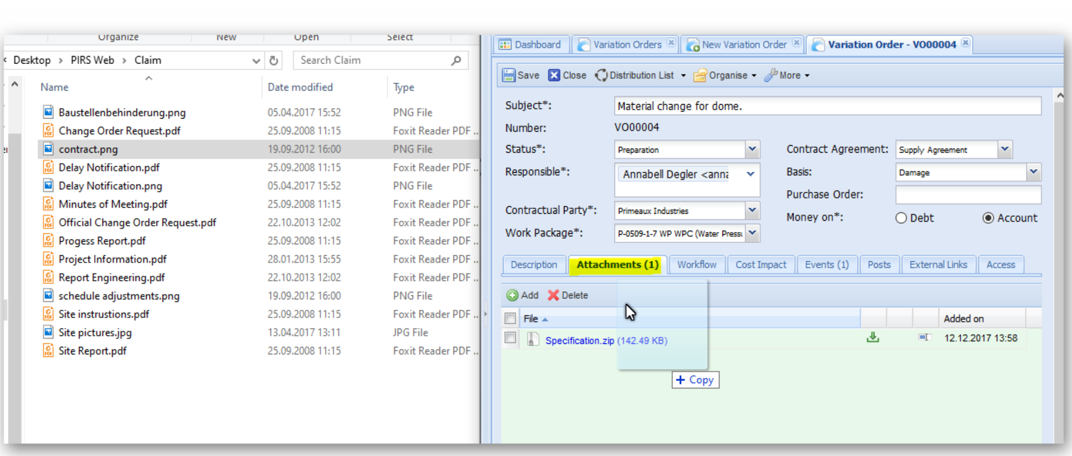
button for example allows you to create cross references between your stored PIRS:Claim documents and enables you to create and assign tasks linked to PIRS:Claim documents for yourself as well as your team members.

5.1 Attachments

Within every PIRS:Claim document type you are able to add attachments. There are no limitations regarding the file size or format.

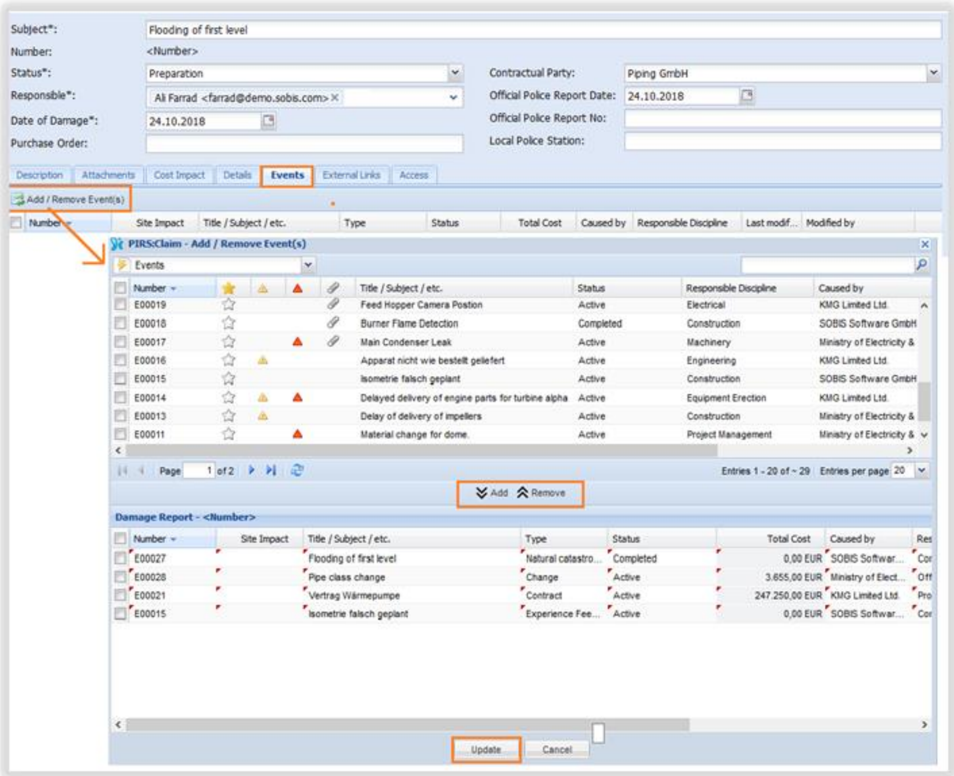
Simply open the tab "Attachments" within the content area of your respective document and either open the explorer by clicking the 

button or import the files via drag & drop as illustrated in the screenshot below.

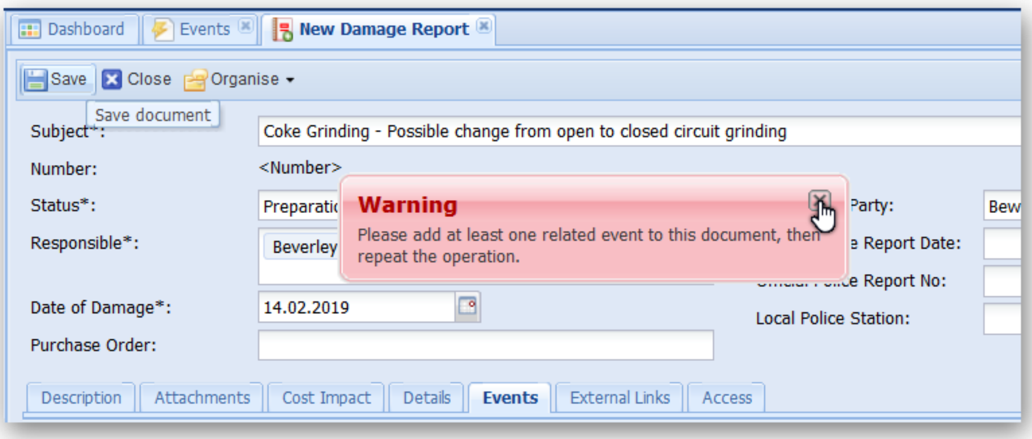


5.2 Events Tab

Every PIRS:Claim entity other than Event, Risk and Opportunity needs to be linked to at least one Event. All linked Events can be viewed under the "Events" tab. Here you are also able to add or remove linked Events. Compare with following screenshot.



In case you have created an entity without linking an Event, you will not be able to save it and PIRS:Claim will notify you that you need to link at least one Event prior to saving the document.

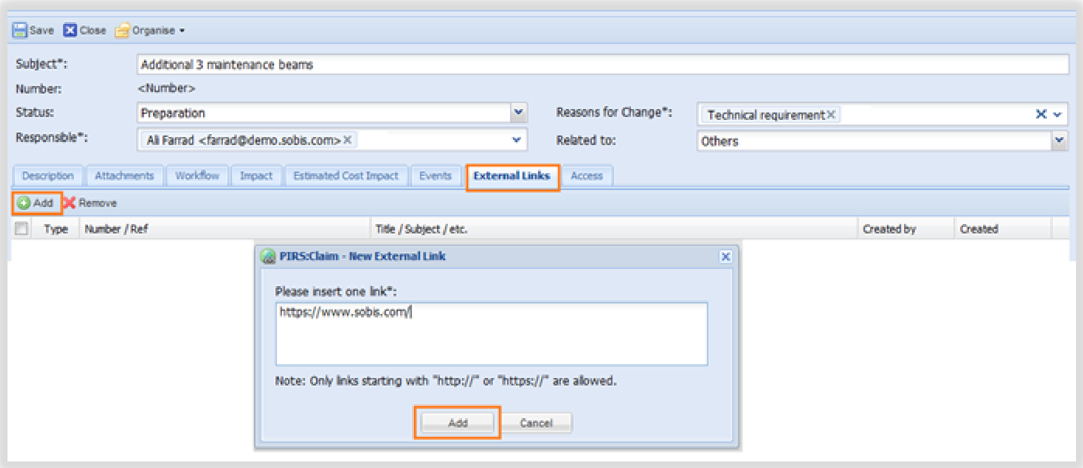


If that is the case, please open the "Events" tab and select and add at least one Event as shown above.

5.3 External Links

Within the content area of every PIRS:Claim entity, there is a tab called "External Links".

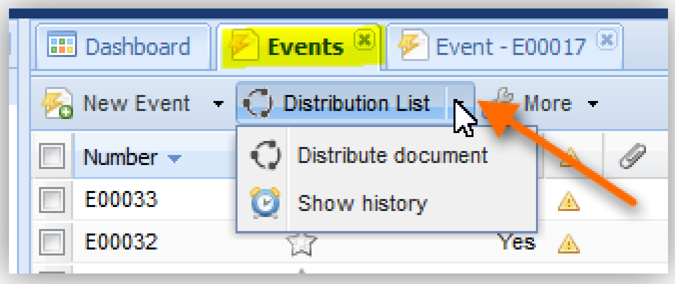
If required documents, files or information from other systems can be included as links. Click the "Add” button, enter the link to the external file (e.g. using copy & paste), then click the "Add" button. Please be aware that only hyperlinks starting with "http://" or "https://" can be used in this frame.

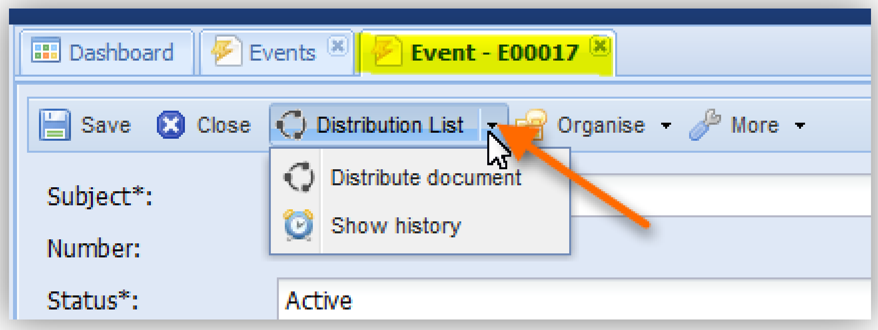


5.4 Distribution List

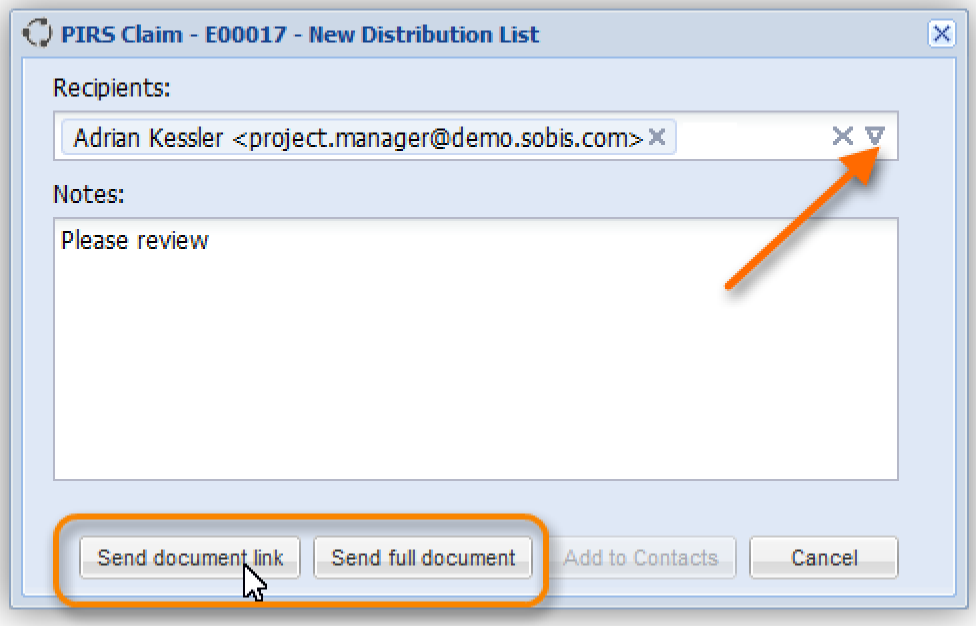
A given on all actions bars regardless whether you operate within a view or a PIRS:Claim document itself, is the distribution list option. It allows you to send the selected document along with a comment to other PIRS:Claim users as well as other contacts.

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





"Distribute document"



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

The orange arrow highlights the opportunity to select contacts of groups from your project address book. In addition you are also able to manually enter the mail address of recipients that are not listed in the PIRS:Claim address book and/or that have no access to the application.

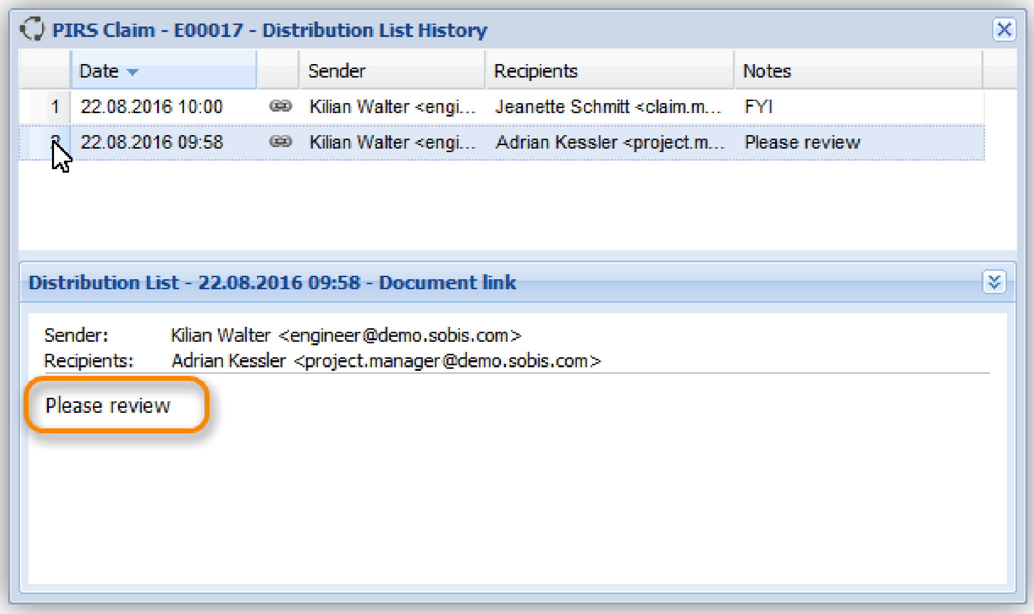
The text box titles "Notes" allows you to address the recipients with a short note.

The orange outline indicates your possibility to either send the document as a document link or send the full document content together with your comment. In both cases an email is sent to all recipients.

If you send the file as a document link the recipients will receive your note together with a link that will lead them directly to the respective document within PIRS:Claim. Furthermore the email will contain a standardized text and signature including your contact information.

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

"Show history"



In order to learn if a PIRS:Claim 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 or open the document you are interested in.

Next unfold the "Distribution List" option within your action bar and click "Show history". Consequently either a new window will open displaying the file's distribution history including the distribution dates, senders, 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.

5.5 Import E-Mails

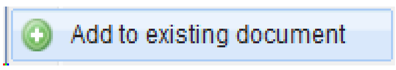
E-mails are the main source of information during a project. Events are communicated via e-mail, topics are discussed using e-mails and external parties will most likely use an e-mails to inform you about change requests, provide you with information or communicate any issues they might have. Therefore, PIRS:Claim offers the option to:

1. Directly create an Event based on an e-mail you have received in your personal or project mail file
2. Add an e-mail to an existing Event or any other PIRS:Claim document

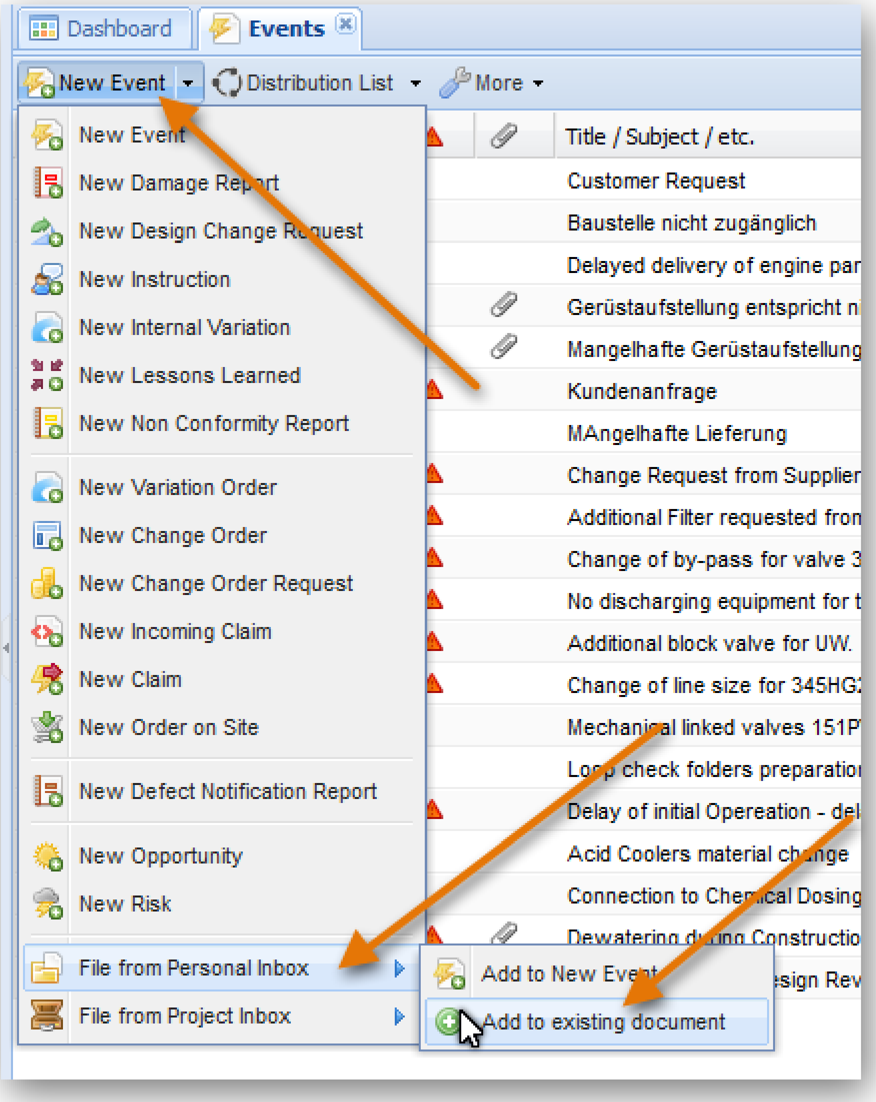
In order to ensure that your added e-mails can be used as source in a legally conflict, any e-mail imported in PIRS will be added with the original time stamps and will also not be editable.

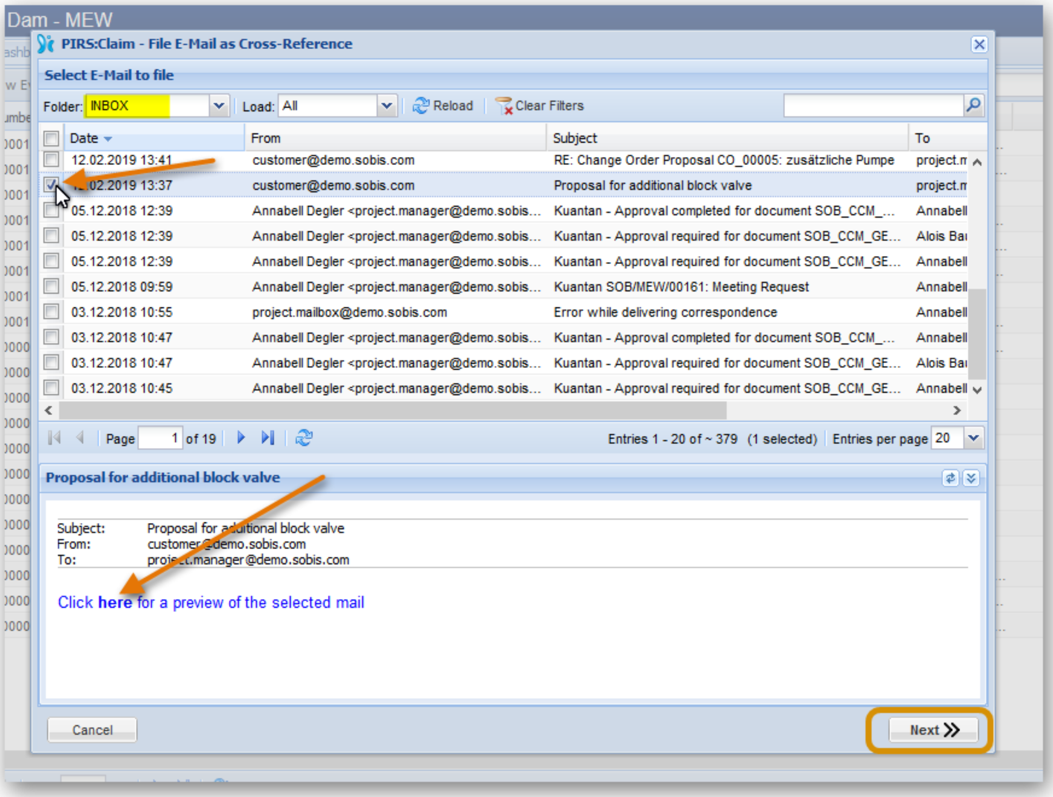
To learn how to create an Event based on an e-mail, please refer to the article "Events" within the manual.

How to import e-mails from personal / project mail file

In order to add an e-mail to an existing PIRS:Claim entity open the options listed under the "New-" button and first select either your personal inbox or the project inbox then click the option 

, as indicated in the following screenshot.


Dashboard
Events
New Event
Distribution List
More
New Event
New Damage Report
New Design Change Request
New Instruction
New Internal Variation
New Lessons Learned
New Non Conformity Report
New Variation Order
New Change Order
New Change Order Request
New Incoming Claim
New Claim
New Order on Site
New Defect Notification Report
New Opportunity
New Risk
File from Personal Inbox
File from Project Inbox
Add to New Event
Add to existing document
Title / Subject / etc.
Customer Request
Baustelle nicht zugänglich
Kundenanfrage
MAngelhafte Lieferung
Additional block valve for UW.



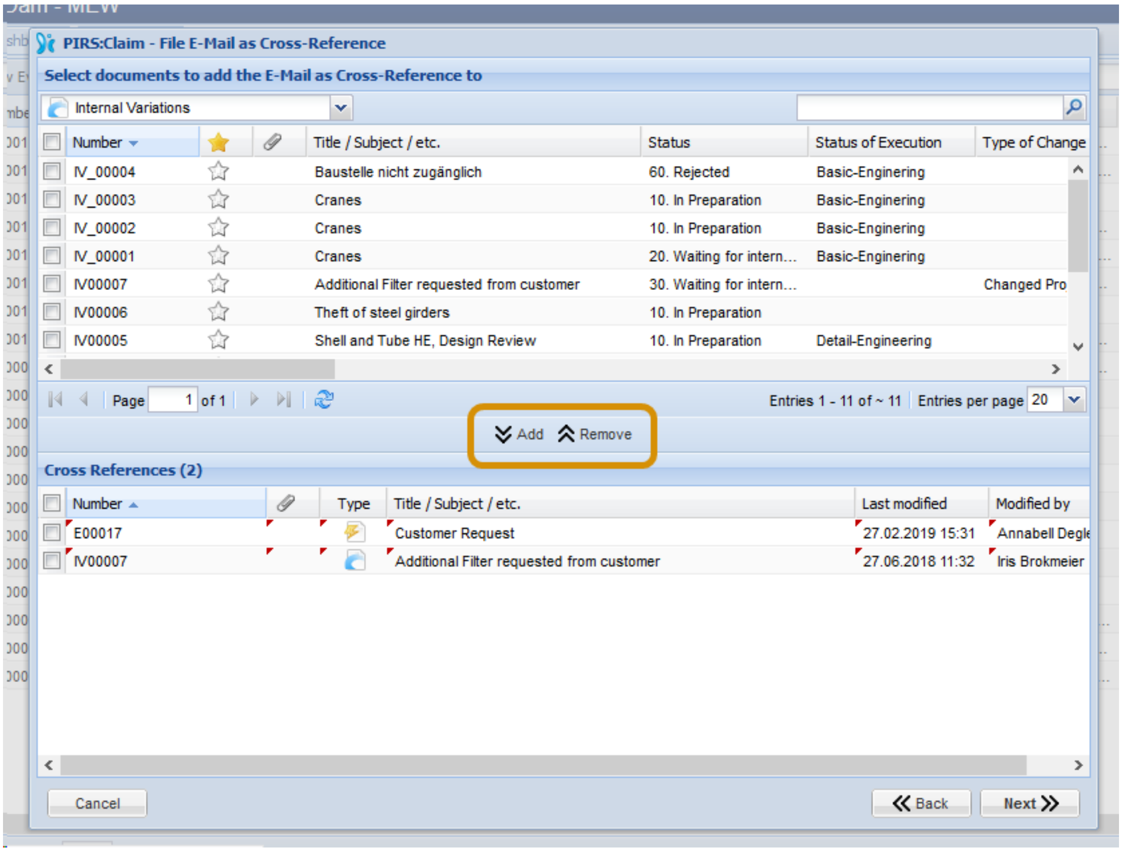
PIRS:Claim will then connect with your personal inbox / your project mailbox and load all e-mails listed by date. By default the mails from your inbox will be shown, but you can also choose to enter any other folder within our respective inbox. In case you have several hundred mails in your mail account the loading process might take several minutes in order to reduce the loading time you can limit the displayed e-mails and select to only load the mails of the last days or months. By the default all mails will be loaded.

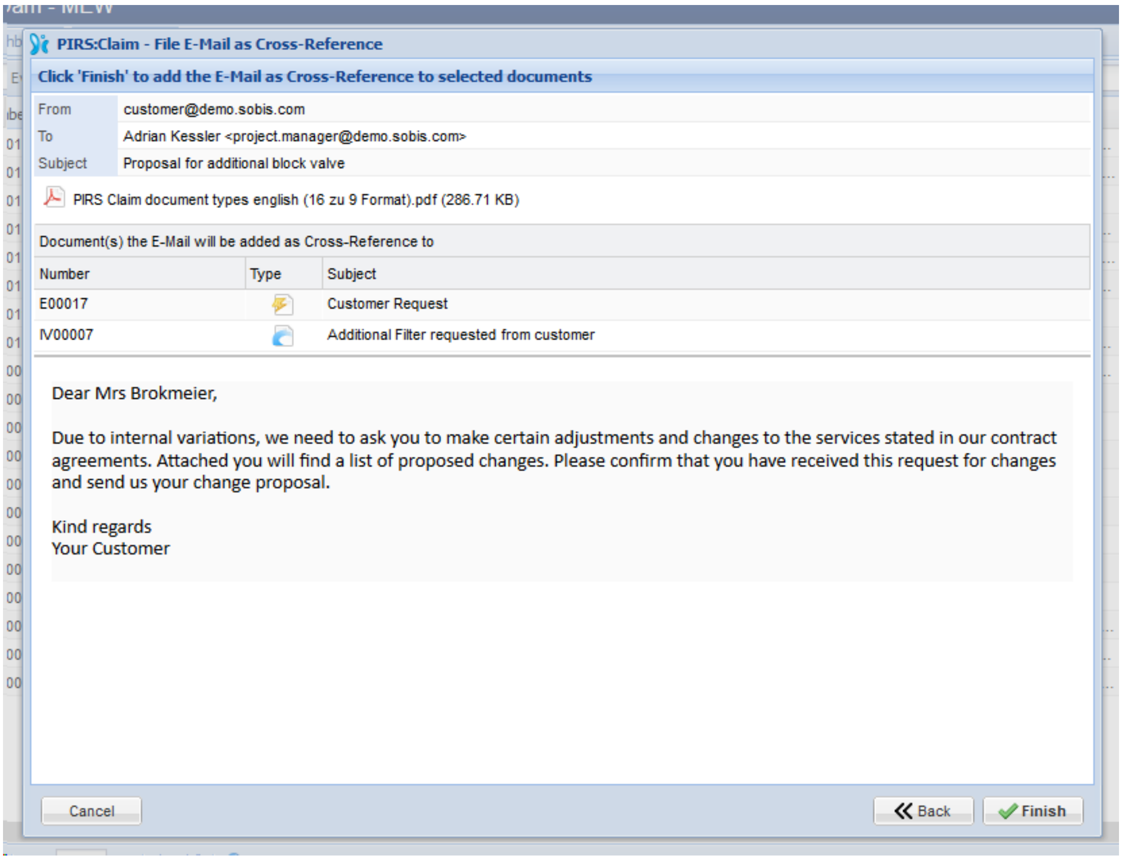
Select the mail that you would like to import and in case you need to review the content before you add it to a PIRS:Claim document, click "**here**" within the preview panel as shown in the screenshot above.

Once you click 

a new window will open allowing you to select the PIRS:Claim document type you would like to select from. By default the Events will be listed.

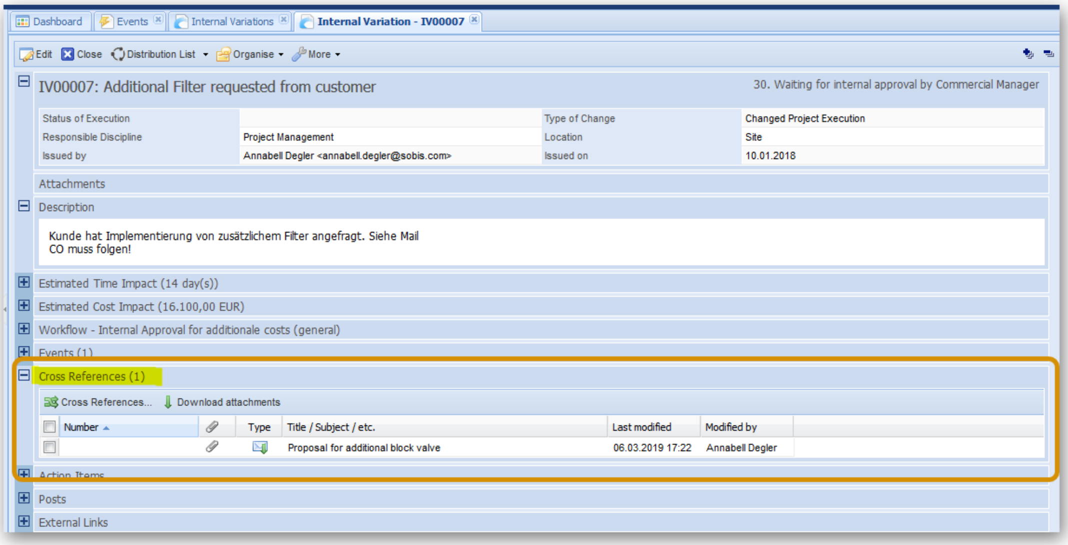
You are able to add your e-mail to several documents at the same time. Select all documents that the mail relates to. As indicated by the screenshot below, it is possible to select different document types. You can add or remove documents using the add/remove button or via drag & drop.





After you click next, a preview will show you the mail you are about to add and a list of PIRS:Claim documents it will be linked to. Click Finish to complete the import.

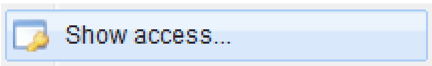
The attached e-mail will be listed as cross reference.



5.6 Manage access rights

The access concept of PIRS:Claim includes 4 different levels, Reader, Creator, Claim Manager and Project Admin(s). Depending on the access role a user is assigned for a project, the user has different access rights. The rights of each role is listed below individually:

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 document can also be determined by the means of the 

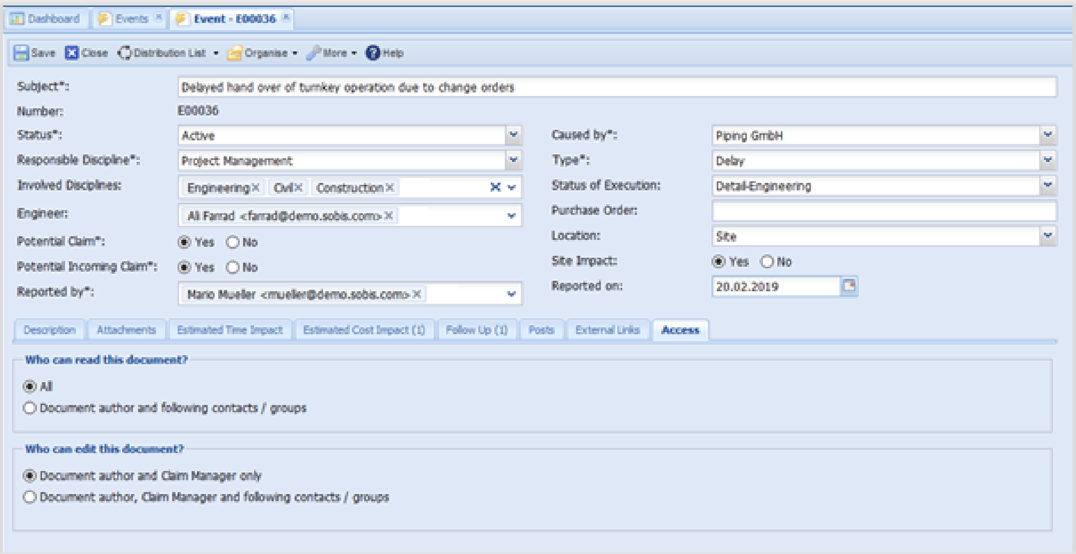
option within the action bar (for further information please refer to the chapter Show access to specific document).

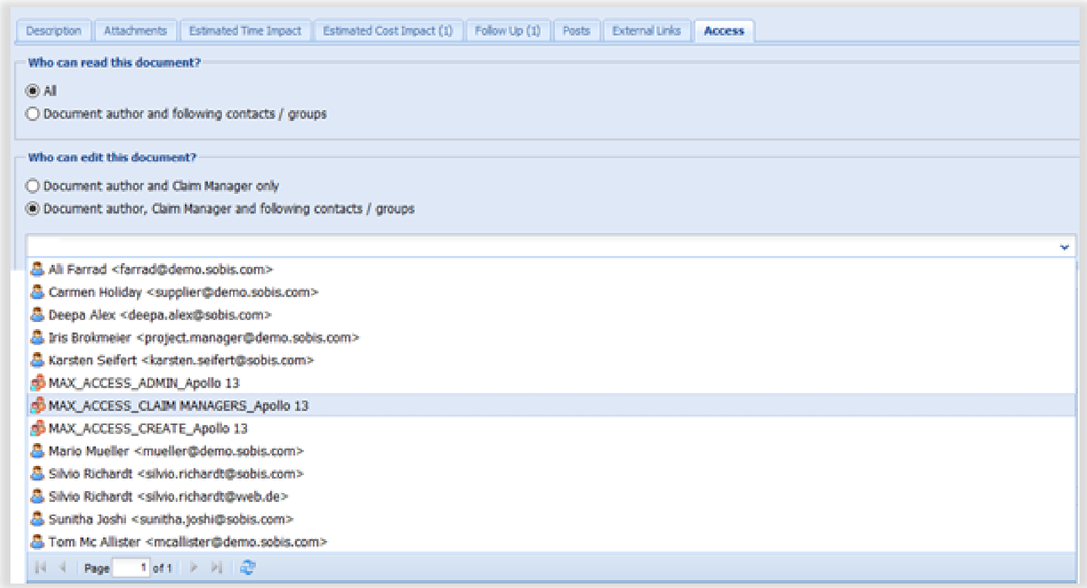
Please be informed that PIRS:Claim project and global administrators are provided with different access rights that enable them to support you in your daily work and your occasional challenges with the application. They are able to access the database administration area.

How to manage access rights to your document

Each PIRS:Claim document contains a tab titled "Access". Within the access tab you will be able to assign and specify access rights to each individual document you are creating and you will be able to adjust those access rights before as well as after having saved and / or distributed the document.

There are two different settings you can adjust, first who are allowed to read the documents, you can select 'all' if you want all the people in the project to read or you may choose document author and the contacts or groups to whom you want to give read access and secondly you can decide who are allowed to edit the document.





As soon as you e.g. select "Document author, Claim Manager and following contacts/groups" within the box "Who can read this document" PIRS:Claim 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 document types may be predefined by the project or the application administrators. In this particular case you will not have the default selection options or they might be restricted because all PIRS:Claim documents created within these predefined type inherit the access rights automatically.

5.7 Posts - Social Networking

In order to keep PIRS:Claim users up to date on latest activities regarding the change and claim management of their project and to support social networking between PIRS:Claim users, the system offers several social networking features (available since PIRS:Claim 3.0).

PIRS:Claim Activity Stream

Activities of users such as creating or editing new Events or Internal Variations, commenting on any PIRS:Claim document or creating new contacts or action items are always documented within the PIRS:Claim 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 he is allowed to access the related items in PIRS:Claim. For example, should your project manager create a confidential Internal Variation, than this action would only be visible within the activity stream of those 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.

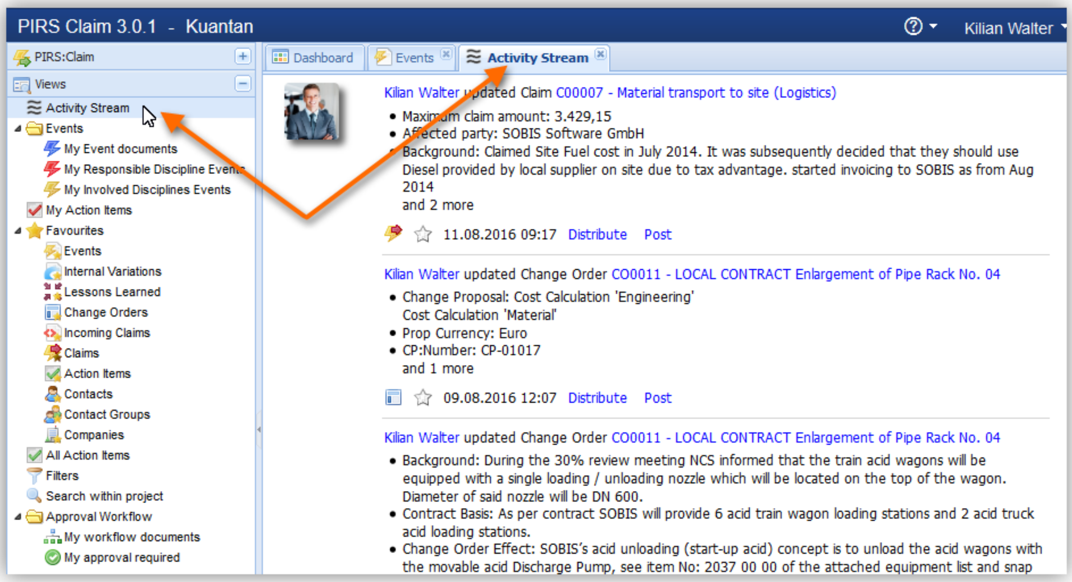
All actions listed in your Activity Stream include links to the contact who carried out the event as well as to the related PIRS:Claim item.

The Activity Stream is always project based. This means that within each project you are involved in you will have an individual view that lists all activities.

Access the project Activity Stream

In order to keep track of all current events and actions of your project, PIRS:Claim offers a view titled "Activity Stream" that displays all new activities.

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.

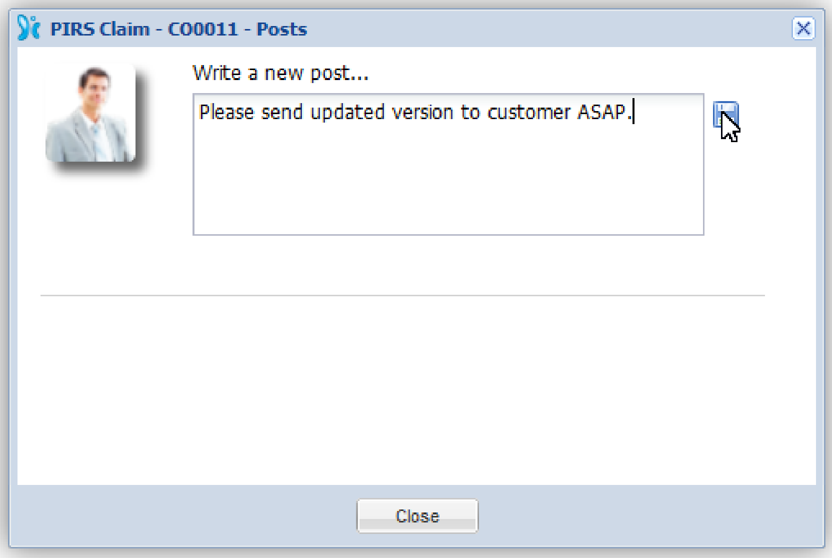


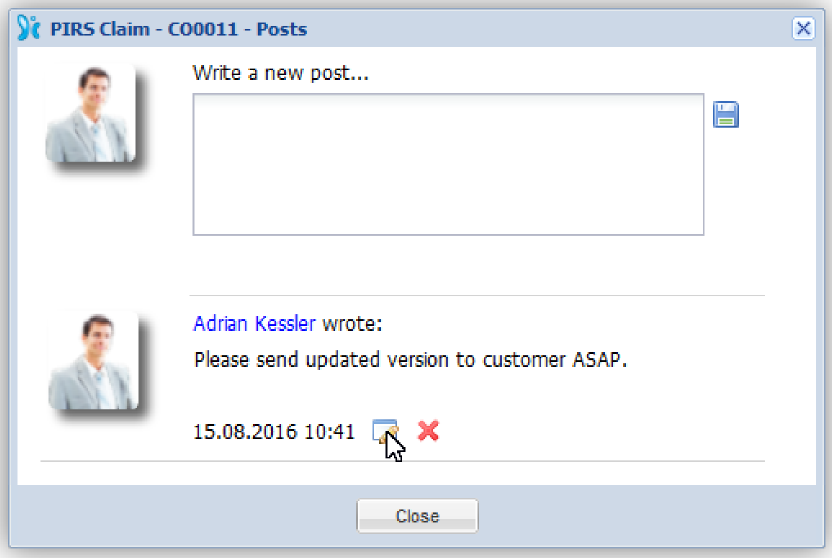
Communicate using Distributions Lists & Posts

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:Claim item. If for example the entry in the Activity Stream would state that Kilian Walter has updated a specific Change Order, the distribution list would include a link to this specific Change Order.

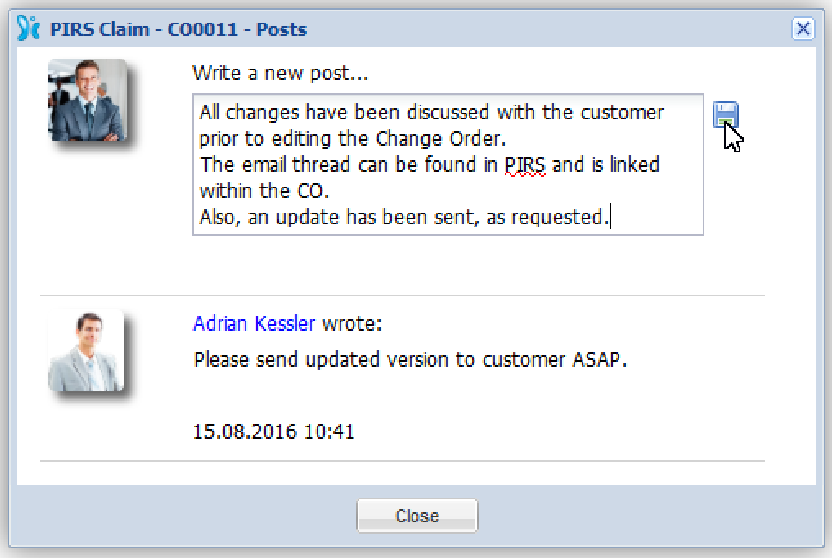
Second of all, you are able to leave a note concerning the entry in your Activity Stream by clicking "Post".

A message box will open where you can enter your comment.





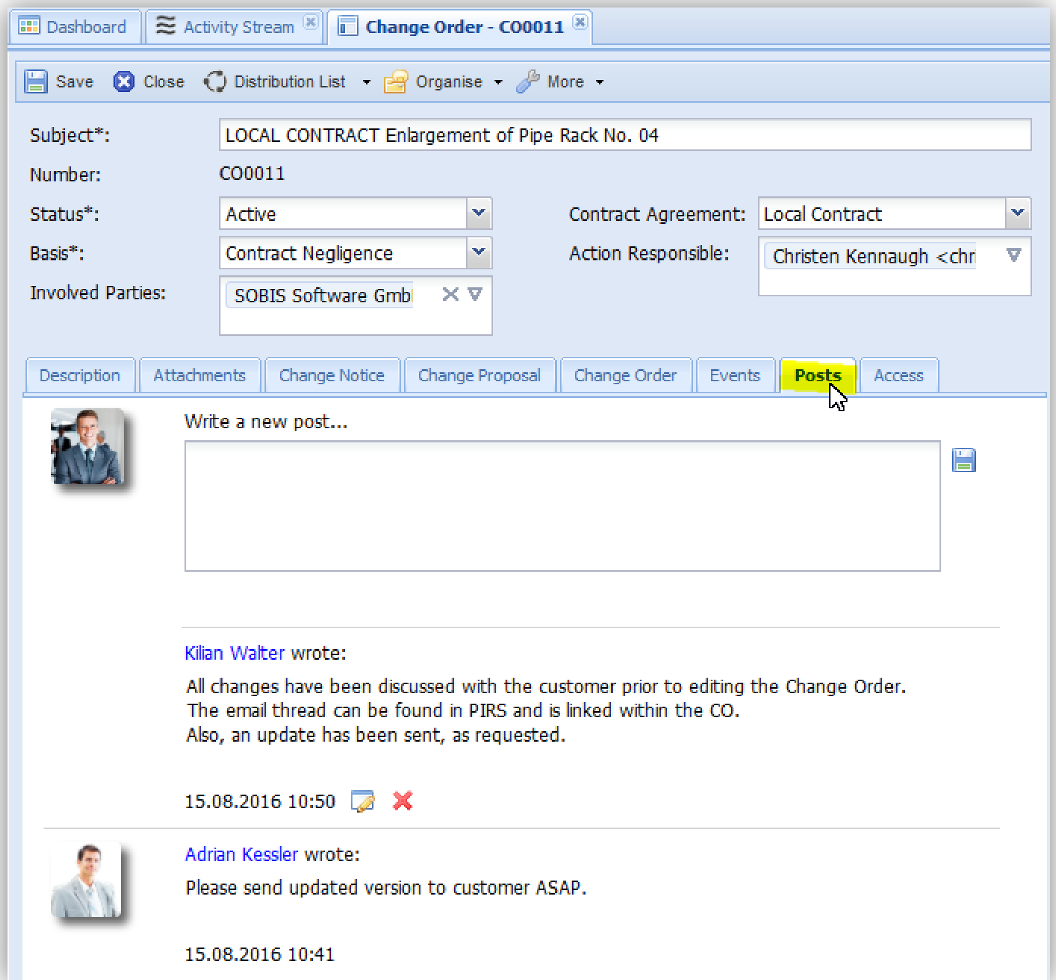
As soon as you click the save symbol ( ) your post will appear in the bottom part of the message box. As indicated by the second screenshot above you are still able to edit or delete your own posts.



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.

Furthermore, PIRS:Claim includes a "Posts" tab within the PIRS:Claim documents the respective entry relates to, listing all comments made.

So, for example, should two separate entries relate to one particular Change Order, all posts will be listed within the "Posts" tab of the related document (compare with screenshot of Change Order in edit mode).

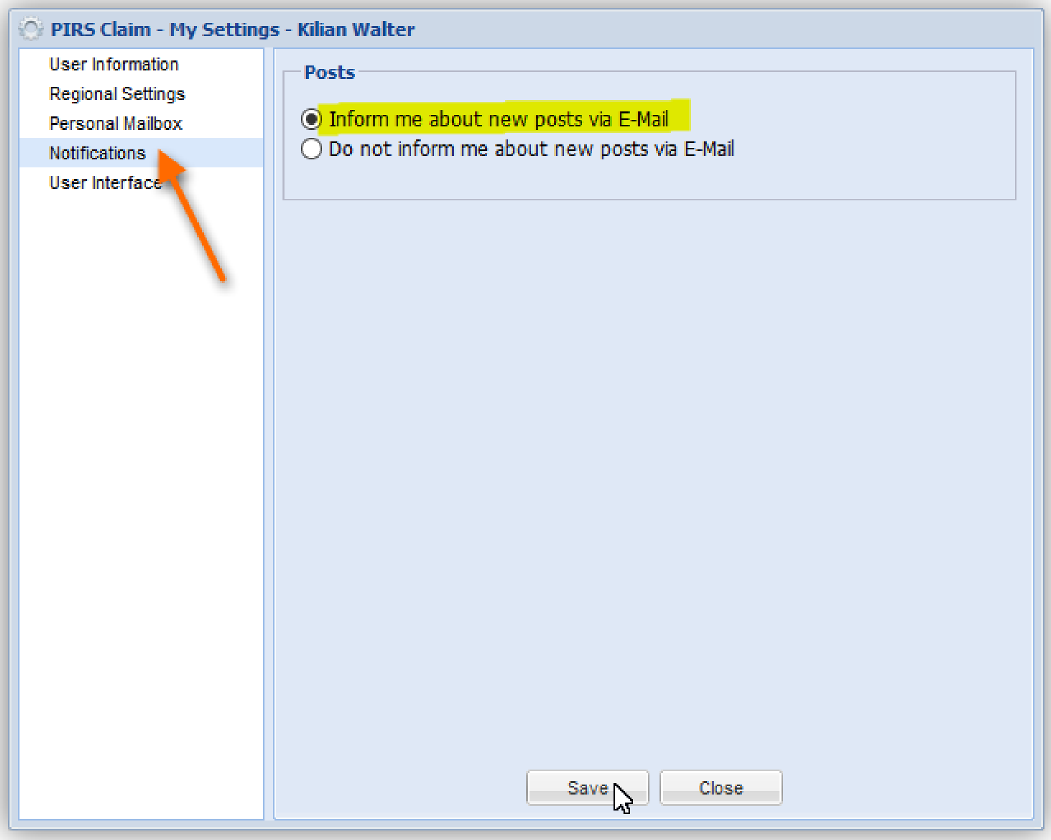


In addition to adding your posts within your Activity Stream you have the option to write a new post directly within PIRS:Claim documents.

Receive notification about new post

By default PIRS:Claim will not inform you if your team members write new posts concerning your documents or in relation to your activities. Should you like to receive notifications in form of e-mails you need to enter your personal settings and open the tab "Notifications".

Within this tab you have the option to activate or deactivate the distribution of your personal notification.



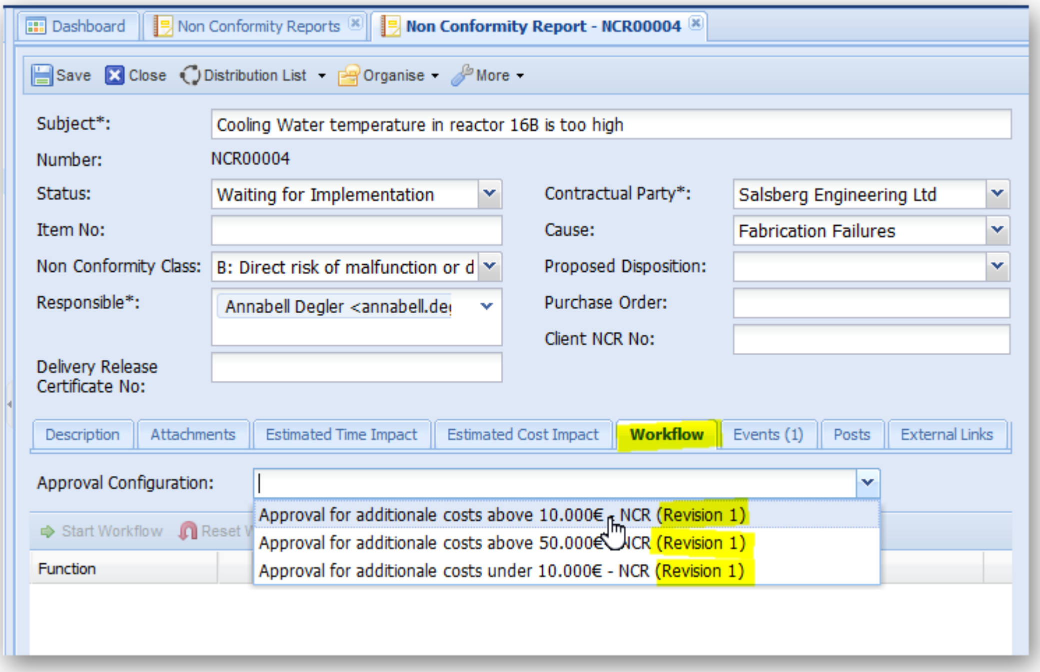
5.8 Workflow

Transparency is very important concerning any business transaction or process that involves potential additional costs or delays. A great way to spread important information to the right people and also make sure that the right actions are being taken and approvals are being given is by setting up workflows.

Workflows are available for most PIRS:Claim documents. Also, there can be several workflows set up for each document type where it is supported. In case you would like to know whether workflows are available for your project, contact your project manager or service desk.

As soon as the workflow module is activated, each PIRS:Claim document, where it was activated, will contain an additional tab in the content area called "Workflow". Within this tab all the various workflows that are implemented for this document type will be presented to you.

Each workflow could e.g. be specific concerning the amount of additional 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 changes are made to a workflow e.g. a change in responsible persons or an additional WF step, a new revision of the workflow will be created.



After a workflow has been selected, the respective workflow steps will be visible in the content area of the workflow tab. Once you saved the entry, the workflow can be started by clicking the

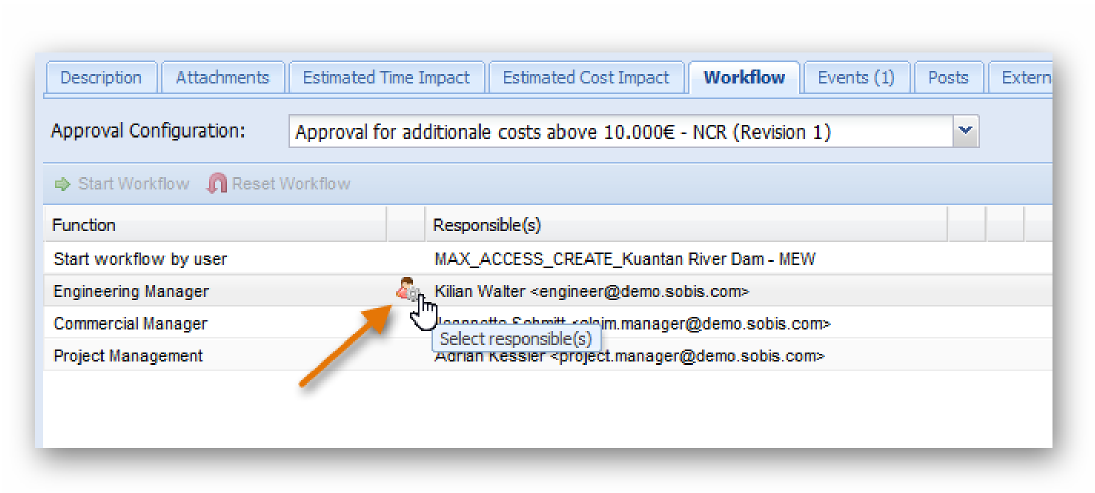
button in the upper right corner of the workflow tab.

As soon as the workflow has been started the entry will be closed and represented to you in read mode. The entry will be frozen ensuring that during an approval process important information can't be changed or deleted. 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.

If your project specifications were implemented with a default value for the respective PIRS:Claim document status, each newly created entry will carry this default value. If a workflow is started by the 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.

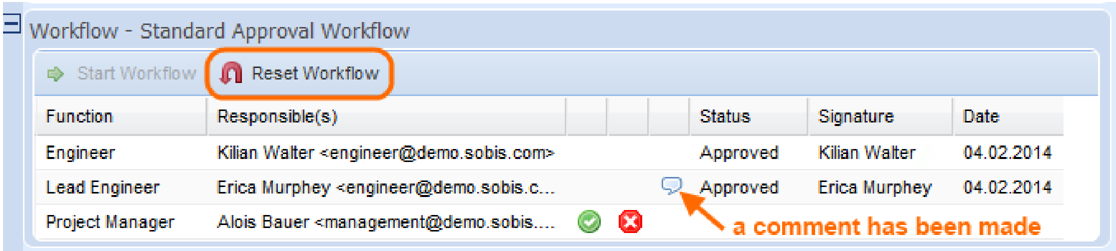
Currently all available workflows are sequential, there is however the possibility to select multiple responsible persons for each workflow step.

In addition it is also possible to select or change the responsible of a workflow step prior to starting the process. If this option is activated for a workflow there will be a respective symbol visible right next to the name of the responsible. Regard the following screenshot.



The responsible party or parties 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.

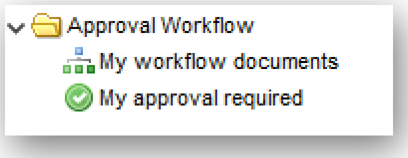
Either way, the responsible has the possibility to include a comment with their approval / rejection that will be indicated by a speech bubble within the workflow content table (compare with following screenshots).



At any point of the workflow, it is possible for the document/project administrator to reset the workflow. If a workflow is reset, the entry content can be edited again.

Should a document be rejected the workflow will be interrupted and the document creator will be informed about the rejection. The workflow can then again be reset by the administrator.

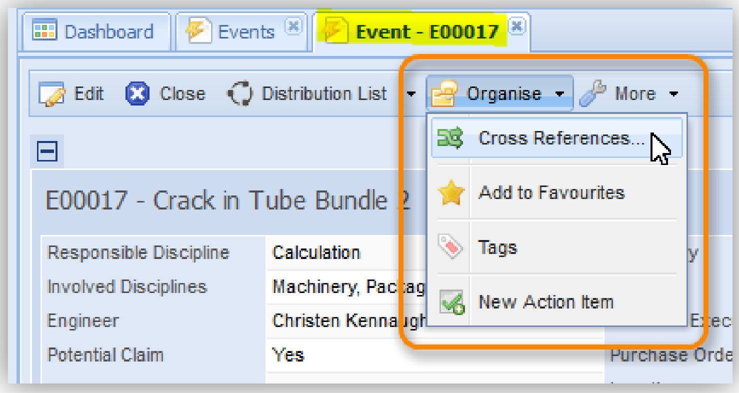
The Workflow Views and Widgets



As soon as the Workflow Module has been activated, you will be presented with two more views in addition to your other personal PIRS:Claim views. First of all you can choose to look at all your PIRS:Claim entries where currently a workflow is active and second of all you can display all entries that await your approval.

As it is the case with most views, you have the opportunity to select them 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:Claim project.

5.9 Organise



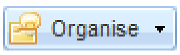
There is a feature offered to you only within in the action bar of PIRS:Claim documents called "Organise". Among other options this button includes the option to set cross references between different PIRS:Claim documents regardless of their type.

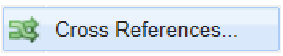
The other options offer to you within the organise button are to add this specific PIRS:Claim document to your favourites, to create an "Action Item" that will be liked to this document or to assign "Tags" to this document.

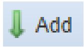
All these features are only visible after your have saved the PIRS:Claim document.

5.9.1 Create Cross References

Cross References enable you to connect PIRS:Claim documents with each other that are related but not necessarily inter-depend or are base on each other. You can for example link an Event to another Event which contains related information that might be important for your project or claim manager.

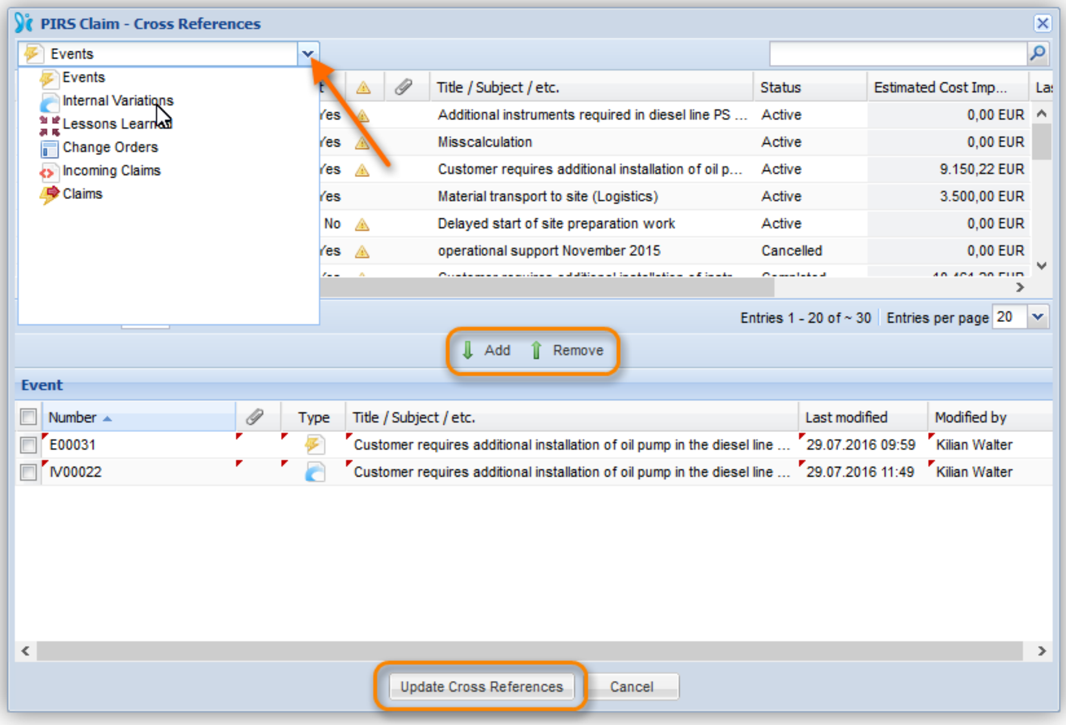
The process is similar to the process of linking Events to related follow-up documents. After clicking 

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 view from which you like to select the cross reference(s). The example below displays the "Events" 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 

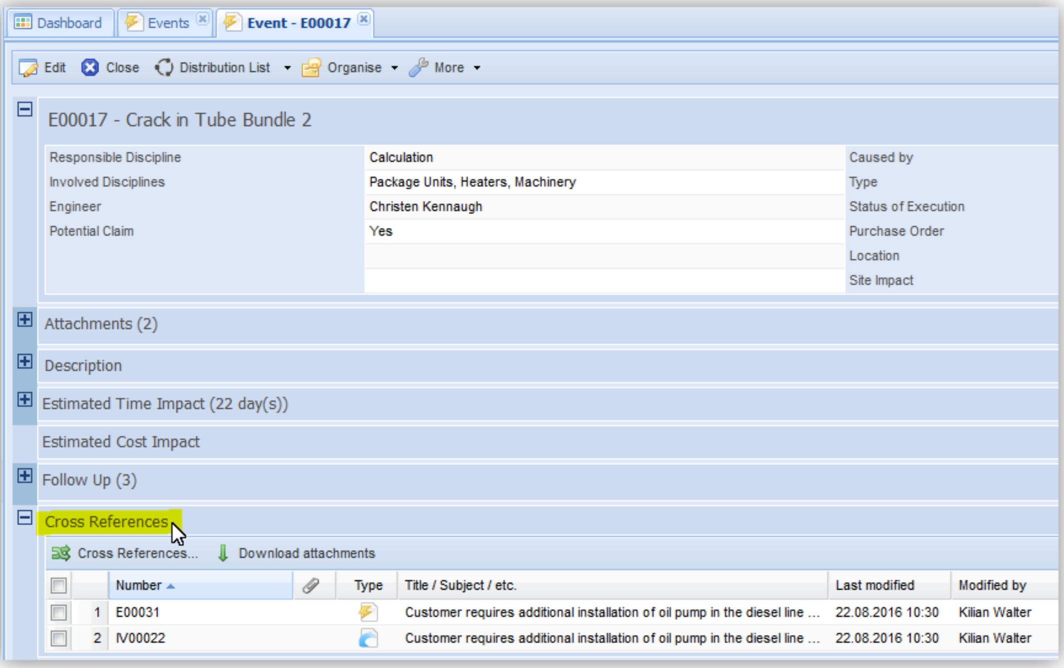
button. The same way, you can remove items from the list either via drag & drop or by using the remove button.

It is possible to switch between the views. So you can first select documents from the Events view and afterwards switch to any other PIRS:Claim view.



After selecting all PIRS:Claim documents you want to indicate relations to, click "Update Cross References" to save you changes. The documents that were linked to the respective PIRS:Claim item will then be listed as cross reference.

All cross references can be opened out of the referred PIRS:Claim item and the link will be visible both ways. This means that within the item that was cross referenced you will also be able to find a link to the other one. Therefore, it is only necessary to select the cross reference once.



5.9.2 Add Tags

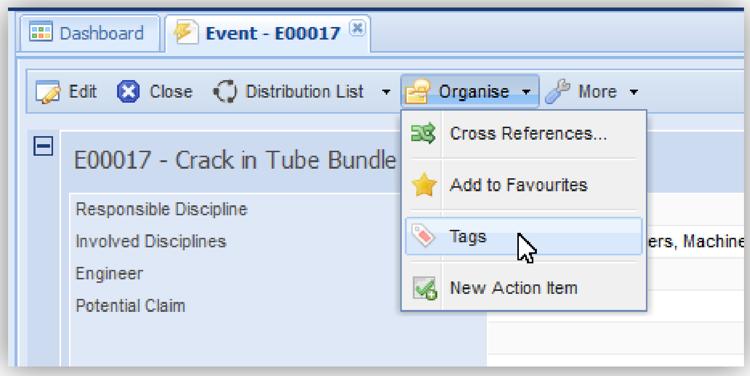
Tags are keywords that can optionally be assigned to all PIRS:Claim items in order to provide the reader with additional information.

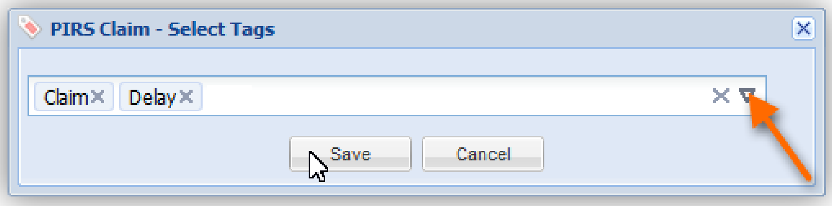
They offer a useful way to group related PIRS:Claim documents together and to quickly give readers an insight into their topics. Tags also make it easier for PIRS:Claim users to find content they are looking for because they can specifically search for tags or filter grid contents using tags as their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

Select Tags

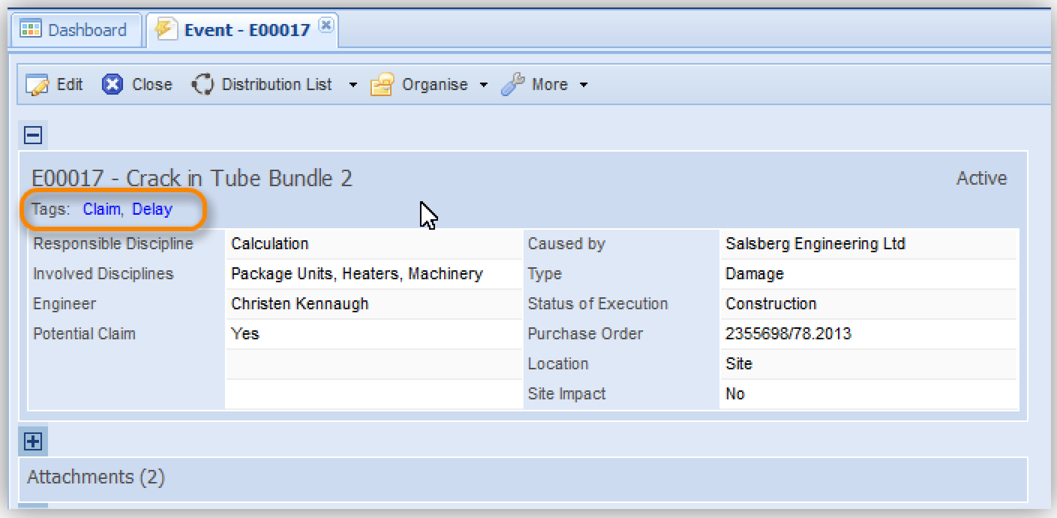
In order to assign tags to your documents select the Organise option in your toolbar.

Then click Tags .A new message box will open providing you with a selection of tag keywords stored within your PIRS:Claim project. You can select one or more tags depending on the information you would like to assign to the particular document.



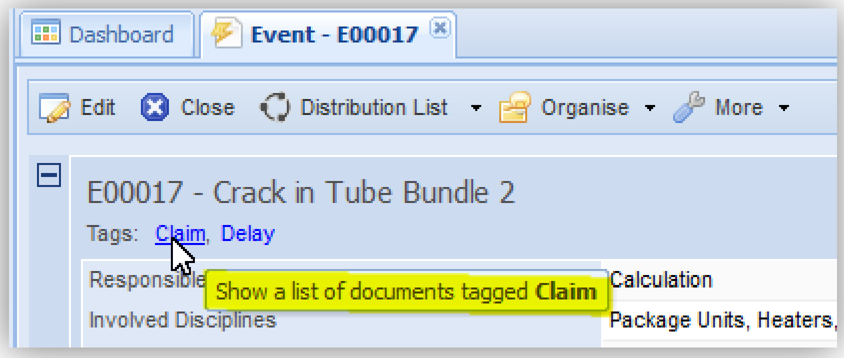


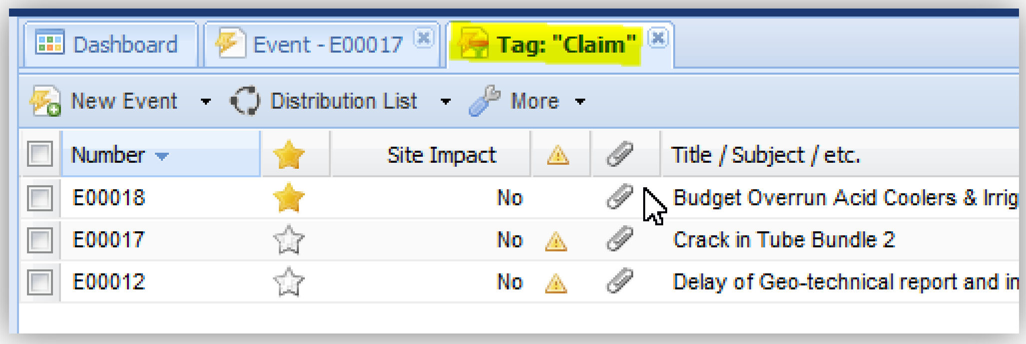
After saving you tags selection, the tags will be listed within the header-information of the PIRS:Claim document as indicated by the following screenshot.



Please be aware that tags are only displayed as header information in read mode.

Each tag is also a link that will open a new "Tag view". By clicking a tag listed in your document, you are able to open a list of all PIRS:Claim items that were tagged with the same tag keyword.





In addition you can of course also filter for one or more specific tags within any PIRS:Claim view.

Set up Tag keywords

The list of tags that PIRS:Claim 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:Claim support desk will be able to make adjustments within the project administration. For further information please contact your project manager or PIRS:Claim support desk.

5.9.3 Create Action Items

Action Items are individual PIRS:Claim items that help you and your team to manage your personal as well as your team's project tasks. 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 is pursued and will be completed on time.

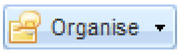
An Action Item can be either created in relation to one or more PIRS:Claim documents (e.g. as a reminder to yourself or your colleague to send a Change Order proposal to your customer) or it can be created without any connection to another PIRS:Claim item (e.g. as a personal reminder to make a follow up call until a certain date).

There are two ways to create an Action Item:

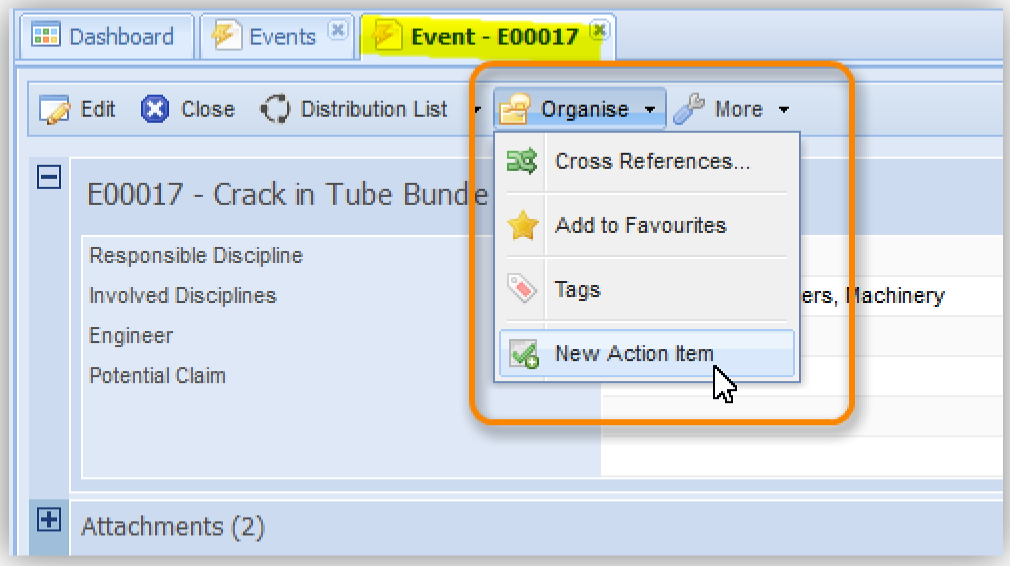
1. From within a PIRS:Claim Item in read or edit mode
2. From the Action Items View

Both options will be introduced in detail below.

5.9.3.1 Create an Action Item from within a PIRS:Claim item

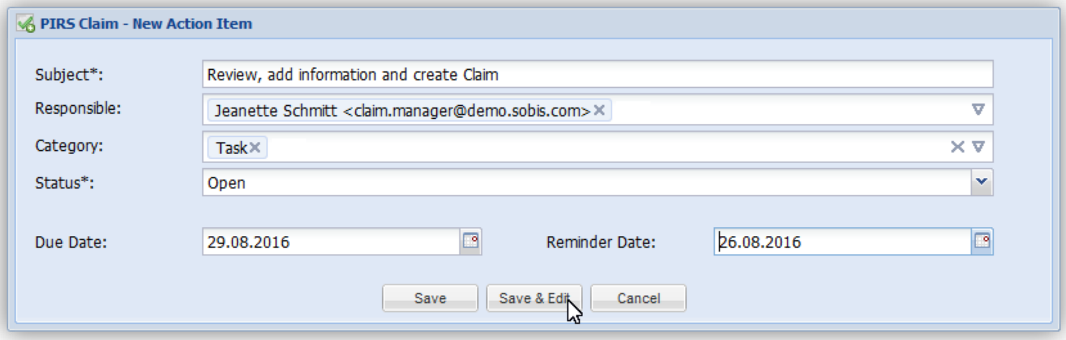
In order to create an Action Item that is automatically linked to a certain PIRS:Claim document e.g. an Event, open the PIRS:Claim item in read or edit mode and click the 

button. A list of options will be presented to you. Click on "New Action Item" as indicated in the screenshot.



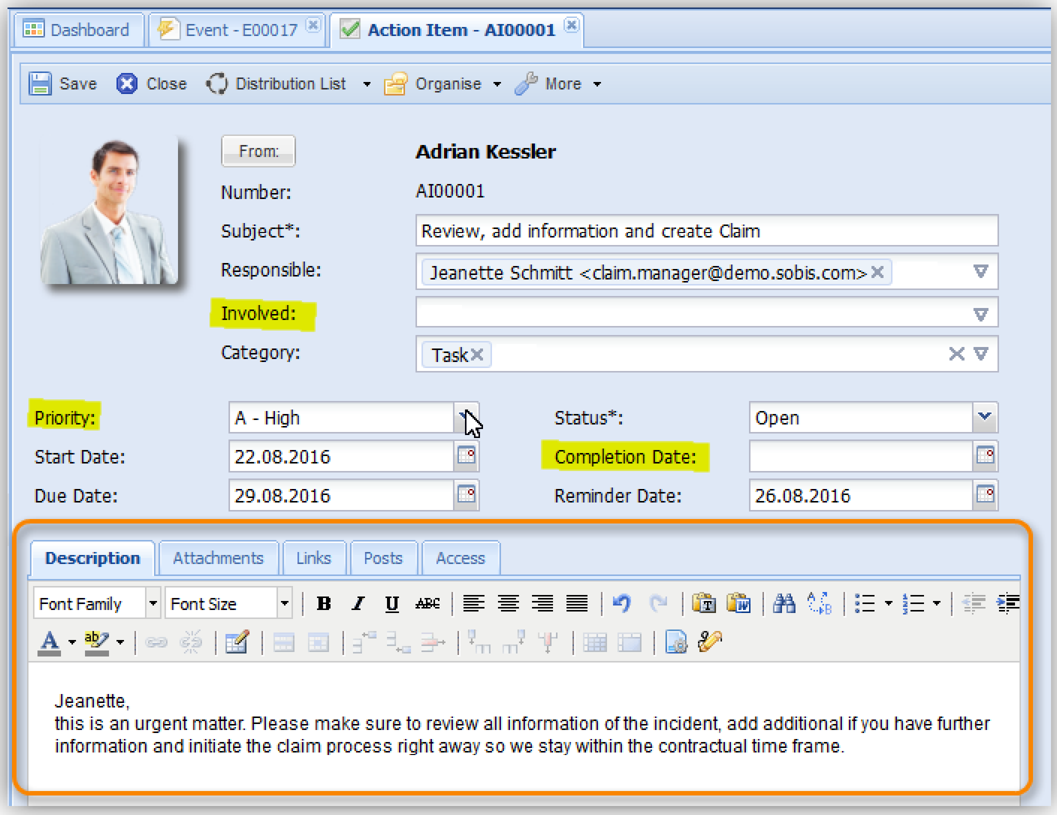
An input mask will open in a new window allowing you to assign a subject and a responsible to your new Action Item.

Furthermore, at this step you are also able to select a specific category reflecting 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. Once you click save the Action Item will be created and the responsible informed.



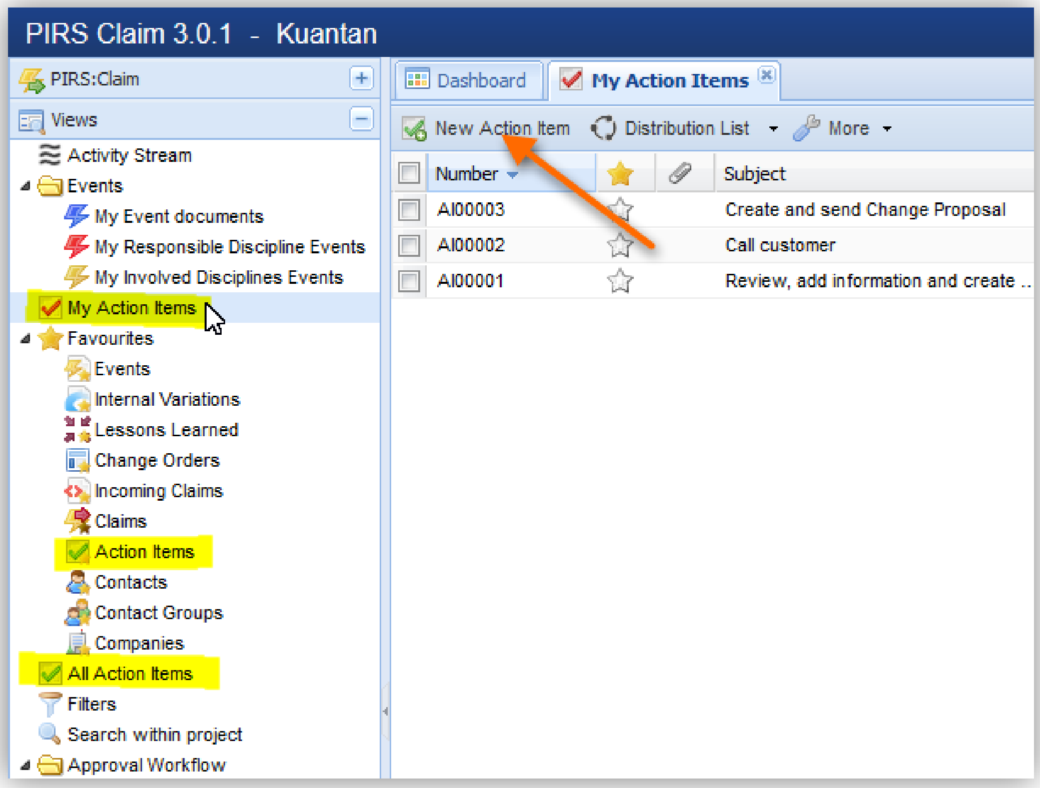
In case you need to add further information to your Action Item, click the button "Save & Edit" and the Action Item will be opened in edit mode.

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:Claim document within the "Links" tab.



If you have set a reminder date, the responsible will receive an e-mail containing the link and a standard reminder text at the start of his work day on the respective date. Once the task is completed the responsible can select the completion date and set the status to "completed". This way all involved will be able to track open tasks and make sure that nothing is overlooked.

5.9.3.2 *Manage and Create an Action Item within the Action Items View*



In order to manage your own tasks and reminders you can follow up on your Action Items within your personal "My Action Items" view. All Action Items, your own as well as those of your team members that you also have access to 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 favorites 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

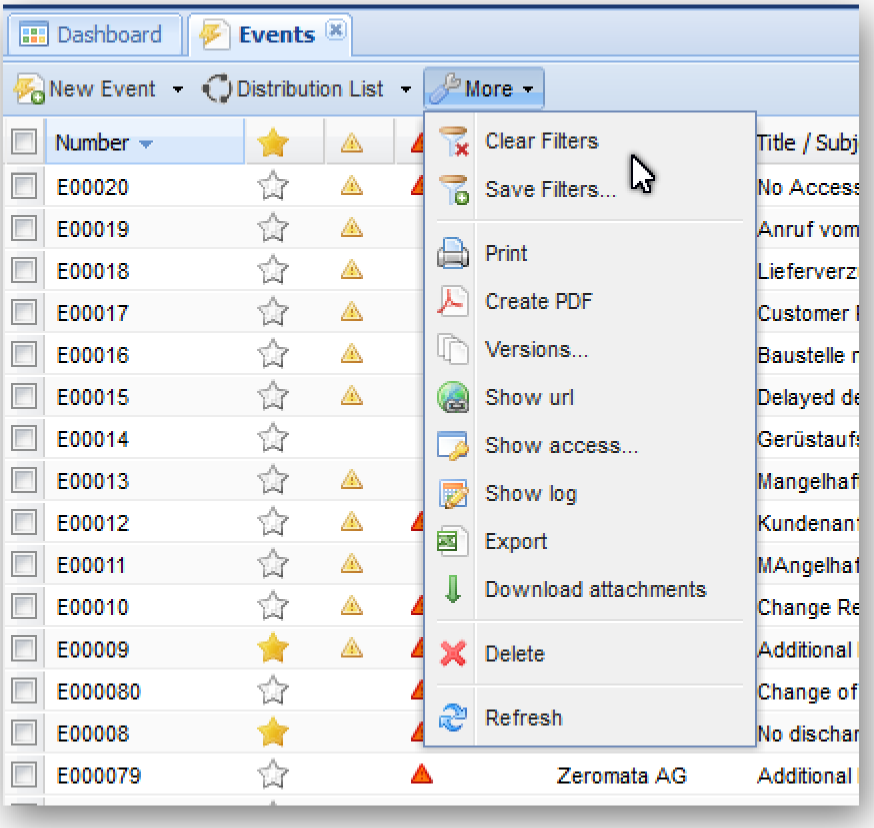
the 

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, no PIRS:Claim document will be linked automatically to your new task or reminder. Should you wish to link a specific PIRS:Claim item use the "Links" tab.

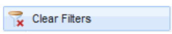
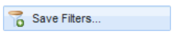
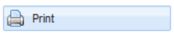
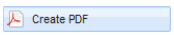
5.10 The "More" Actions



The "More"- button is either the last or the second to last action choice within the each action bar.

Following, each selection option offered within this button will be explain briefly.

For more details on each action please refer to the respective chapters that are linked within the short explanations.

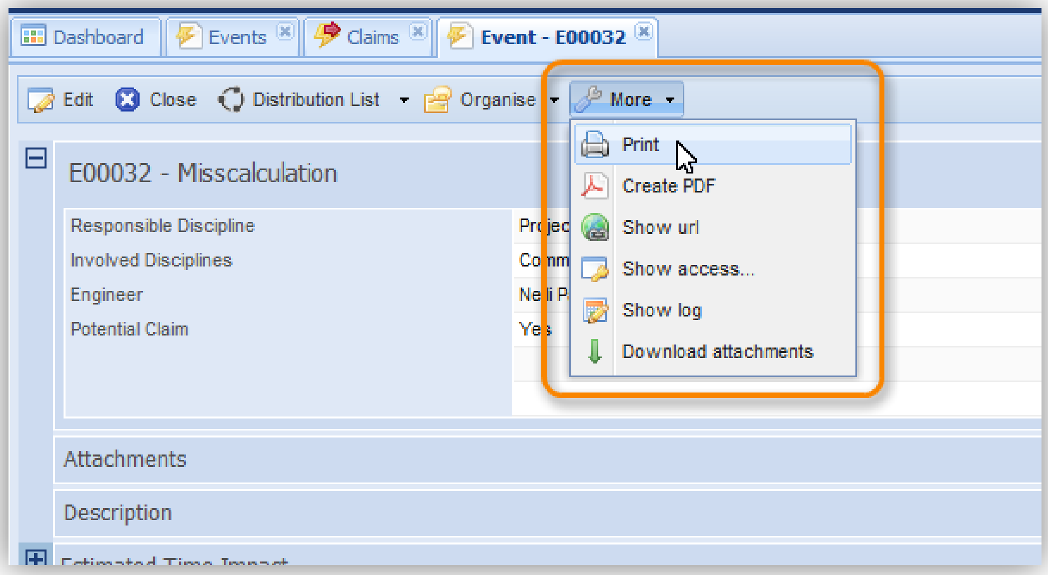
Selection option	Description
	This action will clear your current view of all filters that might have been set previously. (Please also refer to chapter Search and filter functions)
	This action allows you to save filter combinations that you use on a regular basis as a personal view. (Please also refer to chapter Search and filter functions)
	The Print option allows you to quickly print any PIRS:Claim document without selecting a print template. (Please also refer to chapter Print without print template)
	This action will create a PDF file according to your company templates that are stored within PIRS:Claim. 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 PDF file)
Versions...	Versions allow you to create and then compare different versions of your PIRS:Claim entities. Learn more in chapter Versions.
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. You could also 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 to specific document)
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 Excel Export)
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)
Refresh	This action will refresh the current view.
Delete	This action will move all selected documents to the recycle bin. The button is only visible to users that hold the role of project manager or claim manager. (To learn more about PIRS:Claim deletion process refer to chapter Deletion Concept)

5.10.1 Print without print template

Since release PIRS:Claim 3.0 the tool bar offers a new print option. As described in chapter (Create PDF file) you can always create PDF files based on your PIRS:Claim documents using your company templates. This option should always be used when printing or sending a Change Order or Change Proposal for example.

In case you quickly need to print a document you are now also able to use the print button (Print) offered to you within the "More" options.



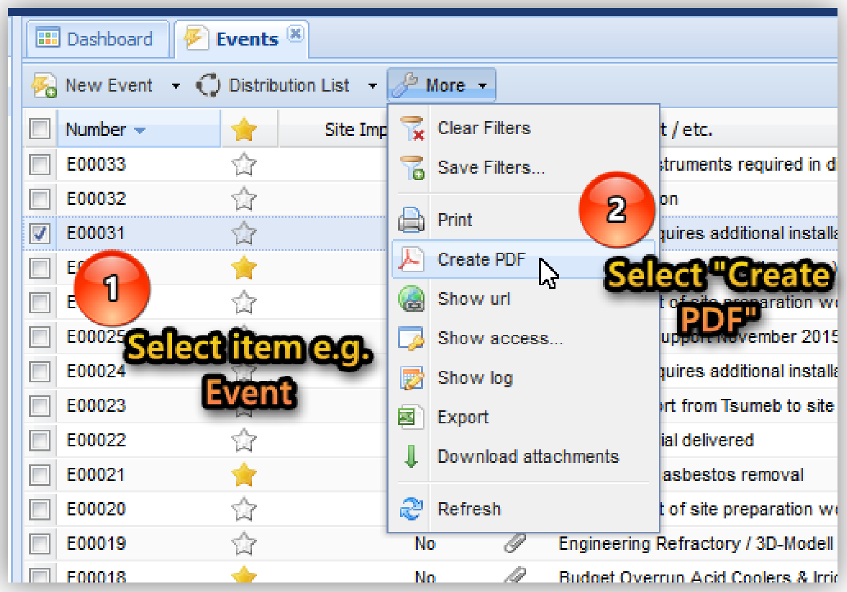
PIRS:Claim will connect to your browser printer and depending on the browser you are using the printer options will open in a new window or browser tab. You are now able to select the correct printer from your offered company printers and also select all other standard printing options.

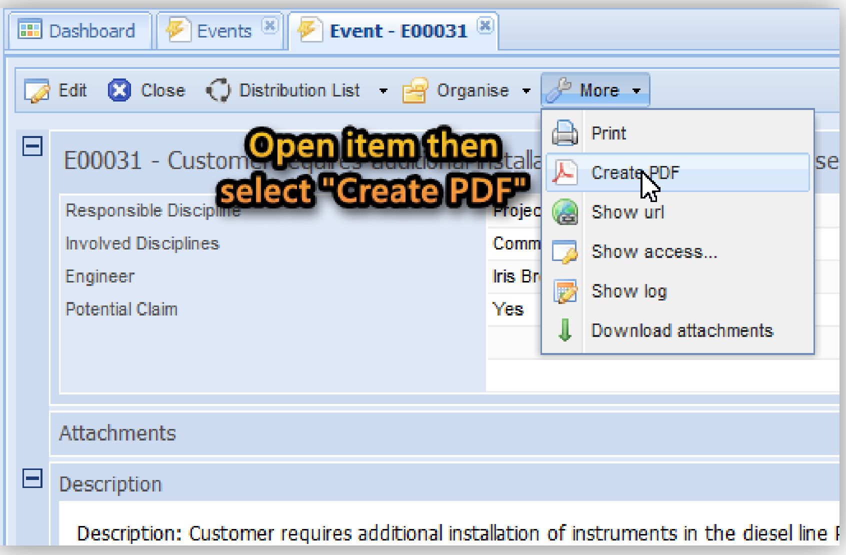
Info
Please be aware that only the content of a saved PIRS:Claim document is considered for the print out. So make sure to save your document before you print it. Also, since PIRS:Claim is directly connecting with your browser printer the layout of the print out might not be consistent with your PIRS:Claim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

5.10.2 Create PDF file

In case you need to preserve, store or print a PIRS:Claim item, e.g. if you wish to send the document to a partner or customer as attachment or as paper document, you have the option to create a PDF file based on any PIRS:Claim document.

The "Create PDF" action can be found within the "More" options of any view action bar as well as the action bar of any PIRS:Claim document. To create a PDF file within a view, you first need to select the item you wish to created the PDF file from. When the document is already open this step is of course not necessary.





Click the action "Create PDF" located within the "More" options of your respective action bar.

In case your company has more then one template stored for a specific document type, you will be presented with a selection of templates. After having selected the required template, the PDF file will then be created and opened in a new tab.

Please ensure that your browser settings allow the automatic opening of a PDF file in a new tab, otherwise it will be prevented by your browser.

The creation of a PDF file is possible within all types of PIRS:Claim items and will therefore not be explain in detail all other chapters in question.

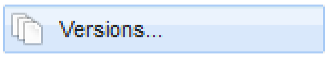
However, as an exception the Change Order must be mentioned. A Change Order includes three different forms (Change Notice, Change Proposal, Change Order) that are usually based on each other, but nevertheless interdependent. All of these forms shouldn't necessarily be stored within one paper document, especially when it might be used to be sent to the customer. Therefore, when creating a PDF within a Change Order you will have to option to choose between the three different forms.

All information displayed within the PDF documents are defined within your company templates by your project manager and can be changed any time if required.

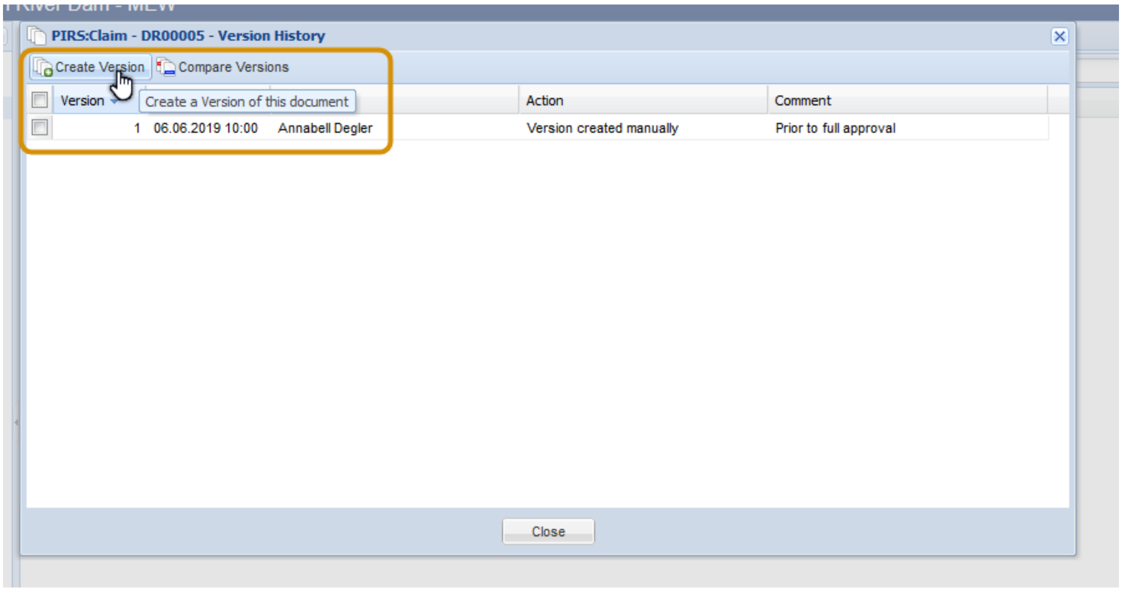
5.10.3 Versions

Versions enables you to compare different stages or versions of a document e.g. during the document process / workflow. It is available for almost all document types.

To enable the comparison, different versions of a document need to be created. This can be done either automatically or manually. The automatic creation of a version can be triggered e.g by a workflow step. To set up the automatic versioning please contact your project manager.

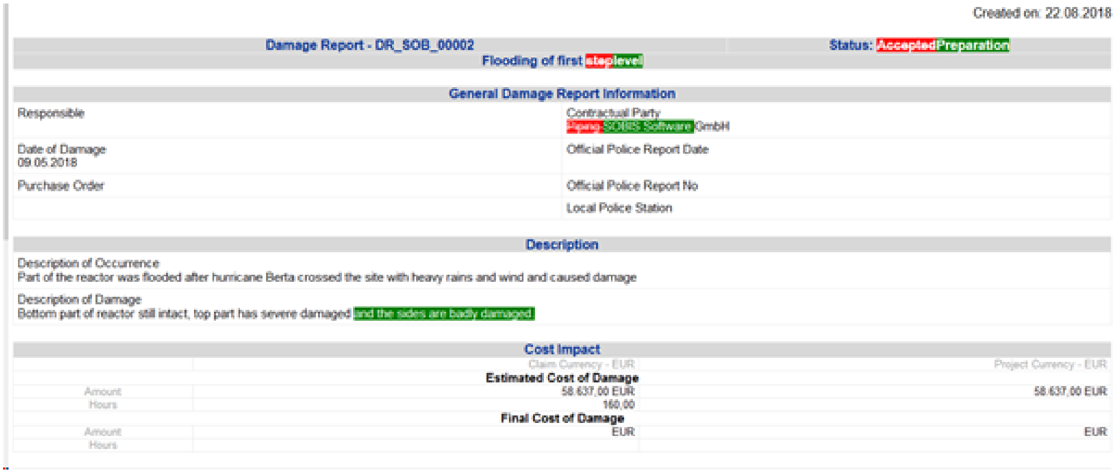
On the other hand, versions can also be created manually. Select the option 

available under the "More" options and click "Create Version".



Next you are able to enter a comment regarding e.g. the stage or status of the document when the version was created.

To compare two document versions, simply choose any two document versions from the list of versions offered in this window. Once you click "Compare Versions" a new tab will be opened in your browser displaying a comparison of both versions. All changes and fields with different values will be highlighted. So, instead of going through the entire document log and look for changes made, you will be able to see the changes clearly highlighted in different colors as illustrated below.



Created on: 22.08.2018

Damage Report - DR_SOB_00002 Flooding of first steplevel	Status: AcceptedPreparation
General Damage Report Information	
Responsible	Contractual Party Pipeng SOBIS Software GmbH
Date of Damage 09.05.2018	Official Police Report Date
Purchase Order	Official Police Report No
	Local Police Station

Description
Description of Occurrence Part of the reactor was flooded after hurricane Berta crossed the site with heavy rains and wind and caused damage
Description of Damage Bottom part of reactor still intact, top part has severe damaged and the sides are badly damaged

Cost Impact		
	Claim Currency - EUR	Project Currency - EUR
	Estimated Cost of Damage	
Amount	58.637,00 EUR	58.637,00 EUR
Hours	160,00	
	Final Cost of Damage	
Amount	EUR	EUR
Hours		

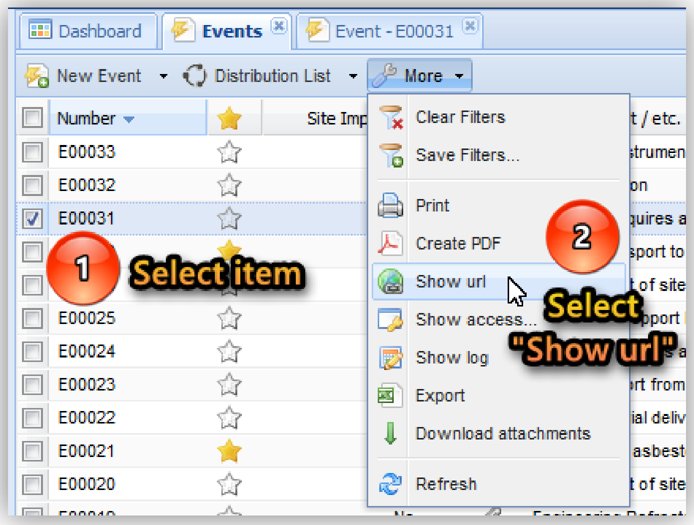
5.10.4 Show document URL

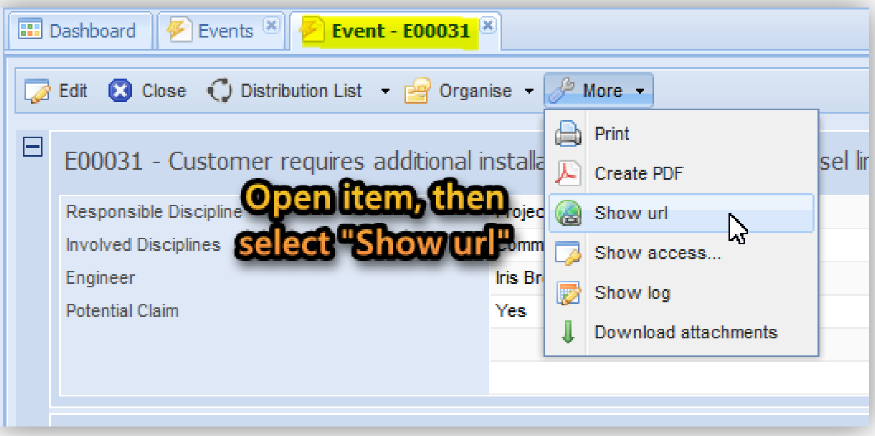
Each PIRS:Claim document is assigned a unique document number as well as a unique document URL as soon as it is saved within the PIRS:Claim application database.

In order to trace, copy and possible share this unique URL of a document with you team members, you can either select the file within the respective view (e.g. "Events") or open the document in read or edit mode.

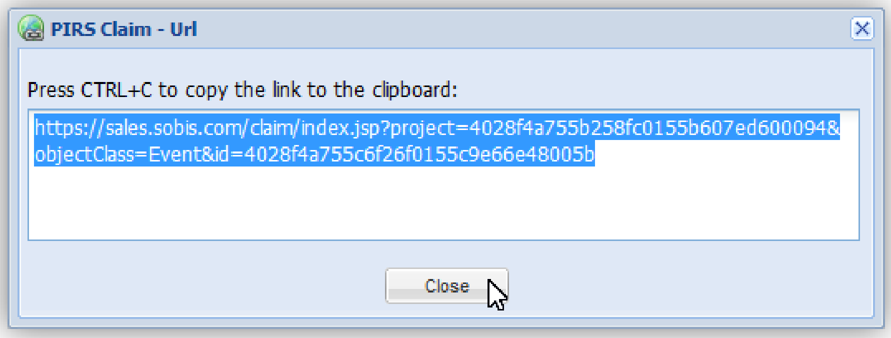
Next expand the selection options within the "More"-button positioned in the action bar which is displayed either at the top of the open document or at the top of the respective view.

If you want to show the URL while working within a view, you first need to select the document in question. Then simply select the option "Show url". (Compare with the following screenshots.)

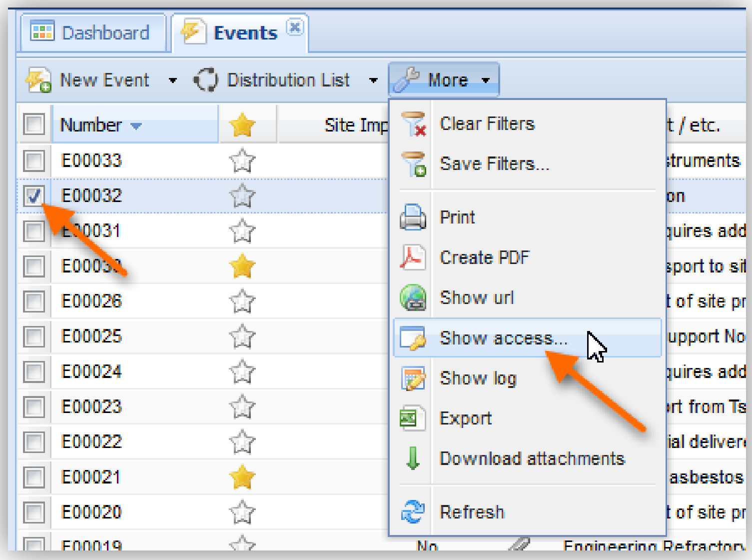




As illustrated by the following screenshot, a small message box will appear in the center of your screen containing the document URL and giving you instructions on how to copy the link the simplest way possible.



5.10.5 Show access to specific document

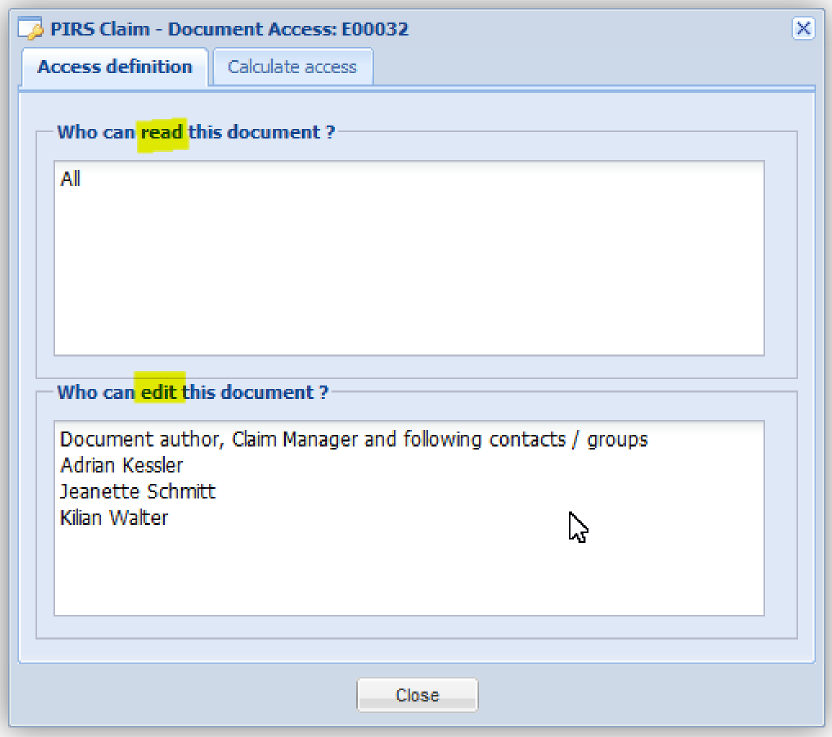


In case you need to know what kind of access rights a certain project member or project group has to a specific PIRS:Claim document e.g. an Event, you can use the "Show access..." feature. It can be found within the options of the "More" features within the action bars.

The access to a file can either be viewed or calculated out of a view or directly within an open document in read or edit mode.

As illustrated by the screenshot, you first need to select an item in the grid in order to show or calculate the access information within a view. Please be aware that the access setting of PIRS:Claim documents can only be displayed one at a time. If you select more than one item you will receive an error message.

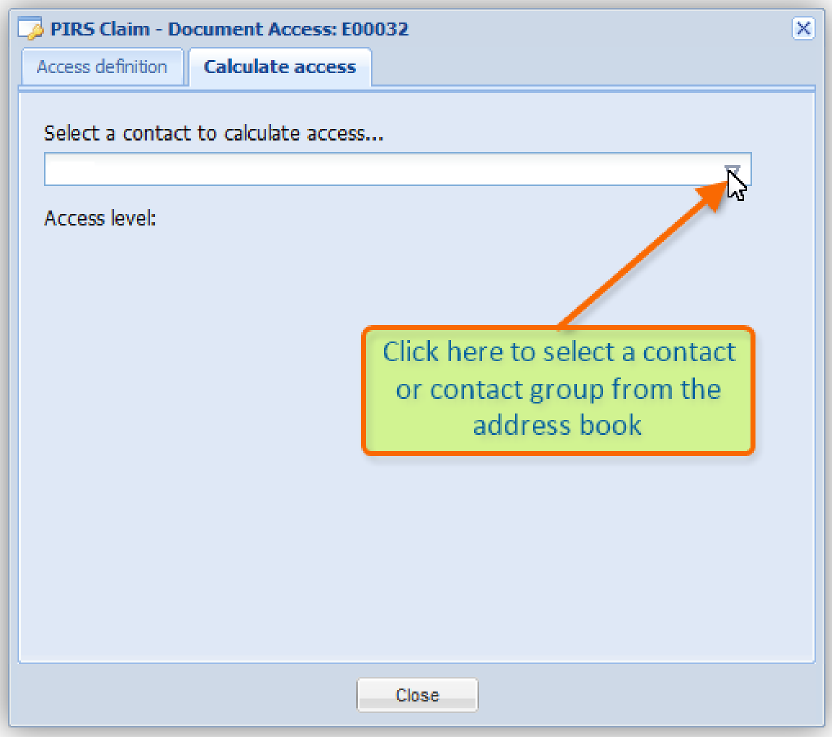
After selecting the item in question and clicking the “Show access...” button, a new window will be opened presenting two different tabs.

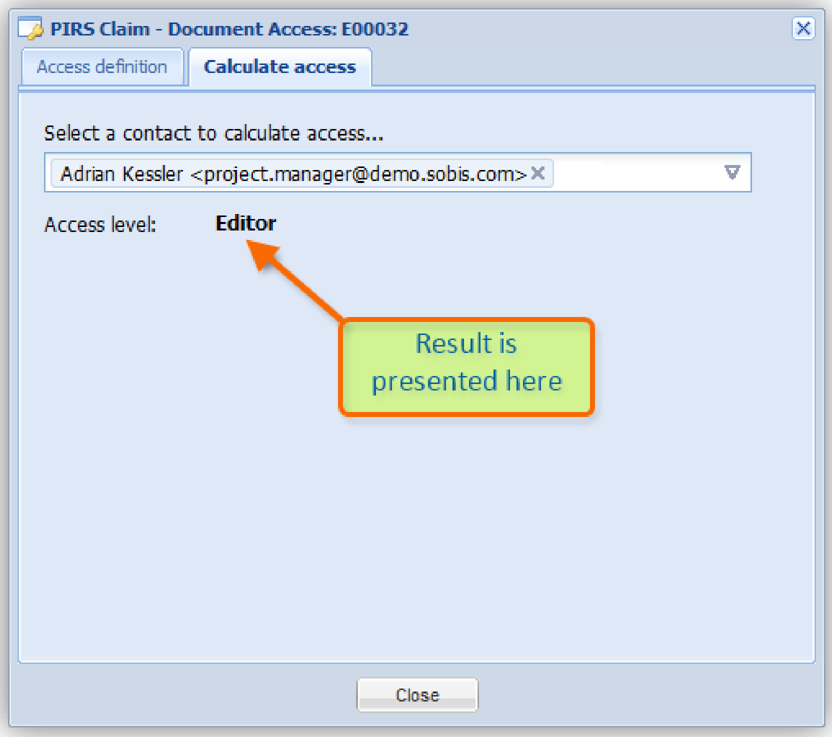


The first tab will give you the general access information defined for the selected document. It lists all users that currently are able to access and read the document as well as those that are allowed to edit the document.

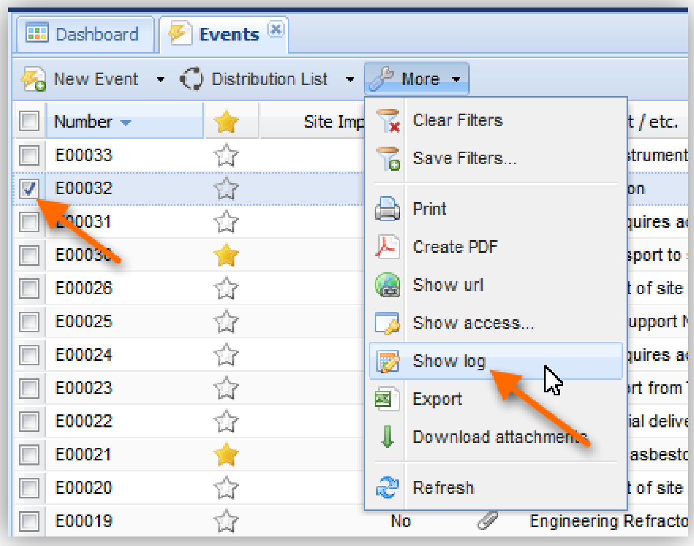
In case you need to calculate the access of one specific PIRS:Claim user or group to a PIRS:Claim item, the second tab includes a selection field where you can either enter the person or group for whom you wish to determine his/her/it's access rights manually or you can select them from the address book. Access the project address book by clicking the arrow head to the right hand side of the text box. Please keep in mind that you will only be able to select one value at a time.

As illustrated in the following screenshots, 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.


PIRS Claim - Document Access: E00032
Access definition
Calculate access
Select a contact to calculate access...
Access level:
Click here to select a contact or contact group from the address book
Close


PIRS Claim - Document Access: E00032
Access definition
Calculate access
Select a contact to calculate access...
Adrian Kessler <project.manager@demo.sobis.com>
Access level:
Editor
Result is presented here
Close

5.10.6 Document log

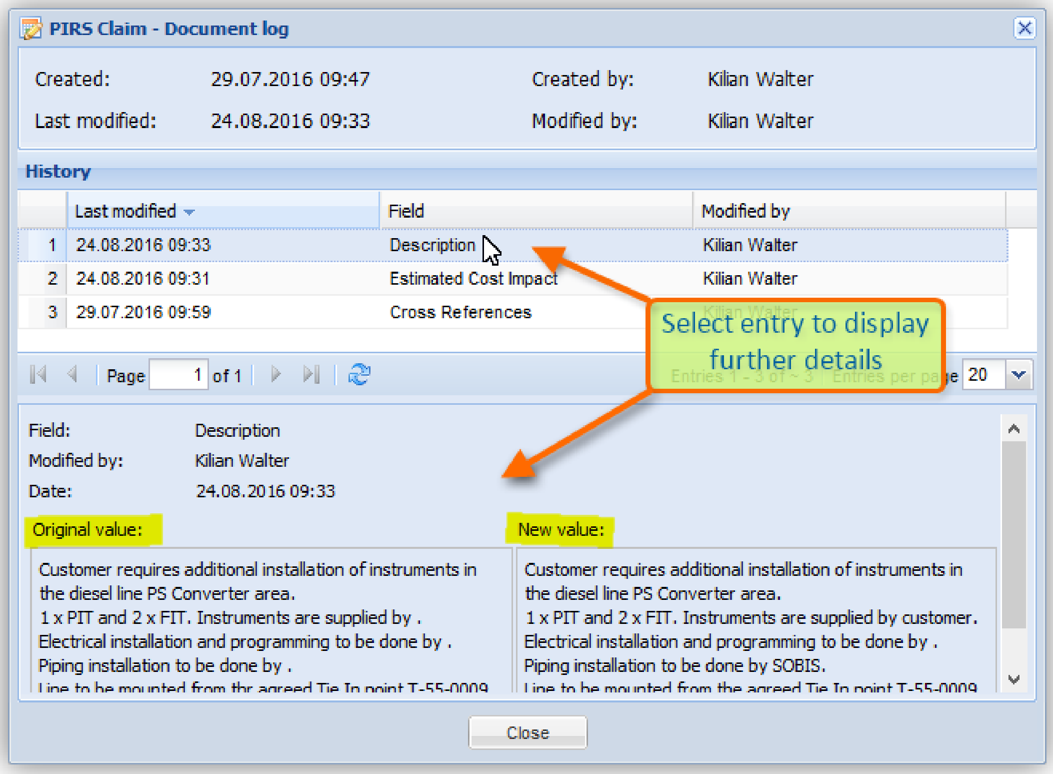


The document log is a very helpful tool to be able to analyze and trace changes, modifications and actions that were made within a document.

It enables project members and especially project and claim managers to follow each step of the editing processes. At any time one can track changes and identify the person who modified the document in question and when each modification took place. This function therefore ensures that no information is lost and that it can be restored if necessary.

In order to show the log information of a specific document simply select it within the respective view or open it in read or edit mode. Next expand the selection options within the "More"-button positioned in the action bar which is displayed at the top of the open document or the respective view and select the option "Show log".

A pop-up window will open on top of your PIRS:Claim content screen. As illustrated in the following screenshot listed in the header of the new window you fill find the basic information about the selected document such as the creation date, the user who created this particular document and when it was last modified.



PIRS:Claim - Document log

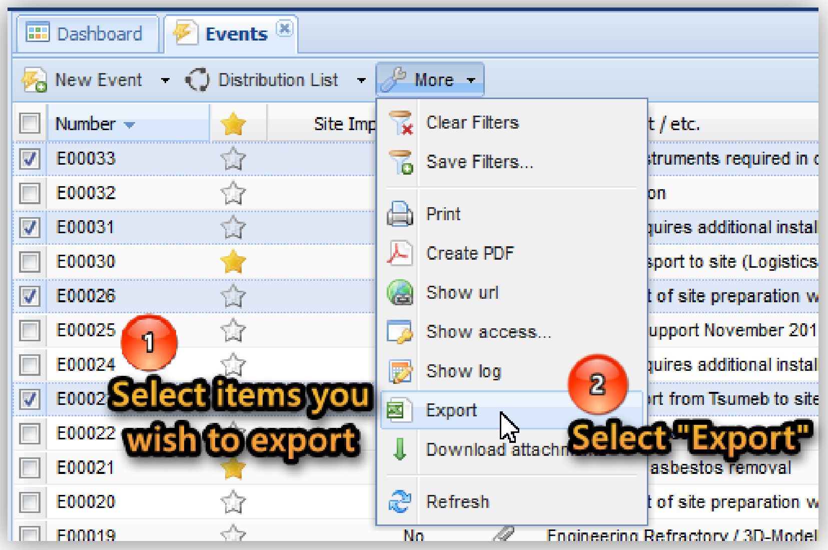
A "PIRS:Claim - Document log" window is always divided into three areas. As mentioned above, the header will always show the creation date of the document as well as its creator and the date when the document was last modified as well as by whom it was modified.

The area underneath 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 and time the document was edited, the specific field that was modified as well as the responsible project member.

Within the third area 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.

5.10.7 Excel Export

There are hardly any offices now a days that don't work with MS excel in order to calculate, process and present data. To support a smooth and easy transition of information you wish to analyze and process using excel, PIRS:Claim offers a feature called excel export.



Regardless of the view you currently display on your screen, you will find the "Export" function within the choices of the "More" option displayed in the action bar.

You have two different options in order to select exactly the documents that hold the information you are interested in, either you manually select all those items within the grid view or you first filter the content according to your intended result. For more information on how to filter data and search for specific information please refer to the respective chapter (Search and filter functions).

If you want to export all items that are listed within a view simply start the export process right away. It is not necessary to manually select all items because if no items are selected PIRS:Claim will automatically consider the entire view content.

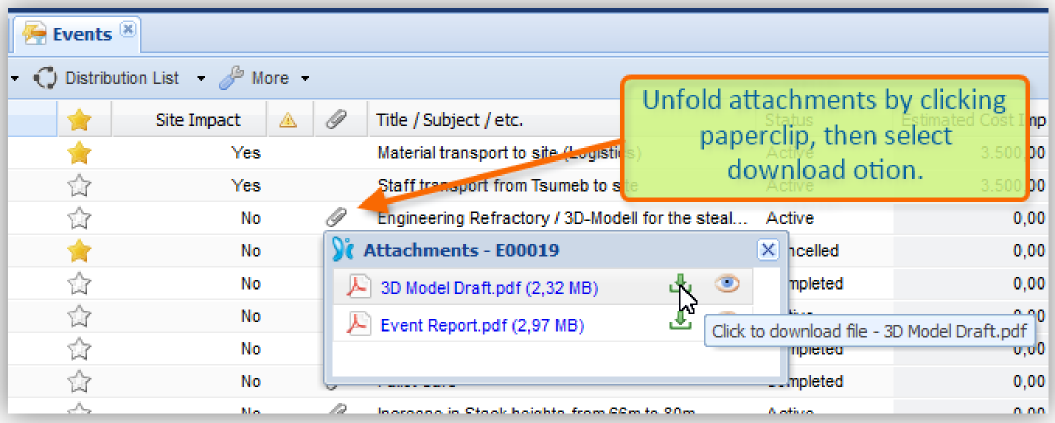
After you have selected all items you wish to export, select the "Export" option listed within the "More" button. The result of the export will be opened automatically in an excel sheet.

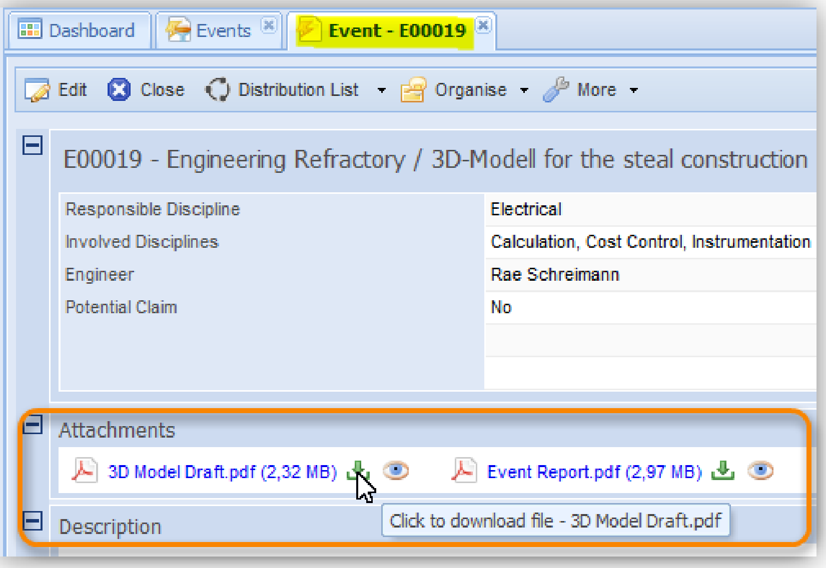
The column values of each document regardless if they are visible or deactivated within your current customize grid display will be taken into account and presented in a separate column within the excel sheet. In addition another column displaying the link to each document is also add to the excel table allowing you to directly open an item of interest within PIRS:Claim.

5.10.8 Download Attachments

PIRS:Claim offers its users the option to quickly and easily extract files attached to PIRS:Claim documents, e.g. in order to store and access them locally.

Attachments can be downloaded directly within each document or view simply by selecting the attached file as illustrated in the screenshots below.

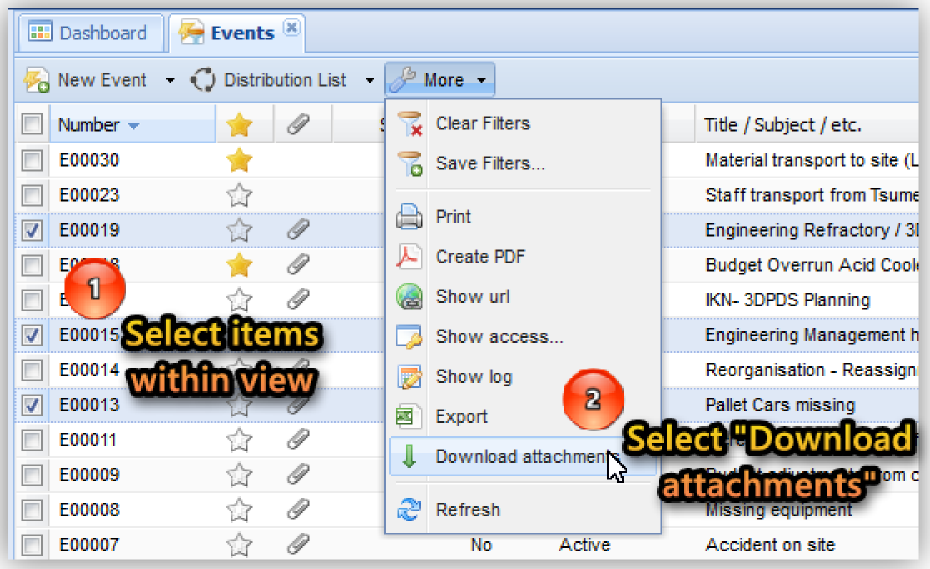




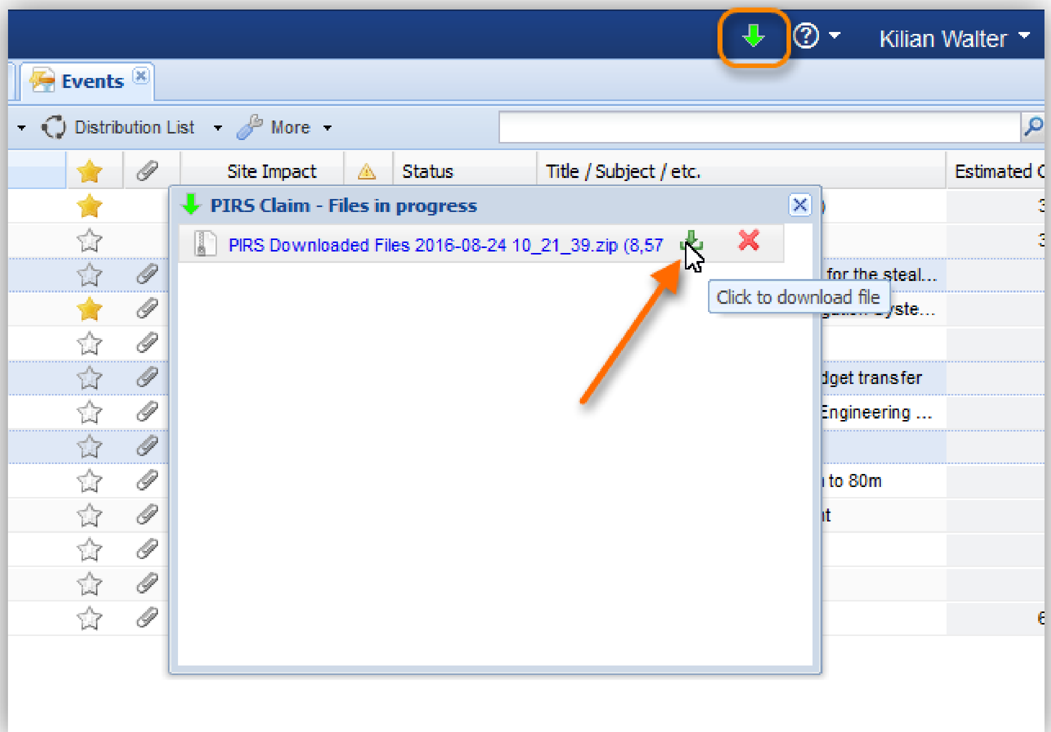
This way you are able to download one attachment at a time. In case you need to download and stored multiple attached files at once, PIRS:Claim offers the "Download attachments" feature within the "More" options of all view action bars.

How to download attachments from multiple documents

First select the items within your PIRS:Claim view from which you would like to extract the attached files. Then open the "More" options in your action bar and select the "Download attachments" feature.



PIRS:Claim 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 close the window and reopen it by clicking the grey arrow in the top level PIRS:Claim tool bar.

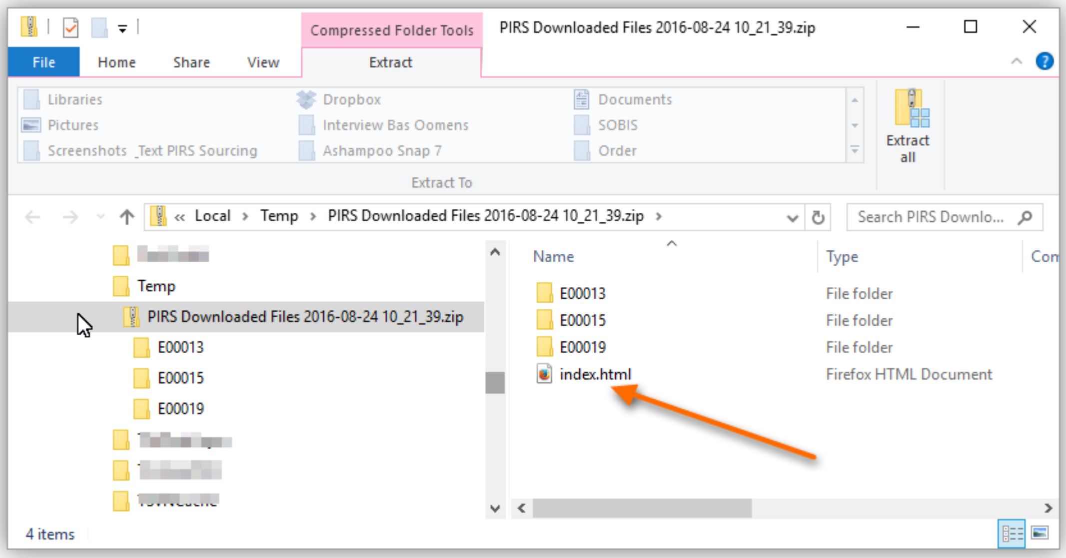


As soon as the download is completed you will be informed by a small message box and the arrow in the tool bar will turn green. (Compare with highlighted section of the following screenshot.

To complete the download process and store the respective files locally click the file link or the download symbol as pointed out in the screenshot.

A download can be canceled or deleted during the download or after the download is completed using the red cross.

Once the download process is completed, all files will be organized and stored in folders according to their unique 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.

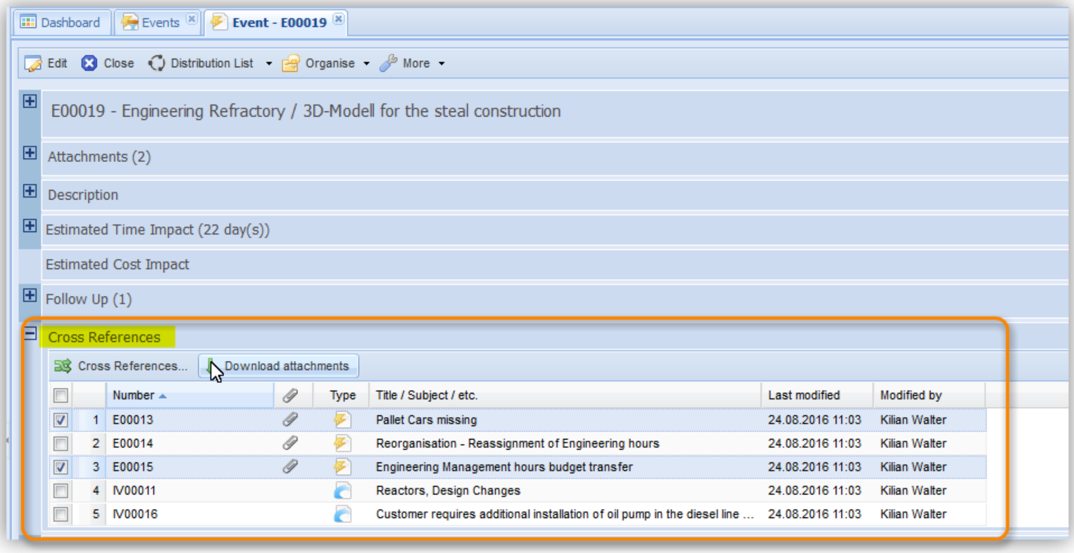


Besides the folders named after the respective document numbers, the zip file also contains an html index file that can be opened in your browser and that shows a detailed list of all downloaded attachments.

Download attachments from "Cross References"

Besides the download options described above you are also able to download attachments from PIRS:Claim items that are linked as cross references. To learn more about PIRS:Claim cross references refer to chapter Create Cross References.

Regardless whether you open a document in read or edit mode, there is an area or a tab that displays all PIRS:Claim entities that are interlinked as cross references. In addition to being able to add or remove items linked to the respective PIRS:Claim document, you can also select any of the linked PIRS:Claim entities in order to download their attachments.



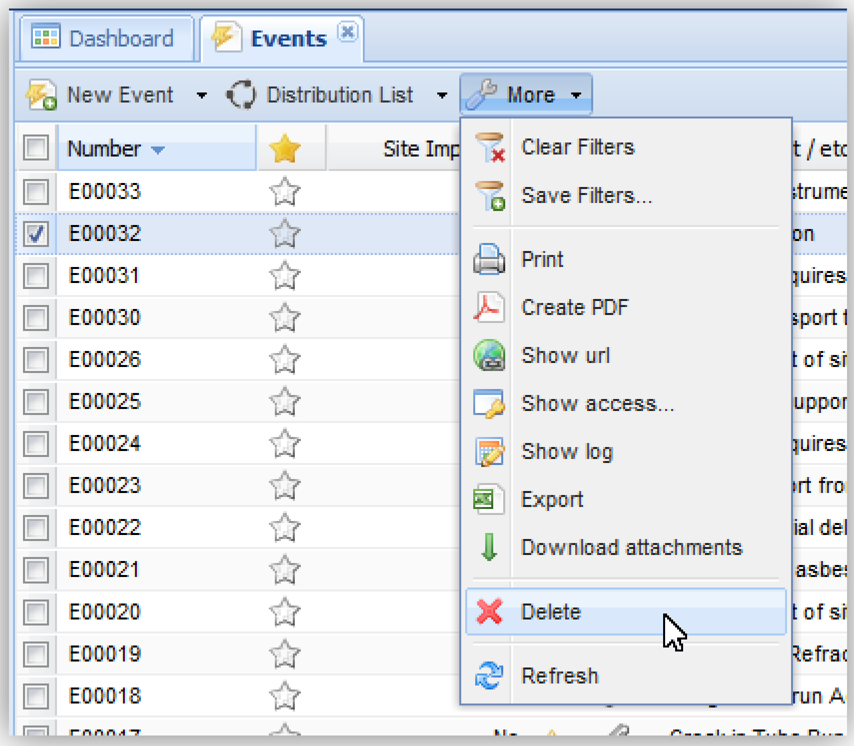
Regardless whether you initiate the download process within a document in edit or read mode, PIRS:Claim will create a zip file containing all selected attachments as described for the attachment download above.

5.10.9 Deletion Concept:

PIRS:Claim ensures the highest level of information security as well as supports the constant recording of all occurring events, therefore preventing the loss of any important information.

All event that might have an effect on the project outcome or success should be documented consistently. In addition all events need to be complemented and if necessary completed by follow up documents while all workflows and processes should be documented and traced.

Therefore PIRS:Claim follows the principle of a soft deletion concept.



In general, PIRS:Claim documents can only be deleted by users that have the role of a Claim Manager or higher.

Furthermore, documents 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. Deleted documents can either be restored by users with the role of Project Admin or by your SOBIS support team.

This concept guaranties that no document can be deleted and lost accidentally.

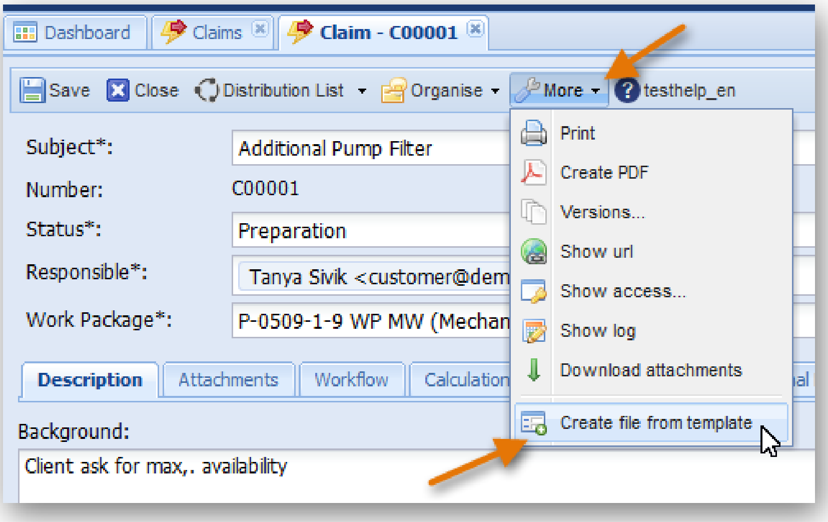
In order to delete one or more documents users who have the role of a Claim Manager or higher, need to select it/them in the respective view (e.g. Events) and then click on the delete symbol located within the "More"-options in the view action bar as illustrated by the image.

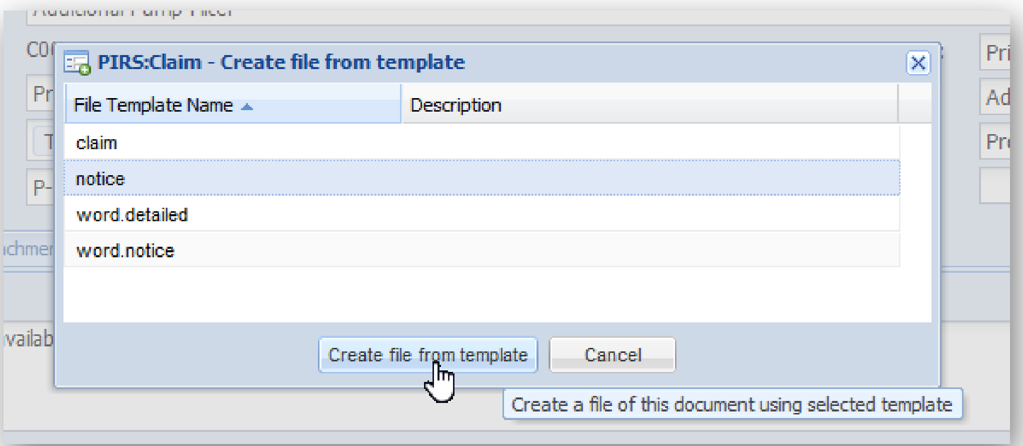
5.10.10 Generate Standard Template (Word/Excel)

Within several documents such as Claims, Change Orders or Nonconformity Reports, PIRS:Claim offers your company the option to integrate word and/or excel templates.

This gives you for example the option to create a claim notification which will include all important information you collected concerning a claim documented within the system according to your company standards.

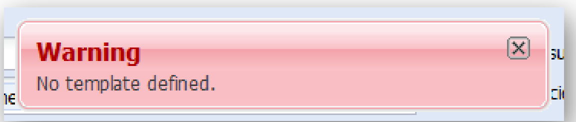
In order to create a word or excel file using your company template, **you need to open the respective PIRS:Claim entry in edit mode**. Next expand the functions listed under "More" and select the option "Create file from template".





In case there is more than one template available for this document type, a window will show all templates you can choose from. Select the template you are looking for and click "Create file from template".

The word/excel file will be created and opened.



If there is no template provided for this particular document type you will receive a message.

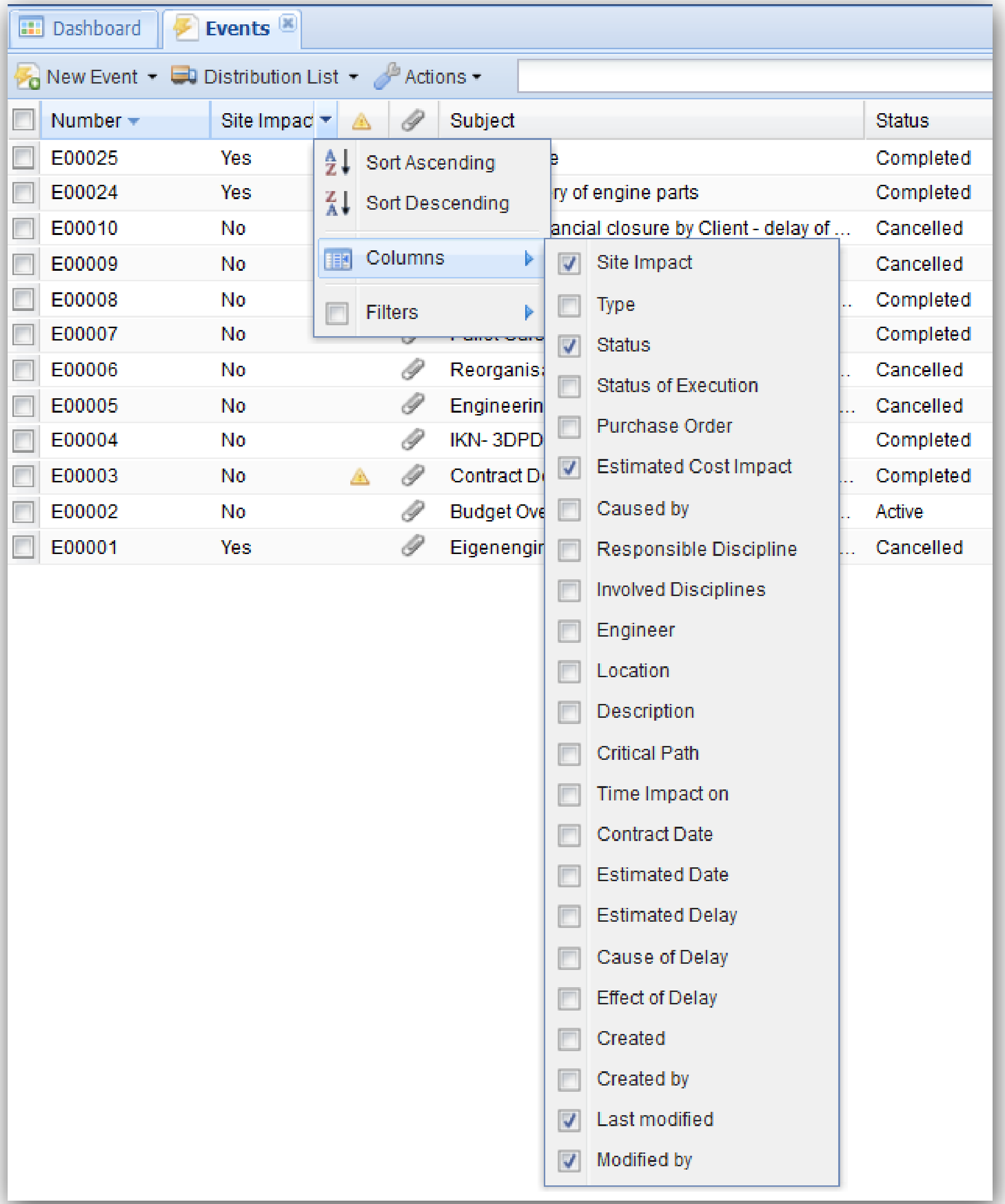
Should you find templates are missing or additional one required, please contact your project manager or Service Desk.

5.11 Search and filter functions

There are many different possibilities supported in PIRS:Claim that allow you to quickly and easily find and retrieve all information stored within attached files and / or documents that you might seek.

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

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



The application will save any changes made, even after you have logged out. Therefore you can modify the content display for the grid of each document type 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 respective chapters (Customize your grids & User preferences).

5.11.1 Filter data

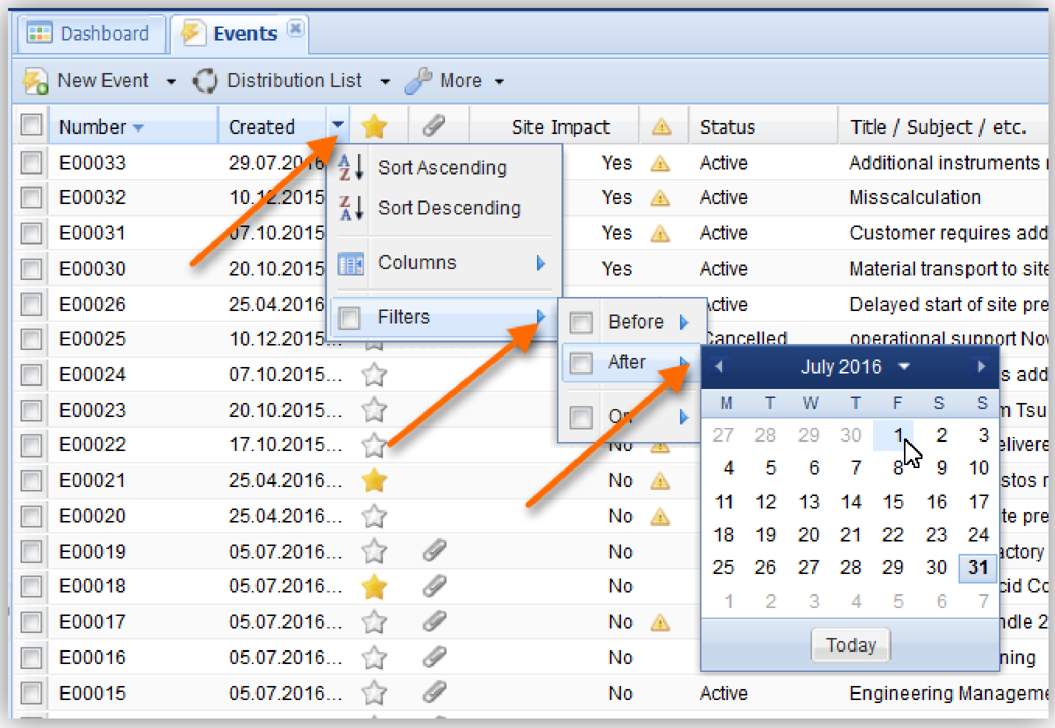
As mentioned above, PIRS:Claim offers the possibility to adjust any grid within any view. This means you can add or remove columns and move their position within your grid. All changes you make within a grid (e.g. "Events") will be memorized within your individual settings.

Therefore, all changes will be displayed again during your next sessions. This feature enables you to adjust your general content display to your preferences.

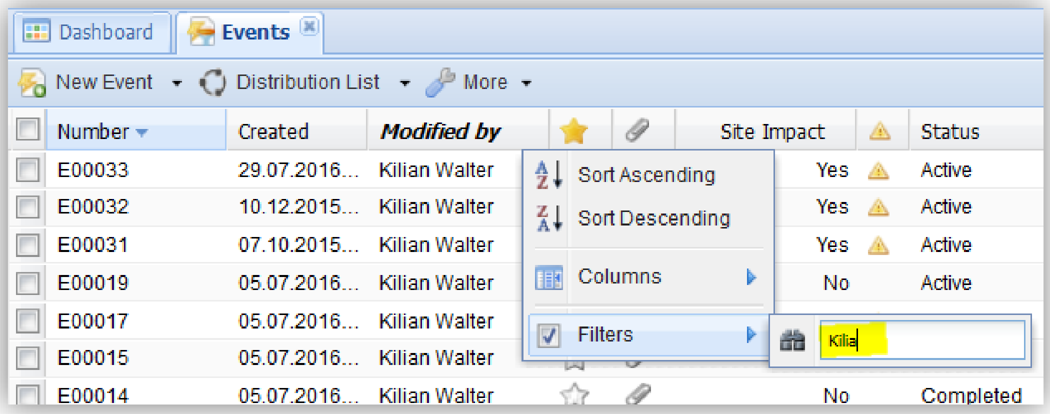
The feature "Filters" allows you to search for particular documents or information by filtering the data content for certain criteria.

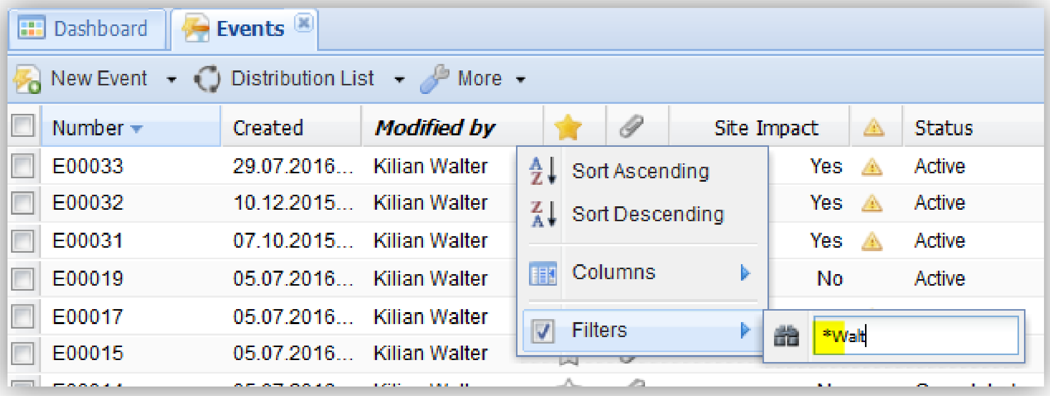
If for example you would like to see all events created on or after the 1st of July 2016 that were last modified by one particular project member, you will have the opportunity to filter the data within the view "Events" to fit all your search criteria.

Click the arrow in the corner of the respective columns, namely "Created" and "Modified by" and you will expand a selection box within which you can select the desired filter option. For the date column for example, you will now be able to choose a date span before or after a certain date or one particular date. For our example the time span after the first of July should be selected.



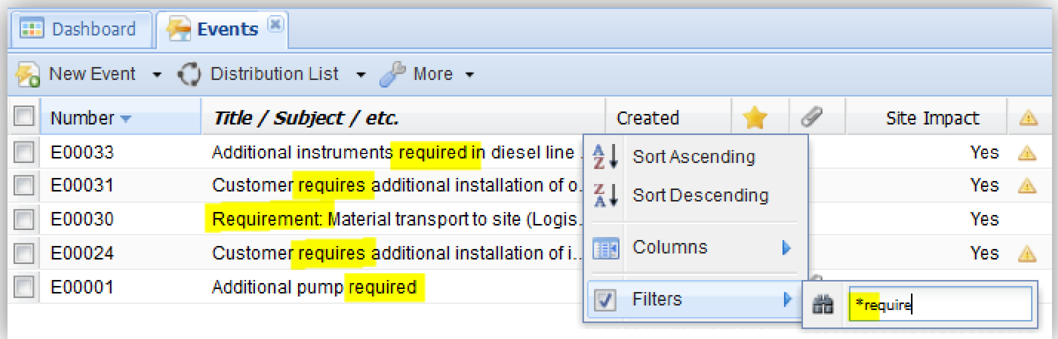
Next we need to activate the filter of the "Modified by" column and enter the name of the person we would like to filter for. It is possible to enter the name only partially, the application will also recognize partial words. In both cases PIRS:Claim will find the matching person. Once you start typing and have entered at least three letters, PIRS:Claim will start the search. Please keep in mind, that in case you want to enter the second word of a search criteria such as the last name of the person, you need to let the application know that there is another set of letters in front by first entering the *symbol (compare with screenshots below).



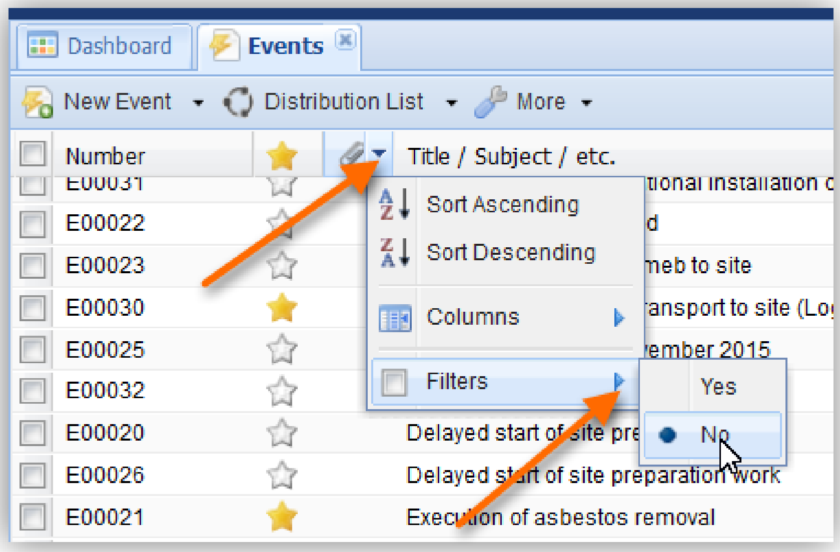


As with the field "Modified by" there are certain columns, where you need to enter the value manually.

For all these columns it is necessary to insert the *symbol in front of words or partial word if they are not the first letters of the particular value you are looking for. For example, let's say you like to filter the Event entries for a certain information within the subject such as "require" or "requirement". If you enter only the search inquiry "require" only those Event documents that start with this exact word will be found. However, if you enter "*require" all possible combinations are being displayed within the search result.

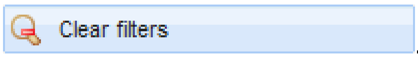


Since PIRS:Claim release 3.1. you are able to filter for existing attachments. So, in case you need to know for example how many Events currently don't have any additional files attached you can select "No" for the column attachments, as illustrated in the screenshot below.



You can clear each filter you have set separately by removing the check mark from the filter. If you like to deactivate all selected filters at once there is also another option offered to you.

Click the 

button in the action bar and select the action


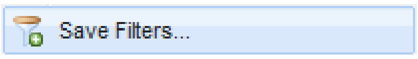
.

Please be aware that when you close and reopen or reload a view, all set filters will be cleared automatically. Unless filters are saved within a personal or public view as described below, all filters set during a session will only be active during the current session. The exception is the use of the refresh action offered to you in every view. If you click the refresh button after having set filters, your filter selection will still be valid.

5.11.1.1 Save Filters

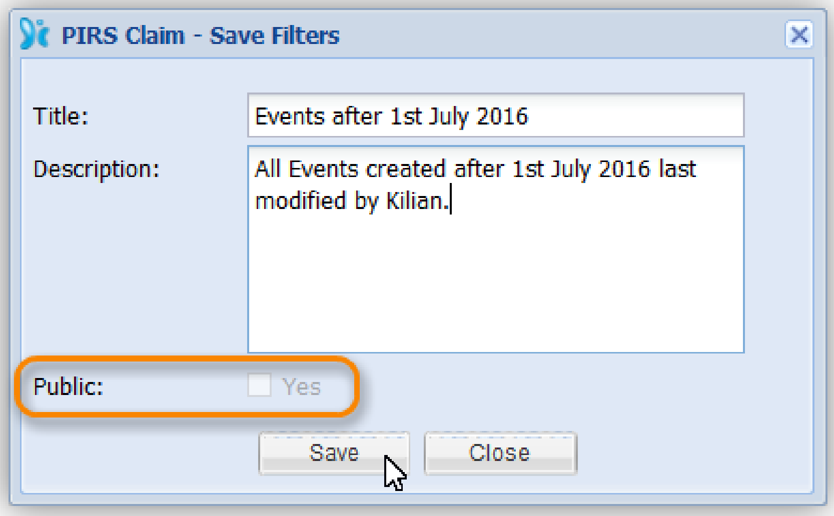
In case you use certain filter combinations on a regular basis and prefer not to set them manually every time, you can choose to save filter combinations for PIRS:Claim document types.

In order to save filter combinations expand the 

button and click


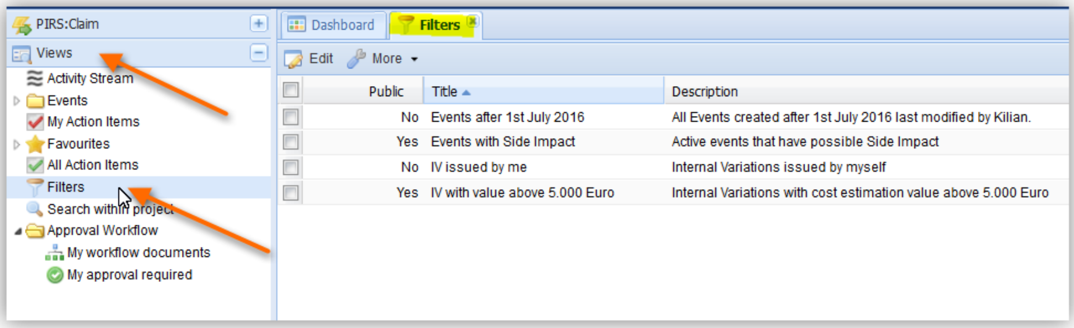
.

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.

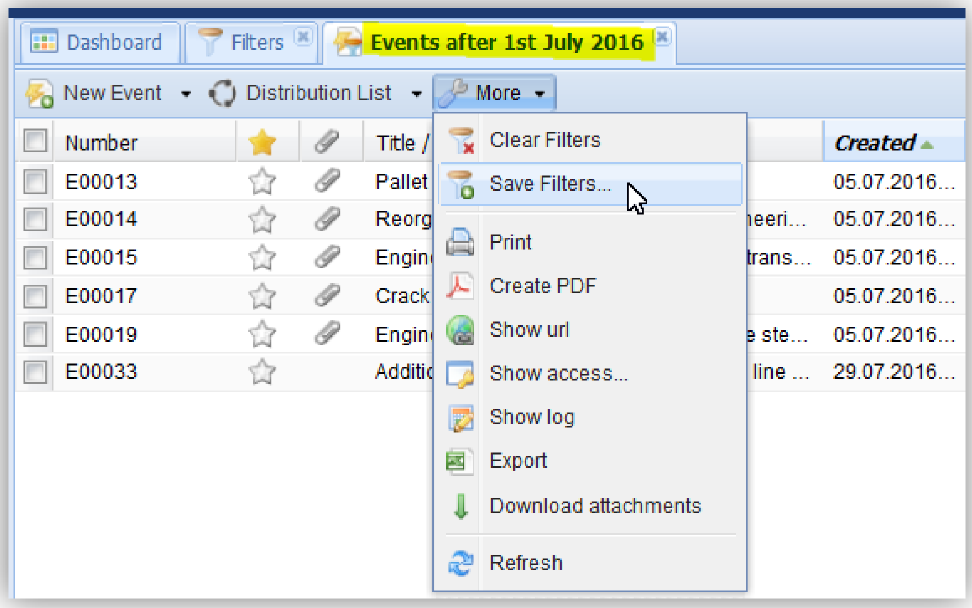
In order to open filters, enter the view "Filters" listed under "Views" in your PIRS:Claim navigation. Here you will find all your personally created filters as well as the filters that have been created for public use listed with their title and description.



The "More" button within the filter view offers the option to delete your personal filters, take a look at the history log of any 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. You are always able to edit your own saved filters by adding or changing filters and then selecting the "Save Filter..." option again.



Public filters can only be modified by users that hold the role of project manager.

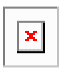
5.11.2 Search documents with full-text search

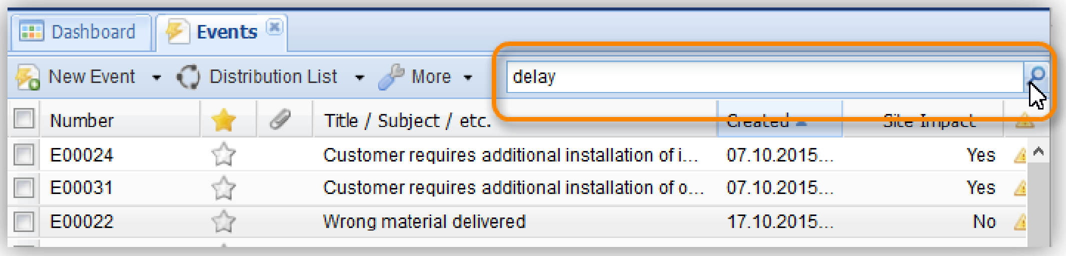
The search function in PIRS:Claim is a very useful and flexible feature. The whole content of a project database or just one singular view content can be searched for certain keywords or a user defined string. The full-text search hereby considers all existing entries and includes the content of attachments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

Please be aware however, that the content of attached files is not automatically included in the full-text search. This function can be activated by your PIRS:Claim administrator. For more information about the activation of the full text search within the attachments please contact your SOBIS support team.

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

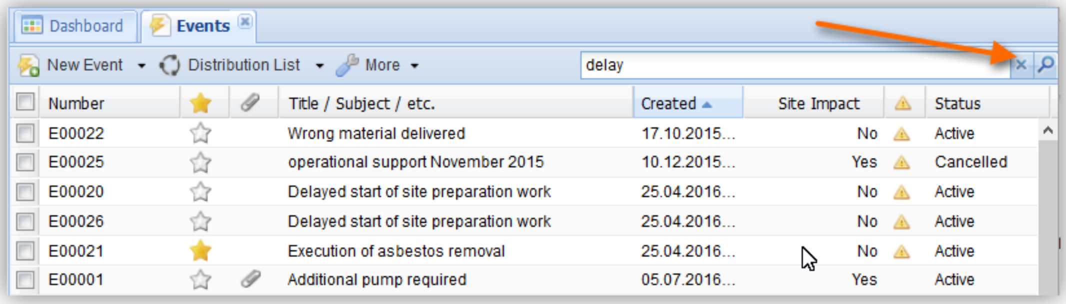
Search within a view:

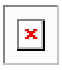
In order to initiate a search within a particular view e.g. the Event view, enter the term, you would like to search the view content for, into the text field in the right had corner of the view action bar, outline in the following screenshot, and either hit enter or click the  button. The term does not have to abide by the rules of the upper and lower case letters, because the search is not case sensitive.



The results are calculated and displayed as soon as you hit enter or click the search symbol.

As illustrated in the screenshot below, not all results carry the search term within their subject name or show the term in any value field visible within the grid. This would be an example where the term was found in the document body or other document content fields.

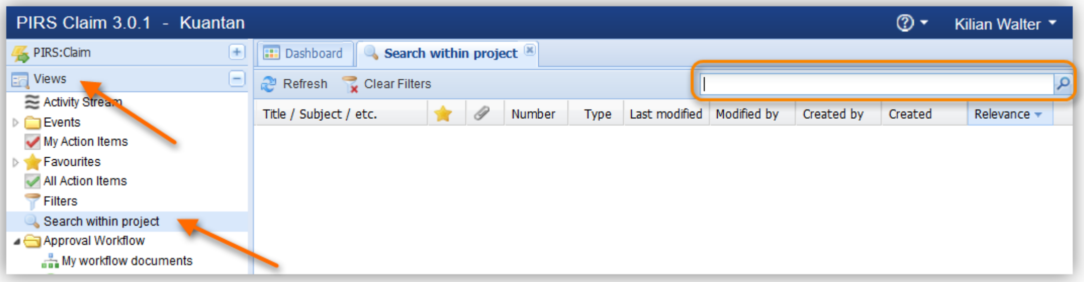


By clicking the  button the search box will be cleared, revoking the search result display.

Search within the entire project database:

In case you want to look for information concerning a certain topic without knowing whether or not there is any such information or you like to search for information regardless of the PIRS:Claim document type, you can use the project wide search view. It will apply the full-text search to all files stored within the 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.



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 internal as well as commercial documents, e.g. Events, Claims, Change Orders etc. as well as address book files like contacts and companies. However, only entries that you have at least read access to will be included within the results.

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.

PIRS:Claim search boolean functions:

In order to allow you to search for exactly the search terms you need, the PIRS:Claim 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. Delay, delay or DELAY, 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.

Following search operators are currently offered to you:

1. The Wildcard

The search includes the possibility to insert the ? symbol as a wildcard 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 *delay* you could for example enter de?ay and in order to insure all word combination that could refer to a minutes of meeting report (minutes, minutes of, minute of, ...) you could type minut*.

2. Search for a string

In order to ensure that the result will return matches for exactly a specific combination of words e.g. minutes of meeting report, you are able to enclose the search phrase into quotation marks ("minutes of meeting report"). In this case the search will display only those entries 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".

3. Boolean Operators

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

In general the OR operator is used as 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 of the terms exist. Please be aware that the Boolean operators must be ALL CAPS.

Would you for example like to find all entries that refer to the delay of material delivers that involve the user Mr. Schuhmann you could use the following search term:

"material delivery" AND delay AND Schuh*

4. Search within specific field(s)

By default the PIRS:Claim full text search will always search for the entered term or search criteria within all existing document fields and grid columns. However, the application 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 then the label of the field.

As an example, let's say you are in the Event view and you like to search for all entries where the Subject field contains "employee safety training" and the Responsible Discipline column is Construction. You can create the following search phrase:

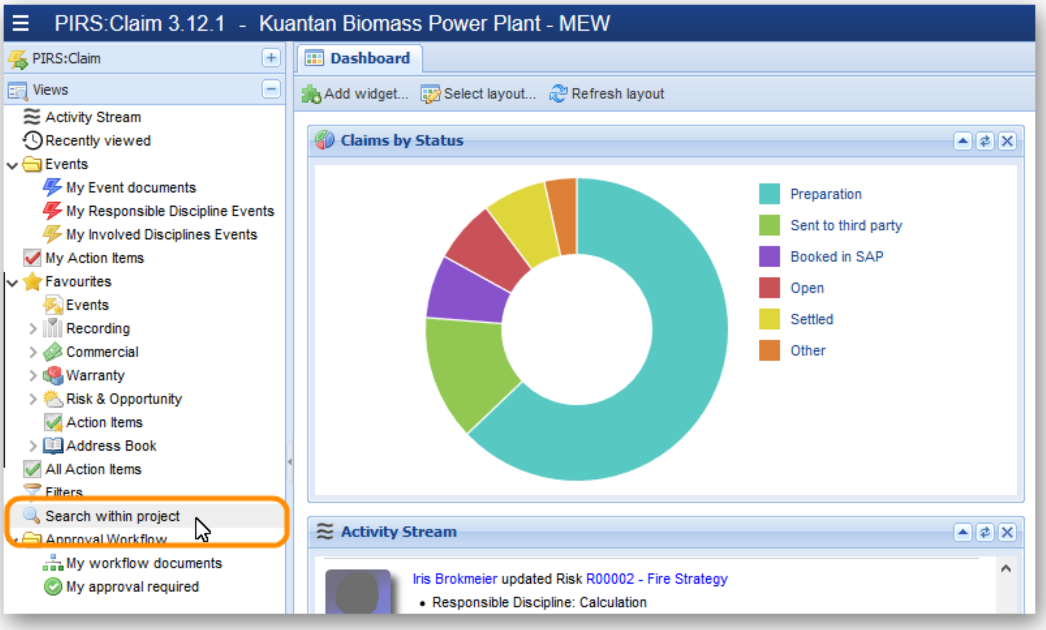
subject:"employee safety training" AND Responsible_Discipline:Construction

Please note that the field is only valid for the search term that it directly precedes, so e.g. the query *subject:employee safety training* would only look for the word employee within the subject field while "safety" and "training" will be searched for in all fields.

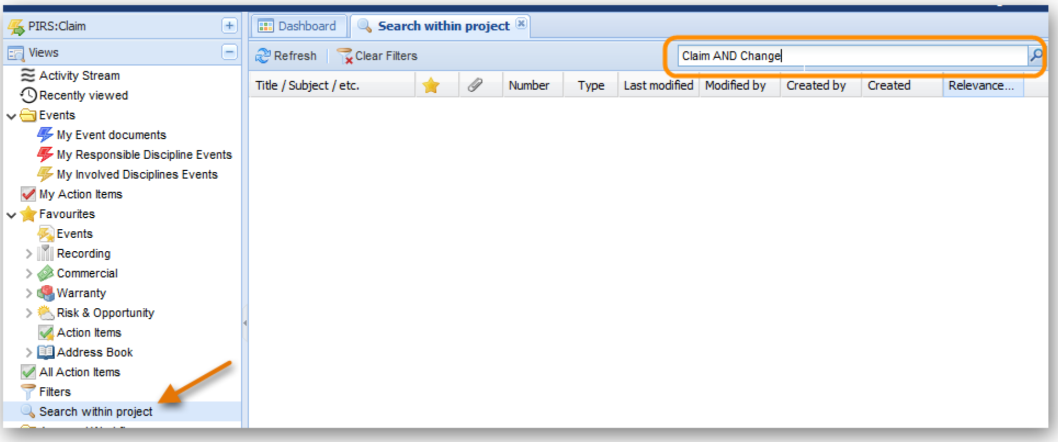
Note
The PIRS:Claim full text search is oriented on the rules of the Apache Lucene Syntax. Should you like to inform yourself about all supported search queries and the vocabulary used in the Lucence rich query language please follow this link: http://lucene.apache.org/core/old_versioned_docs/versions/2_9_1/queryparsersyntax.html.

5.11.3 Search within project

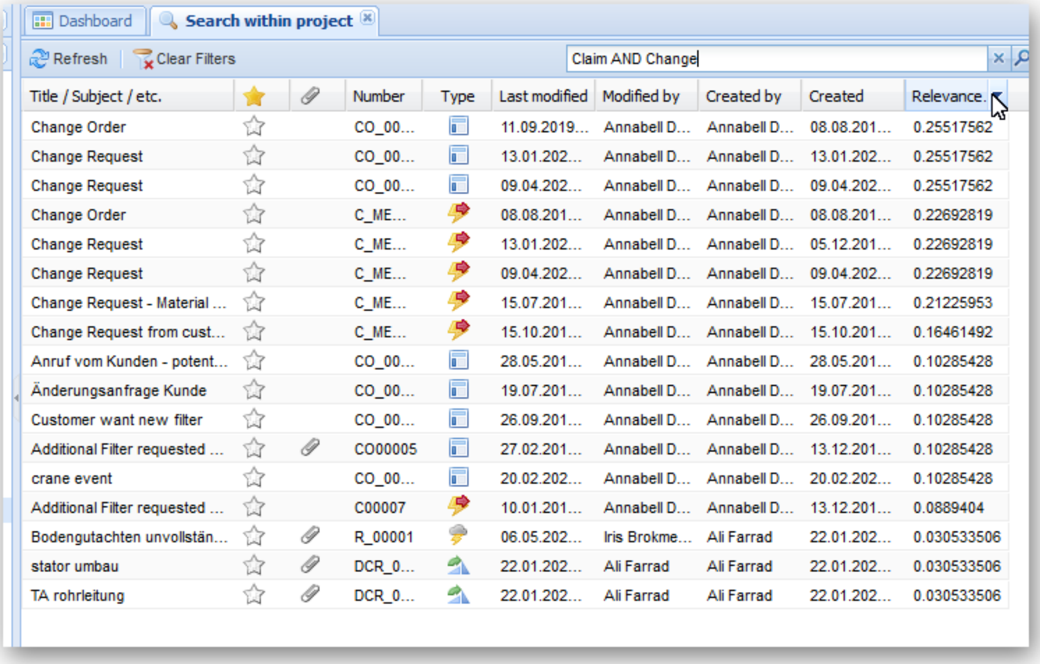
Besides the offered filters and full text search features offered to you within every grid and view, there is also a separate view that allows you to start a general search from scratch which will consider all information stored within your PIRS:Claim project.



To open the project search expand the views and click on "Search within project". The view will be empty at the beginning. Enter your search criteria within the full text search box in the upper right corner. Here you are able to use common search functions also known from google searches. To learn more about your search options offered here please refer to: http://lucene.apache.org/core/old_versioned_docs/versions/2_9_1/queryparsersyntax.html



Once you entered your search criteria and hit enter all entries that fit your search will be displayed. The Relevance column will show you likelihood that an entry will fit your search.



Title / Subject / etc.	Number	Last modified	Modified by	Created by	Created	Relevance
Change Order	CO_00...	11.09.2019...	Annabell D...	Annabell D...	08.08.201...	0.25517562
Change Request	CO_00...	13.01.202...	Annabell D...	Annabell D...	13.01.202...	0.25517562
Change Request	CO_00...	09.04.202...	Annabell D...	Annabell D...	09.04.202...	0.25517562
Change Order	C_ME...	08.08.201...	Annabell D...	Annabell D...	08.08.201...	0.22692819
Change Request	C_ME...	13.01.202...	Annabell D...	Annabell D...	05.12.201...	0.22692819
Change Request	C_ME...	09.04.202...	Annabell D...	Annabell D...	09.04.202...	0.22692819
Change Request - Material ...	C_ME...	15.07.201...	Annabell D...	Annabell D...	15.07.201...	0.21225953
Change Request from cust...	C_ME...	15.10.201...	Annabell D...	Annabell D...	15.10.201...	0.16461492
Anruf vom Kunden - potent...	CO_00...	28.05.201...	Annabell D...	Annabell D...	28.05.201...	0.10285428
Änderungsanfrage Kunde	CO_00...	19.07.201...	Annabell D...	Annabell D...	19.07.201...	0.10285428
Customer want new filter	CO_00...	26.09.201...	Annabell D...	Annabell D...	26.09.201...	0.10285428
Additional Filter requested ...	CO00005	27.02.201...	Annabell D...	Annabell D...	13.12.201...	0.10285428
crane event	CO_00...	20.02.202...	Annabell D...	Annabell D...	20.02.202...	0.10285428
Additional Filter requested ...	C00007	10.01.201...	Annabell D...	Annabell D...	13.12.201...	0.0889404
Bodengutachten unvollstän...	R_00001	06.05.202...	Iris Brokme...	Ali Farrad	22.01.202...	0.030533506
stator umbau	DCR_0...	22.01.202...	Ali Farrad	Ali Farrad	22.01.202...	0.030533506
TA rohrleitung	DCR_0...	22.01.202...	Ali Farrad	Ali Farrad	22.01.202...	0.030533506

In addition you are also able to narrow down your search result by using filters.

6 Controlling & Reporting

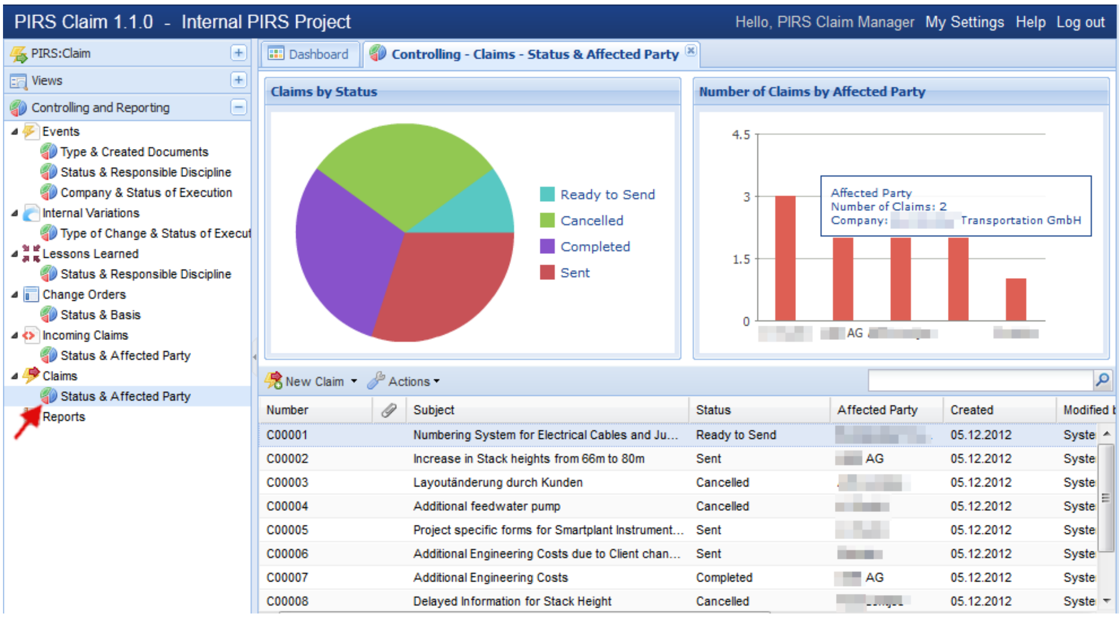
Especially in projects that run over a period of several years, where consequently the accumulation of many Events, Claims, Incoming Claims, Internal Variations, Lessons Learned and Change Orders is to be expected, it is most important to keep track of all documents. Therefore, some of the most important functionalities of PIRS:Claim are its controlling views and reporting tool.

6.1 Controlling

As illustrated by the following screenshot, PIRS:Claim Web allows you to track and trace all created forms of each type individually and structured after certain criteria. The results of the various collection of information within each view will be displayed and visibly exemplified by the means of different diagrams.

By the means of the Controlling views, PIRS:Claim Web offers e.g. answers to the questions:

- How many events are currently in which execution status?
- Which supplier / customer is responsible for the most events?
- Did the realization of countermeasures prove to be successful?
- How many Incoming Claims could be defended the past month?
- …



In addition to the controlling views PIRS:Claim Web also provides on option for customized Excel and PDF reports such as the export of all existing event documents including all their collected information to an Excel Sheet with which further calculations can be conducted. Besides exports to Excel and PDF, reports can be created in the formats of HTML or regular MS Word, depending on how the information should be displayed.

As illustrated above it is furthermore possible to extract even more detailed information from the diagrams by hovering the curser over the respective diagram area.

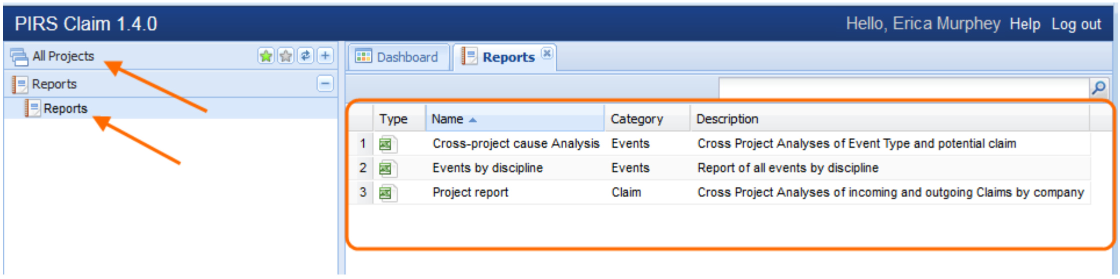
6.2 Reports

All within PIRS:Claim 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:Claim 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.

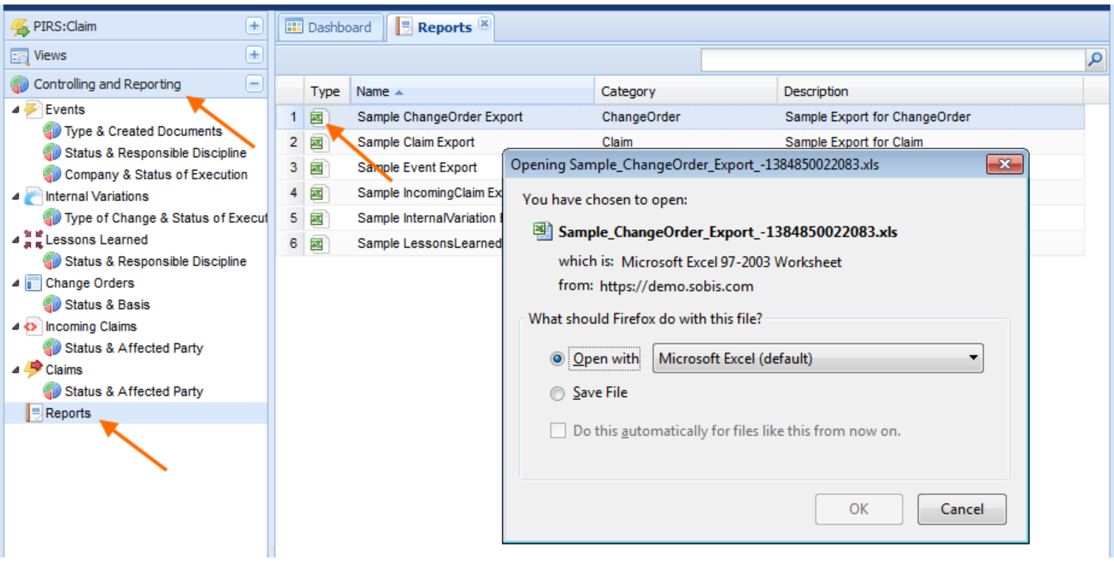


Reports are initiated by simply clicking the respective report entry in the content grid. PIRS will then access all your projects and create the selected report including information from all entries that you hold the necessary access rights for.

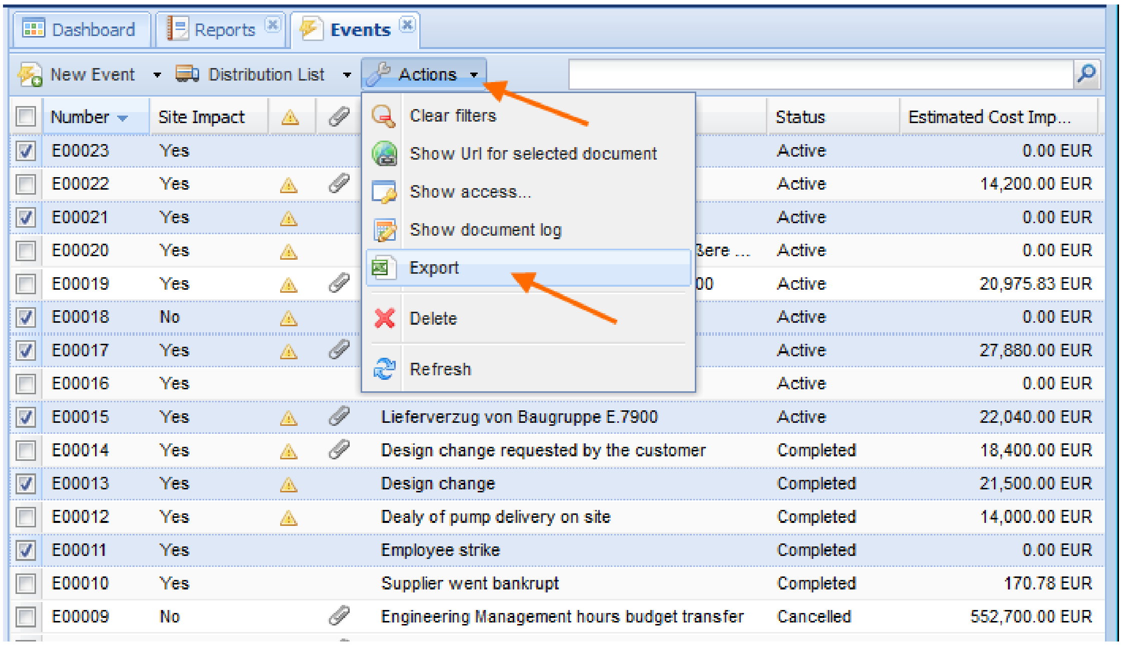
Project Reports

Unlike global reports, project reports only consider information regarding one specific project. Therefore, PIRS:Claim offers a separate reports view within each project which can be opened from the "Controlling and Reporting" area in your project navigation.

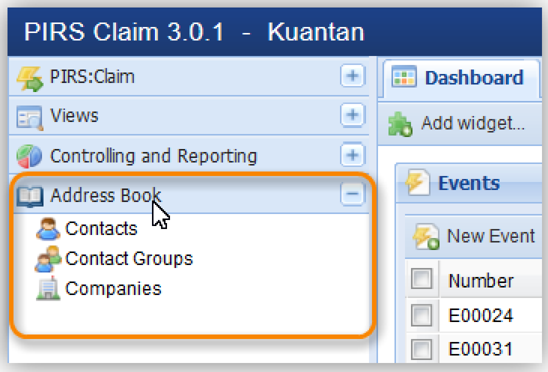
There are certain standard reports that PIRS:Claim provides to each user such as the export of all existing Event forms including all their collected information to an Excel sheet with which further calculations can be conducted. In addition, it is of course also possible to have individual reports created for you by your PIRS:Claim support team. Besides exports to Excel sheets, reports can be created for you in the formats of PDF, HTML or regular MS Word, depending on how the information should be displayed.



Please be aware that PIRS:Claim also features the option to export information within any view to an Excel sheet. As illustrated in the image below, you can simply select the forms that you would like to export and then select the excel export option in your “Actions” selection.



7 Adress Book



The PIRS:Claim 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.

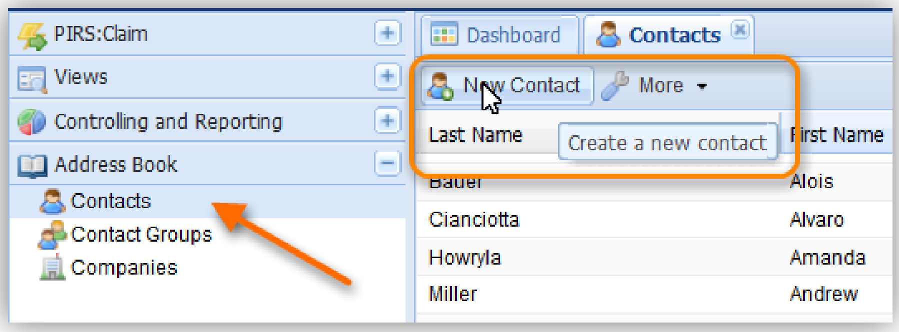
Please be aware that for each project there is an individual project address book and the various project address books are not interlinked with one-another. Therefore contacts that might be provided in one project address book don't necessarily have to be stored in another project address book. You do however have the opportunity to add new contacts or ask you SOBIS support team to add a contact for you if you find that contacts are missing from a certain address book. The chapter "Create a new Contact" further instructs you on how to create new contacts yourself.

In addition to contacts 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. When you want to share information with a groups of team members that are listed in a PIRS:Claim contact group, you don't need to enter each contact individually but address the group instead. Generally, contact groups are created and managed by your project or claim manager. To learn more on 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".

You are also able to add new companies ( ) to your project address book. Each contact includes fields with information about the company the respective project member works for. Most of those field must have a value, 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 "Create a new Company Form".

7.1 Create a new Contact

In order to create a new contact click the "New Contact"-button located on the left hand side of the "Contacts" view action bar, as indicated on the screenshot to below. The new contact document will then be opened in a new tab.

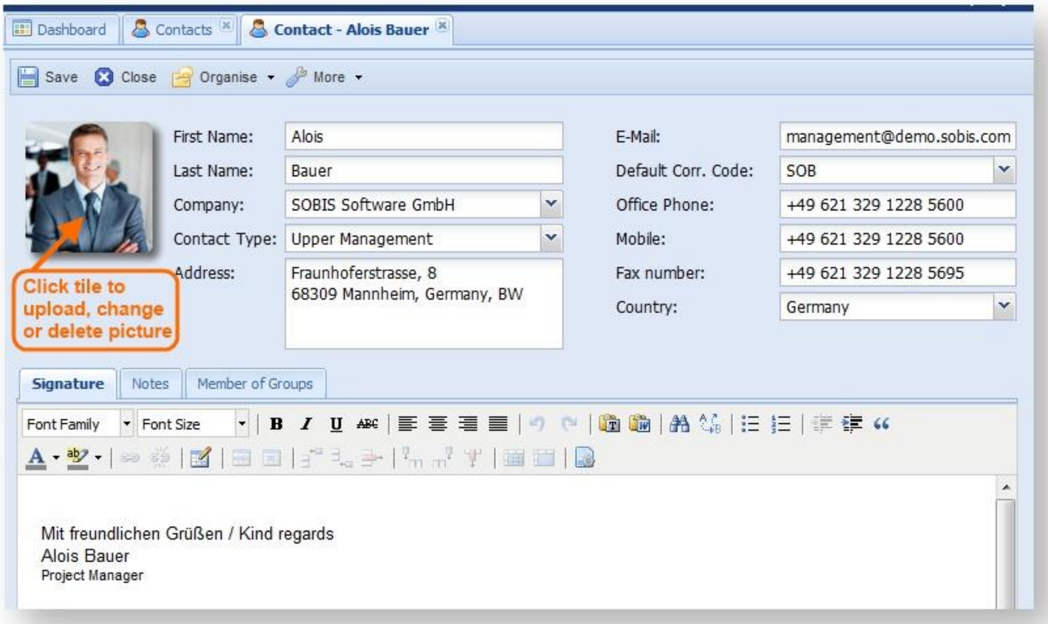


The empty body field in the content tab structure positioned at the lower part of the contact document can be used to enter a company signature. The signature will be used as template to be inserted automatically into the body of new email correspondence created by the respective project member.

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 respective chapter .

The values that are supposed to be entered into the fields in the header will be described in the following table.



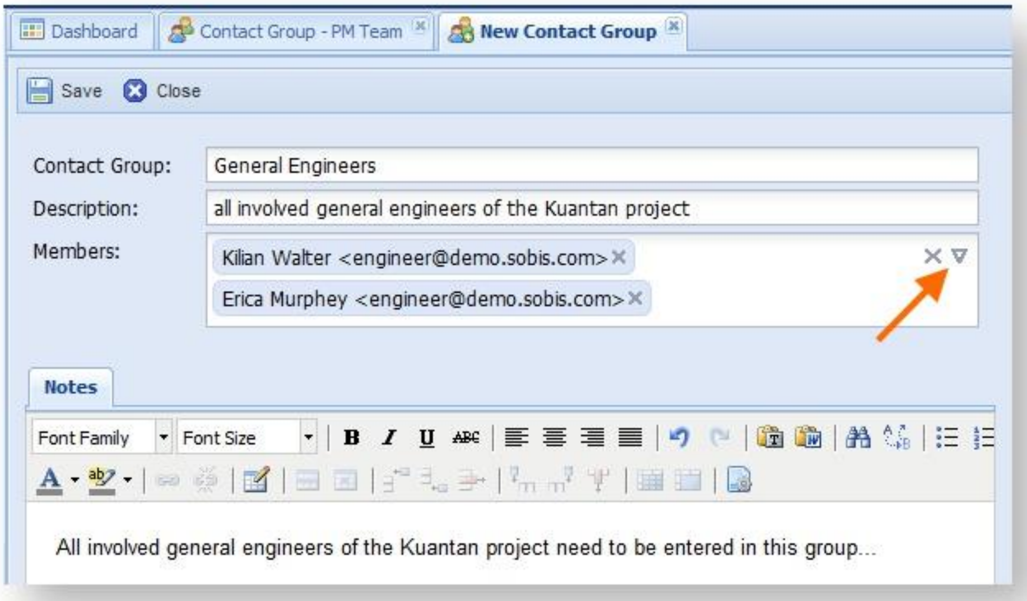
Field name	Description
First Name	The first name of the person you wish to create this contact sheet for must be entered as field value.
Last Name	The last name of the person you wish to create this contact sheet for must be entered as field value.
Company	Here the company the project member works for 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:Claim 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.
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:Claim support team.

<table>
<tr><td>Address</td><td>The address field should be used to enter the address of the company location the project member is currently working at.</td></tr>
<tr><td>E-Mail</td><td>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.</td></tr>
<tr><td>Default Corr. Code</td><td>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 PIRS correspondence 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. In case your company is also using PIRS to manage the correspondence of your project, it is however highly recommended to set this value since it will save you time when creating new correspondence files within PIRS.</td></tr>
<tr><td>Office Phone</td><td rowspan="4">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.</td></tr>
<tr><td>Mobile</td></tr>
<tr><td>Fax</td></tr>
<tr><td>Country</td></tr>
</table>

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 entries can be opened and if you hold the necessary access rights adjusted out of this view.

In order to create a new contact group you need to click the "New Contact Group" button within the "Contact Groups" view. A new entry will open in a separate tab. In case such a button is not displayed, this means that the role you hold within this project does not include the right to create and manage contact groups. Please contact your project manager or your SOBIS Service Desk for more information.



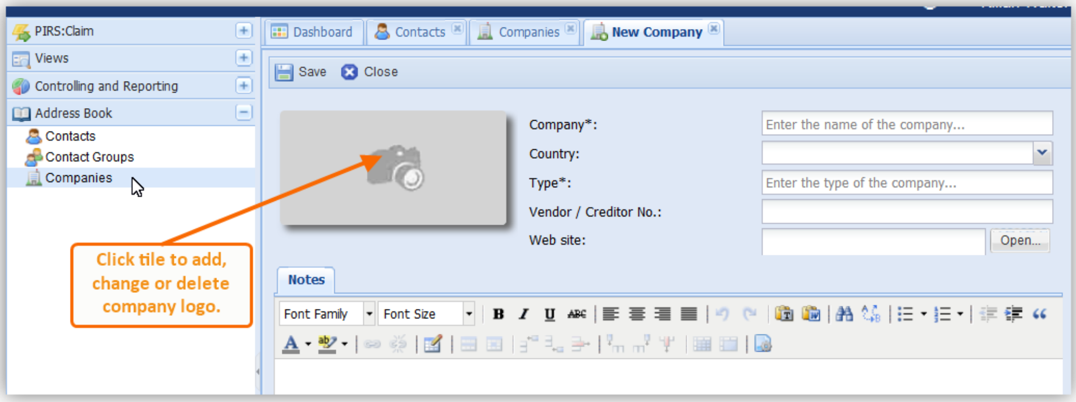
Besides the name of the group which could be e.g. General Engineers, you can also add a short description that will be display together with the name in the "Contact Groups" view. If required, a more detailed description can be added in the "Notes" field.

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.

7.3 Create 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 mandatory information you are required to enter the company's name and type. As company type you could for example differ between customers, suppliers or partner.

In addition you also have the opportunity to enter additional information such as the company web side or the country the company is located at. In order to insert a company specific image right click the rectangle that bears the camera image.

Similar to the contact documents, you have the possibility to enter all additional company information in the "Notes" field located underneath the header information in the content area.

8 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:Claim newest features.

Regard slide in overview presentation listed above:

PIRS:Claim Release	New Feature	Short Description	Link to Chapter in this Guide
3.16	**Presentation Overview**	PIRS:Claim 3.16 Highlights	
	Implemented additional grid to display pending documents in workflow		
	Automated mails for all follow up documents as well as R&O + DNR, when saving the first time		
	COR (and VO) - display “Estimated Cost Impact” from Event		
	Grid Filters: “Blank” - search for documents where the field is empty		
	Created new Button “Link Action Item(s)”		
	Implemented additional grid to display pending documents in workflow		
3.15	**Presentation Overview**	PIRS:Claim 3.15 Highlights	
	Allow Author/Workflow Starter to reset approval workflows		
	Workflow button for Bulk Change to Assign, Start, Approve, Decline, Reset		

PIRS:Claim Release	New Feature	Short Description	Link to Chapter in this Guide
	Damage Report, Instruction, Opportunity, Risk: Implementation of Workflow		
	Display Personal and Project Mailbox as Grid in the "View"		
	Add global grid views for all missing claim documents		
3.14	**Presentation Overview**	PIRS:Claim 3.14 Highlights	
	Controlling Chart - Display number of documents in Legends of Pie charts		
	Display My distribution List sent / received grids		
3.13	**Presentation Overview**	PIRS:Claim 3.13 Highlights	
	Added new field „Contractual Party“ in the header of DNR		
	‘Bulk Change’ available for all document types		
3.11	**Presentation Overview**	PIRS Claim 3.11. Highlights	
	Generate standard template for all claim doc types		
	Non Conformity - add cost calculation and time impact to NCR form		
	Import Events and DNRs via excel file		
	Implement global grid for DNRs & NCRs		
3.10	**Presentation Overview**	PIRS:Claim 3.10 Highlights	
	Add Cost Calculation Templates to projects		
	Import contacts via MS Excel		

PIRS:Claim Release	New Feature	Short Description	Link to Chapter in this Guide
	Inform action item responsibles and involved responsibles via e-mail after creation		
	Add tab in Lessons Learned with "Decision"		
	Filter in the Global View on the first column 'project'		
3.8	**Presentation Overview**	PIRS:Claim Highlights 3.8	
	New document type "Defect Notification Report"		
	New Controlling Charts		
	"Generate standard template" in Lessons Learned (allows to export data to MS Word)		
	Global view to display all Lessons Learned		
	New fields in Lessons Learned		
	New view: Recently viewed grid which can be added to the dashboard		
	Allow user to add Events in Follow Up from the "Recently viewed" grid		
	Option to disable the „File from Personal Inbox“ for users		
	Add context menu to right-click mouse operations		
	German language is available		
3.7	**Presentation Overview**		
	Lessons Learned - new field "Engineer" for value of keyword Discipline		
	Event: add column "Status" to Follow up grid		
	Enable and Disable Document Types (except Events)		
	Intergrate company abbreviation into document number		

PIRS:Claim Release	New Feature	Short Description	Link to Chapter in this Guide
	Copy & Paste Project Settings		
3.6	**Presentation Overview**		
3.5	**Presentation Overview**		
3.4	**Presentation Overview**		
3.3	**Presentation Overview**		
3.2	**Presentation Overview**		
3.1	**Presentation Overview**		
3.0	**Presentation Overview**		
1.4	Favorite Entries	Select your favorite Events, Internal Variations, Lessons Learned, Change Order, Claim, Incoming Claim or Contacts, Contact Groups and Companies and access them form views or widgets	Favor Entries
	Global Reports	Run reports cross-project	Reports

PIRS:Claim Release	New Feature	Short Description	Link to Chapter in this Guide
	Search Attachment Content	Include all attachments in your full-text search	Search documents with full-text search

9 PIRS:Claim App

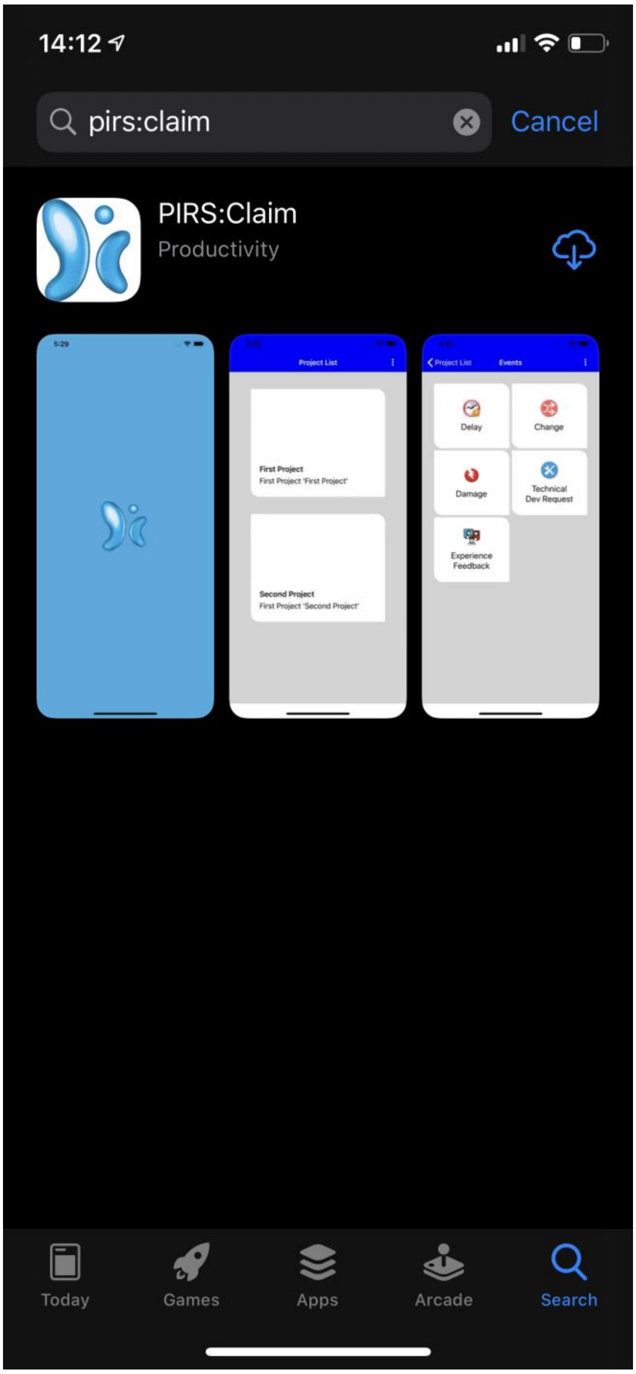
The PIRS:Claim App allows users to create and submit Events with a minimum amount of effort. The main goal is to document everything that happens out of the ordinary without having to rely on a laptop or having to sit down and write up a lengthy report.

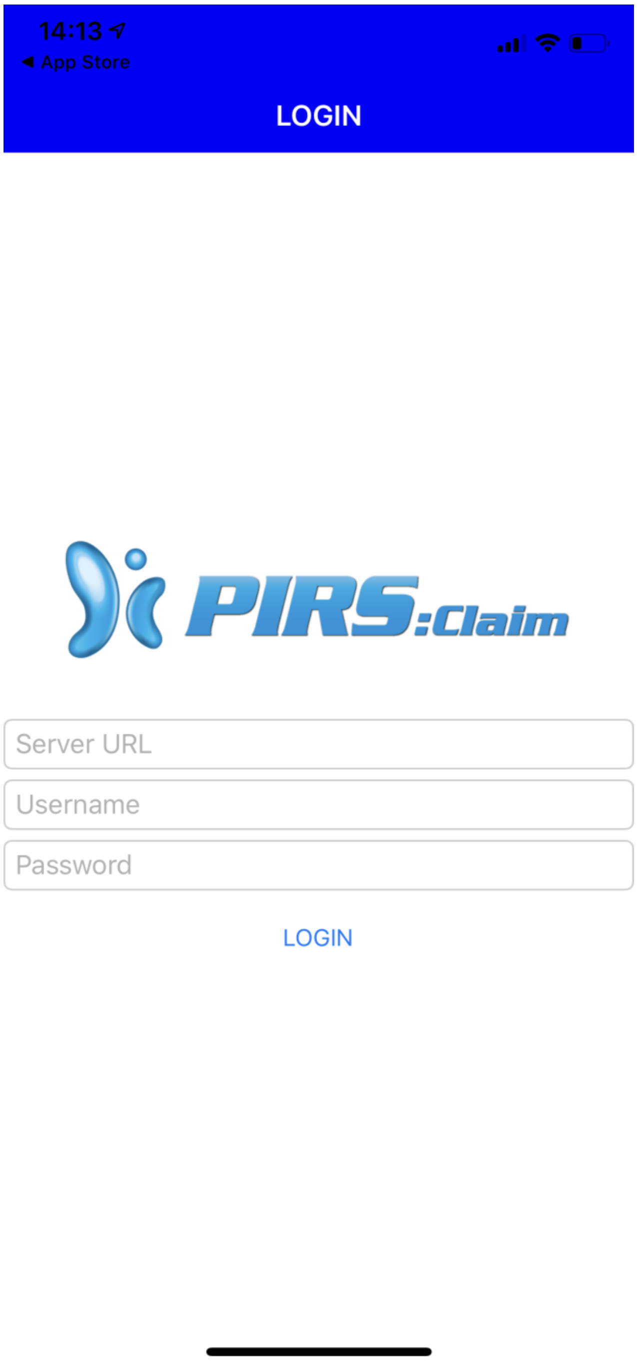
With the PIRS:Claim App you can quickly take a picture of the incident, e.g. a damaged pipe, openly running cables, blocked access etc., attach it to an Event you create in your app and submit it with or without currently available internet access.

The app is available for smartphones and tablets running on IOS or Android.

9.1 How to install the PIRS:Claim App and log in

Open you app store and search for PIRS:Claim. Click the cloud symbol to download the app.


14:12
pirs:claim
Cancel
PIRS:Claim
Productivity
Project List
First Project
First Project 'First Project'
Second Project
First Project 'Second Project'
Project List
Events
Delay
Change
Damage
Technical
Dev Request
Experience
Feedback
Today
Games
Apps
Arcade
Search


14:13
App Store
LOGIN
PIRS:Claim
Server URL
Username
Password
LOGIN

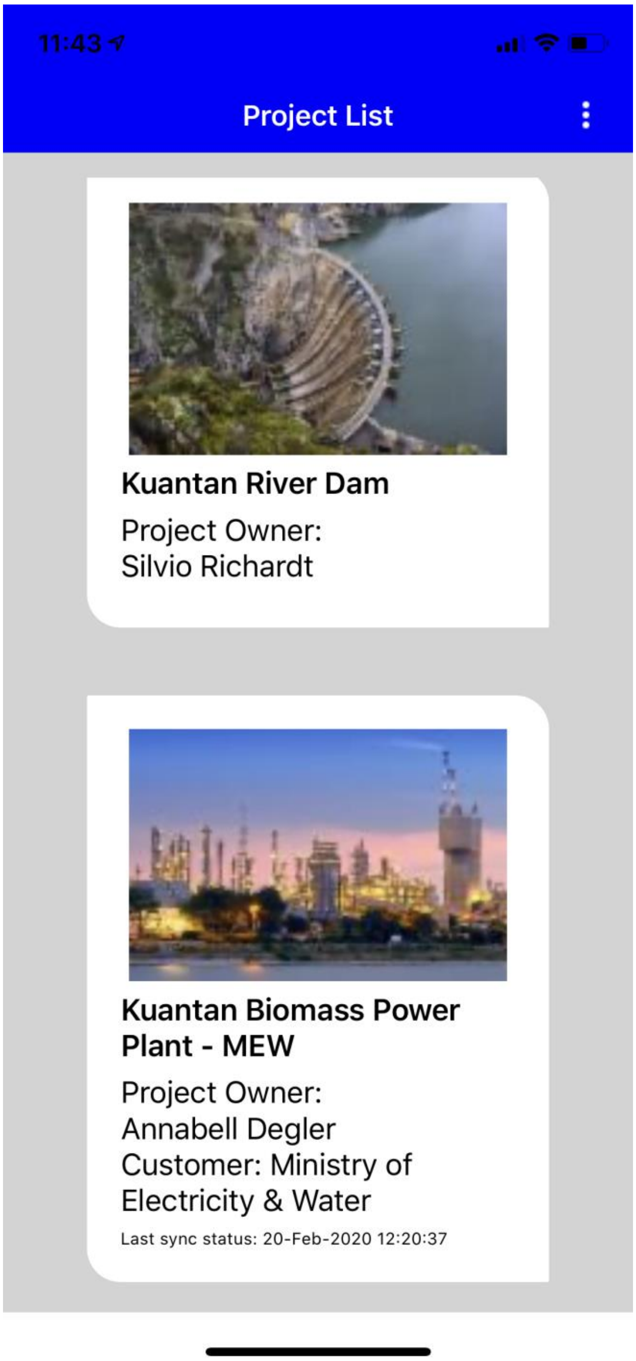
Once the app is downloaded you can open is directly or by clicking the PIRS:Claim symbol on your screen. Enter the URL for you PIRS:Claim Application into the first field. Next, enter your personal user name and password provided to you by SOBIS or your project manager.

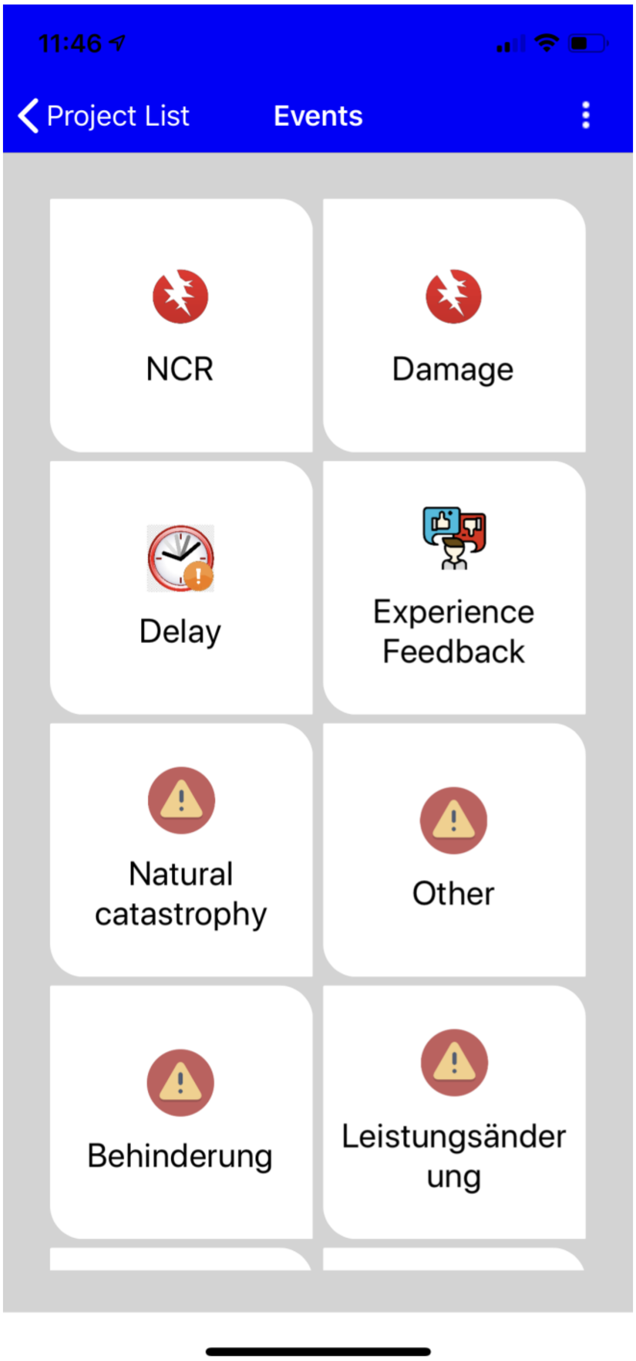
For the first log in you need to have internet access. In case you are going to work on site where internet might not be a given, we recommend to first load the app and access your project once while you have internet connection. Once at the site you can create Events regardless whether internet is available or not.

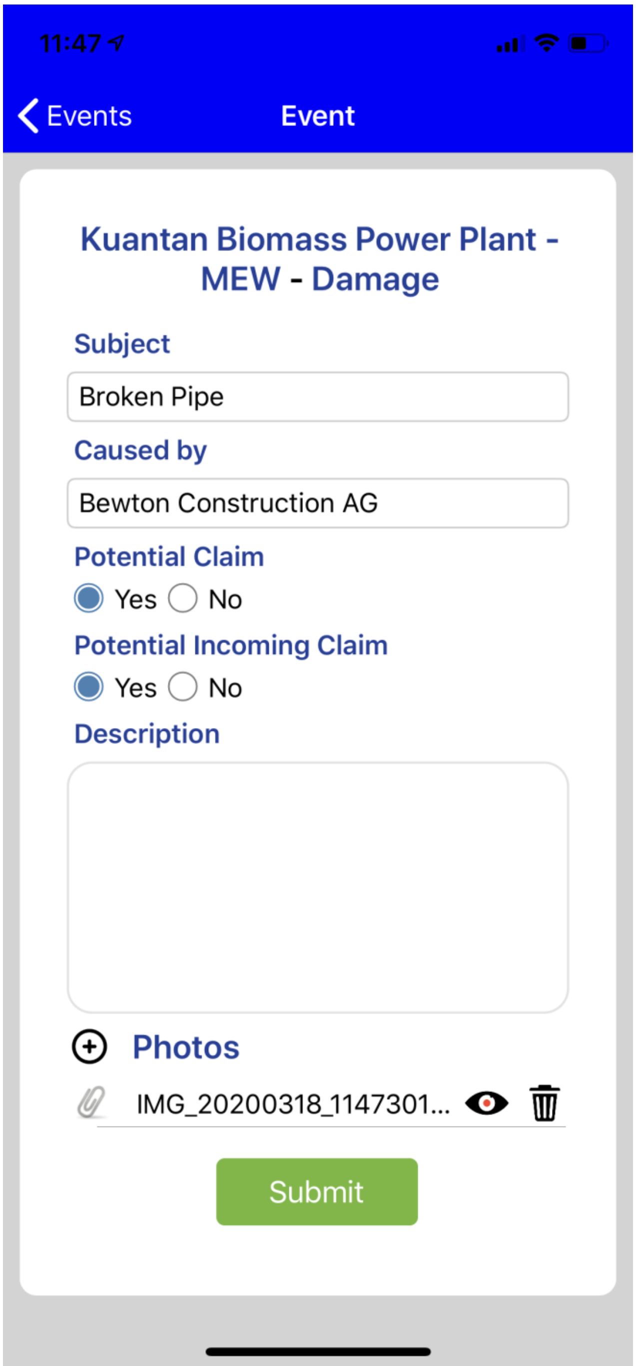
9.2 Create a new Event

Once you have entered your company PIRS:Claim URL, user name and password correctly, the app will load all the projects you have access to.

Select the project you need to create an Event for by tapping the tile with your finger.


11:43
Project List
Kuantan River Dam
Project Owner:
Silvio Richardt
Kuantan Biomass Power Plant - MEW
Project Owner:
Annabell Degler
Customer: Ministry of Electricity & Water
Last sync status: 20-Feb-2020 12:20:37


11:46
Project List
Events
NCR
Damage
Delay
Experience Feedback
Natural catastrophy
Other
Behinderung
Leistungsänderung

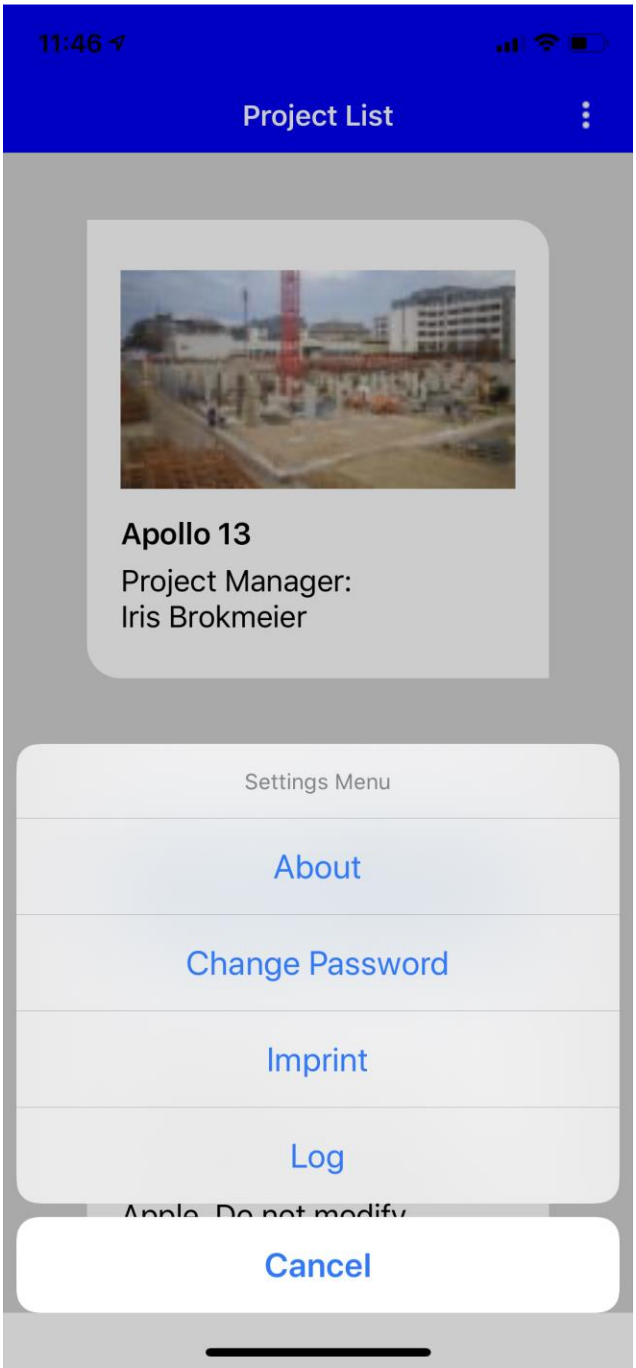


Next, you are asked the define the type of Event. After selecting a type, you are able to provide more details by entering a subject, selecting the party who caused the event and deciding whether or not this event might lead to a claim that your company may be able to pursue or that your company might be faced with. These fields - "Subject", "Caused by", "Potential Claim" and "Potential Incoming Claim" - are mandatory and need to contain a value before the Event can be submitted.

On top of the mandatory fields you are able to provide additional information within the "Description" field and/or add pictures e.g. from the incident by clicking the symbol.

Once you click "Submit" the Event will be saved within PIRS:Claim and a notification will be sent out to a predefined internal responsible. In case your device is currently not connected to the internet, all your submitted Events will be collected within the App and sent out as soon as the device is connected to the internet again.

9.3 Options within the general menu



There are several options offered to you within the menu of your project list. Open the menu symbol in the top right corner.

The "About" option lists information about the PIRS:Claim App release currently running on your device, by clicking "Change Password" you are able to select a new password. Please keep in mind that if you have access to your companies PIRS:Claim application the password will be changed there as well. In case your PIRS:Claim account is linked to your company Windows account, a password change will not be supported.

"Imprint" will provide you with information concerning SOBIS.

"Log" will show a logfile of your recent activities. In case there is a problem with PIRS:Claim App, your service desk team might ask you to submit the log file to analyze. There is a button that allows you to directly submit current log files to your support team.