

PIRS 3.23

Highlights und Improvements

Easy follow up on your correspondence I

Default Follow up tab available on Correspondence (customisable on demand)

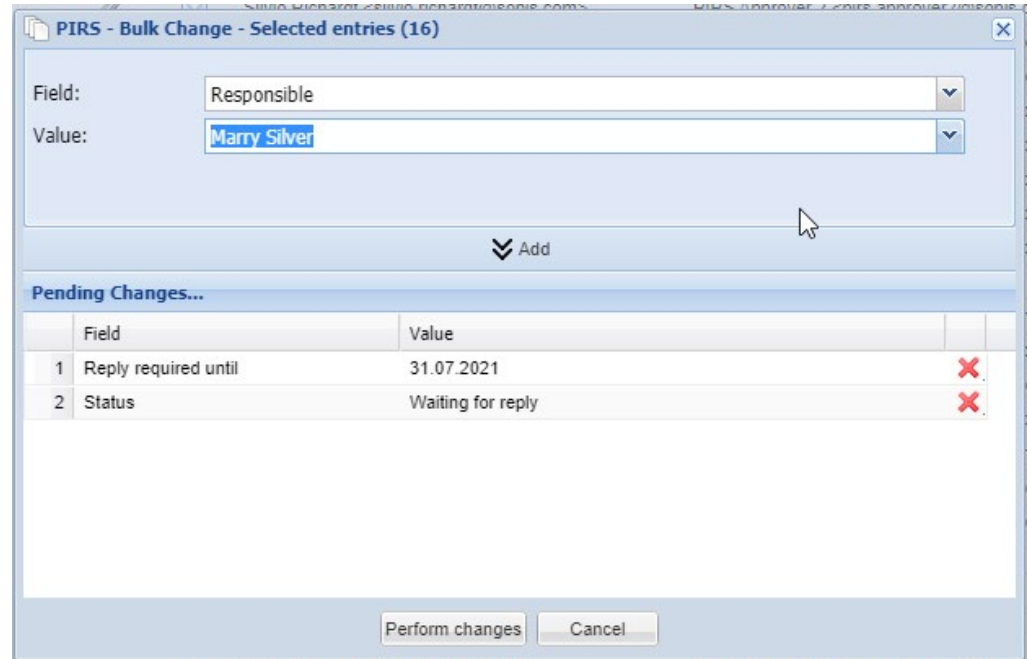
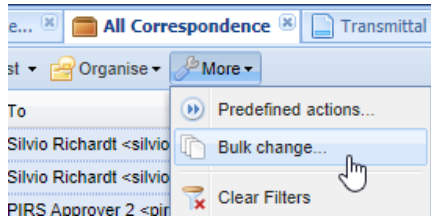
The screenshot shows the SOBIS correspondence interface. The top section contains metadata: Document ID, Subject* (Minutes from CAB meeting today), Ref. No.* (SOB/SOB/00001 EI), and Classification. Below this is a tabbed interface with 'Body', 'Attachments (1)', 'Posts', 'Follow Up', and 'Access'. The 'Follow Up' tab is highlighted with a circle and an arrow pointing to a detailed configuration panel. This panel includes a rich text editor toolbar and a 'Follow Up' configuration area with the following fields:

- Reply required until:** 07.07.2021
- Status:** Waiting for reply
- Responsible:** (empty dropdown)

The email body text reads: "Hi All, attached I send you all the items from the meeting. Please check all items until 07.07.2021. Best regards Richard".

Please get in contact with SOBIS Service Desk if you want to use this feature.

Easy follow up on your correspondence II – bulk changes



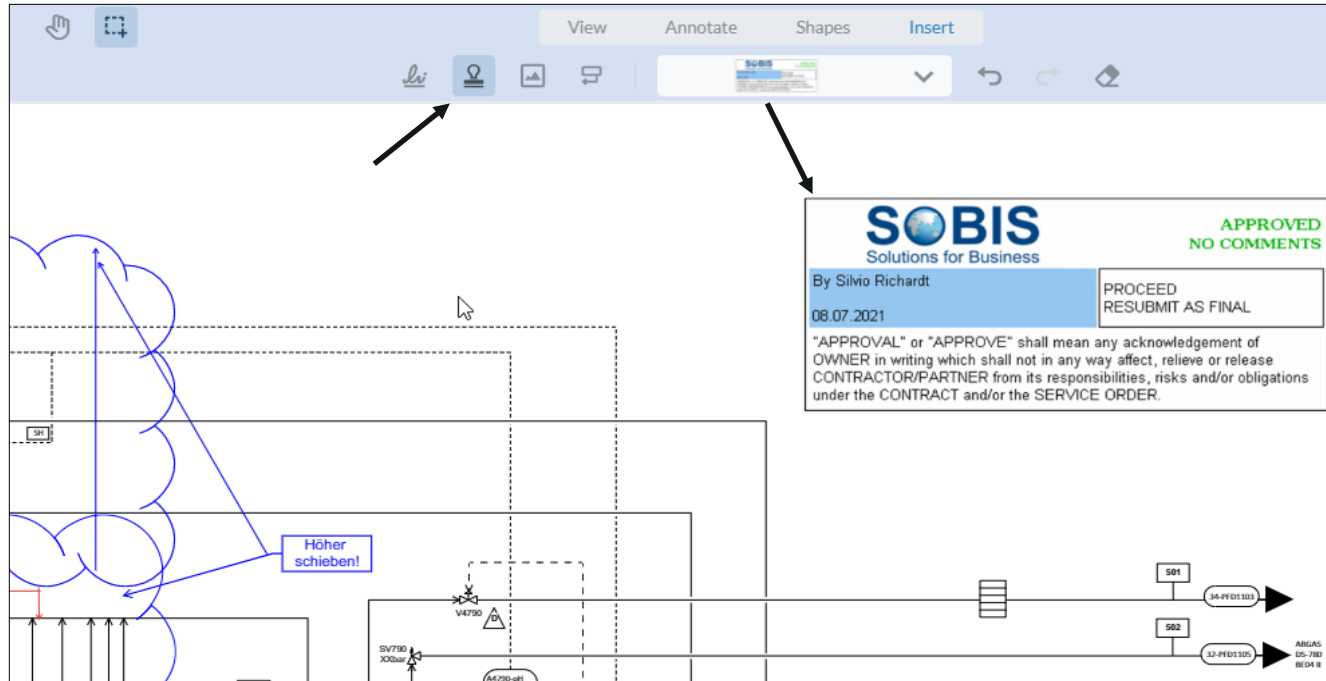
Also bulk changes are possible...

Display To, CC, BCC and Doclink columns correspondence grids

- » In addition to the recipients column it is also possible to add the To, Cc, Bcc and Doclink fields to the correspondence grids
- » All columns are hidden by default

Send by	To	Cc	Bcc
estUser	Cara Vaughan <cara.vaughan@enron.com>...	John Buchanan <john.buchanan@enron.com>...	John Buchanan <john.buchanan@enron.com>, Larry Berger
estUser	Elizabeth Brown <elizabeth.brown@enron.com>...	Alma Carrillo <alma.carrillo@enron.com>...	Alma Carrillo <alma.carrillo@enron.com>, Shelley Corman <shelley.corman@enron.com>
estUser	Cara Vaughan <cara.vaughan@enron.com>...	John Buchanan <john.buchanan@enron.com>...	John Buchanan <john.buchanan@enron.com>, Larry Berger
estUser	Bradley Holmes <bradley.holmes@enron.com>...	Alma Carrillo <alma.carrillo@enron.com>...	Alma Carrillo <alma.carrillo@enron.com>, Ava Garcia <ava.garcia@enron.com>
estUser	John Freeman <john.freeman@enron.com>...	Allan Shaffer <allan.shaffer@enron.com>...	Allan Shaffer <allan.shaffer@enron.com>, Andrea Woody <andrea.woody@enron.com>
estUser	Cara Vaughan <cara.vaughan@enron.com>...	Shelley Corman <shelley.corman@enron.com>...	Shelley Corman <shelley.corman@enron.com>, Terry Kovarik <terry.kovarik@enron.com>
estUser	Jan Moore <jan.moore@enron.com>, Richard...	Darrell Schoolcraft <darrell.schoolcraft@enron.com>...	Darrell Schoolcraft <darrell.schoolcraft@enron.com>, Kimber...
estUser	Shelley Corman <shelley.corman@enron.com>...	Alma Carrillo <alma.carrillo@enron.com>...	Alma Carrillo <alma.carrillo@enron.com>
estUser	Lynn Blair <lynn.blair@enron.com>, Mary Da...	Alice Johnson <alice.johnson@enron.com>...	Alice Johnson <alice.johnson@enron.com>, Cara Vaughan <cara.vaughan@enron.com>
estUser	Dari Dornan <dari.dornan@enron.com>, Lya...	Alice Johnson <alice.johnson@enron.com>...	Alice Johnson <alice.johnson@enron.com>, Cara Vaughan <cara.vaughan@enron.com>
estUser	Controllers <controllers.dl-eta@enron.com>...	David Gaines <david.gaines@enron.com>...	David Gaines <david.gaines@enron.com>, Greg Hill <greg.hill@enron.com>
estUser	Amy Mulligan <amy.mulligan@enron.com>, B...	Darrell Schoolcraft <darrell.schoolcraft@enron.com>...	Darrell Schoolcraft <darrell.schoolcraft@enron.com>, Gary S...
estUser	Bert Hernandez <bert.hernandez@enron.com>...	Darrell Schoolcraft <darrell.schoolcraft@enron.com>...	Darrell Schoolcraft <darrell.schoolcraft@enron.com>, Terry K...

Custom Dynamic Project Stamps in File Viewer



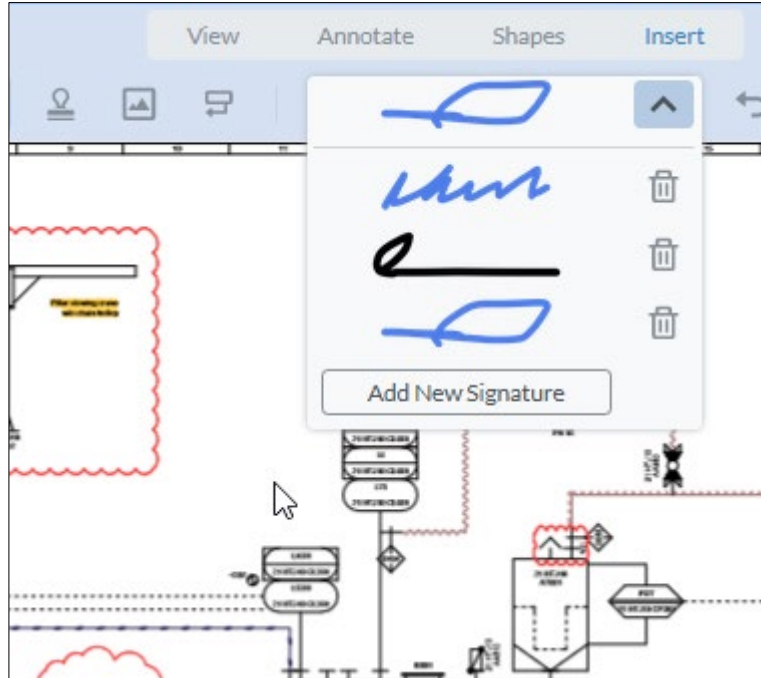
It is now possible to use a company specific dynamic stamp in the File Viewer!

Define your own:

- Company logo
- User name
- Current date
- Any other field or text or format

Please talk to SOBIS Service Desk to setup this feature.

Save up to 4 personal signatures in File Viewer



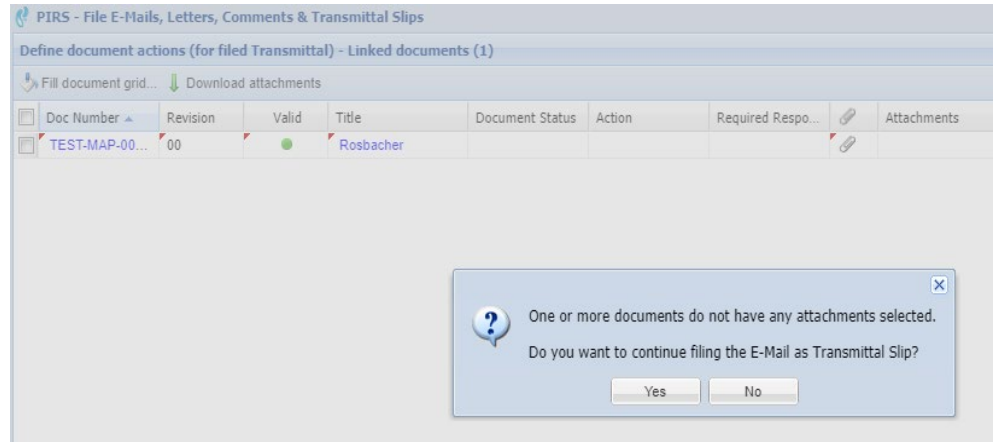
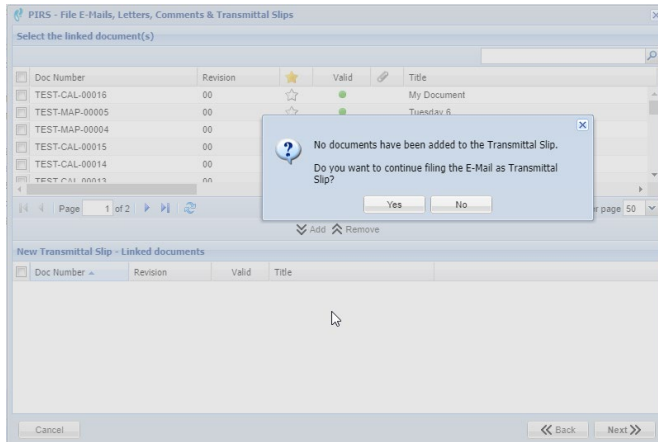
Signatures created in the File Viewer will be saved automatically (in the personal user settings), so that they can be used anytime.

Create Action Items in Full Mode

- » **New Action Items will be displayed in full edit mode (new tab)**
- » **Action Items can be displayed in full mode (default) or dialog mode**



New prompt when filing a Transmittal or Comment



- additional prompt ensures that files are linked
- works similar to the prompt when Transmittals are send

Add time stamp information to approval steps in workflow

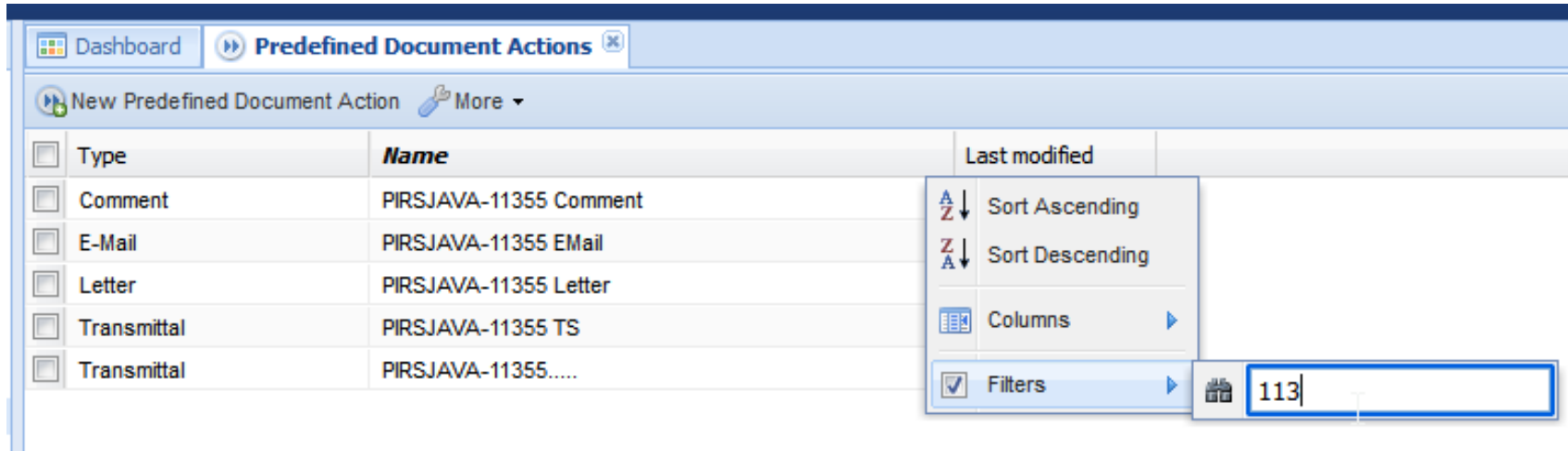
- » In previous releases only the date was displayed in the workflow overview

			Status	Date	Signature
ardt@sobis.onmicrosoft.com>			Approved	06.05.2021	Silvio Richardt
ardt@sobis.onmicrosoft.com>	✓	✗			
ardt@sobis.onmicrosoft.com>					

- » The new release will also provide the a time stamp

Workflow - Default Approval Process for Non Conformity Report (Revision 1)						
Start Workflow Reset Workflow						
Function	Responsible(s)			Status	Date	Signature
Start workflow by user	PIRS Approver 1 <pirs.approver1@sobis.com>			Approved	28.05.2021 15:27	Iris Brokmeier
Confirm Solution (WPH)	PIRS Approver 1 <pirs.approver1@sobis.com>			Approved	28.05.2021 15:27	Iris Brokmeier
Confirm Solution (SIQM)	PIRS Approver 1 <pirs.approver1@sobis.com>	✓	✗			
Confirm Implementation (SIQM)	PIRS Approver 1 <pirs.approver1@sobis.com>					

Provide filter for PDA in project administration



Dashboard | Predefined Document Actions

New Predefined Document Action More

<input type="checkbox"/> Type	<i>Name</i>	Last modified
<input type="checkbox"/> Comment	PIRSJAVA-11355 Comment	
<input type="checkbox"/> E-Mail	PIRSJAVA-11355 EMail	
<input type="checkbox"/> Letter	PIRSJAVA-11355 Letter	
<input type="checkbox"/> Transmittal	PIRSJAVA-11355 TS	
<input type="checkbox"/> Transmittal	PIRSJAVA-11355.....	

Sort Ascending
Sort Descending
Columns
Filters 113

New columns in Correspondence Excel Export

There are several new columns added to the default Excel Export:

- » **Tags**
- » **To, Cc, Bcc and Doclinks**
- » **Follow up fields for correspondence (if defined)**

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