

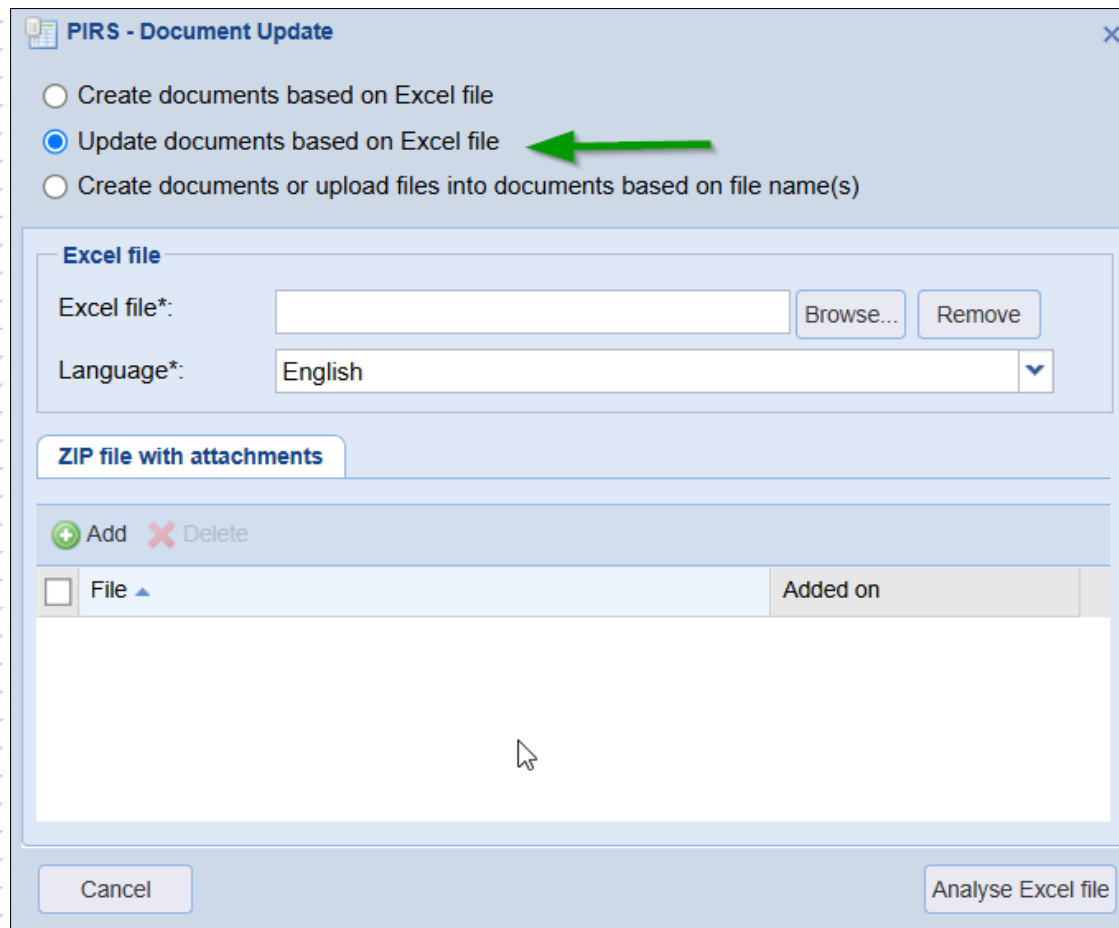
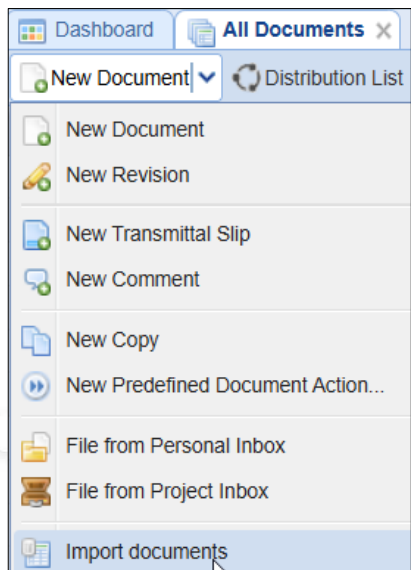


# **PIRS – Highlights and Improvements**

**Release 3.84**

Update  
Documents  
based on Excel File

# Update documents based on Excel file



Import documents feature provides a new option to update documents based on Excel file.

This will allow users to:

- Update meta data
- Upload files and
- Link documents to Action Items by a single Excel import!

# Update documents based on Excel file

Update meta data:

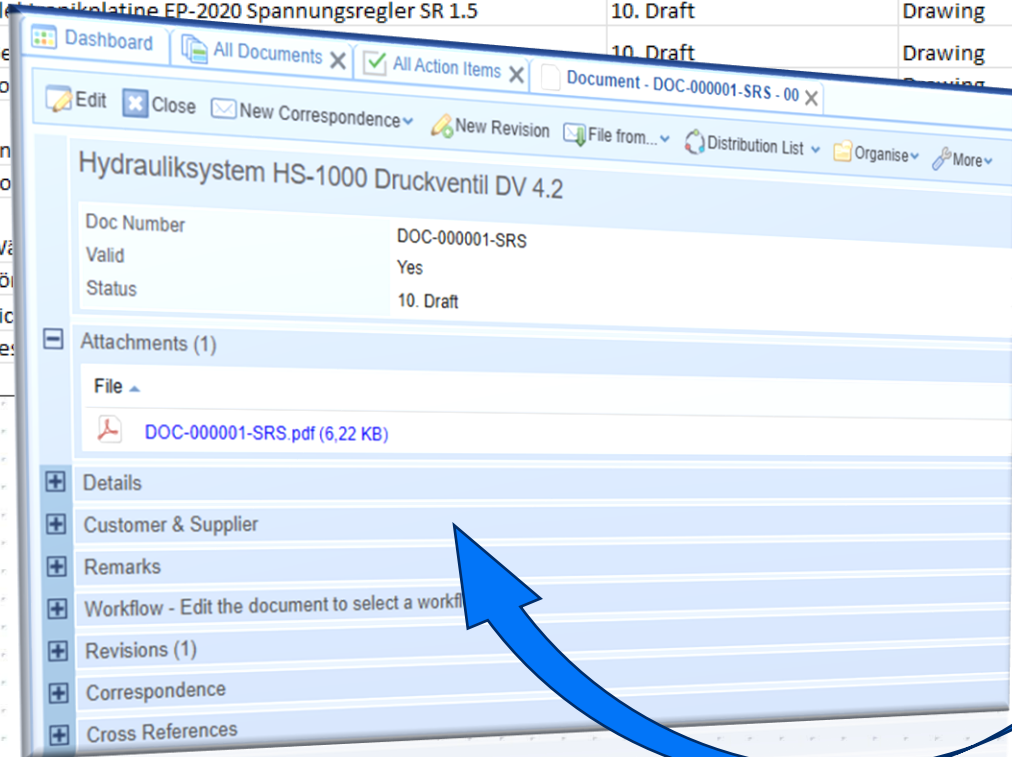
The screenshot shows a document management system interface. On the left, a document detail view for 'Transformer core TC-1500 winding wire WW 4.6' is displayed. The 'Customer & Supplier' section shows the 'Customer Doc Number' as 'L1M3U7', which is circled in green. On the right, an Excel table lists document metadata. A blue arrow points from the circled 'L1M3U7' in the document view to the 'Customer Doc number' column in the Excel table, specifically to the row with 'L1M3U7'.

Supplier	System	Language	Customer Doc number	Application
SOBIS Software GmbH	Mechanical	EN	A3B7X9	Code 2
SOBIS Software GmbH	Mechanical	EN	C8D2Y5	Code 2
SOBIS Software GmbH	Mechanical	EN	E6F1Z4	Code 2
SOBIS Software GmbH	Mechanical	EN	G9H4W2	Code 2
SOBIS Software GmbH	Mechanical	EN	J5K8V6	Code 2
SOBIS Software GmbH	Mechanical	EN	L1M3U7	Code 2
SOBIS Software GmbH	Mechanical	EN	N7P6T1	Code 2
SOBIS Software GmbH	Mechanical	EN	Q4R9S3	Code 2

# Update documents based on Excel file

Attach files to existing documents:

Doc number	Folder	Revisi	Valid	Title	Status	Type	File
DOC-000001-SRS	10.00 Project Management Team	00	Yes	Hydrauliksystem HS-1000 Druckventil DV 4.2	10. Draft	Drawing	DOC-000001-SRS.pdf
DOC-000002-SRS	10.00 Project Management Team	00	Yes	Elektronikplatine EP-2020 Spannungsregler SR 1.5	10. Draft	Drawing	DOC-000002-SRS.pdf
DOC-000003-SRS	10.00 Project Management Team	00	Yes	Ge...	10. Draft	Drawing	DOC-000003-SRS.pdf
DOC-000004-SRS	10.00 Project Management Team	00	Yes	So...		Drawing	DOC-000004-SRS.pdf
DOC-000005-SRS	10.00 Project Management Team	00	Yes	Ph...			DOC-000005-SRS.pdf
DOC-000006-SRS	10.00 Project Management Team	00	Yes	Ro...			DOC-000006-SRS.pdf
DOC-000007-SRS	10.00 Project Management Team	00	Yes	Wä...			
DOC-000008-SRS	10.00 Project Management Team	00	Yes	Fö...			
DOC-000009-SRS	10.00 Project Management Team	00	Yes	Sic...			
DOC-000010-SRS	10.00 Project Management Team	00	Yes	Te...			



The screenshot shows a document management interface. The document title is "Hydrauliksystem HS-1000 Druckventil DV 4.2". The document details are as follows:

- Doc Number: DOC-000001-SRS
- Valid: Yes
- Status: 10. Draft

Under the "Attachments (1)" section, a PDF file named "DOC-000001-SRS.pdf" (6,22 KB) is listed. A blue arrow points from the "File" column of the Excel table to this attachment.



# Update documents based on Excel file to link Action Items

Link to existing Action Items:

Doc number	Folder	Revisi	Valid	Title	Status	Type	File	Action Items
DOC-000001-SRS	10.00 Project Management Team	00	Yes	Hydrauliksystem HS-1000 Druckventil DV 4.2	10. Draft	Drawing	DOC-000001-SRS.pdf	AI00006
DOC-000002-SRS	10.00 Project Management Team	00	Yes	Elektronikplatine EP-2020 Spannungsregler SR 1.5	10. Draft	Drawing	DOC-000002-SRS.pdf	AI00006
DOC-000003-SRS	10.00 Project Management Team	00	Yes	Ge...	10. Draft	Drawing	DOC-000003-SRS.pdf	AI00006
DOC-000004-SRS	10.00 Project Management Team	00	Yes	So...	10. Draft	Drawing	DOC-000004-SRS.pdf	AI00006
DOC-000005-SRS	10.00 Project Management Team	00	Yes	Pr...	10. Draft	Drawing	DOC-000005-SRS.pdf	AI00006
DOC-000006-SRS	10.00 Project Management Team	00	Yes	Ro...	10. Draft	Drawing	DOC-000006-SRS.pdf	AI00001
DOC-000007-SRS	10.00 Project Management Team	00	Yes	Wa...	10. Draft	Drawing	DOC-000007-SRS.pdf	AI00006
DOC-000008-SRS	10.00 Project Management Team	00	Yes	Fö...	10. Draft	Drawing	DOC-000008-SRS.pdf	AI00001
DOC-000009-SRS	10.00 Project Management Team	00	Yes	Sid...	10. Draft	Drawing	DOC-000009-SRS.pdf	AI00006
DOC-000010-SRS	10.00 Project Management Team	00	Yes	Te...	10. Draft	Drawing	DOC-000010-SRS.pdf	AI00001

Hydrauliksystem HS-1000 Druckventil DV 4.2

Doc Number: DOC-000001-SRS  
Valid: Yes  
Status: 10. Draft

Attachments (1)

Details

Customer & Supplier

Remarks

Workflow - Edit the document to select a workflow

Revisions (1)

Correspondence

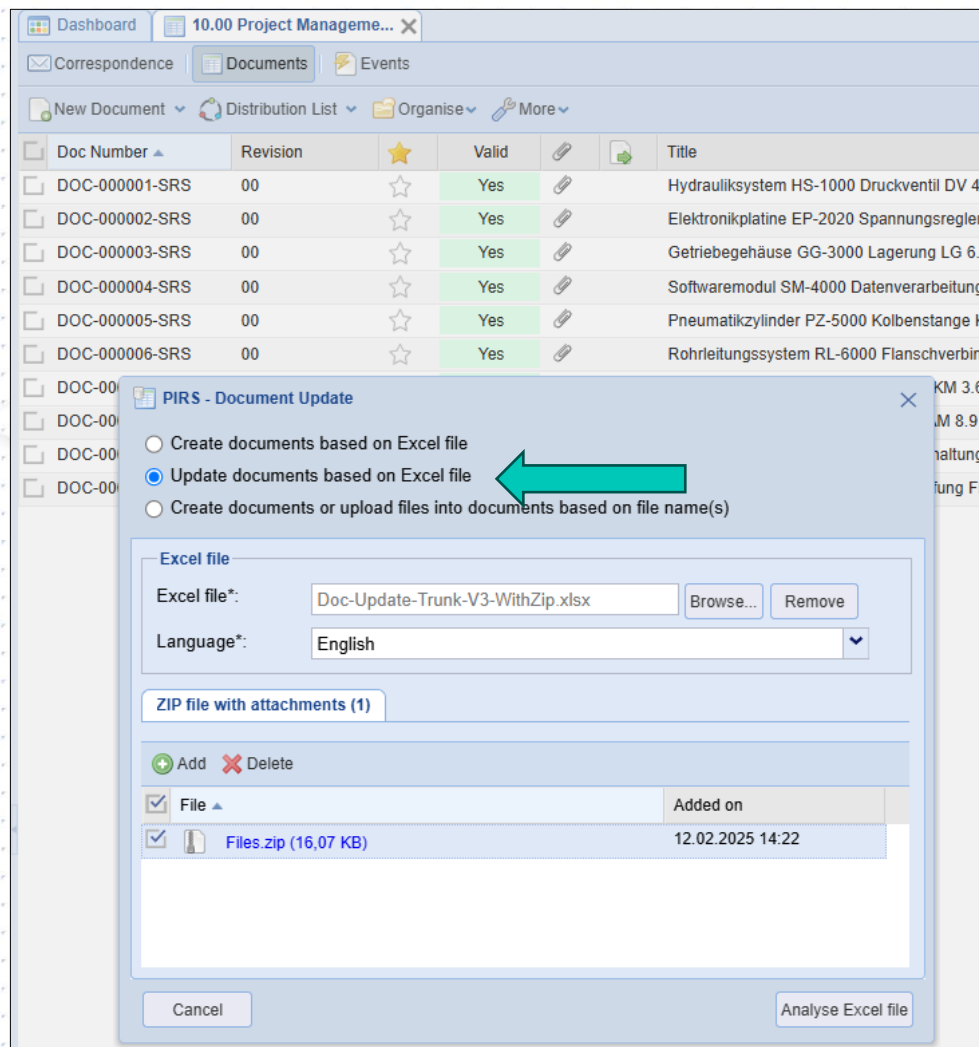
Cross References

Action Items (1)

Number	Subject
<input checked="" type="checkbox"/> AI00006	Prepare document handover for generator in basemen

Comment Review Sheet

# Update documents based on Excel file – Good to know



Update of all fields and files is possible, except for:

- Doc No
- Revision
- Valid flag

The Doc No and Revision is used as key to identify existing documents.

The import is limited to a maximum of 200 entries by default. However this limit can be exceeded in the project setup.

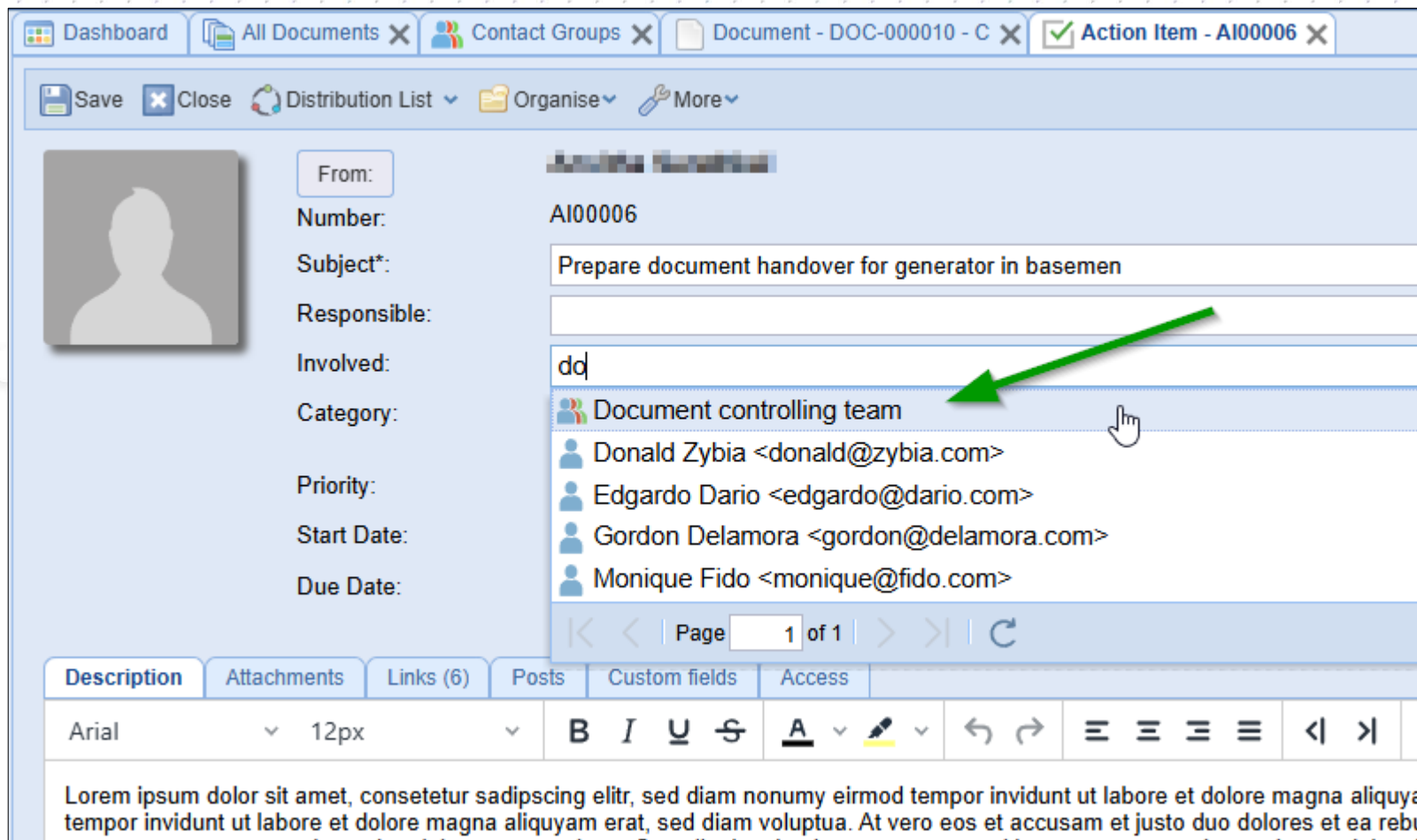
In the current release the new feature is available only for PIRS enthusiasts and early adopters.

Please talk to SOBIS, if you are going to use it.

# Other Improvements



# Allow selection of Contact Groups in Involved field of Action Items

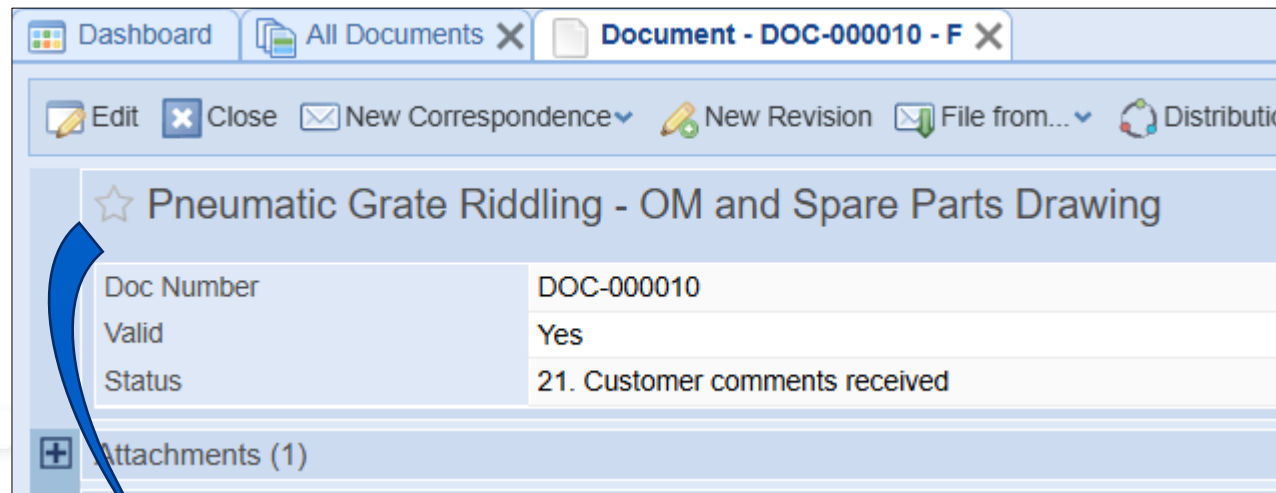


The „Involved“ field allows the selection of Contact Groups now.

If document is saved then the group members are shown.

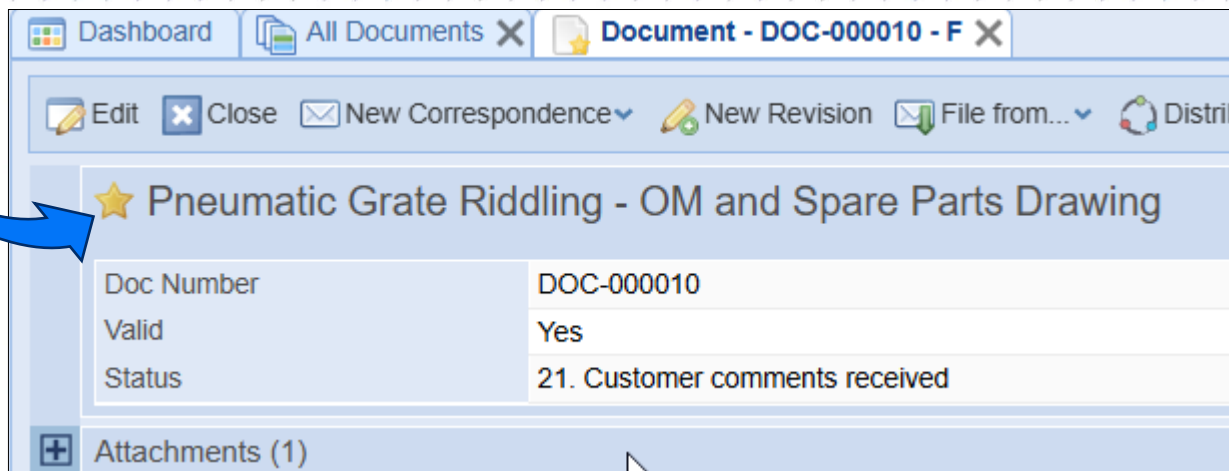
Update of the Contact Groups will not modify existing Action Items.

# Set favourite flag in read mode



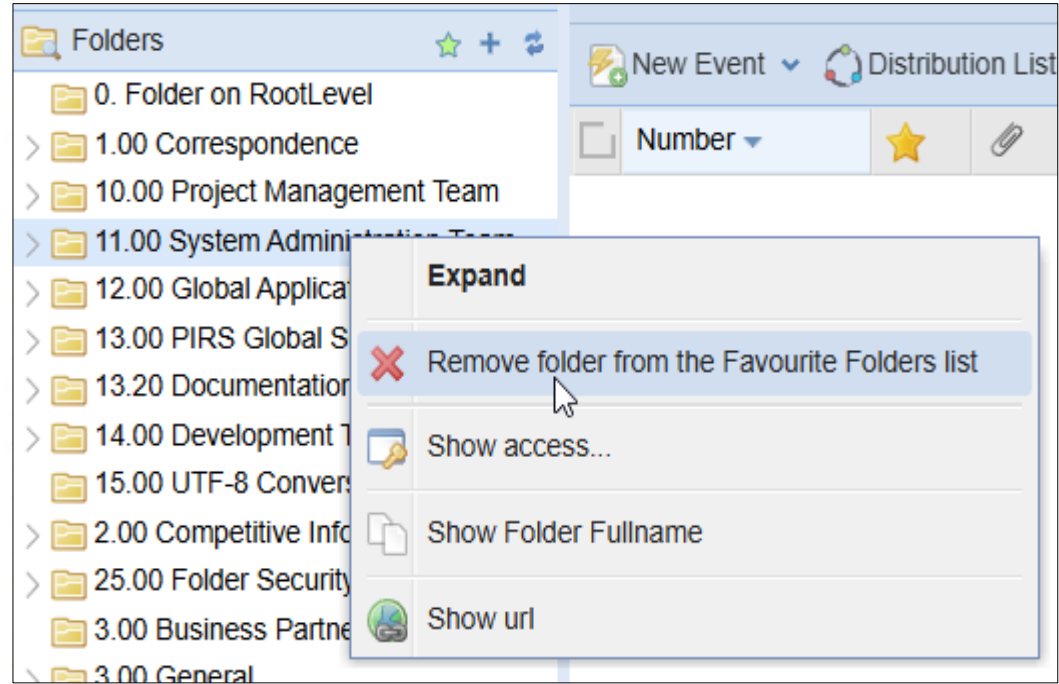
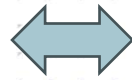
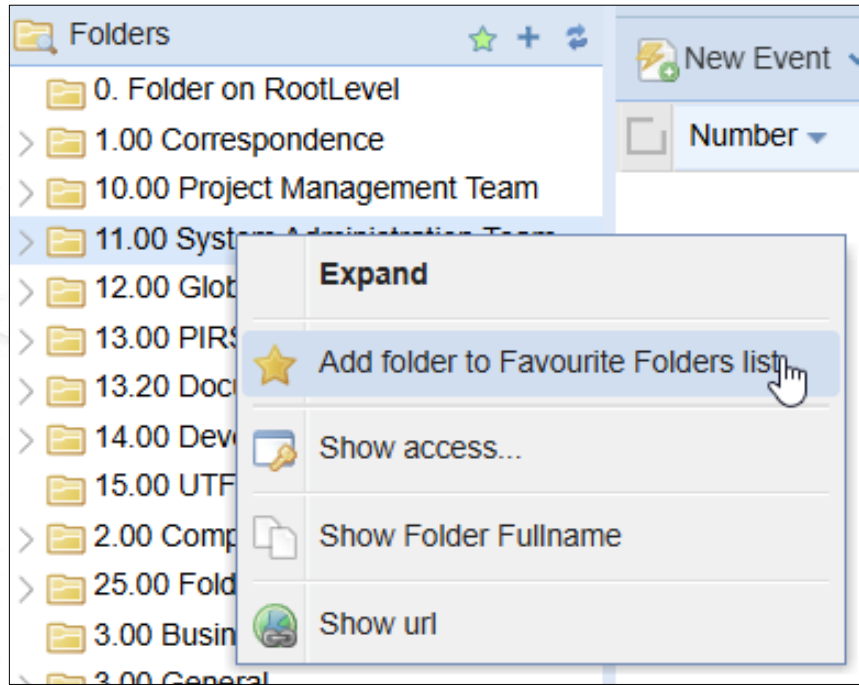
Simplified way to set favourites.

No need anymore to click on:  
„Organise > Add to Favourites“



# Improve Folder context menu

Display only available options for folder favorites:



# Pre-select document files when Transmittal is created

File(s) of document(s) are also pre-selected, if users do not use a „Predefined Document Action“. This will avoid potential errors, especially for users who are new in PIRS. It is also possible to define filters so that only files with „pdf“ extension are selected by default.

Subject\*: My files  
 Ref. No.\*: SOB/MEW/<Number> T  
 Folder\*: 0. Folder on RootLevel  
 Your reference:   
 Your reference dated:

Documents (2) | Body | Attachments | Access

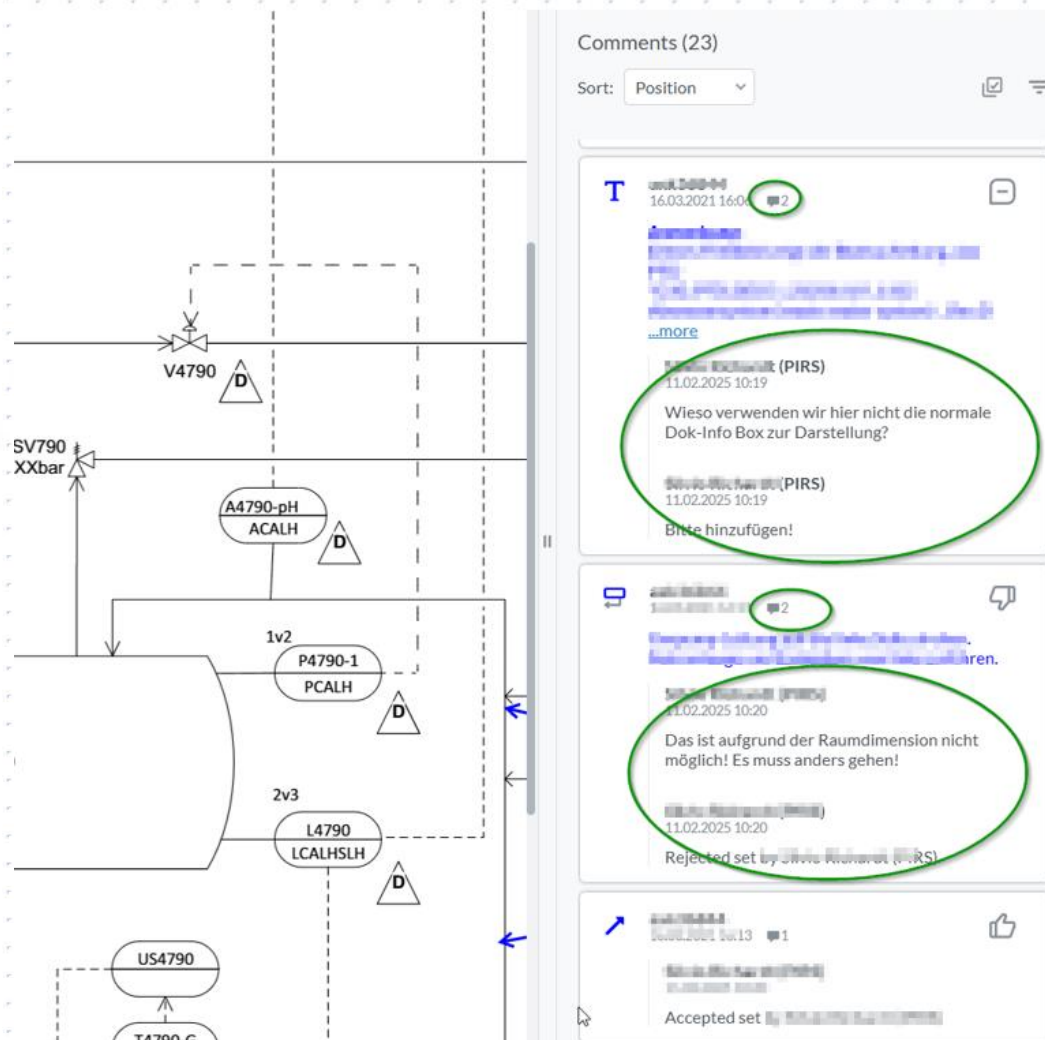
<input type="checkbox"/>	Doc Number ▲	Revision	Valid		Title	Document Status	Action	Required Resp...		Attachments
<input type="checkbox"/>	1-PRE-MA-KB...	00	Yes		Design Specification Rotor Blade 34-5					AR5GG+01000A01.pdf
<input checked="" type="checkbox"/>	1-PRE-MA-KB...	00	Yes		Design Specification Rotor Blade 35-5					AR5GG+01000A02.pdf

Please talk to SOBIS if this feature should be enabled in your project(s).



# Extend all annotations (and replies) in File Viewer by default

If files have many annotations with replies then it might be useful to see all replies extended.

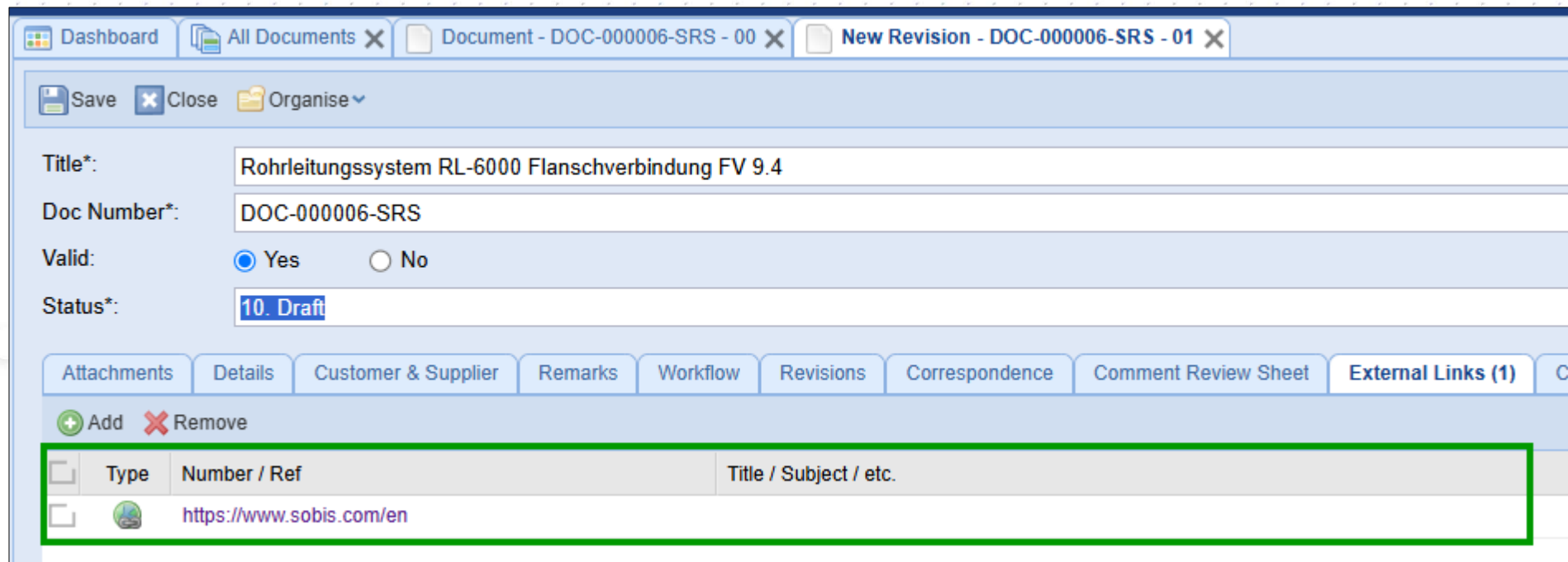


The image shows a technical drawing on the left side of a software interface, with various components labeled: V4790, SV790 XXbar, A4790-pH ACALH, P4790-1 PCALH, L4790 LCALHSLH, US4790, and T4790-G. On the right side, there is a 'Comments (23)' panel. The panel shows a list of annotations with replies. The first annotation is from 'Wolfgang K... (PIRS)' dated 11.02.2025 10:19, with a reply asking 'Wieso verwenden wir hier nicht die normale Dok-Info Box zur Darstellung?'. The second annotation is from 'Sören M... (PIRS)' dated 11.02.2025 10:19, with a reply saying 'Bitte hinzufügen!'. The third annotation is from 'Wolfgang K... (PIRS)' dated 11.02.2025 10:20, with a reply saying 'Das ist aufgrund der Raumdimension nicht möglich! Es muss anders gehen!'. The fourth annotation is from 'Sören M... (PIRS)' dated 11.02.2025 10:20, with a reply saying 'Rejected set by Wolfgang K... (PIRS)'. The fifth annotation is from 'Wolfgang K... (PIRS)' dated 11.02.2025 10:13, with a reply saying 'Accepted set by Sören M... (PIRS)'. The replies are highlighted with green circles and green ovals to show they are extended.

Please talk to SOBIS if this feature should be enabled in your project(s).



# Provide option to transfer external links to next document revision



External links (and Cross References) can be inherited from previous document revision.

Please talk to SOBIS if this feature should be enabled in your project(s).