

SOBIS Software GmbH
Our software and your power for successful projects

PIRS 3.5

Improvements Overview

Release Notes Overview (Improvements)

1. **Move recipients of correspondence easily**
2. **Define preferences for news buttons in personal settings**
3. **Sort correspondences in read mode of a document**
4. **Optimize Actions for Transmittal and Comments**
5. **Show number of entries in tab**
6. **Display Send By field in Thread/Timeline grids**
7. **Improve the display of sent document files in Transmittals**
8. **Facilitate deletion of a single record**
9. **Use default values also in Predefined Document Actions**
10. **Automatic pre-selection of default correspondence type when filing**

1. Move recipients of a correspondence easily

The screenshot shows an email client interface with a 'Draft' email. The 'To' field contains several recipients: Amanda Howryla, Alvaro Cianciotta, Eddie Aamot, Edgardo Dario, and Freddy Lespier. A context menu is open over the 'To' field, listing actions for the selected recipient, Eddie Aamot: 'Show business card', 'Move Eddie Aamot <eddie@aamot.com> to', 'Move all to', 'Remove Eddie Aamot <eddie@aamot.com>', and 'Remove all'. A sub-menu is also open over the 'Cc:' option, showing 'To:', 'Cc:', 'Bcc:', and 'Doclink:'.

2. Define preferences for news buttons in personal settings

PIRS - My Settings - silvio

- User Information
- Regional Settings
- Personal Mailbox
- Notifications
- User Interface
- Correspondence
- Documents

Views

Default 'New' button:

Letter

Default 'Send' button:

Transmittal Slip / Comment

Default 'Send' button:

Forward / Reply

Default 'Forward' button:

Default 'Reply' button:

- Forward
- Forward without attachments
- Forward with doclink
- Dynamic-use last action



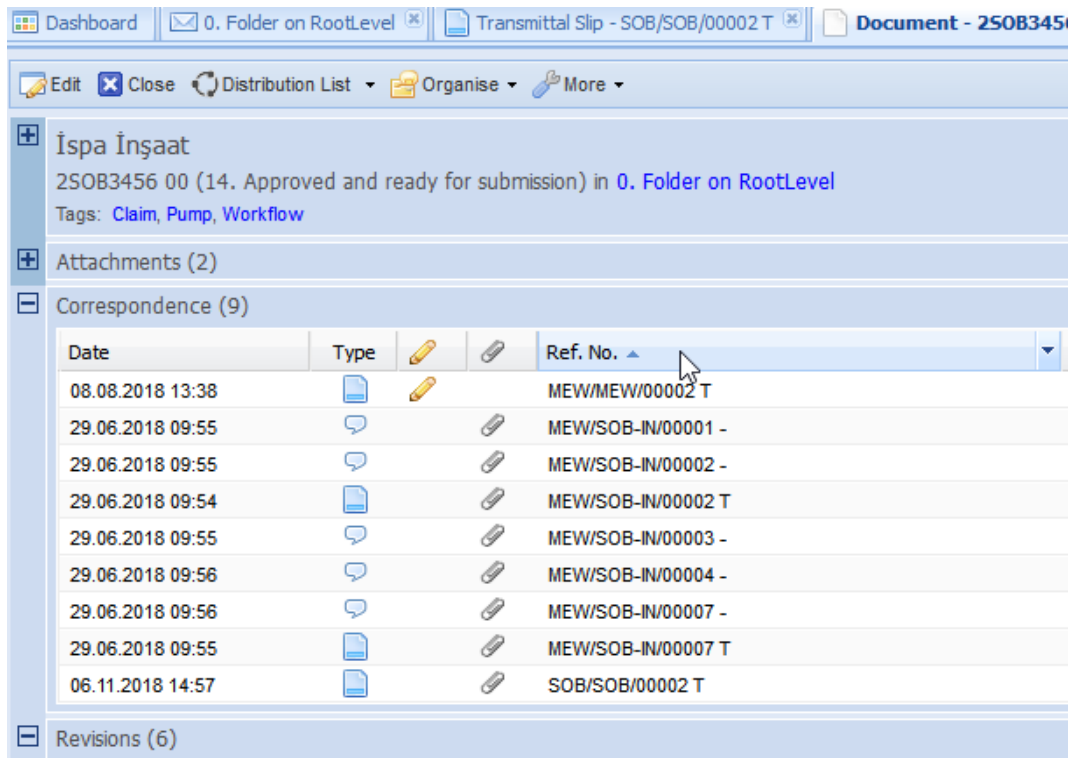
Dashboard | 0. Folder on RootLevel

Correspondence | Documents | Activity

New Transmittal Slip | Reply with history

Date		
06.12.2018 13:26		☆
06.12.2018 13:26		☆
06.12.2018 13:26		☆
06.12.2018 13:26		☆
06.12.2018 13:26		☆
06.12.2018 13:26		☆
06.12.2018 13:26		☆



















3. Sort correspondences in read mode of a document



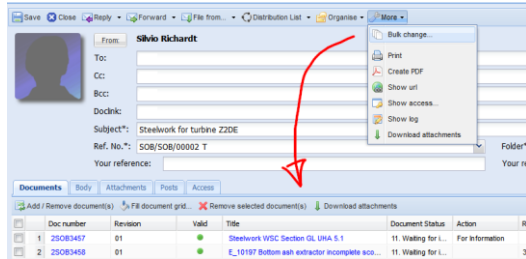
The screenshot displays the SOBIS software interface for a document titled "Document - 250B345". The interface includes a top navigation bar with "Dashboard", "0. Folder on RootLevel", and "Transmittal Slip - SOB/SOB/00002 T". Below this is a toolbar with "Edit", "Close", "Distribution List", "Organise", and "More" options.

The main content area is divided into sections:

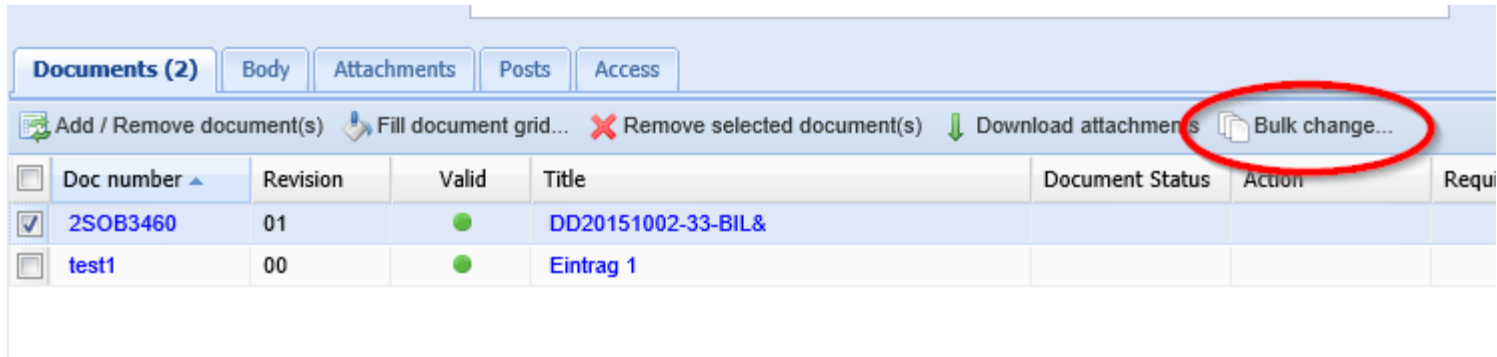
- İşpa İnşaat**: 250B3456 00 (14. Approved and ready for submission) in 0. Folder on RootLevel. Tags: Claim, Pump, Workflow.
- Attachments (2)**
- Correspondence (9)**: A table listing correspondence items with columns for Date, Type, and Ref. No.
- Revisions (6)**

Date	Type	Ref. No.
08.08.2018 13:38	 	MEW/MEW/00002 T
29.06.2018 09:55	 	MEW/SOB-IN/00001 -
29.06.2018 09:55	 	MEW/SOB-IN/00002 -
29.06.2018 09:54	 	MEW/SOB-IN/00002 T
29.06.2018 09:55	 	MEW/SOB-IN/00003 -
29.06.2018 09:56	 	MEW/SOB-IN/00004 -
29.06.2018 09:56	 	MEW/SOB-IN/00007 -
29.06.2018 09:55	 	MEW/SOB-IN/00007 T
06.11.2018 14:57	 	SOB/SOB/00002 T

4. Optimize Actions for Transmittal and Comments



Allows execution of action on selected documents within a Transmittal or Comment



5. Show number of entries in tab

Status*: 14. Approved and ready for submission

Attachments (4) Details Customer & Supplier Workflow **Revisions (6)** Correspondence (12) Pos

Doc number	Revision	Valid	Title
2SOB3456	00	●	İspa İnşaat
2SOB3456	01	●	List of Subcontractors
2SOB3456	02	●	Overall Plan Mechanical
2SOB3456	A	●	Outdoor Support 0PAB40BQ031
2SOB3456	B	●	DD20151009-38-BIL
2SOB3456	C	●	Pneumatic Grate Riddling - OM and Spare Parts Drawing

6. Display Send By field in Thread/Timeline

» ...in addition to the From field:

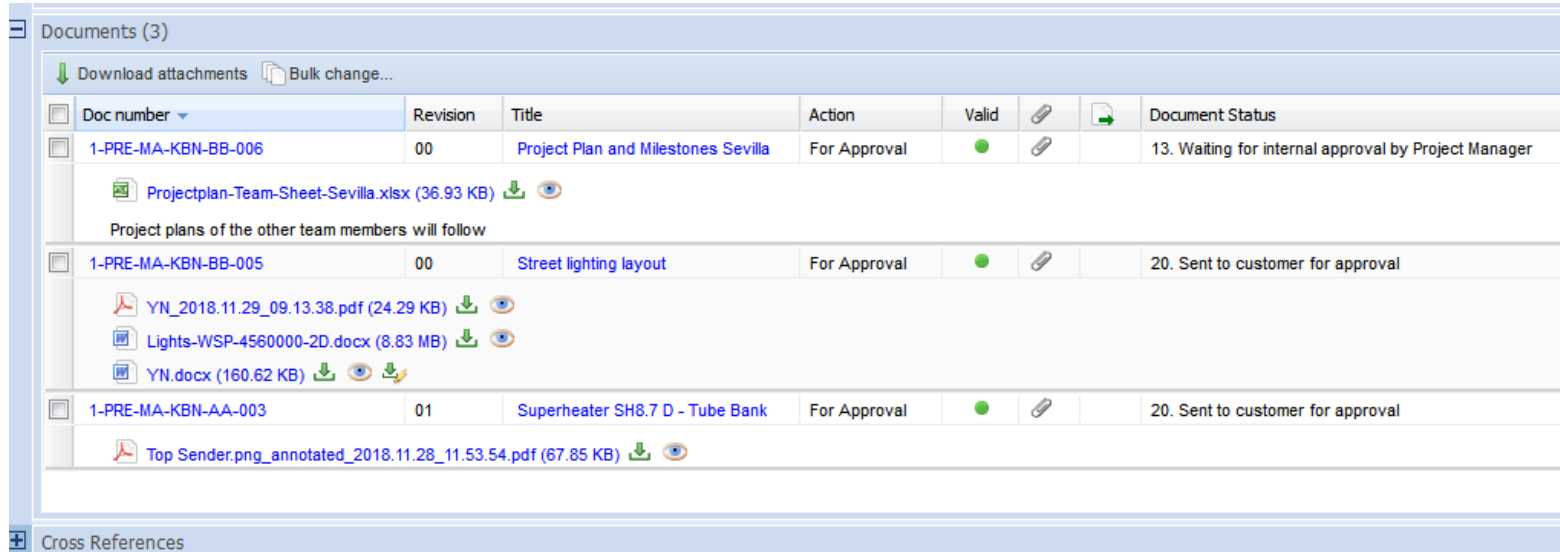


The screenshot shows an email client interface with two tabs: 'Dashboard' and 'Correspondence - MEW/SOB-IN/00002 T'. The 'Correspondence' tab is active, and the view is set to 'Display as thread'. Two email messages are displayed in a thread view.

Message 1 (Light Blue):
Sender: Chester Gregoroff <chester@gregoroff.com> (09.08.2018 09:44)
Sent by: PIRS Setup <pirs.setup@sobis.com>
Subject: MEW/SOB-IN/00002 T - Documents for approval
Body: sfdgs fdg sfdgs fdgsfdgsfdg





















Message 2 (Light Green):
Sender: Nikolaus Wittenbeck <Nikolaus.Wittenbeck@sobis.com> (23.08.2018 08:59)
Sent by: Mihai Sterie <mihai.sterie@sobis.com>
Subject: SOB-IN/SOB/00006 - - Re: Documents for approval
Body: asdf asdfasdfasdfasdfasfd Best regards, Mihai Sterie ----- History from PIRS Setup on 09.08.2018 09:44 (Reference Number: MEW/SOB-IN/00002 T)----- From: Chester Gregoroff

7. Improve the display of sent document files



Documents (3)

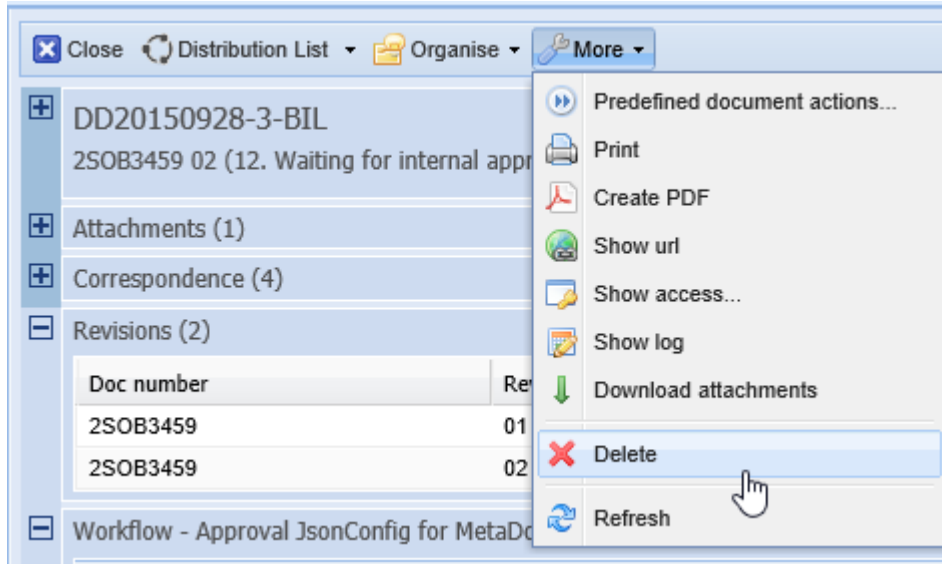
Download attachments Bulk change...

Doc number	Revision	Title	Action	Valid			Document Status
1-PRE-MA-KBN-BB-006	00	Project Plan and Milestones Sevilla	For Approval	●			13. Waiting for internal approval by Project Manager
 Projectplan-Team-Sheet-Sevilla.xlsx (36.93 KB)  							
Project plans of the other team members will follow							
1-PRE-MA-KBN-BB-005	00	Street lighting layout	For Approval	●			20. Sent to customer for approval
 YN_2018.11.29_09.13.38.pdf (24.29 KB)  							
 Lights-WSP-4560000-2D.docx (8.83 MB)  							
 YN.docx (160.62 KB)   							
1-PRE-MA-KBN-AA-003	01	Superheater SH8.7 D - Tube Bank	For Approval	●			20. Sent to customer for approval
 Top Sender.png_annotated_2018.11.28_11.53.54.pdf (67.85 KB)  							

Cross References

- For Transmittals and Comments
- Show attached files as list
- Display the **full name** of every attached file
- Order of all columns can be customized upon personal user preferences

8. Facilitate deletion of a single record



Button is visible now also directly on the record (and not only in the grid).

9. Use default values also in Predefined Document Actions

Name*: Default Transmittal for Approval Process
 Type*: Transmittal Slip
 Comment
 E-Mail

To:
 Cc:
 Bcc:
 Doctlink:

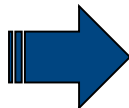
Subject: Drawings to be approved
 Ref. No.: Sender: Recipient:
 Folder:

Action: For Approval
 Document Status: 20. Sent to customer for approval
 Customer Status:
 Supplier Status:

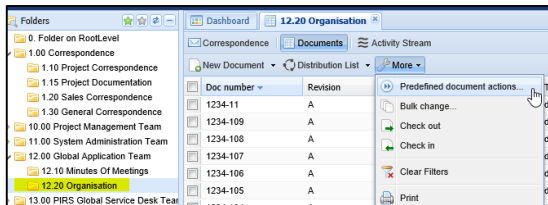
Required Response Days: No. of copies:

Notes:

Attachments:



Use default correspondence values!
 Selected folder...



Default sender code of current user...

Doctlink:
 Subject*: Drawings to be approved
 Ref. No.*: SOB;<recipient>/<Number> T
 Your reference: Your reference dated:

Folder*: 12.20 Organisation

No value defined in PDA for:

- Sender Code
- Recipient Code
- Folder

10. Automatic pre-selection of default correspondence type when filing

- » For example a „File as Reply...“ to a selected Transmittal Slip pre-selects a Comment as correspondence type

The screenshot shows the 'PIRS - File E-Mails, Letters, Comments & Transmittal Slips' dialog box. The 'Create Reference Number' section is active. It features two columns for 'Sender' and 'Recipient', each with a dropdown menu and a search field. Below these are lists of sender and recipient names. The 'Code' field is set to 'SOB' for the sender and 'MEW' for the recipient. Under 'Advanced Options', 'Sequential Numbering' is selected. The 'Number' field contains '<Number>'. The 'File as*' dropdown is highlighted in yellow and set to 'Comment'. The 'Reference Number Category:*' dropdown is set to '- - Official letters or faxes'. At the bottom, there are 'Cancel', '<< Back', and 'Next >>' buttons.

Europe – Germany

SOBIS Software GmbH
Fraunhoferstraße 8
68309 Mannheim
Tel.: +49 621 1228 5600

Middle East – Saudi Arabia

SOBIS K.S.A.
Wasel: 8974, Zip code: 12214
Unit 4 – Wadi Ath Thumamah
Riyadh, Kingdom of Saudi Arabia
Telefon: +966 11 216 1180

Asia – India

SOBIS Software (India) Pvt. Ltd.
#12, Varsav Plaza, Jayamahal Main Road
Bangalore – 560 046, India
Tel.: +91 80 2354 7953

www.sobis.com
info@sobis.com

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and your power
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