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## **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**



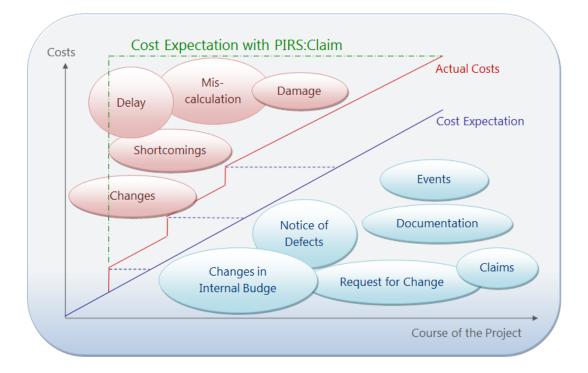
## 2 PIRS:Claim Web Basics

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 Information **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.



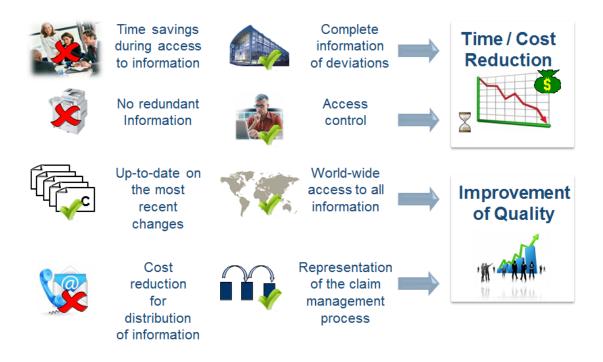
PIRS:Claim Web offers a platform to document, monitor and evaluate all events, deviations, variations and internal as well as external changes that occur in the course of a project. Based on these documents, impacts can be assessed, countermeasures can be taken, claims can be filed and incoming claims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



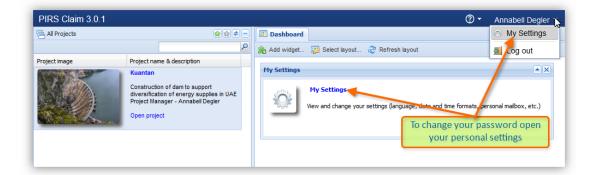
## 3 Getting Started

🎻 PIRS Claim - Log In							
User name:	User name						
Password:	•••••						
	Log in						

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

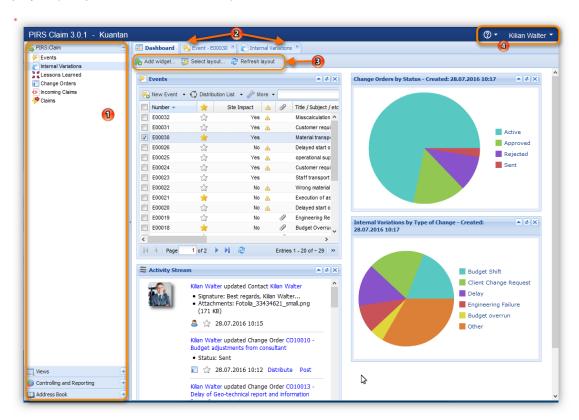
project and switch between the views in order to quickly find the project(s) you are currently involved in.

PIRS Claim 3.0.1	⑦ ▼ Kilian Walter ▼
All Projects Switch between all	Dashboard     Select layout. Refresh layout     Select widgets & adjust
Project image Project name & description  Kuantan  Construction of dam to support diversification of energy supplies in UAE Project Manager - Annabell Degler  Open project  Click to open	Hy Settings     Wew and change your settings (language, date and time formats, personal mailbox, etc.)

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.

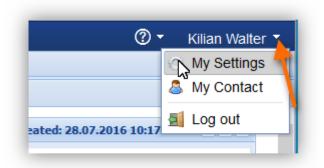
#### Controlling

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.
- 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.

User Information	User Information	
Regional Settings		
Personal Mailbox	User name:	Kilian Walter
Notifications		Change password
User Interface	A second burnle	Creator
	Access level:	Creator
	Roles:	Team Member
		1 Tojocc Thanbort
		Claim Manager Controlling & Reporting
		controlling of Reporting

User Information	Language	
Regional Settings	Lunguage	
Personal Mailbox	Language:	English 💙
Notifications		
User Interface	Date and Time forma	:
	Format:	Germany
	Date/time example:	31.12.2010 15:37
	Number example:	1.234.567,89
	Note: Restart your brov	vser for your regional settings to be applied!
	Note: Restart your brov	vser for your regional settings to be applied!
	Note: Restart your brov	vser for your regional settings to be applied!

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.

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User Information	Personal Mailbox			
Regional Settings				
Personal Mailbox	Mail server:	sobisdema03.sob	is.com	
Notifications	Protocol:	imap 💌	Port:	143
User Interface	User name:	engineer@demo.	sobis com	
	User fiame.			
		Test connection	and settings	
			\$	
		~		
		Save	Close	

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

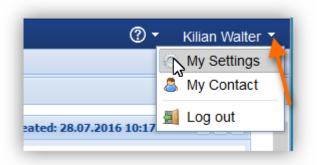
Please be aware that if you click the button Reset User Interface all your personal customization will be reset to default.

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 <u>User</u> <u>Preferences and Set-up</u>.

### 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.

Number 👻	🗾 Site Impact 🛛 🔬	5 0	9	Subject
E00015	Ž↓ Sort Ascending			Event-Test Delayed
E00013 /	Z Sort Descendin	g		Delayed delivery of engine
E00012			2	Missing equipment
E00011	Columns	•		Site Impact
E00010	Filters			Туре
E00009				Status
E00008	No 🙆			Estimated Cost Impact
E00007	No	0		Caused by
E00006	No	0		1
E00005	No	0		Responsible Discipline
E00004	No	0		Involved Disciplines
E00003	No 🙆			Engineer
E00002	No	0		Location
E00001	Yes	0		Created
				Created by
				Last modified
				Modified by

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.

🔢 Dashboard	🗾 Events 🛎				
😽 New Event 🔹 🖡	Distribution List	- 6	Actio	ane	
Number 🕶	Site Impact		0	Subject	Status
E00015	Yes			Event-Test Delayed	Active
E00013	Yes			D Status of engine parts p	Active
E00012	No		10	Missing equipment	Cancelled
	0.023			21 U.2 V 1121 V.1 12	620059

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 <u>User Preferences and Set-up</u>).

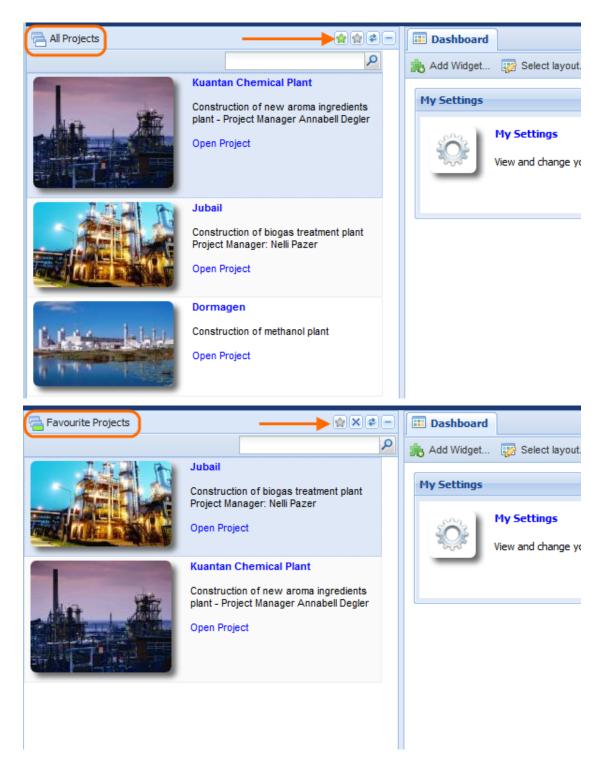
### 3.4.3 Favorites

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.

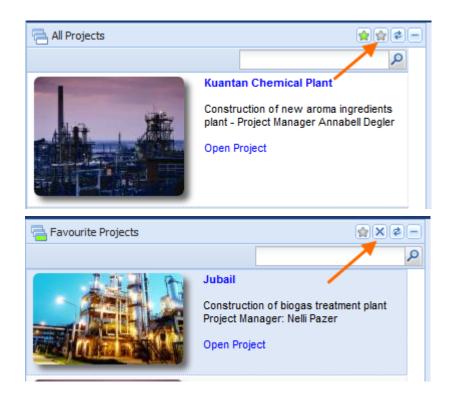
### 3.4.3.1 Favor Projects

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.

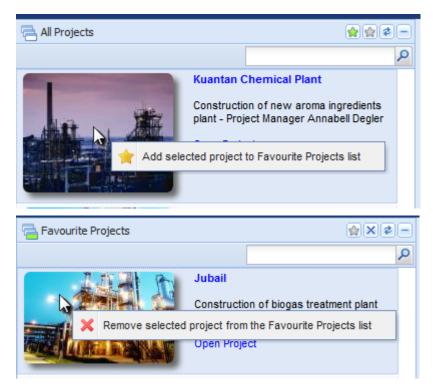


#### Selecting and removing favorite projects

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.

💷 Dashboard 📃 Reports 🙁 🔗 Events 🙁								
🗞 New Event 🔻 🚍 Distribution List 👻 🥜 Actions 👻								
🔲 Number 🔻	Site Impact	*		0	Subject	Status		
E00023	Yes	<b>∼</b> ☆			Delay of delivery	Active		
E00022	Yes	*		Ø	Delay of component E.500	Active		
E00021	Yes	☆			Damage of Turbine	Active		
E00020	Yes	Ŕ			Zugang zu Baustelle behindert durch größere	Active		
E00019	Yes	1	Click t	o add th	is document to Favourites Baugruppe Z.300	Active		
E00018	No	☆			Additional equipment missing	Active		
E00017	Yes	☆		Ø	Wrong delivery of equipment E.7900	Active		
E00016	Yes				Mangelnder Zugang zu Anlagen	Active		
E00015	Yes	☆		Ø	Lieferverzug von Baugruppe E.7900	Active		
E00014	Yes		A	Ø	Design change requested by the customer	Completed		
E00013	Vee	<u></u>			Design change	Completed		

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.

FIRS:Claim		ashb	oard 🛛 🍝 Favour	rite Events 🗵		
E Views -	😽 N	😽 New Event 🔻 💭 Distribution List 👻 🥜 Actions 👻				
▲		<b>k</b>	Number 👻	Subject	Status	
My Responsible Discipline Events My Involved Disciplines Events			E00103 E00101	Delay of Equipment Additional pump necessary	Active Active	
Favourites		k	E00100	Delayed delivery of equipment on site	Active	
Section 2017 Events			E00099 E00097	Training necessary ion site Missing equipment on site	Active Active	
Lessons Learned		-	E00094	Increase of stack high	Cancelled	
Incoming Claims		k .	E00093	Missing personal on site	Active	
Claims Contacts			E00092	Delayed parts on site	Active	
Contact Groups						

# 4 PIRS:Claim Processes &

## **Documentation**

💫 Search within project

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.

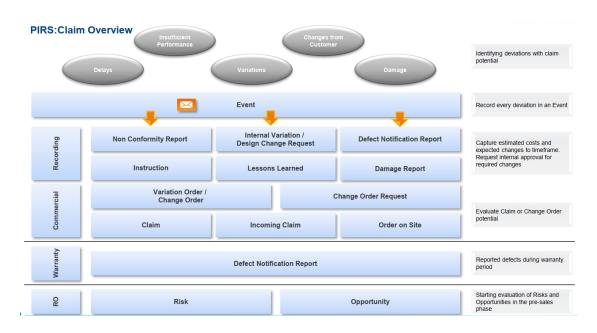
For every new document saved, PIRS:Claim will automatically assign a new unique document number that consists of a letter sequence indicating the type and a sequential number, including (if required) the involved company code.

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     International Second	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
<ul> <li>✓ Set Warranty</li> <li>E Detect Notification Reports</li> <li>✓ Rek &amp; Opportunity</li> <li>○ Opportunities</li> <li></li></ul>	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

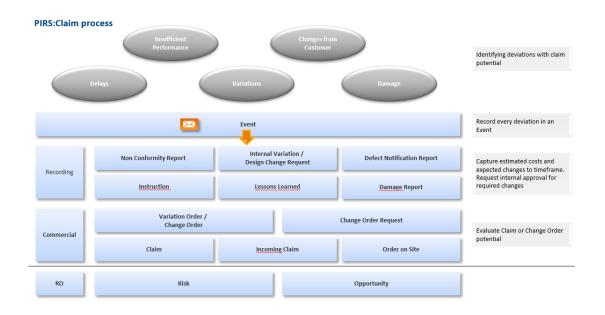
Overview	Document Type	Short Description	Team
		Requests are the simplified version of an Internal Variation.	
	Instructions	Additional instruction to the supplier or contractor to perfom work within or in addition to an existing contract. Instructions are not commercial documents and do not cause or 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.

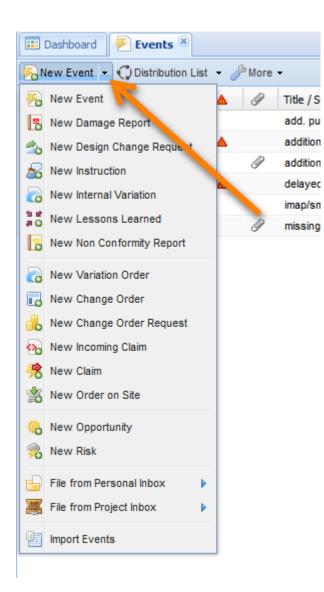


As indicated by the image, Internal Variations, Lessons Learned, Change Orders as well as Incoming Claims and Claims are meant to result from one or more Events. The Event allows PIRS:Claim users to document events or incidents that occur, to categorize and assign them and also to evaluate and assess possible impacts. Based on this identification process Followup 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 🛎	Rew Event 🕷			
🔚 Save 🙁 Close 🔒 Organi				
Subje <mark>ct*:</mark>	add. pump for filter			
Number:	<number></number>			
Statu <mark>s*:</mark>	Active	Caused by*:	SOBIS Software GmbH	*
Responsible Discip <mark>line*:</mark>	Project Management	Тур <mark>е*:</mark>	Change	*
Involved Disciplines:	Procurement× × •	Status of Execution:	Detail-Engineering	*
	Commissioning ×	Purchase Order:		
Engineer:	Iris Brokmeier <iris.brokmeier@sobis.< td=""><td>Location:</td><td>Site</td><td>~</td></iris.brokmeier@sobis.<>	Location:	Site	~
Potential Clai <mark>m*:</mark>	● Yes ○ No	Site Impact: Reported on:	O Yes  No	
Potential Incoming Clai <mark>m*:</mark>	○ Yes			
Reported b <mark>y*:</mark>	Tom Hollmann <tom.hollmann@sobis td="" 🗸="" 🗸<=""><td></td><td></td><td></td></tom.hollmann@sobis>			
Description Attachments	Estimated Time Impact Estimated Cost Impact	Follow Up External Links A	Access	
Font Family   Font Size	•   B / U ARC   📰 🔄 🗐 🚺	-   🛍 🛍   🗛 🎲   🗄 • 🚍	• 🛊 ≢ 🕊	
A - 🕸 -   🚥 🐳   😭	== ==   f <sup>**</sup> =↓ ] ≯   <sup>1</sup> / <sub>2</sub>			
Instruments are supplied	onal installation of pump for the filter. by supplier programming to be done by us.	2		

This document and any information or descriptive matter set out hereon are the confidential and intellectual property of SOBIS Software GmbH and must not be disclosed, loaned, copied or used for any other purpose without the written permission of the SOBIS Software company.

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  $\triangle$ .

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 <u>Create Cross</u> <u>References</u>.

	·					
3\$0	ross References 👃 Downl	oad attachr	ments			
	Number 🔺	Ø	Туре	Title / Subject / etc.	Last modified	Modified by
	1 E00009		- 🔛	Additional Filter requested from customer	10.01.2018 09:19	Annabell Degler
	2 E00010	1	- 🔛	Change Request from Supplier	10.01.2018 08:36	Annabell Degler
	3 E00011		- 🔊	MAngelhafte Lieferung	10.01.2018 14:10	Annabell Degler

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.)

who can n	ead this docum	ent?					
o All							
O Docume	ent author and	following contacts / gr	oups				
Who can e	dit this docum	ent?					
_							
Docume	ent author and	Claim Manager only					
	Document author, Claim Manager and following contacts / groups						

#### 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.

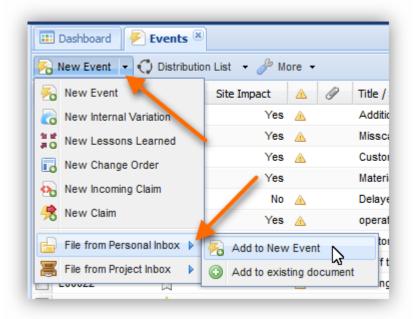
Once an Event is saved, it automatically receives a unique document number. Compare with highlighted area in the screenshot below. Furthermore, additional buttons appear within the document action bar.

📰 Dashboard 🛛 🕖 Events 🛎 🖉 Event - E000033 🛞				
Save 🙁 Close 🕠 Distrit	oution List 🔹 🚰 Organise 👻 🥜 More 👻 😮 Help			
Subject*:	Recycle Gas Scrubber - Start-up Equipment			
Number:	E000033			
Status*:	Active			
Responsible Discipline*:	Machinery			

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

#### 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.

🤌 PIRS Claim	- Login to your personal mailbox
User name:	project.manager@demo.sobis.com
Password:	•••••
	Log in Cancel

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.

S	BIS
---	-----

🔏 PIRS Claim - Add E-Mail to	file to New Event		
Select E-Mail from your Pers	onal Inbox		
Folder: INBOX	Load: All 🗸 Reload 🔒 Cle	ar Filters	P
🗖 Date 🗸	From	Subject	
01.06.2016 10:23	Annabell Degler <annabell.degler@sobis.com></annabell.degler@sobis.com>	Jubail: New Event created for E00144 - Change Request Herr Farrad	^
01.06.2016 08:28	Customer <customer@demo.sobis.com></customer@demo.sobis.com>	Request for change	
26.04. Select or cha	ange the folder obis.com	Error while delivering correspondence	
	our personal	Request for change	
20 04 040 46:40	wish to display emo.sobis.com>	Official Comment - Documents approved with comments	
20.04 1016 14:54	Customer <customer@demo.sobis.com></customer@demo.sobis.com>	Request for change	
20.04.1016 14:54	Engineer <engineer@demo.sobis.com></engineer@demo.sobis.com>	Baustellenbehinderung	
08.04.2016.10:36	Annahell Deoler <annahell deoler@sobis.com=""></annahell>	Approval required for M00085 - Rehinderungsanzeige	¥
Page 1 of 12	▶ N   æ	Entries 1 - 20 of ~ 231 Entries per page 20	*
Request for change		\$	8
Subject: Request for cha From: Customer <cust< td=""><td>ange tomer@demo.sobis.com&gt;</td><td></td><td>_</td></cust<>	ange tomer@demo.sobis.com>		_
Click here for a preview of	f the selected mail		
Cancel		Next =	

🕅 PIRS Claim - Add E-Mail to file to New Event						
Select E-Mail from your Personal Inbox						
Folder: INBOX 🗸 Load: All	🛛 🍣 Reload 🔹 📆 Cle	ar Filters		P		
Date - From		Subject				
01.06.2016 10:23 Annabell Degler <annab< td=""><th>ell.degler@sobis.com&gt;</th><th>Jubail: New Event created for E00144 -</th><th>Change Request Herr Farrad</th><td>^</td></annab<>	ell.degler@sobis.com>	Jubail: New Event created for E00144 -	Change Request Herr Farrad	^		
☑         01.06.2016 08:28         Customer <customer@c< td=""></customer@c<>	emo.sobis.com>	Request for change				
26.04.2016 16:44 project.mailbox@demo.s	obis.com	Error while delivering correspondence				
26.04.2016 15:14 Customer <customer@c< td=""><th>emo.sobis.com&gt;</th><th>Request for change</th><th></th><td></td></customer@c<>	emo.sobis.com>	Request for change				
26.04.2016 15:12 Customer <customer@c< td=""><th>emo.sobis.com&gt;</th><th>Official Comment - Documents approved</th><th>d with comments</th><td></td></customer@c<>	emo.sobis.com>	Official Comment - Documents approved	d with comments			
20.04.2016 14:54 Customer <customer@c< td=""><th>emo.sobis.com&gt;</th><th>Request for change</th><th></th><td></td></customer@c<>	emo.sobis.com>	Request for change				
20.04.2016 14:54 Engineer <engineer@de< td=""><th>mo.sobis.com&gt;</th><th>Baustellenbehinderung</th><th></th><td></td></engineer@de<>	mo.sobis.com>	Baustellenbehinderung				
08.04.2016.10:36 Annabell Denler «annab	ell dealer@sabis.com>	Approval required for M00085 - Behind				
◀ Page 1 of 12 ▶ ▶   2		Entries 1 - 20 of	~ 231 Entries per page 20	~		
Request for change				88		
Click here to report selected mail				^		
Subject: Request for change From: Customer «customer @demo.sobis.com > To: 'Annabell Degler' <project.manager@demo.sobis.com> Change Requests of (99,6 KB)</project.manager@demo.sobis.com>						
Dear Mrs Degler, Click to download file - Change Requests.pdf						
due to internal variations, we need to ask you to make certain adjustments and changes to the services stated in our contract agreements. Attached you will find a list of proposed changes. Please confirm that you have received this request for changes and send us your change proposal.						
Cancel			Next =			

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

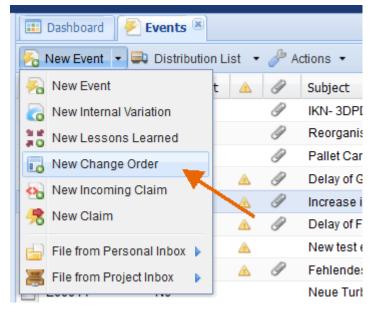
Usually an event or an incident stands at the beginning of each process in Claim Management. Following our Claim Management Standard, those events and incidents are supposed to be recorded as an Event in PIRS:Claim regardless of its appeared severity.

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".

💷 Dashboard 🛛 🕗 Events 🗷						
🗞 New Event 💌 킂 Distribution List 👻 🥜 Actions 👻						
🔲 Number 🔺	Site Impact		Subject			
E00004	No	Ð	IKN- 3DPDS Planning			
E00006	No	Ð	Reorganisation - Reassignment or			
E00007	No	Ð	Pallet Cars			
E00008	No 🤞		Delay of Geo-technical report and i			
F00009	Yes ⊿		Increase in Stack heights from 66r			
E00010	No 🤌	Ø	Delay of Financial closure by Clien			



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

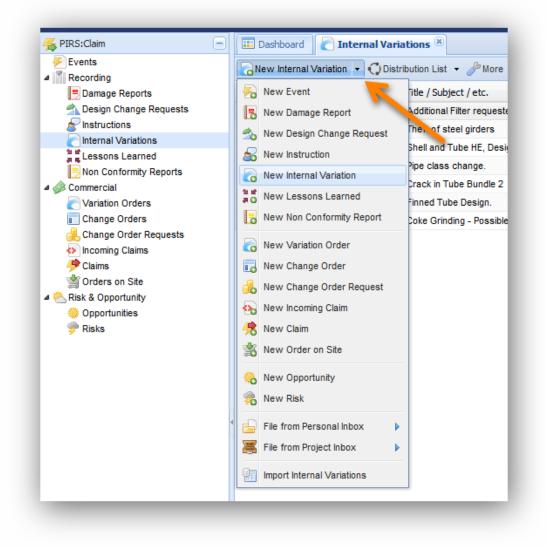
Internal Variations are one of the PIRS:Claim follow up documents that are used to document deviations and variations that effect internal processes and calculations.

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.

Subject*:	Cranes		1	
Number:	<number></number>			
Status of Execution:	Basic-Enginering	✓ Status*:	10. In Preparation	
		Type of Change:		
Responsible Discipline*:	Offering	Location:	Main Office	
Issued by:	Iris Brokmeier <iris.brokmeier@sobis.cc< th=""><th>v Issued on:</th><th>20.06.2018</th><th></th></iris.brokmeier@sobis.cc<>	v Issued on:	20.06.2018	
Description A	ttachments Workflow Estimated Time Imp	pact Estimated Cost Impact	Events External Links Access	
	ont Size 🔻 B I U 🗛 🚍	= =   🤊 🦿   🛅 🎬	▲公 日・日・  律律 🦛	
Font Family 🔻 F				
	ont Size 🔹 B I U ABC 🗐 🚍	= = 🔊 (* ) 🛅 🎬	🏔 🎎   田・田・  徳 律 🥨	

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.

Approval Configuration:	Internal Approval for additionale costs (	free ch	ioice d	of ap	oprover)		
Start Workflow 🕅 Rese	t Workflow						
Function	Responsible(s)				Status	Date	Signature
Start workflow by user	MAX_ACCESS_CREATE_Kuantan River .			$\bigtriangledown$	Approved	20.06	Iris Brokmeier
Engineering Manager	Annabell Degler <annabell.degler@sobis.< td=""><td> 📀</td><td>8</td><td></td><td></td><td></td><td></td></annabell.degler@sobis.<>	📀	8				
Commercial Manager	Jeannette Schmitt <claim.manager@dem.< td=""><td></td><td></td><td></td><td></td><td></td><td></td></claim.manager@dem.<>						
Project Management	Adrian Kessler <project.manager@demo< td=""><td></td><td></td><td></td><td></td><td></td><td></td></project.manager@demo<>						

#### 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

🔒 New Damage Report clicking button listed under the "New..."-options. Compare

🖐 PIRS:Claim 🔤	– ] 📰 Dashboard 🕹 Events 🛎				
Events	New Event 👻 📢 Distribution List	🕶 🥜 More	•		
Recording Damage Reports	Rew Event	. 0	Title / Subject / etc.	Status	Responsible Disci
🐴 Design Change Requests	🖪 New Damage Report 📐 🛌		Pallet Cars	Completed	Calculation
Search Instructions	New Design Change Reques.		Coke Grinding - Possible change from open t	Cancelled	Accounting
Internal Variations Lessons Learned Lessons Learned Variation Orders Commercial Variation Orders Change Order Requests Claims Cl	Rew Instruction		Start-Up Belt Conveyor - Start-up Equipment	Cancelled	Civil
		02	Delay of turbine to project site due to breakdo	Active	Construction
	New Internal Variation		Customer changed Environmental specificati	Cancelled	Vessels
	New Lessons Learned	A	Sile. cers on valves 351LV6601, 351PV6602A	Completed	Machinery
	📘 New Non Conformity Report	A	Finned Tube Design.	Active	Process
	Rew Variation Order	A	Remove by-pass for valve 340FV1152.	Cancelled	Construction
			E7.009 Hearth Layer Screen, E7.010 Return F	Active	Calculation
	New Change Order		Additional Items from PID Review	Cancelled	Secretary
	🗸 🚠 New Change Order Request	A	Additional Analysers	Completed	Process
	New Incoming Claim		Insurance by CANDOR	Completed	Equipment Erec
	New Claim	A	IKN- 3DPDS Planning	Completed	Noise Control
	🖄 New Order on Site		Overtime due to delay of construction	Cancelled	Equipment Erec
			Summary: Change in burner concept	Cancelled	Electrical
	New Defect Notification Report		Additionals for Screw Conveyor/Feeder Suppl	Active	Offering
	🛞 New Opportunity	A	New engineering suggestions for heating pu	Active	Calculation
	Risk	A	Platforms and ladders at reactors	Active	Calculation
	<b>50</b> Herrick		Additional Cost	Completed	Project Manage
	🔓 File from Personal Inbox 🔹 🕨	A	Accident on site	Active	Construction
	📕 File from Project Inbox 🛛 🕨				
Views 🛛	+				

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.

📰 Dashboard 🛛 🕖 Events 🗷	🖪 New Damage Report 🗷							
Eave IN Close i Organise -								
Subject*:	Subject*: Coke Grinding - Possible change from open to closed circuit grinding							
Number:	<number></number>							
Status*:	Preparation 💌	Contractual Party:	Bewton Construction AG	~				
Responsible*:	¥	Official Police Report Date:						
Date of Damage*:		Official Police Report No:						
Purchase Order:		Local Police Station:						
Description of Occurrence:			2					
Description of Damage:			6					

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.

Currency:		EUR				*	
Estimated Cost of	Damage	EUR					
Amount:	vanage	USD				27.00	
Announc.					30.0	37,00	
		-					
Description Attachments	Cost Impact	Detais	Events	External Links	Access		
Currency:	EUR			~		Project currency: EUR	
				1000			
Estimated Cost of Dam	age						
Amount:				58.637,00		58.637,00 EUR	
	-			160,00		58.637,00 EUR	
Amount: Hours:				58.637,00 160,00		58.637,00 EUR	
Amount: Hours: Final Cost of Damage				160,00			
Amount:				160,00		58.637,00 EUR 60.500,00 EUR	

"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.

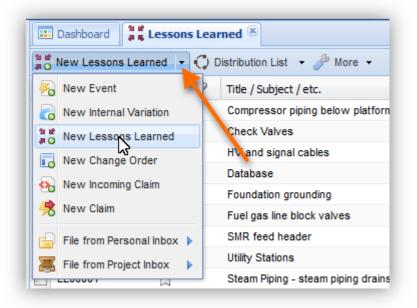
Save 🔀 Close 🥑 Org	anise •									
Status*:	Preparation			~	Contractual Party:		SOBIS Ind	la		
Responsible*:	All Farrad <	farrad@demo.sobis.com	××	*	Official Police Repo	rt Date:	23.10.201	8	3	
Date of Damage*:	23.10.2018	3			Official Police Repo	rt No:	No:23445	6		
Purchase Order:	PO:SOBIN23				Local Police Station	n:	XYZ Polcie	Station	n	
Description Attachment	s Cost Impact	Details Events	External Links   Ac	cess						
Noticed During*:		Normal Operation		~	Assessment by Legal	Departm	ent:	(	⊖Yes ⊖No	
Kind of Incident*:		Flooding		~	Corrective Action Imp	plemente	d/NCR No:		NCRNO:234576	
Place of Damaged Produ	ct*:	Site		~	Distribution:				Accident×	× ~
Cause*:		Faulty instruction		~	Distribution Other:					
Incident Responsible*:		Contractor		~						
Witnesses @ Aqd										
🔾 Add 💭 Ede 🗙 Rer	rove First Name Mc	Postal Address No.12, XYZ Street	Country Germany	Company SOBIS	y Phone 374736437	Mobile 978748	Ema 736 Mc.	il alister@.		
🔾 Add 💭 Ede 🗙 Rer	First Name Mc						736 <sup>•</sup> Mc.			
🔾 Add 💭 Ede 🗶 Rer	First Name Mc	No.12, XYZ Street				978748	736 <sup>•</sup> Mc.			
🔾 Add 💭 Ede 🗶 Rer	First Name Mc	No.12, XYZ Street	Germany			978748	736 <sup>•</sup> Mc.		A CONTRACTOR OF	
🔾 Add 💭 Ede 🗶 Rer	First Name Mc	No.12, XYZ Street PERS:Claim - Witness First Name*:	Germany	SOBIS		978748	736 <sup>•</sup> Mc.		6.	
🔾 Add 💭 Edit 🗙 Rer	First Name Mc	"No.12, XVZ Street PERS:Claim - Witness First Name*: Last Name*:	Germany Al Fareed	SOBIS		978748	736 <sup>•</sup> Mc.			
🔾 Add 💭 Edit 🗙 Rer	First Name Mc	"No.12, XVZ Street PERS:Claim - Witness First Name*: Last Name*:	Germany Al Fareed	SOBIS		978748	736 <sup>•</sup> Mc.			
🔾 Add 💭 Edit 🗙 Rer	First Name Mc	"No.12, XYZ Street PIRS:Claim - Witness First Name": Last Name": Postal Address:	Germany Al Fareed No11, ABC Stre	SOBIS		978748 X	736 <sup>•</sup> Mc.			
Add GEdt X Rer	First Name Mc	"No.12, XVZ Street (PIRS:Claim - Witness) First Name": Last Name": Postal Address: Country: Company: Phone:	Germany Al Fareed No11, ABC Stre Germany	sobis		978748 X	736 <sup>•</sup> Mc.			
Add GEdt X Rer	First Name Mc	"No.12, XYZ Street PIRS:Claim - Witness First Name": Last Name": Postal Address: Country: Company:	Germany Al Fareed No11, ABC Stre Germany Piping GMBH	sobis		978748 X	736 <sup>•</sup> Mc.			

### 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.

📰 Dashboard 🛛 🖗 Events 🛎	Damage Report - DR_BEW_00001 🛞	
Save 🚺 Close 🔿 Distri	bution List 👻 🗃 Organise 👻 🥜 More 👻	
Subject*:	Coke Grinding - Possible change from open to closed circ	uit grinding
Number:	DR_BEW_00001	
Status*:	Preparation	<ul> <li>Contractual Party:</li> </ul>
Responsible*:	Beverley Mcgavisk <customer@demo.sobis.com></customer@demo.sobis.com>	Official Police Report
		Official Police Report
Date of Damage*:	14.02.2019	Local Police Station:

### 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.

📰 Dashboard 🛛 🗯 🕻 Le	ssons Learned 🙁  🗯 Les	ssons Learned - Ll	L00009 🗵		
📄 Save 🙁 Close	🗘 Distribution List 👻 🗧	🖁 Organise 👻 🥜	More 👻		
Subject*:	Compressor piping belo	w platform		1	
Number:	LL00009				
Status*:	Cancelled	~	Category*:	B = important issue	~
Responsible Discipline*:	Accounting×	V	Involved Disciplines:	Civil×	×v
				2	
Proposed Actions: This is very much de	pendent on the Plot Lay	/out.This type of is	ssue should be highlighte	-	ability" review.

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 <u>Common Functions</u>.

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.

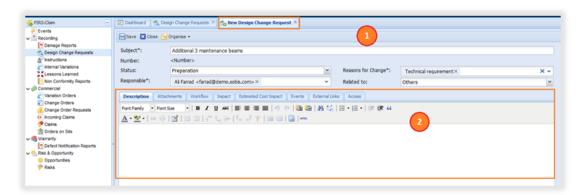
# S BIS

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 <u>Internal Variation</u>.

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.

" Recording	PoNew Design Change Request .	Distribution List • PMore •					Q,
Damage Reports	🐁 New Event	Subject	Status	Responsible	Reasons for Change	Est. Total Cost	Next appro
🐴 Design Change Requests	S New Damage Report	Pipe class change	Waiting for Approval	Karsten Seifert «kars	Experience feedback	3.655,00 EUR	MAX_ACO
Instructions Internal Variations	A New Design Change Request	Additional 3 maintenance beams	Settled	Catalina Holimann «cl	Technical requirement	3.125,00 EUR	
Classons Learned     Mon Contrantly Reports     Change Chorer Reports     Read A Copportunity     Opportunity	Reve hattycelon     Reve hattycelon     Reve hattycholon     The we hattycholon     Reve hattycholon     Reve hattycholon     Reve Nan Contormly Report     Reve Change Order Request     Reve Change Order Request     Reve Change Change     Reve Chang     Reve Chang     Reve Chang     Reve Chang     Reve Chang     Reve Chang     Reve Change	Redesign of Botton Aah Bunker	Wating for Approval	ins Brokmeer «ins.br	Contractual requirement, Technical requirement	0.00 EUR	iris Brokm
🍄 Riaks	New Defect Notification Report           New Opportunity           New Risk           Ple from Personal Inbox						

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.

Subject*:	Additional 3 mainte	nance bea	ms								
Number:	<number></number>										
Status:	Preparation				~	Reasons	for Cha	nge":	Technical requirem	ent×	× ~
Responsible*:	Ali Farrad <farrad< td=""><td>pdemo.sob</td><td>ois.com&gt;×</td><td></td><td>~</td><td>Related</td><td>to:</td><td></td><td>Others</td><td></td><td></td></farrad<>	pdemo.sob	ois.com>×		~	Related	to:		Others		
Description Attacher			Estimated Cost Impact	Events	External Links						
Start Workflow	DCR Apportor	al									
Function	internal appro							Status	Date	Signature	
Start workflow by user		MAX_AC	CESS_CREATE_Apollo 13	3							
Confirm solution by Engl	neer 🧯	0									

• Start Workflow

Description Attachments We	orkflow Impact Es	timated Cost Impact E	vents Posts	External Links	Access				
Approval Configuration: inte	rnal approval DCR			*					
Start Workflow 🕅 Reset Workf	low.								
Function	Responsible	(s)				Status	Date	Signature	
Start workflow by user	MAX_ACCE	SS_CREATE_Apollo 13							
Confirm solution by Engineer	armen Ho	day <supplier@demo.sob< td=""><td>s.com&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></supplier@demo.sob<>	s.com>						
Confirm solution by Project Manager	All Farrad 4	farrad@demo.sobis.com>							
Confirm solution by Contract Manage	r Carmen Ho	day <supplier@demo.sob< td=""><td>s.com&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></supplier@demo.sob<>	s.com>						
	V PIRSClaim - W Do you want to s Comment:	art the Approval Work start the workflow	_	cument?		×			

### Reset Workflow

Function		Respons	ble(s)				Status	Date
Start workflow by user		MAX_AC	CESS_CREATE_Apolio 13			Q	Approved	07.11.201
Confirm solution by Enginee	r	Carmen H	loliday <supplier@demo.sobis.com></supplier@demo.sobis.com>	0	8			
Confirm solution by Project	Manager	Ali Farrad	<pre><farrad@demo.sobis.com></farrad@demo.sobis.com></pre>					
Confirm solution by Contrac	t Manager	Carmen H	loliday <supplier@demo.sobis.com></supplier@demo.sobis.com>					
	St PIR	S:Claim - Wo	orkflow Comment				×	
	Do you Comm		set the workflow for this document? 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.

ib-category	Item	Company Cost Center	Expenses Perso	onnel	Working	Hour	Wor_	Cost	Chargeback Cost	Total Cost
		🙀 PIRS:Claim - Estimated Cost Impa	ĸt				×			
		Item":	3 monorals							
		Category:	External×				-			
		Company:	Piping GmbH				~			
		Cost Center:	Office Mannhei	m			~			
		Expenses:	3.	.000,00	EUR		~			
		Working Hours					_			
		Personnel Resources:	Site Staff				~			
		Working Hours:		50,00						
		Hourly Rate: Select		125,00	EUR					
		Working Hour Cost:	6	250,00	EUR					
		Cost (Project currency):	9	250,00	EUR					
		Chargeback Cost:	9.	500,00	EUR		-			
		Chargeback Cost (Project currency)	): 9.	500,00	EUR					
			Add Cano	et 11						

Description Attachm	vents Workflow	v Impact	Estimated Cost Imp	act Events	External Uni	ks Access					
🔾 Add 🍃 Edit 💢 Ri	emove										
Sub-category	Item	Company	Cost Center	Expenses	Personnel	Workin	Hourly Ra	Working H	Cost	Chargeback Cost	Total Cost
External (1 entry)											
3	3 monorails	Piping GmbH	Office Mannheim	3.000,00 EUR	Site Staff	50,00	125,00 EUR	6.250,00 EUR	9.250,00 EUR	0,00 EUR	9.250,00 EUR
						50,00		6.250,00 EUR	9.250,00 EUR	0,00 EUR	9.250,00 EUR

### **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.

💾 Save 🗶 Close 🕻	) Distribution List 🔻 🚔 Organise 👻 🥜 More 👻	
Subject*:	Additional 3 maintenance beams	
Number:	DCR_00002	
Status:	Waiting for Approval	~

### 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.

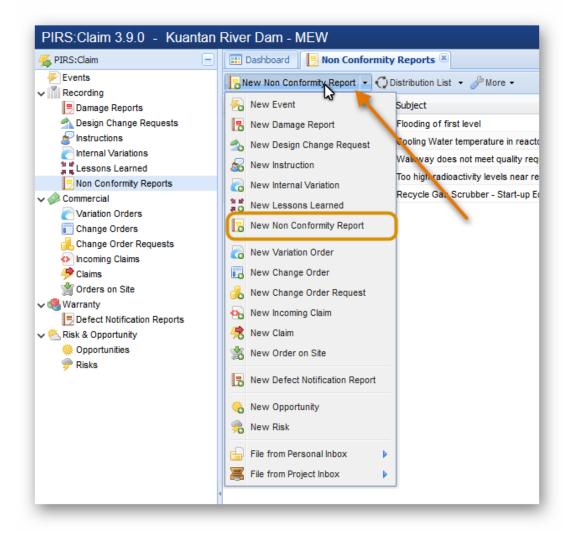
NCR is created based on an event and listed under 'recording'.

### 4.3.5.1 Create a new NCR

In order to create a new NCR, click

Rew Non Conformity Report

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.

	Enter the subject	1		
Number:	<number></number>			
Status:	Preparation	<ul> <li>Contractual Party*:</li> </ul>	Enter the Contractual Party	~
Item No:		Cause:		~
Non Conformity Class	:	<ul> <li>Proposed Disposition:</li> </ul>		~
Responsible*:	Select the responsible	✓ Purchase Order:		
Delivery Release Certificate No:		Client NCR No:		
Remarks:			2)	
Remarks:			2	
Remarks: Proposed Remedial Action:			2	~

# 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 '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.

Description:	
Remarks:	
roposed	
Remedial Action:	Concession Request
Description of	Corrective Action
solution / Corrective Action:	Instruction to scrap Demove

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 '<u>Common Functions</u>'.

#### 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.

📰 Dashboard 📃 Nor	n Conformity Reports 🗷 惧 Non Conformity Report - NCR00005 🗷
📙 Save 🔀 Close 🔇	Distribution List 👻 🗁 Organise 👻 🥜 More 👻
Subject*:	Flooding of first level
Number:	NCR00005
Status:	Preparation

### 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 <sup>New Instruction</sup> 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.

Damage Reports   Design Change Requests   Design Change Requests   New Design Change Orders   Change Orders   New Change Order   New Variation Orders   New Change Order   New Change Order   New Order on Ste   New Oportunity   New Oportunity	Events	SNew Instruction 🔹 🗘 Distribution Li	st 👻 🧬 More 👻				
Rew Risk       Image: File from Personal Inbox		New Event         New Damage Report         New Design Change Request         New Instruction         New Instruction         New Lessons Learned         New Lessons Learned         New Variation Order         New Non Conformity Report         New Non Conformity Network         New Change Order         New Incoming Claim         New Order on Site         New Order on Site         New Opportunity         New Rusk	Subject Accident on site - install new excavator Accident on site - Remove broken excavator	Active Preparation	Karsten Seifert <clai Karsten Seifert <clai< th=""><th>SOBIS Software GmbH SOBIS Software GmbH</th><th>13.12.2018 13.12.2018</th></clai<></clai 	SOBIS Software GmbH SOBIS Software GmbH	13.12.2018 13.12.2018

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

🖐 PIRS:Claim 📃	🛛 Dashboard 🛛 👷 Instructions 🛝 😹 New Instruction 🌂
PIRS-Claim      Parts-Claim      Prescuring      Denroge Reports      Rex & Opportunity      Prests      Prests      Denroge Reports      Denroge Repor	Satubard Protectors &  Accident on site - instal new excavator Subject*: Accident on site - instal new excavator Subject*: Accident on site - instal new excavator Status: Preparaton V Contractual Party*: Piping GmbH V Responsible*: Proparaton V Contractual Party*: Piping GmbH
En Views +	ontractor beleves instruction constitutes a variation*:
Controlling and Reporting     Address Book     +	urchaser acknowledges instruction constitutes a variation*:   Applicable  Not applicable

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.

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.

🔚 Save 🔀 Close 🔿 Distrib	oution List 👻 😑 Organise 👻 🥜 More 👻
Subject*:	Accident on site - install new excavator
Number:	I_SOB_00002
Status:	Active

# 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.

cid wagons w	Action rder Events Il be equipped with the mova	ble acid Di	le:	1 ocal Contract Christen Kennaugh <christen@kennaugh.co ng / unloading nozzle which will be located Pump, see item No: 2037 00 00 of the att</christen@kennaugh.co 	on the
v     v     v     v     v     v     v     v     v     v     v     v     v     v     v     v     d wagons will	Action rder Events Il be equipped with the mova	Responsib Posts with a sing	le:	ocal Contract Christen Kennaugh < christen@kennaugh.co ng / unloading nozzle which will be located	on the
Change Ord	Action rder Events Il be equipped with the mova	Responsib Posts with a sing	le: Access	Christen Kennaugh <christen@kennaugh.co< th=""><th>on the</th></christen@kennaugh.co<>	on the
× ⊽ Change Ord	rder Events	Posts with a sing	Access gle loadir	ng / unloading nozzle which will be located	on the
Change Oro	ill be equipped with the mova	with a sing	gle loadii	ng / unloading nozzle which will be located	
t wagons will	ill be equipped with the mova	with a sing	gle loadii	ng / unloading nozzle which will be located	
cid wagons w	with the mova	ble acid Di	-		
cid wagons w	with the mova	ble acid Di	-		
			02 rev3.	NUMP, see item to: 2037 to to of the act NCS requested SOBIS to include one acid v in shall be used for unloading of the star-up	vagon
				2	
ions and 2 a	acid truck acid	loading sta	ations.		
				N	
					 }

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...".

Description Attachments	Change Notice Change Propos	sal Change Order	Events	Posts Acces
Change Notice Number	CN-00006			
Cost of Preparation:		250,00 EUR	~	
Change Notice Date:	08.08.2016		•	
Instruction required until:	12.08.2016		•	
💿 Ard 🍃 Edit 🗙 Remo	ve			
Add a new Cost Calcula	ation Category	Company		Total Cost
1 Engineering	Internal/Engineering\Planning	SOBIS Software Gmb	н	14.080,00 EUR
2 Material	External/Supplier	KMG Limited Ltd.		108.760,00 EUR
Total:	122.840,00 EUR			

Description Attachments	Change Notice Change Proposal Change Order Events Posts Access
Change Proposal Number	CP-01017
Cost of Preparation:	250,00 EUR Y
Change Proposal Date:	
Instruction required until:	
Add Z Edit X Remo	Category Copy Cost Calculations from Change Notice
Total: Time Impact:	0,00 EUR

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.

	nge Orders		_			
Subject*: Number: Status*: Basis*: Involved Parties: Description Attachmu Change Proposal Numb	LOCAL CO CO0011 Active Contract SOBIS S ents Cha	on List • 🔗 Organise • ONTRACT Enlargement of Negligence Software GmbH× ange Notice Change Pro		Create PDF Show url Show access Show log Download attachments	tract Agreement: on Responsible: nts Posts Acco	Local Con Christen
Cost of Preparation:				250,00 EUR 🛩		
Change Proposal Date: 11.0		08.2016				
Instruction required ur	ntil: 16.0	08.2016				
🗿 Add 🍃 Edit 🗙	Remove	Copy from Change Notice	,			
Item		Category		Company	Total Cost	
1 Engineering		Internal/Engineering/Plann	ing	SOBIS Software GmbH	14.080,00 EUR	Ł
2 Material		External/Supplier		KMG Limited Ltd.	108.760,00 EUR	Ł

PIRS Claim - Select PDF Template		×
Pdf Template Name 🔺	Description	
changeorder		
changeorder.notice		
changeorder.order		
changeorder.proposal		
I 4 Page 1 of 1 ▶ 2	Entries 1 - 4 of ~ 4 Entries per page 20	~
changeorder.proposal		*
-	Created on: 08.04.2016	<u>ہ</u>
Change Order - Proposal:		
LOCAL CONTRACT Enlard	gement of Pipe Rack No. 04 (CO0011)	
General Change Order Informa		
Status	Contract Agreement	U
Activo	Local Contract	
	Create PDF Cancel	

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 "<u>Change Order</u>". 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 Variation Order offered either directly within the tool bar of the Variation Orders view or within the "New-"options of all other views.

PIRS:Claim 3.9.0 - Kuantan	River Dam - MEW	
🗲 PIRS:Claim 📃	📰 Dashboard 🛛 💽 Variation Orde	rs 🕱
<ul> <li>Events</li> <li>Recording</li> </ul>	New Variation Order - C Distribu	tion List 👻 🌽 More 👻
Damage Reports	New Event	Subject
🐴 Design Change Requests	🚦 New Damage Report	Material change for dome.
Sections	🐴 New Design Change Request	Dewatering during Construction
Lessons Learned	😹 New Instruction	new engineering suggestions for heating pump
Non Conformity Reports	Rew Internal Variation	Additional block valve for UW.
🗸 🧼 Commercial	New Lessons Learned	
Variation Orders		
Change Orders	New Non Conformity Report	
Change Order Requests Incoming Claims	Rew Variation Order	
🥬 Claims	Rew Change Order	
🖄 Orders on Site	🔒 New Change Order Request	
Varranty	New Incoming Claim	
✓ <sup>™</sup> Risk & Opportunity	📌 New Claim	
Opportunities	🖄 New Order on Site	

The new VO will open in a new tab.

📰 Dashboard 🛛 💽 Varia	ition Orders 🛞 🐻 New Variation Order	×			
📙 Save 🔀 Close 😑 🤇	Organise 👻				
Subject*:	Enter the subject				
Number:	<number></number>				
Status*:	Please select the status	<ul> <li>Contract Agreement:</li> </ul>		*	
Responsible*:		<ul> <li>Basis:</li> </ul>			~
Contractual Party*:	Select the company	<ul> <li>Purchase Order:</li> </ul>			
Work Package*:	Select the Work Package	✓ Money on*:	🔾 Debt	<ul> <li>Account</li> </ul>	
Based on:				2	
Reference Document /	Contractual Ref.:				

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.

Currency:	EUR	~		Project currency:	EUR
Maximum Amount*:			EUR		EUR
Realistic Amount*:			EUR		EUR
Settled Amount:			EUR		EUR

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 Kew Change Order Request offered to you within the "New-" options in your tool bar.

E Dashboard	🔒 Change Ord	ler Requests 🔅	🛛 🔥 New Cha	nge Orde	r Request 🗷					
E Save 🔀 Clos	se 🔗 Organis	e 🕶 🕜 testhe	lp							1
Subject*:		Enter the sul	oject							
Number:		<number></number>						Contractual Party*:	Select the company	~
Status*:				~	Reason for Request:		~			
Contract Agree	ment:						*	Purchase Order:		
Responsible*:							۲	Work Package*:	Select the Work Package	~
Description	Attachments	Workflow	Cost Impact	Events	External Links	Access				
Description:										
										2
Effect:										
Based on:										
Reference Docu	ment / Contra	actual Ref :								
	incirc y concil									

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

# S BIS

are set specifically to match your company processes and project specifics. In case there are values missing, please contact your project manager.

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

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 <u>Common Functions</u>.

### 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.

S	BIS
---	-----

Subject*:	Material transport to site (Logistics)	6		
Number:	C00007	1		
Status*:	Active 💌	Category:	Moved from Change Order	~
Basis*:	Contract Negligence	Action	Alois Bauer <management@der< td=""><td>V</td></management@der<>	V
Affected Party*:	SOBIS Software GmbH	Responsible:		
		Purchase Order:	2355698/78.2015	~
Description A	ttachments Calculation Events Posts	Access		
Background:				
Jackground.				
-				
-	cost in July 2014. It was subsequently dec	ided that they should	use Diesel provided by local supplier	on
Claimed Site Fuel	cost in July 2014. It was subsequently dec		use Diesel provided by local supplier	on
Claimed Site Fuel	cost in July 2014. It was subsequently dec vantage. started invoicing to SOBIS as fron		use Diesel provided by local supplier	on
Claimed Site Fuel			use Diesel provided by local supplier	on
Claimed Site Fuel			use Diesel provided by local supplier	on
Claimed Site Fuel site due to tax ad			use Diesel provided by local supplier	on
Claimed Site Fuel site due to tax ad Claim Effect:	vantage. started invoicing to SOBIS as from	n Aug 2014		on
Claimed Site Fuel site due to tax ad Claim Effect:		n Aug 2014		on
Claimed Site Fuel site due to tax ad Claim Effect:	vantage. started invoicing to SOBIS as from	n Aug 2014		on
Claimed Site Fuel site due to tax ad Claim Effect:	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on
Claimed Site Fuel site due to tax ad Claim Effect:	vantage. started invoicing to SOBIS as from	n Aug 2014		on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis:	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	r on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis:	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	Ó
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis:	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis:	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis: Chapter D4 Exclus	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis: Chapter D4 Exclus	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on
Claimed Site Fuel site due to tax ad Claim Effect: Since Aug 2014 f Contract Basis:	vantage. started invoicing to SOBIS as from	n Aug 2014	rered	on on

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.

Description Attachments	Calculation Events	Posts	Access	
Claim Currency:	EUR 👻		Project Currency:	EUR
Estimated Cost Impact:	3.500,00	EUR	3.500,00	EUR
Maximum Claim Amount:	3.429,15	EUR	3.429,15	EUR
Probability:	75	%		
Realistic Amount:	2.571,86	EUR	2.571,86	EUR
Settled Amount:		EUR	0,00	EUR

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.

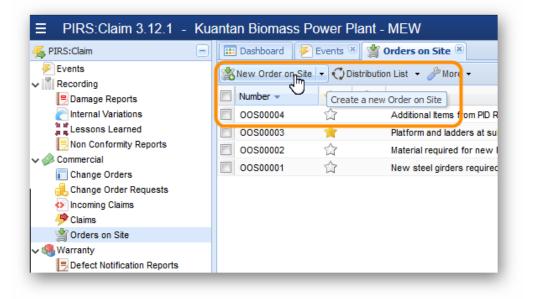
### 4.4.5 Order on Site

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.

	Dashboard 🛛 🖗 Events 🛎	<b>\$</b> (	Orders on S	Site 🗵					
<b>1</b>	lew Event 🚽 📿 Distribution Lis	st 🝷	de More	•					
8	New Event			*			0	Туре	Caused by
18	New Damage Report			$\Rightarrow$				Delay	Bewton Construct
	New Internal Variation			$\bigcirc$				Change	KMG Limited Ltd.
912	New Lessons Learned			合		<b>A</b>	I	NCR	Bewton Construct
	New Non Conformity Report			合				Q-Meldung	Grintek
15	New Non Comornity Report			合	≙		Ø	Damage	Bewton Construct
	New Change Order			合			I	Delay	Bewton Construct
6	New Change Order Request			合		<b>A</b>	I	Other	EMMA Engineering
0	New Incoming Claim			合			I	Other	Candlish Engineeri
	New Claim			合		<b>A</b>		NCR	Bewton Construct
				合		<b>A</b>		Change	Ministry of Electric
2	New Order on Site			合		<b>A</b>		Delay	Kogler CoKG
18	New Defect Notification Report					<b>A</b>	I	Damage	Bewton Construct
				公			I	NCR	EMMA Engineering
	New Opportunity							Change	EMMA Engineering
70	New Risk			☆				Other	Ministry of Electric
	File from Personal Inbox	•		☆			Ø	NCR	KMG Limited Ltd.
	File from Project Inbox			☆			Ø	Delay	Bewton Construct
	The mont Project index			☆			Ø	Damage	EMMA Engineering



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.

Save 🔀 Close 📩	Organise 👻 🕜 testhelp_en						
Subjec <mark>t*:</mark>	Additional Cement on site						
Number:	<number></number>			Contractual Party			
Statu <mark>s*:</mark>	Preparation	~		Contractual Party:	Heidelber	gCement A	G
Responsibl <mark>e*:</mark>	Adrian Kessler <project.n< th=""><th>nanager@de 🗸 🗸</th><th>]  </th><th>Address:</th><th>Berliner S 69120 He Deutschla</th><th>eidelberg</th><th></th></project.n<>	nanager@de 🗸 🗸	]	Address:	Berliner S 69120 He Deutschla	eidelberg	
Work Packag <mark>e*:</mark>	P-0509-1-1 Project Mana	gement 👻					
Delivery Option:	FCA - Free Carrier	*		Phone:			
Order date:	15.06.2020		1	E-Mail:	sales@he	idelbergcen	nent.de
PSP Element:							
Scope / Price De	livery / Invoice Attachments	Workflow Ev	ents (1)	External Links	Access		
🕜 Add 🍃 Edit 🗙 F	emove						
Number Ite	m					Price	Price (Project currency)
Number Ite	m					Price	Price (Project currency)

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".

Scope / Price	Delivery / Invoice Attachments	Workflow Events (1)	External Links	Access		
Add Bedit	Item				Price	Price (Project currency
	) PIRS:Claim - New item				×	
	Item*: Price:	100.000 kg Cement 15.000,00	EUR	×		
	Price (Project currency):	15.000,00	EUR			
		Add S Cano	el			
Total:	0,	00 EUR				

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.

Delivery			
Delivery Date:	06.07.2020	Delivery confirmation date:	
Delivery Address:	Downing Street No 10 London	Delivery confirmed by:	*
	United Kingdom	Purchase representative:	~
		Purchase representative on site:	*
Invoice			
Invoice Address:	White House Washington	Purchaser:	×
	USA		
AT No:			

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.

	ers on Site 📧 🖄 🍏 Order on Site - OS0000	<b>)1</b> 🗷			
🔚 Save 🔀 Close 📢	Distribution List 👻 🔐 Organise 👻 🌽 More 👻	(?) testh	elp_en		
Subject*:	Additional Cement on site				
Number:	OS00001		Contractual Party		
Status*:	Preparation	•	Contractual Party:	HeidelbergCement A	G
Responsible*:	Adrian Kessler <project.manager@de< td=""><td>*</td><td>Address:</td><td>Berliner Straße 6 69120 Heidelberg Deutschland</td><td></td></project.manager@de<>	*	Address:	Berliner Straße 6 69120 Heidelberg Deutschland	
Work Package*:	P-0509-1-1 Project Management	~			
Delivery Option:	FCA - Free Carrier	~	Phone:		
Order date:	15.06.2020		E-Mail:	sales@heidelbergcem	ent.de
PSP Element:					
	Delivery / Invoice Attachments Workflow	Even	its (1) Posts Exte	ernal Links Access	
💿 Add 🍃 Edit 💥 Re	move				
Number Item	l de la construcción de la constru			Price	Price (Project currency)
🗉 EUR (1 entry)					
00001 100.	000 kg Cement			15.000,00 EUR	15.000,00 EUR
				15.000,00 EUR	15.000,00 EUR

# 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.

🔓 PIRS:Claim	🕘 🛄 Deckbeerd 🔄 Defect Notification Reports 🛎 📑 Defect Notification Report
差 Events	🖪 New Defect Notification Report 👻 💭 Distribution List 👻 🥜 More 🗸
Recording	
📒 Damage Reports	Subject
🐴 Design Change Requests	DNR00001 Material bad quality
Instructions	
C Internal Variations	
🚆 🖁 Lessons Learned	
📑 Non Conformity Reports	
🗸 🧼 Commercial	
Variation Orders	
📄 Change Orders	
뤥 Change Order Requests	
Incoming Claims	
<del>/</del> Claims	
Orders on Site	
🖉 😪 Warranty	1
Defect Notification Reports	
Biok & Opportunity	
🜞 Opportunities	
🖗 Risks	

#### Report in detail:

 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

Subject*:	Rust on outside structure			
Number:	DNR00001			
Status:	Open	Type of Issue*:	Damage	
Responsible*:	Andrew Miller <customer@demo.sobis.com>X</customer@demo.sobis.com>	Date of Incident*:	27.02.2019	(
ssued by*:	Annabell Degler <annabell.degler@sobis.com>×</annabell.degler@sobis.com>	Employer Classification*:	В	
		Acceptance as Defect:	•	
Description At	tachments Workflow Impact Estimated Cost Impact Posts	External Links Access		
Font Family 🔹 Fo	nt Size 🔹 🖪 🖌 🗓 🗚 🗑 📰 🗮 🗐 🕐 🔯	M   AA (&   E •   E •   ⊞	律 "	
	) 🖬 🗉 🗉 🕹 🗲 🐜 🖓 🖬 💷 🔒 📖			
			2	
	ality			

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.

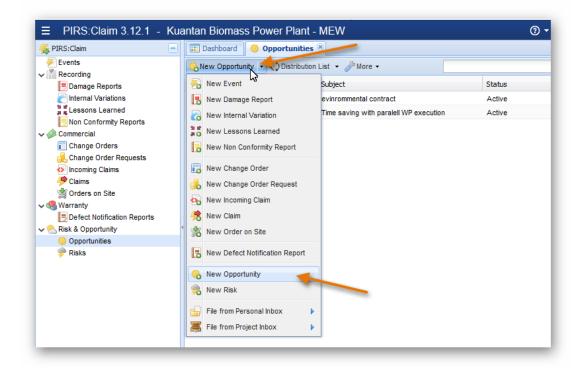
## 4.7.1 **Opportunities**

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.

FIRS:Claim -	🔝 Dashboard 🛛 😑 Opportur	ites 🔺 💊 New Opportunity 🛎		
Events     Recording	🚍 Save 🔀 Close 🚖 Orga	nise •	6	0
Durage Reports     Derage Reports     Derage Charge Reports     Derach Charge Reports     Derach Charge Reports     Derach Variation     Non Conformity Reports     Charge Orders     Charge Orders     Charge Order So     Noom Clarks     Orders on Site     Order to Site      Order to Site      Order to Site      Order to Site      Orders on Site      Orders Note      Orders	Status*: Responsible Discipline*: Opportunity Owner*:	Order for new pipes <number> Active Process Engineering Ali Farrad «farrad@demo.sobis.com&gt; X Is Bripact Heasures External Links Access</number>	× ×	
Risk & Opportunity				
🍄 Rata				
Views •				
Controlling and Reporting	L			

- 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.
- 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.

nitial Impact Category*:	Marginal =< 250.000 EUR			*
Currency:	USD 👻		Project currency: EUR	
Before Measures				
Initial Benefit*:	250.000,00	USD	212.566,96	EUF
Likelihood of Initial Benefit*:	below 50%	%		
Likely Initial Benefit:	62.500,00	USD	53.141,74	EUP
Explanation of Estimation:				
With Mangurag				
With Measures Maximum Benefit*:	1.250.000,00	USD	1.062.834,79	EUI
	1.250.000,00 above 80%		1.062.834,79	EUF
Maximum Benefit*:		%	1.062.834,79 850.267,83	
Maximum Benefit*: Likelihood of Maximum Benefit*:	above 80%	% USD		EUF
Maximum Benefit*: Likelihood of Maximum Benefit*: Likely Maximum Benefit:	above 80%	% USD USD	850.267,83	EUF
Maximum Benefit*: Likelihood of Maximum Benefit*: Likely Maximum Benefit: Total Cost of Measures: Likely Maximum Benefit minus Total Cost of	above 80%	% USD USD	850.267,83	EUI
Maximum Benefit*: Likelihood of Maximum Benefit*: Likely Maximum Benefit: Total Cost of Measures: Likely Maximum Benefit minus Total Cost of Measures:	above 80%	% USD USD	850.267,83	EUI
Maximum Benefit*: Likelihood of Maximum Benefit*: Likely Maximum Benefit: Total Cost of Measures: Likely Maximum Benefit minus Total Cost of Measures:	above 80%	% USD USD	850.267,83	EUF
Likelihood of Maximum Benefit*: Likely Maximum Benefit: Total Cost of Measures: Likely Maximum Benefit minus Total Cost of Measures:	above 80%	% USD USD	850.267,83	EUF EUF

**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.

Item*:	Additional men on site		
Cost:	5.000,00	USD	~
Cost (Project currency):	4.225,11	EUR	

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



) as shown in the below image.

😳 Add 🍞 Ed	it 💢 Remove		
Number	Item		Cost
🗄 EUR (1 entry	0		
00001	Costs for storage	-6	150.000,00 E
			150.000,00 E
🗆 USD (1 entr	v)		·
00002	Additional men on site		5.000,00 U
		<ul> <li>Comparison</li> </ul>	te a new Action Item

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

Number -	· 👌 🛛 🗄	Subject	Status	Responsible	Due Date	Reminder Date	Category
	G PIRS:Claim - New	Action Item - 000001-00002: Ad	lditional men on s	site			
	Subject*:	O00001-00002: Additional	men on site - req	uest offer			
	Responsible:	Jeannette Schmitt <claim< td=""><td>.manager@demo.</td><td>sobis.com&gt; ×</td><td></td><td>•</td><td></td></claim<>	.manager@demo.	sobis.com> ×		•	
	Category:	Task×				× •	
	Status*:	Open				*	
	Due Date:	26.06.2020		Reminder Date:	25.06.2020	C	1

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.

🔚 Save 🔀 Close ( Distribu		
	ution List 👻 📴 Organise 👻 🥜 More 👻	
Sul_Save document	Time saving with paralell WP execution	
Number: 0	000001	
Status*:	Active	*
Responsible Discipline*:	Calculation	*
Opportunity Owner*:	Annabell Degler <annabell.degler@sobis.com>×</annabell.degler@sobis.com>	~

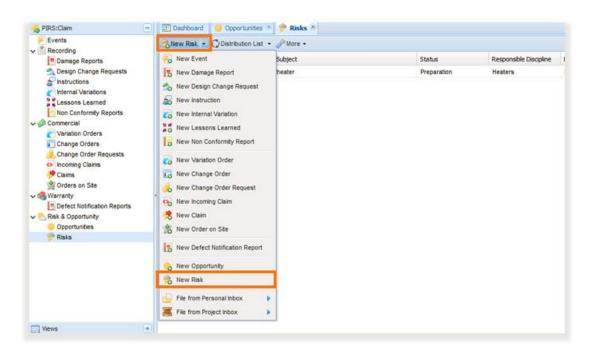
## 4.7.2 Risk

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.

😽 FIRS:Claim 📃	🔳 Dashboard 🛛 🥐 Risks	* 😤 New Risk *				
Events	Save 🖸 Close 😁 Or		(	1		
Damage Reports	Subject*:	Leakage				
a instructions	Number:	<number></number>				
Lessons Learned	Status*:	Preparation	-	Risk Category*:	Operation	*
Non Conformity Reports	Responsible Discipline*:	Process Engineering	~	Occurrence of Risk*:	17.06.2020	
Variation Orders	Risk Owner*:	Tom Mc Allister <mcallister@demo.sobis.com>×</mcallister@demo.sobis.com>	*			
Change Orders	Description Attachm	ents Impact Measures External Links Access				
<ul> <li>Incoming Claims</li> </ul>	Leakage of pipel in the c	ommon area.				
Claims						
V Swarranty						
Risk & Opportunity						
Opportunities Pisks						
7 Raka			2			
			C			
Vevs +						
Controlling and Reporting +						
🛄 Address Book 🔹						

- 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.
- 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.

Initial Impact Category*:	Negligible =<	100.000 EUR			~
Currency:	USD	~		Project currency: EUR	
Before Measures					
Initial Risk*:		300.000,00	USD	255.080,35	EUR
Likelihood of Initial Risk*:	75%	*	56		
Likely Initial Risk:		225.000,00	USD	191.310,26	EUR
Explanation of Estimation:					
Residual Risk*:		45.000,00		38.262,05	EUR
Likelihood of Residual Risk*:	25%	~	- 79		
Likelhood of Residual Risk*: Likely Residual Risk:	25%	11.250.00		9,565,51	EUR
	25%	11111111	USD	9.565,51 3.872,97	
Likely Residual Risk:	25%	11.250,00	USD USD		EUR
Likely Residual Risk: Total Cost of Measures:	25%	11.250,00 4.555,00	USD USD	3.872,97	EUR
Likely Residual Risk: Total Cost of Measures: Likely Residual Risk plus Costs of Measures:	25%	11.250,00 4.555,00	USD USD	3.872,97	EUR

**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.

tem*:	Additional Analysis		
ost:	15.000,00	EUR	~
ost (Project currency):	15.000,00	EUR	

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

) Add 🏾 🏹 (	Edit 💢 Remove			
Number	Item		Cost	Cost (Project currency)
EUR (2 en	tries)	×		
00001	Additional Analysis		15.000,00 EUR	15.000,00 EUR
00002	Reserve Supply		75.000.00 EUR	75.000,00 EUR
		Crea	te a new Action Item	90.000,00 EUR

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

Number 👻 🌱	🖢 🖉 Subje	ct	Status	Responsible	Due Date	Reminder Date	Category
A100004	2 R000	06-00001: Additional Analysis	Open	Annabell Degler	24.01.2018		Task
PIRS:	Claim - New Acti	on Item - R00006-00001: Add	itional Analysis				
Subjec	ct*:	R00006-00001: Additional Ar	nalysis - Request o	ffer			
Respo	Responsible:         Adrian Kessler <project.manager@demo.sobis.com>X</project.manager@demo.sobis.com>						
Catego	ory:	Task×				× •	
Status	s*:	Open				~	
Due D	ate:	26.06.2020		Reminder Date:	25.06.2020		

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.

📰 Dashboard 🏼 🏓 Risks	🗷 🎭 Risk - R00006 🗷	
	tribution List 🔻 🔗 Organise 👻 🌽 More 👻	
Save document	Soil analysis might be wrong	
Number:	R00006	
Status*:	Active	<ul> <li>Risk Cat</li> </ul>
Responsible Discipline*:	Construction	<ul> <li>Occurre</li> </ul>
Risk Owner*:	Annabell Degler <annabell.degler@sobis.com>×</annabell.degler@sobis.com>	·

# **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.

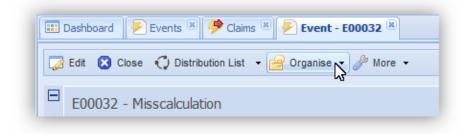
These features will be explain in the following chapters. As indicated in the following screenshots, some of the common functions are to be found within the tool bars in the left hand upper corner of the view of all PIRS:Claim document types as well as the documents individually.

😽 New Event 🕞	<ul> <li>O Distribution Li</li> </ul>		
Number +		ite Impoct 🔬 🔗	Title / Subject / et
E00033	습	Yes 🔺	Additional instrum
E00032	合	Yes 🔺	Misscalculation
E00031		Yes 🔺	Customer requires
Dashboard	🖗 Events 💌 4	🖻 Claims 🛞	
	Events 💌 4		
			)
🗏 New Claim		.ist 👻 🥜 More 🏹	

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

# S BIS

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

🔗 Organise 🔻

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 <sup>Add</sup> button or import the files via drag & drop as illustrated in the screenshot below.

•	Name	Date modified	Туре	Save 🔀 Close 🔾	Distribution List 🔹 🚰 Organise 👻 🌽 More 👻	
	Baustellenbehinderung.png	05.04.2017 15:52	PNG File	Subject*:	Material change for dome.	
	Change Order Request.pdf	25.09.2008 11:15	Foxit Reader PDF	Number:	V000004	
	contract.png	19.09.2012 16:00	PNG File	Status*:	Preparation Contract Agreement: Supply Agree	ement 👻
	Delay Notification.pdf	25.09.2008 11:15	Foxit Reader PDF	Responsible*:	Annabell Degler <anna basis:="" damage<="" td="" v=""><td></td></anna>	
	Delay Notification.png	05.04.2017 15:52	PNG File		Purchase Order:	
	Minutes of Meeting.pdf	25.09.2008 11:15	Foxit Reader PDF	Contractual Party*:	Drimonus Industrias	<u>.</u>
	Official Change Order Request.pdf	22.10.2013 12:02	Foxit Reader PDF	Work Package*:	P-0509-1-7 WP WPC (Water Press)	Account
	Progess Report.pdf	25.09.2008 11:15	Foxit Reader PDF	Work Fuckage .		
	Project Information.pdf	28.01.2013 15:55	Foxit Reader PDF	Description Attack	ments (1) Workflow Cost Impact Events (1) Posts External	Links Access
	Report Engineering.pdf	22.10.2013 12:02	Foxit Reader PDF			
	schedule adjustments.png	19.09.2012 16:00	PNG File	Add X Delete	<b>N</b>	
	Site instructions.pdf	25.09.2008 11:15	Foxit Reader PDF	File 🔺		Added on
	Site pictures.jpg	13.04.2017 13:11	JPG File	Specification.z	ip (142.49 КВ)	12.12.2017 13:58
	📓 Site Report.pdf	25.09.2008 11:15	Foxit Reader PDF			
					+ Copy	
					1.144	

# 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.

Subject*:		Flooding of f	first lev	el											
Number:	<number></number>														
Status":		Preparation						Contractual Party:		Piping Gr	nbH				
Responsible*:	Ali Farrad <farrad@demo.sobis.com> × v</farrad@demo.sobis.com>						Official Police Report Date:			24.10.20	18				
Date of Damage*: Purchase Order:		24.10.2018							Official Police Report No:						
								Local Police Station:							
Description Attach		s Cost Impact	Det		ents	Externa	(Links Access								
3 Add / Remove Even	-	s    cost nibert	Des		rents	CARIE	LINA PLUESS								
	ofa)						pe Status								
Number				bject / et:		Ту	pe status		Total Cost	Caused	by Respon	spie Disoprine	E Last modif M	loained by	
N	x	PIRS:Claim - Ade Events	17 Ken	iove tve	nt(s)										2
1.00	2			1	Y										~
		Number + E00019	1	4		1	Title / Subject / etc. Feed Hopper Camera Pos			Status		Responsi Electrical	ble Discipline	Caused by KMG Limited Ltd	
	E	E00018	습			9	Burner Flame Detection	aon		Complet		Construct		SOBIS Software Gr	
	E	E00010	실습			1	Main Condenser Leak			Active	PU	Machiner		Ministry of Electricity	
	E	E00016	4		-		Apparat nicht wie bestelt	e parts for turbine alpha Active			Engineering Construction Equipment Exection Construction		KMG Limited Ltd. SOBIS Software GmbH KMG Limited Ltd. Ministry of Electricity &		
	E	E00015	-				isometrie falsch geplant								
	ē	E00014	\$	4			Delayed delivery of engin								
	10	E00013	\$	4			Delay of delivery of impell								
15		E00011	☆		٠		Material change for dome			Active		Project M	anagement	Ministry of Electricity	y& 4
	<														>
	19	4 Page	1 of 2	> >1	9							t	intries 1 - 20 of ~ 29	Entries per page 20	0 ~
								¥ Add	Remove						
	Da	mage Report - «	Numb	er>											
		Number +		Site Impa	ct T	itle / Subje	ect / etc.		Type		Status		Total Cost		Re
		E00027			F	looding of	first level		Netural cet	astro	Completed			JR SOBIS Softwar	· 'o
		E00028				pe class			Change		Active			IR Ministry of Elect.	
		E00021					irmepumpe		Contract		Active	-		JR KMG Limited Ltd.	P
		E00015	00015 Isometrie falsch geplant					Experience Fee A		Active		0,00 EI	JR SOBIS Softwar	· 0	

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.

📰 Dashboard 🔗 Events 🖲	New I	Damage Report 🗵									
Save 🔀 Close 😑 Orga	inise 🗸										
Save document Subject*:	Coke Grind	Coke Grinding - Possible change from open to closed circuit grinding									
Number:	<number></number>										
Status*:	Preparatio	Warning 🙀	Party:	Bew							
Responsible*:	Beverley	Please add at least one related event to this document, then repeat the operation.	e Report Date:								
			e Report No:								
Date of Damage*:	14.02.2019	Local Police	Station:								
Purchase Order:											
Description Attachments	s Cost Imp	Details Events External Links Access									

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.

Subject*:	Additional 3 maintenance beams					
Number:	<number></number>					
itatus:	Preparation	~	Reasons for Change*:	Technical requirement×		3
tesponsible*:	Ali Farrad <farrad@demo.sobis.com>×</farrad@demo.sobis.com>	~	Related to:	Others		
Type Numb		Subject / etc.			Created by	Created
Add Remove		Subject / etc.			Created by	Created
	@ PIRS:Claim - New Extern	aal Link		×		
	Please insert one link*:					
	Please insert one link*: https://www.sobis.com	4				
		1				
			//* are allowed.			

## 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.

💷 Dashboard	🖻 Events 🛎 🖉 Event - E00017 🗵
😽 New Event 👻	O Distribution List
Number 🔻	C Distribute document
E00033	🔯 Show history
E00032	🛱 Yes 🛦

🎫 Dashboard 🛛 🛃 Ev	vents 🛞 🔁 Event - E00017 🛞
📄 Save 🙁 Close	😲 Distribution List 🗸 🤪 Organise 👻 🌽 More 👻
Subject*: Number:	<ul> <li>Distribute document</li> <li>Show history</li> </ul>
Status*:	Active

## "Distribute document"

🗘 PIRS Claim - E00017 - New Distribution List	×
Recipients:	
Adrian Kessler <project.manager@demo.sobis.com>×</project.manager@demo.sobis.com>	
Notes:	
Please review	
Send document link Send full document Add to Contacts Cancel	

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.

# S BIS

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.

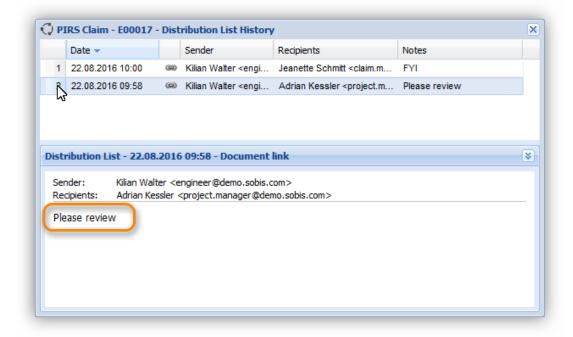
The text box titles "Notes" allows you to address the recipients with a short note.

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.

# S BIS

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 email, 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:

- 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 email 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 "<u>Events</u>" 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

Add to existing document

as indicated in the following screenshot.

	Dashboard 🖉 Events 🕷		
<b>1</b>	lew Event 👻 📢 Distribution List 👻	de More 👻	
-	New Event	▲ Ø	Title / Subject / etc.
13	New Damage Report		Customer Request
2	New Design Change Request		Baustelle nicht zugänglich
	New Instruction		Delayed delivery of engine par
	New Internal Variation	9	Gerüstaufstellung entspricht n
21 12	New Lessons Learned	9	Mangelhafte Gerüstaufstellung
<b>80</b>			Kundenanfrage
10	New Non Conformity Report		MAngelhafte Lieferung
6	New Variation Order	<b></b>	Change Request from Supplier
	New Change Order	<b>^</b>	Additional Filter requested from
4	New Change Order Request		Change of by-pass for valve 3
6	New Incoming Claim		No discharging equipment for t
	New Claim		Additional block valve for UW.
70 			Change of line size for 345HG Mechanigal linked valves 151P
20	New Order on Site		Loss check folders preparation
15	New Defect Notification Report		Delay of initial Opereation - del
-	New Opportunity		Acid Coolers material change
- <b>*0</b>			Connection to Chemical Dosing
50	New Risk	1	Dewatering dy ung Constructio
	File from Personal Inbox 🖊 🕨	😽 Add to	New Event sign Rev
æ	File from Project Inbox	Add to	existing document

Select E-Mail to file			
Folder: INBOX	🗙 Load: All 🔪 🖓 Reload 🛛 🏹 Clea	ar Filters	Q
🗖 Date 👻	From	Subject	То
12.02.2019 13:41	customer@demo.sobis.com	RE: Change Order Proposal CO_00005: zusätzliche Pumpe	project.rr 🔨
102.2019 13:37	customer@demo.sobis.com	Proposal for additional block valve	project.m
05.12.2018 12:39	Annabell Degler <project.manager@demo.sobis< td=""><td>. Kuantan - Approval completed for document SOB_CCM</td><td>Annabell</td></project.manager@demo.sobis<>	. Kuantan - Approval completed for document SOB_CCM	Annabell
05.12.2018 12:39	Annabell Degler <project.manager@demo.sobis< td=""><td>. Kuantan - Approval required for document SOB_CCM_GE</td><td>Alois Bai</td></project.manager@demo.sobis<>	. Kuantan - Approval required for document SOB_CCM_GE	Alois Bai
05.12.2018 12:39	Annabell Degler <project.manager@demo.sobis< td=""><td>. Kuantan - Approval required for document SOB_CCM_GE</td><td>Annabell</td></project.manager@demo.sobis<>	. Kuantan - Approval required for document SOB_CCM_GE	Annabell
05.12.2018 09:59	Annabell Degler <project.manager@demo.sobis< td=""><td>. Kuantan SOB/MEW/00161: Meeting Request</td><td>Annabell</td></project.manager@demo.sobis<>	. Kuantan SOB/MEW/00161: Meeting Request	Annabell
03.12.2018 10:55	project.mailbox@demo.sobis.com	Error while delivering correspondence	Annabell
03.12.2018 10:47	Annabell Degler <project.manager@demo.sobis< td=""><td>. Kuantan - Approval completed for document SOB_CCM</td><td>Annabell</td></project.manager@demo.sobis<>	. Kuantan - Approval completed for document SOB_CCM	Annabell
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PIRS:Claim will then connect with your personal inbox / your project mailbox and load all emails 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.

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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.

This document and any information or descriptive matter set out hereon are the confidential and intellectual property of SOBIS Software GmbH and must not be disclosed, loaned, copied or used for any other purpose without the written permission of the SOBIS Software company.

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## 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:

<b>•</b>	
	PIRS:claim

READER CREATOR	CLAIM MANAGER	PROJECT ADMIN
<ul> <li>Cannot create any document.</li> <li>General Read Access for Recording Documents.</li> <li>Dedicated Read Access for Commercial Documents (access to the document has been assigned explicitly)</li> <li>Edit Recording and Commercial Documents if author name is listed under Who can edit this document."</li> <li>Start, Approve or Reject Workflow of recording documents</li> <li>Add Cross References, Tags and External Links to all visible documents.</li> <li>Remove own Cross References, Tags and External Links</li> <li>Remove any Cross References, Tags and External Links when listed as editor of the document.</li> <li>Frizen mode of documents with started workflow apply to creators only</li> </ul>	<ul> <li>Create access and additional.</li> <li>Create and Read Access for all Commercial Documents.</li> <li>Edit all Documents.</li> <li>Start, Approve or Reject Workflow of all documents (independent of Workflow Configuration).</li> <li>Remove any Cross References, Tags and External Links.</li> <li>Workflow related Frozen Mode does not apply</li> </ul>	<ul> <li>Claim Manager access and additional.</li> <li>Access to project administration area.</li> <li>Delete and Restore documents.</li> <li>Delete Activity Stream Entries.</li> <li>Define Workflow Configuration.</li> <li>Belete Posts of other users.</li> <li>Reset Workflow</li> </ul>

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 <u>User</u> <u>preferences</u>).

Your individual access to a specific document can also be determined by the means of

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

# **S BIS**

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.

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🚨 Deepa /	Alex <deepa.al< td=""><td>ex@sobis.com&gt;</td><td></td><td></td><td></td><td></td><td></td></deepa.al<>	ex@sobis.com>					
🚨 Iris Bro	kmeier <projec< td=""><td>ct.manager@demo.sob</td><td>is.com&gt;</td><td></td><td></td><td></td><td></td></projec<>	ct.manager@demo.sob	is.com>				
🚨 Karsten	Seifert <karst< td=""><td>en.seifert@sobis.com&gt;</td><td>•</td><td></td><td></td><td></td><td></td></karst<>	en.seifert@sobis.com>	•				
💰 MAX_A	CCESS_ADMIN	_Apollo 13					
🚳 MAX_A	CCESS_CLAIM	MANAGERS_Apollo 13					
🚳 MAX_A	CCESS_CREAT	E_Apollo 13					
🚨 Mario N	tueller <muelle< td=""><td>er@demo.sobis.com&gt;</td><td></td><td></td><td></td><td></td><td></td></muelle<>	er@demo.sobis.com>					
a Silvio R	ichardt <silvio.< td=""><td>richardt@sobis.com&gt;</td><td></td><td></td><td></td><td></td><td></td></silvio.<>	richardt@sobis.com>					
Silvio R	ichardt <silvio.< td=""><td>richardt@web.de&gt;</td><td></td><td></td><td></td><td></td><td></td></silvio.<>	richardt@web.de>					
a Sunitha	Joshi <sunith< td=""><td>.joshi@sobis.com&gt;</td><td></td><td></td><td></td><td></td><td></td></sunith<>	.joshi@sobis.com>					
🚨 Tom M	: Allister <mca< td=""><td>llister@demo.sobis.com</td><td>m&gt;</td><td></td><td></td><td></td><td></td></mca<>	llister@demo.sobis.com	m>				
14 4 B		× N 2					

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.

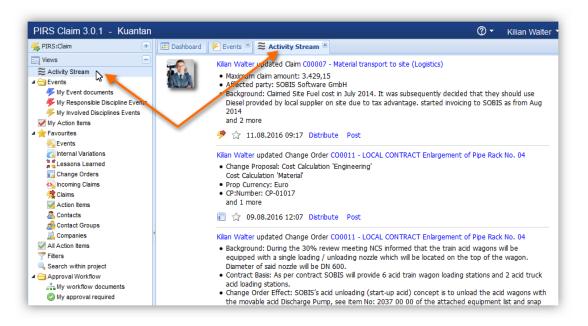
All actions listed in your Activity Stream include links to the contact who carried out the event as well as to the related PIRS:Claim item.

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.

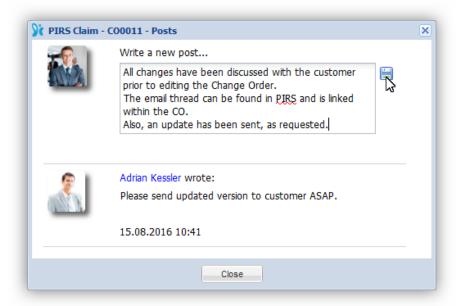
Second of all, you are able to leave a note concerning the entry in your Activity Stream by clicking "Post".

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

<u></u>	Write a new post							
	Please send updated version to customer ASAP.							
	Close							

🦹 PIRS Claim -	CO0011 - Posts	×
	Write a new post	
	Adrian Kessler wrote: Please send updated version to customer ASAP.	_
_	15.08.2016 10:41 🥂 🗙	
	Close	

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).

E Dashboard	<b>≈</b> Activit	y Stre	am 🛎 🖬 Char	ige Ord	er -	C0001	1 🗷					
🔚 Save 🔀	Close 🔇	Distri	ibution List 👻 🔓	Organi	se •	· 🥜 I	Nore 👻					
Subject*:	L	.OCA	L CONTRACT En	largem	ent (	of Pipe	Rack No. 04					
Number:	C	C00011										
Status*:	/	Active	ctive Contract Agreement: Local Contract									~
Basis*:	C	Contract Negligence  Action Responsible: Christen Kennaugh							<chri< th=""><th>V</th></chri<>	V		
Involved Parti	es:	SOBIS Software Gmb			V							
Description	Attachmen	its	Change Notice	Chang	e Pro	posal	Change Order	Events	s Posts	Access		
	Write a new post							_				
	Kilian Walter wrote: All changes have been discussed with the customer prior to editing the Change Order. The email thread can be found in PIRS and is linked within the CO. Also, an update has been sent, as requested. 15.08.2016 10:50 🔀 🗙											
	Adriar	n Kes	sler wrote:									
n de la comercia de l	Please	e sen	id updated version	on to c	usto	mer AS	SAP.					
	15.08	.201	6 10:41		_							

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.

PIRS Claim - My Settings	s - Kilian Walter
User Information	Posts
Regional Settings	
Personal Mailbox	Inform me about new posts via E-Mail
Notifications	O Do not inform me about new posts via E-Mail
User Interface	
	Save Close

## 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.

	Distribution List 👻 🚔 Organise 👻	de More	-		
Subject*:	Cooling Water temperature in	reactor	16B is too high		
Number:	NCR00004				
Status:	Waiting for Implementation	~	Contractual Party*:	Salsberg Engineering Ltd	~
Item No:			Cause:	Fabrication Failures	~
Non Conformity Class:	B: Direct risk of malfunction	or d 💌	Proposed Disposition:		~
Responsible*:	Annabell Degler <annabell.de< td=""><td>e 🗸</td><td>Purchase Order:</td><td></td><td></td></annabell.de<>	e 🗸	Purchase Order:		
	_		Client NCR No:		
Delivery Release					
Certificate No:					
	ents Estimated Time Impact	Estimated	d Cost Impact	Events (1) Posts Exter	nal Links
Certificate No:		Estimated	d Cost Impact	Events (1) Posts Exter	nal Links
Certificate No:	:   Approval for additionale	costs abo	d Cost Impact Workflow ove 10.000€ NCR (Revision ove 50.000€ CR (Revision	1)	nal Links

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

#### Start Workflow

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.

This document and any information or descriptive matter set out hereon are the confidential and intellectual property of SOBIS Software GmbH and must not be disclosed, loaned, copied or used for any other purpose without the written permission of the SOBIS Software company.

Approval Configuration:	Approval for a	dditionale costs above 10.000€ - NCR (Revision 1)	*	
🔿 Start Workflow 🏼 🕅 Reset	Workflow			
Function		Responsible(s)		
Start workflow by user		MAX_ACCESS_CREATE_Kuantan River Dam - MEW		
Engineering Manager		אוian Walter <engineer@demo.sobis.com> חית</engineer@demo.sobis.com>		
Commercial Manager	× •	Select responsible(s)		
Project Management		Agrian Kessier <project.manager@demo.sobis.com></project.manager@demo.sobis.com>		

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.

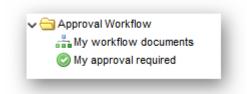
Either way, the responsible has the possibility to include a comment with their approval / rejection that will be indicated by a speech bubble within the workflow content table (compare with following screenshots).

Workflow - Standar	d Approval Workflow						
Start Workflow	Reset Workflow						
Function	Responsible(s)			Status	Signature	Date	
Engineer	Kilian Walter <engineer@demo.sobis.com></engineer@demo.sobis.com>			Approved	Kilian Walter	04.02.2014	
Lead Engineer	Erica Murphey <engineer@demo.sobis.c< td=""><td></td><td></td><td>Approved</td><td>Erica Murphey</td><td>04.02.2014</td></engineer@demo.sobis.c<>			Approved	Erica Murphey	04.02.2014	
Project Manager	Alois Bauer <management@demo.sobis< td=""><td><math>\bigcirc</math></td><td>×</td><td colspan="4">a comment has been made</td></management@demo.sobis<>	$\bigcirc$	×	a comment has been made			

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



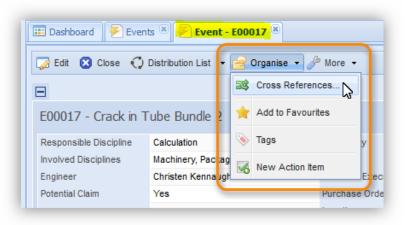
As soon as the Workflow Module has been activated, you will be presented with two more views in addition to your other personal PIRS:Claim views. First of all you can choose to look

# S BIS

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 Granise followed by the Cross References... 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 **Add** 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.

St PIRS Claim - Cross Reference	es								×
Events	Y	]							Q
Events		t		Title / Subject / etc.	Status	5	Estimate	d Cost Imp	La
Internal Variations		res		Additional instruments required in diesel line PS	Active	e		0,00 EU	JR 🔺
Change Orders		/es		Misscalculation	Active	e		0,00 El	JR
Incoming Claims		⁄es		Customer requires additional installation of oil p	Active	e		9.150,22 El	JR
A Claims		/es		Material transport to site (Logistics)	Active	e		3.500,00 El	JR
		No	<u></u>	Delayed start of site preparation work	Active	e		0,00 El	JR
		⁄es	<u>A</u>	operational support November 2015	Cance	elled		0,00 El	- M
		/		······································	<u>^</u>			40.404.00.5	>
				Er	ntries 1	- 20 of ~ 30	Entries	s per page 20	
				🖡 Add 👔 Remove					
Event									
Number 🔺	Ø Ту	pe	Title / Subjec			Last modifi		Modified by	
E00031	· · · · · · · · · · · · · · · · · · ·		Customer re	quires additional installation of oil pump in the diesel	line	29.07.201	6 09:59	Kilian Walter	r
■ V00022			Customer re	quires additional installation of oil pump in the diesel	line	29.07.201	6 11:49	Kilian Walter	
<			Upda	te Cross References Cancel					>

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.

	Dashboard 🖉 Events 🕷 🗲 Event - E00017	8					
	Edit 🙁 Close 📢 Distribution List 🝷 🗁 Organ	iise 🔻 🧬 More 👻					
	E00017 - Crack in Tube Bundle 2						
	Responsible Discipline	Calculation	Caused by				
	Involved Disciplines	Package Units, Heaters, Machinery	Туре				
	Engineer	Christen Kennaugh	Status of Execution				
	Potential Claim	Yes	Purchase Order				
			Location				
			Site Impact				
Ŧ	Attachments (2)						
Đ	Description						
Ŧ	Estimated Time Impact (22 day(s))						
	Estimated Cost Impact						
Ŧ	Follow Up (3)						
	Cross References						
	😂 Cross References 🌡 Download attachmen	Its					
	Number 🔺 🥔 T	ype Title / Subject / etc.	Last modified Modified by				
	1 E00031	Customer requires additional installation of oil pump in the diesel line	22.08.2016 10:30 Kilian Walter				
	2 IV00022	Customer requires additional installation of oil pump in the diesel line	22.08.2016 10:30 Kilian Walter				

## 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.

-	E00017 - Crack in Tube Bundle		Cross Refere	ences	
	Responsible Discipline	*	Add to Favou	irites	
	Involved Disciplines	<b>N</b>	Tags 🔓	e	rs, Machine
	Engineer Potential Claim	-	New Action I	tem	
_	IRS Claim - Select Tags	-			
> P					

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.

🔝 Dashboard 🖉 Event - E00017 🗵						
🍃 Edit 🙁 Close 📢	🍃 Edit 😢 Close 📢 Distribution List 🔹 🚔 Organise 👻 🥜 More 👻					
E00017 - Crack in T Tags: Claim, Delay	ube Bundle 2			Active		
Responsible Discipline	Calculation	Caused by	Salsberg Engineering Ltd			
Involved Disciplines	Package Units, Heaters, Machinery	Туре	Damage			
Engineer	Christen Kennaugh	Status of Execution	Construction			
Potential Claim	Yes	Purchase Order	2355698/78.2013			
		Location	Site			
		Site Impact	No			
Đ						
Attachments (2)						

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.

Dashboard 🖉 Event - E00017 🙁
Edit 🔇 Close 📢 Distribution List 👻 🔗 Organise 👻 🌽 More 👻
E00017 - Crack in Tube Bundle 2 <sup>Tags:</sup> <u>Claim</u> , Delay
Responsible Show a list of documents tagged Claim Calculation Involved Disciplines Package Units, Heaters,

📰 Dashboard 🖉 Event - E00017 🛞 🔗 Tag: "Claim" 🛞								
病 New Event 🔹 🗘 Distribution List 👻 🌽 More 👻								
	Number 👻	*	Site Impact		0	Title / Subject / etc.		
E	E00018	*	No			Budget Overrun Acid Coolers & Irri		
<b>E</b>	E00017		No		0 h	Crack in Tube Bundle 2		
E 6	E00012		No		Ø	Delay of Geo-technical report and i		

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:

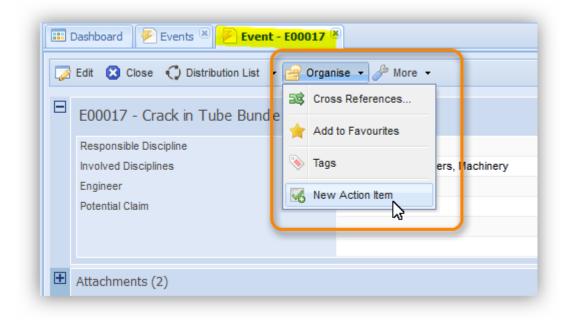
- 1. From within a PIRS:Claim Item in read or edit mode
- 2. From the Action Items View

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 edit organise - 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.

§ PIRS Claim - New	Action Item	
Subject*:	Review, add information and create Claim	
Responsible:	Jeanette Schmitt <claim.manager@demo.sobis.com>×</claim.manager@demo.sobis.com>	V
Category:	Task×	×v
Status*:	Open	~
Due Date:	29.08.2016 Reminder Date: 26.08.2016	
	Save Save & Edit Cancel	

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.

	From: Number: Subject*: Responsible:		<b>ssler</b> d information and create Schmitt <claim.manager@< th=""><th></th><th></th></claim.manager@<>			
	Involved: Category:	Task×			⊽ × ⊽	
Priority:	A - High	1 <sub>3</sub>	Status*:	Open	~	
Start Date:	22.08.2016		Completion Date:			
Due Date:	29.08.2016		Reminder Date:	26.08.2016		
Description       Attachments       Links       Posts       Access         Font Family       Font Size       I       B       I       II       Access         A • 22 •   ∞ 00       III       III       IIII       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII						

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

🖐 PIRS:Claim 🛛 🛨	💷 Dashboard 🛛 🗹	My Action It	ems 🗵
🔄 Views 📃	New Action Item	<ul> <li>Distribution</li> </ul>	n List 🔻 🌽 More 👻
≈ Activity Stream ▲ → Events	Number -		Subject
🖐 My Event documents	AI00003		Create and send Change Proposal
🖐 My Responsible Discipline Events	Al00002		Call customer
My Involved Disciplines Events	Al00001	$\odot$	Review, add information and create
My Action Items			
⊿ 🚖 Favourites			
🛃 Events			
Internal Variations			
🚆 💑 Lessons Learned			
📊 Change Orders			
💫 Incoming Claims			
/ Claims			
Action Items			
Contacts			
👼 Contact Groups			
Companies			
All Action Items			
Filters			
Search within project			
A C Approval Workflow			

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 Kew Action Item 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

😽 New Event 🤸	<ul> <li>Obstribution</li> </ul>	on List 👻	BI	Nore 👻	
🔲 Number 👻	*		4 🔽	Clear Filters	Title / Sub
E00020		<u> </u>	4 78	Save Filters 😽	No Acces
E00019		<u> </u>		2.1	Anruf von
E00018		A		Print	Lieferverz
E00017		A	L P	Create PDF	Customer
E00016		A		Versions	Baustelle
E00015		A	8	Show url	Delayed d
E00014				Show access	Gerüstaut
E00013		<u> </u>		Show log	Mangelha
E00012		<u> </u>	4	Export	Kundenan
E00011		<u></u>			MAngelha
E00010		A	4 🐣	Download attachments	Change R
E00009	*	A	4 ×	Delete	Additional
E000080			4		Change o
E00008	*		2	Refresh	No discha
E000079			<b>A</b>	Zeromata AG	Additional

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
Clear Filters	This action will clear your current view of all filters that might have been set previously. (Please also refer to chapter <u>Search and filter functions</u> )
Save Filters	This action allows you to save filter combinations that you use on a regular basis as a personal view. (Please also refer to chapter <u>Search and filter</u> <u>functions</u> )
Print	The Print option allows you to quickly print any PIRS:Claim document without selecting a print template. (Please also refer to chapter <u>Print without print</u> template)
Create PDF	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 <u>Create PDF file</u> )
Versions	Versions allow you to create and then compare different versions of your PIRS:Claim entities. Learn more in chapter <u>Versions</u> .
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 <u>Show</u> <u>document URL</u> )
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 <u>Show access to</u> <u>specific document</u> )
🛃 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 <u>Document</u> 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 <u>Excel Export</u> )
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)
2 Refresh	This action will refresh the current view.
X 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 <u>Deletion</u> <u>Concept</u> )

## 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 (<u>Create PDF file</u>) 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.

📰 Dashboard 🛛 🖉 Events 🛎 🥠 Claims 🛞 🌮	Event - E00032 🛞
😡 Edit 🗴 Close 📢 Distribution List 👻 🔗 Or	rganise 🔻 🥕 More 👻
E00032 - Misscalculation	Create PDF
Responsible Discipline Involved Disciplines Engineer Potential Claim	Projec  Show url Comm Show access Ne i P Ye s Download attachments
Attachments	
Description	
Fotimated Time Impact	

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.

	Dashboard	🕖 Events 🗵					
8	New Event	<ul> <li>O Distribution</li> </ul>	List 👻	& I	More 👻		-
	Number 👻	*	Site Imp	Tx	Clear Filters		t / etc.
	E00033	☆		76	Save Filters	$\sim$	truments required in
	E00032	☆			Drink	2	on
	E00031	☆			Print		quires additional insta
	E CO	*		P	Create PDF	Sel	ect "Greate
	E 1	☆		2	Show url		t of site proparation
	E00025	lectitem	an		Show access	3	uppon november 20
	E00024	Rimo			Show log		quires additional insta
	E00023	Event			Export		ort from Tsumeb to si
	E00022	合			Download att	achmente	ial delivered
	E00021	*		*	Download att	actiments	asbestos removal
	E00020			æ	Refresh		t of site preparation
	E00019	$\bigcirc$		N	o //	Engineering	Refractory / 3D-Mode
	F00018			N		Budget Ove	rrun Acid Coolers & Ir

ashboard 🛛 🖗 Events 🛞 🖗 Event - E00031 🔅	K)			
Edit 区 Close 📢 Distribution List 👻 🛁 Organ	iise 👻	B	More 👻	
E00031 - Custom Constitution Co	IBCOILC		Print Create PDF Show url Show access	se
Engineer Potential Claim	Yes	1	Show log Download attachments	]
Attachments				
Description				
Description: Customer requires additional insta	allation	of in	struments in the diesel li	ine f

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

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

PIRS:Claim - DR00005 - Version History			×
Create Version			
Create Version Compare Versions	Action	Comment	
1 06.06.2019 10:00 Annabell Degler	Version created manually	Prior to full approval	
	Close		

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	201

Dar	mage Report - DR_SOB_00002	Status: Accepted Preparation
	Flooding of first steplevel	
	General Damage Report Information	
Responsible	Contractual Party Party 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 Bert	ta crossed the site with heavy rains and wind and caused damage	
Description of Damage Bottom part of reactor still intact, top part has sever	re damaged and the sides are badly damaged	
	Cost Impact	
	Claim Currency - EUR	Project Currency - EUR
Amount	Estimated Cost of Damage 58.637.00 EUR	58.637.00 EUR
Hours	160,00	
	Final Cost of Damage	
Amount	EUR	EUR

## 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.)

📰 Dashboard 🖗 Events 🛎 🖗 Event - E00031 🗷						
😽 Ne	w Event 👻 🗘	Distribution	List 👻	ß	Nore 👻	_
Nu	imber 👻	*	Site Imp	Tx	Clear Filters	t / etc.
E0	0033	☆		Ъ	Save Filters	trumer
	0032 0031				Print	on Juires
		titem		A	Create PDF 2	sport to
	0025	ज्ञात्वमा क्व	-	8 3	Show url Show access Selec	of site
	0024			2	Show log	œ٩
E E0	0023				Export	ort fron
E0	0022	☆			Download attachments	ial deliv
E0	0021	*		*	Download attachments	asbes
E0	0020	☆		æ	Refresh	t of site
-	0040	~		AL.	B Fasianaia	

Dashboard 🛛 🖉 Events 🛎 🖉 Event - E00031	٩			
Edit 😢 Close 📢 Distribution List 👻 😑 Organ	ise 🗸	J- I	More 👻	
E00031 - Customer requires additional ir			Print Create PDF	sel lir
Responsible Discipline Open item, the Involved Disciplines	Bomm	_	Show url Show access	
Engineer Potential Claim	Iris Br Yes	<b>⊘</b> ↓	Show log Download attachments	

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.

🗟 PIRS Claim - Url	×
Press CTRL+C to copy the link to the clipboard:	
https://sales.sobis.com/claim/index.jsp?project=4028f4a755b258fc0155b607ed600094& objectClass=Event&id=4028f4a755c6f26f0155c9e66e48005b	
Close	

📰 Dashboard	🕗 Events 🖲				
🔏 New Event 🕞	<ul> <li>O Distributi</li> </ul>	ion List 👻	B	More 👻	_
🔲 Number 👻	*	Site Imp	Tx	Clear Filters	t / etc.
E00033			76	Save Filters	struments
V E00032	☆				on
E00031	☆			Print	quires ad
E00030	*		F	Create PDF	sport to s
E00026			8	Show url	t of site p
E00025				Show access	upport N
E00024				Show log	uires ad
E00023				Export	ort from T
E00022				Download attachments	ial delive
E00021	*		+	Download attachments	asbesto
E00020			2	Refresh	t of site p
E00019	4		N	o 🖉 Engineerin	a Defracto

### 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.

and a first the second	Calculate access	
ccess definition	Calculate access	
Who can <mark>read</mark> th	iis document ?	
All		
Who can edit thi	is document 2	
who can eut th	s document ?	
Document outbo	or, Claim Manager and following contacts / groups	
Document autit		
Adrian Kessler		
Adrian Kessler Jeanette Schmit		
Adrian Kessler		
Adrian Kessler Jeanette Schmit		

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>★</project.manager@demo.sobis.com>	
Access level: Editor Result is presented here	
Close	

## 5.10.6 Document log

E Dashboard	🕖 Events 🗷			
😽 New Event 🕤	- 🤿 Distribution L	ist 👻 🥜 I	More 👻	
🔲 Number 👻	🛉 s	Site Imp 了	Clear Filters	t / etc.
E00033	☆	76	Save Filters	strument
<b>E00032</b>	☆		- · ·	on
L. 10031	습		Print	quires a
E00030	*	1	Create PDF	sport to
E00026		2	Show url	t of site
E00025			Show access	upport 1
E00024	合		Show log	quires a
E00023	合		Export	ort from
E00022	合		Download attachme	ial delive
E00021	*		Download attachmer	asbesto
E00020		2	Refresh	t of site
E00019		N	o 🖉 Engir	neering Refracto

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.

Cre	ated:	29.07.2016 09:47		Created by:	Kilian Walter	
Las	t modified:	24.08.2016 09:33		Modified by:	Kilian Walter	
list	ory					
	Last modified	<b>•</b>	Field		Modified by	
1	24.08.2016 0	9:33	Description		Kilian Walter	
2	24.08.2016 0	9:31	Estimated Cost I	mpact	Kilian Walter	
3	29.07.2016 0	9:59	Cross Referenc	es S	Select entry to display	
]4	4 Page	1 of 1   🕨 🕅   🍣			further details	
Field	ł:	Description				^
Mod	ified by:	Kilian Walter				
Date	2:	24.08.2016 09:33		-		
Orig	jinal value:			New value:		
the 1 x Ele Pipi	e diesel line PS C PIT and 2 x FI ctrical installation ing installation t	<ol> <li>Instruments are supplie on and programming to be</li> </ol>	d by . done by .	the diesel line PS C 1 x PIT and 2 x FT Electrical installation Piping installation t	additional installation of instruments in Converter area. T. Instruments are supplied by customer. on and programming to be done by . to be done by SOBIS. d from the arreed Tie In point T-55-0009	

### **PIRS:Claim - Document log**

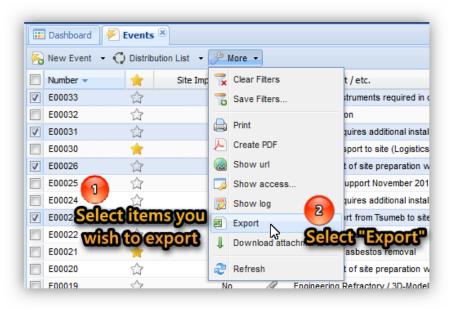
A "PIRS:Claim - Document log" window is always divided into three areas. As mentioned above, the header will always show the creation date of the document as well as its creator and the date when the document was last modified as well as by whom it was modified.

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 (<u>Search</u> 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.

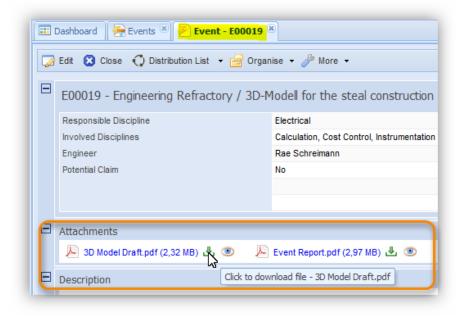
The column values of each document regardless if they are visible or deactivated within your current customize grid display will be taken into account and presented in a separate column within the excel sheet. In addition another column displaying the link to each document is also add to the excel table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

Events	6			
🝷 🗘 Distributi	ion List 👻 🥜 More 👻		Linfald attack	wante bezaliation
*	Site Impact 🔺	Title / Subject / etc.	Statu	ments by clicking b, then select
*	Yes	Material transport to site (Logisti	s) Activ	oad otion.
	Yes	Staff transport from Tsumeb to s	te Active	au otion. 3.500 00
	No	Engineering Refractory / 3D-Mod	lell for the steal Active	e 0,00
*	No	🕽 Attachments - E00019	🗙 noi	elled 0,00
	No	3D Model Draft.pdf (2,32 MB)		oleted 0,00
	No	Event Report.pdf (2,97 MB)	Click to down	nload file - 3D Model Draft.pdf
	No			neted v,v0
	No	6	mp	oleted 0,00
~	Na	A Inoronon in Stack haights from 6	Can to Olam A other	0.00



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.

Dashboard	Events				
🇞 New Event 🕞	🔿 Distrib	oution List 👻	P	More 👻	_
Number 👻	*	0	: 🔭	Clear Filters	Title / Subject / etc.
E00030	*		7	Save Filters	Material transport to site (L
E00023					Staff transport from Tsume
V E00019	☆	0		Print	Engineering Refractory / 3
E E	*	0	E	Create PDF	Budget Overrun Acid Coole
		I	8	Show url	IKN- 3DPDS Planning
E00015	ectite	ms	1 🍃	Show access	Engineering Management h
E00014 Wit	hind	eŵ		Show log	Reorganisation - Reassign
<b>E00013</b>	W W		6	Export 2	Pallet Cars missing
E00011	☆	0		Download attachment	elect "Download
E00009		0	-	Download attachmen	attachments <sup>0</sup> om o
E00008		0	2	Refresh	Missing equipment
E00007		9		No Active	Accident on site

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.

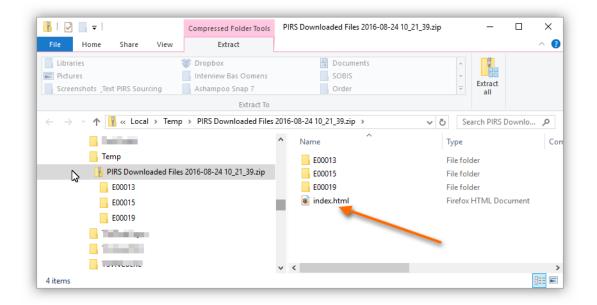
Events		⑦ ▼ Kilian Walter	-
🝷 📢 Distribut	ion List 👻 🥜 More 👻		Q
*	Site Impact A Status Title / Subject / etc.	Estimate	ed C
*	PIRS Claim - Files in progress		3
	PIRS Downloaded Files 2016-08-24 10_21_39.zip (8,57		3
	Ý	for the steal	
		o download file ste	
	9		
	9	dget transfer	
	9	Engineering	
	9		
	9	to 80m	
	9	it	
	9		
	9		
	9		6
			-

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 <u>Create Cross References</u>.

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.

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🗓 Dashboard 🛛 😤 Events 🗷 🖉 Event - E00019 🛞											
🍃 Edit 😢 Close 📢 Distribution List 🔹 🗁 Organise 🔹 🤌 More 👻											
E00019 - Engineering Refractory / 3D-Modell for the steal construction											
÷	Attachments (2)										
÷	Description										
÷	Estimated Time Impact (22 o	day(s))									
	Estimated Cost Impact										
÷	Follow Up (1)										
3	Cross References										
	式 Cross References	Download	attach	iments							
	Number 🔺		9	Туре	Title / Subject / etc.	Last modified	Modified by				
	✓ 1 E00013		Ø	Æ	Pallet Cars missing	24.08.2016 11:03	Kilian Walter				
	2 E00014		Ø	Ł	Reorganisation - Reassignment of Engineering hours	24.08.2016 11:03	Kilian Walter				
	3 E00015		Ø	€	Engineering Management hours budget transfer	24.08.2016 11:03	Kilian Walter				
	4 IV00011			2	Reactors, Design Changes	24.08.2016 11:03	Kilian Walter				
	5 IV00016				Customer requires additional installation of oil pump in the diesel line	24.08.2016 11:03	Kilian Walter				

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.

📰 Das	shboard 🛛 🕗 I	events 🗷				
😽 Nev	w Event 👻 🔿	Distribution	List 👻	B	More 👻	
Nur	mber 👻	*	Site Imp	Tx	Clear Filters	t/etc
E00	0033	☆		Ъ	Save Filters	trume
V E00	0032	☆				on
E00	0031	☆			Print	quires
E00	0030	☆		P	Create PDF	sport t
E00	0026	☆		2	Show url	t of si
E00	0025	$\Rightarrow$			Show access	uppor
E00	0024			1	Show log	quires
E00	0023	☆			Export	ort fro
E00	0022	☆		-	Download attachments	ial del
E00	0021			+	Download attachments	asbe
E00	0020	$\triangle$		X	Delete N	t of si
E00	0019	$\Rightarrow$		~	N3	Refrac
E00	0018			~~	Refresh	_run A
E FOR	047	~			· /2	D

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".

📰 Dashboard 🛛 🥬 Cla	aims 🗵 🦻 Claim - C00001 🗷		
🔚 Save 🔀 Close 🤇	Distribution List 👻 🔓 Organise 👻	P	More - ? testhelp_en
Subject*:	Additional Pump Filter		Print
Number:	C00001		Create PDF Versions
Status*:	Preparation		Show url
Responsible*: Work Package*:	Tanya Sivik <customer@dem< th=""><th></th><th>Show access</th></customer@dem<>		Show access
	P-0509-1-9 WP MW (Mechar	1 "	Show log Download attachments
	chments Workflow Calculation		
Background: Client ask for max,. a	vailability		Create file from template

File Template Nam	Descr	intion	
T claim	Desu	ihnou .	
notice			
word.detailed			
er word.notice			
ıb	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.

🔓 New Event 👻 🎚	科 Distributio	n List 👻 🥜 Ad	tions 🕶			
Number 🔻	Site Imp	ad 🔻 🔺 🖉	Subject			Status
E00025	Yes		cending	е		Completed
E00024	Yes	K↓ Sort De	escending	ry of	f engine parts	Completed
E00010	No		-	anci	al closure by Client - delay of .	Cancelled
E00009	No	Colum	ns 🕨	V	Site Impact	Cancelled
E00008	No	Filters	Þ		Туре	Completed
E00007	No		- anot our		Status	Completed
E00006	No	Ø	-		Status of Execution	Cancelled
E00005	No	I	Engineerin		Purchase Order	Cancelled
E00004	No	I	IKN- 3DPD			Completed
E00003	No	🔺 🖉	Contract D		Estimated Cost Impact	Completed
E00002	No	Ø	Budget Ove		Caused by	Active
E00001	Yes	Ø	Eigenengir		Responsible Discipline	Cancelled
					Involved Disciplines	
					Engineer	
					Location	
					Description	
					Critical Path	
					Time Impact on	
					Contract Date	
					Estimated Date	
					Estimated Delay	
					Cause of Delay	
					Effect of Delay	
					Created	
					Created by	
				V	Last modified	
					Modified by	

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 (<u>Customize your grids</u> & <u>User preferences</u>).

### 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.

	Dashboard	🖻 Events 🛎													
8	New Event 🔹	🔿 Distribution List	🔹 🥜 More 🔹												
	Number 🔻	Created	9	Site I	mpact	:		Statu	IS		Tit	le / S	ubje	ct /	etc.
	E00033	29.07.20 16 🛓	Sort Ascending	)	1	/es	<u></u>	Active	9		Ad	dition	al in	strun	nents i
	E00032	10.12.2015	Sort Descendi	na	1	/es	A	Active	9		Mis	sscal	culat	ion	
	E00031	07.10.2015			1	/es	A	Active	•		Cu	stom	er re	quire	es add
	E00030	20.10.2015 💷	Columns	►	1	/es		Active	9		Ма	terial	tran	sport	t to site
	E00026	25.04.2016	Filters	Þ		Dofe	ore 🕨	ctive	9		De	layed	l star	t of s	ite pre
	E00025	10.12.2015	4	X				Canc	elled		op	eratio	nals	unn	ort Nov
	E00024	07.10.2015 🦿	2	-		Aftei	1	•		Jul	y 201	6 🔻		►	s add
	E00023	20.10.2015 🏌	3			or.	•	М	Т	W	Т	F	S	S	n Tsu
	E00022	17.10.2015 🍸	7		-	INU	<u> /45</u>	27	28	29	30	1	2	3	elivere
	E00021	25.04.2016 🌱	r			No	A	4	5	6	7	84	-	10	stos r
	E00020	25.04.2016 🍸	3	-		No		11	12 19	13	14	15	16	17 24	te pre
	E00019	05.07.2016 🏌	3 0			No		18 25	26	20 27	21 28	22 29	23 30	24 31	actory
	E00018	05.07.2016 🌱	e a constante de la constante			No		1	20	3	4	29	-30 6	7	cid Cc
	E00017	05.07.2016 🦿	3 0			No		-	2	C			0	'	ndle 2
	E00016	05.07.2016 🦿	3 0			No					Today				ning
	E00015	05.07.2016	3 0			No		Active	)		En	ginee	ering	Man	ageme

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).

	Dashboard 🛛 🔗 🛙	Events 🖲									
8	😽 New Event 👻 🔿 Distribution List 👻 🥜 More 👻										
	Number 🔻	Created	Modified by	🛉 🖉 Site Impact 🔺 Status							
	E00033	29.07.2016	Kilian Walter	A Sort Ascending Yes 🔺 Active							
	E00032	10.12.2015	Kilian Walter	Z Sort Descending Yes 🔺 Active							
	E00031	07.10.2015	Kilian Walter	Yes 🔬 Active							
	E00019	05.07.2016	Kilian Walter	Columns No Active							
	E00017	05.07.2016	Kilian Walter	Filters							
	E00015	05.07.2016	Kilian Walter								
	E00014	05.07.2016	Kilian Walter	☆ 🖉 No Completed							

📰 Dashboard 🦂	Events 🗵									
🗞 New Event 👻 🔿 Distribution List 👻 🥜 More 👻										
🔲 Number 🔻	Created	Modified by	🚖 🖉 Site	Impact		Status				
E00033	29.07.2016	Kilian Walter	♣↓ Sort Ascending	Yes		Active				
E00032	10.12.2015	Kilian Walter	Z Sort Descending	Yes	à	Active				
E00031	07.10.2015	Kilian Walter	A.	Yes		Active				
E00019	05.07.2016	Kilian Walter	Columns 🕨	No		Active				
E00017	05.07.2016	Kilian Walter	Filters	45						
E00015	05.07.2016	Kilian Walter		## <b>*</b> W	alt					
	05 07 00 40	1200 III 0	A		_	· · · ·				

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.

💷 Dashboard 🗧	Events 🛞						
😽 New Event 👻 🌾	🗘 Distribution List 👻 🥜 More 👻						
🔲 Number 🔻	Title / Subject / etc.	Cr	eated 🔶 🔶		9	Site Impact	
E00033	Additional instrument <mark>s required in</mark> diesel lin	e <u>A</u> ↓	Sort Ascending			Yes	
E00031	Customer requires additional installation of	0. <b>Z</b> ↓	Sort Descending			Yes	
E00030	Requirement: Material transport to site (Log					Yes	
E00024	Custome <mark>r requires a</mark> dditional installation of	i 🎟	Columns			Yes	
E00001	Additional pump required		Filters		-		
			Fillers	-	**	*require	

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.

💷 Dashboard	📀 Events 🛎		
😽 New Event	🔹 🔿 Distributio	on List 👻 🥜 More 👻	
Number	* 4	Title / Subject / etc.	
E00031	W	∲↓ Sort Ascending	tional installation c
E00022	5 A		d
E00023		Sort Descending	meb to site
E00030	*	Columns	ansport to site (Lo
E00025	습		ember 2015
E00032		Filters	Yes
E00020		Delayed start of site pre	• NR
E00026		Delayed start of site pre	eparation work
E00021	*	Execution of asbestos i	removal

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 *More* button in the action bar and select the action

🔍 Clear filters

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 More - button and click



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

<b>V</b> PIRS Claim -	Save Filters	×
Title:	Events after 1st July 2016	
Description:	All Events created after 1st July 2016 last modified by Kilian.	
Public:	Yes Save Close	

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.

🔏 PIRS:Claim 🔄	🛛 🔝 Dash	iboard <mark> 🖓 I</mark>	Filters 🖲	
🛛 Views 📃	🛛 🍃 Edit	🌽 More 👻		
≈ Activity Stream		Public	Title 🔺	Description
My Action Items		No	Events after 1st July 2016	All Events created after 1st July 2016 last modified by Kilian.
Favourites		Yes	Events with Side Impact	Active events that have possible Side Impact
All Action Items		No	IV issued by me	Internal Variations issued by myself
Tilters		Yes	IV with value above 5.000 Euro	Internal Variations with cost estimation value above 5.000 Euro
Approval Workflow	•			

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.

😽 New Event ,	🗸 🔿 Distri	bution	List 👻	P	More 👻		
Number	*	9	Title /	Tx	Clear Filters		Created 🔺
E00013		Ð	Pallet	70	Save Filters		05.07.2016.
E00014		I	Reorg	0	_	neeri	05.07.2016.
E00015		P	Engin		Print	trans	05.07.2016.
E00017		Ø	Crack	F	Create PDF		05.07.2016.
E00019		I	Engin	6	Show url	e ste	05.07.2016.
E00033			Additic		Show access	line	29.07.2016.
				2	Show log		
					Export		
				Ţ	Download attachments		
				2	Refresh		

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.

💶 Dashboard	🕗 Events 🛎					
😽 New Event 🕞	🔿 Distribution	n List 👻 🥜 More 👻	delay			R
Number	🚖 🖉	Title / Subject / etc.		Created -	Sile Impaci	
E00024		Customer requires ad	ditional installation of i	07.10.2015	Yes	<u> </u>
E00031		Customer requires ad	ditional installation of o	07.10.2015	Yes	4
E00022		Wrong material delive	red	17.10.2015	No	4

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.

	Dashboard 🚽 🕗	Events	×							
1 💦	New Event 👻 🏹	) Distrib	ution l	.ist 👻 🥜 More 👻	delay				×	\$
	Number	*	9	Title / Subject / etc.		Created 🔺	Site Impact		Status	
	E00022			Wrong material delivered		17.10.2015	No		Active	1
	E00025			operational support November 2015		10.12.2015	Yes	<b>A</b>	Cancelled	
	E00020			Delayed start of site preparation work		25.04.2016	No		Active	
	E00026			Delayed start of site preparation work		25.04.2016	No		Active	
	E00021	*		Execution of asbestos removal		25.04.2016	No.		Active	
	E00001	1	Ø	Additional pump required		05.07.2016	Yes	;	Active	

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.

🗲 PIRS:Claim 🛛 🛨	Dashboard Search within project 🖲		
🔤 Views 📃	a Refresh 🗣 Clear Filters		
Activity Stream Use Stream St	Title / Subject / etc. 🚖 🖉 Number Type Last modified Modified by Created by Cr	reated	Relevance 🔻
Search within project ☐ Approval Workflow ♣ My workflow documents			

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

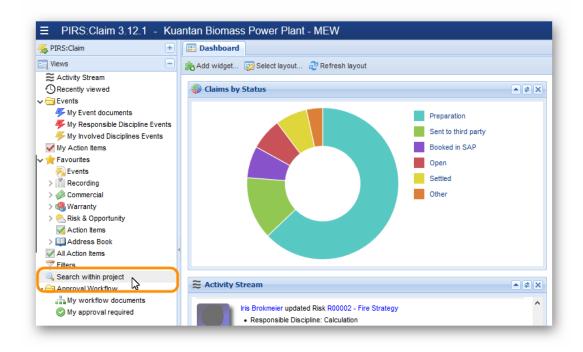
Please note that the field is only valid for the search term that it directly precedes, so e.g. the query *subject:employee safety training* would only look for the word employee within the subject field while "safety" and "training" will be searched for in all fields.

#### Note

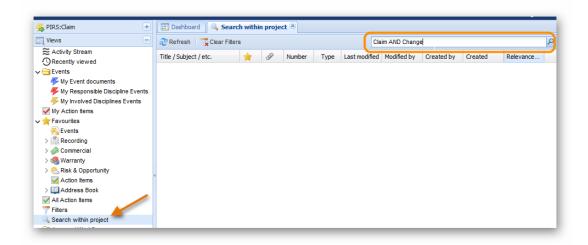
The PIRS:Claim full text search is oriented on the rules of the Apache Lucene Syntax. Should you like to inform yourself about all supported search queries and the vocabulary used in the Lucence rich query language please follow this link: <u>http://lucene.apache.org/core/old\_versioned\_docs/versions/2\_9\_1/queryparsersyntax.ht</u> <u>ml</u>.

### 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/gueryparsersyntax.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.

🔁 Refresh 📔 🔂 Clear Filters					Cla	im AND Change			3	×
Title / Subject / etc.	*	0	Number	Туре	Last modified	Modified by	Created by	Created	Relevance.	ς
Change Order	☆		CO_00		11.09.2019	Annabell D	Annabell D	08.08.201	0.25517562	J
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	<b>/</b>	15.07.201	Annabell D	Annabell D	15.07.201	0.21225953	
Change Request from cust			C_ME	<b>/</b>	15.10.201	Annabell D	Annabell D	15.10.201	0.16461492	
Anruf vom Kunden - potent	☆		CO_00	0	28.05.201	Annabell D	Annabell D	28.05.201	0.10285428	
Änderungsanfrage Kunde			CO_00	0	19.07.201	Annabell D	Annabell D	19.07.201	0.10285428	
Customer want new filter			CO_00	0	26.09.201	Annabell D	Annabell D	26.09.201	0.10285428	
Additional Filter requested		0	CO00005	0	27.02.201	Annabell D	Annabell D	13.12.201	0.10285428	
crane event			CO_00	0	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	☆	I	R_00001	7	06.05.202	Iris Brokme	Ali Farrad	22.01.202	0.030533506	3
stator umbau		I	DCR_0	1	22.01.202	Ali Farrad	Ali Farrad	22.01.202	0.030533506	3
TA rohrleitung		Ø	DCR_0	1	22.01.202	Ali Farrad	Ali Farrad	22.01.202	0.030533506	3

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?
- ...

🐥 PIRS:Claim 🛛 🔄	+ 🔝 Dashb	oard 🛛 🌍 🕻	Controlling - Claims - Status &	Affected Party	×			
in Views	+ Claime h	v Status			Number of Claims	s by Affected Party		
Controlling and Reporting		y status			number of claims	s by Ancelea Parcy		
<ul> <li>Events</li> <li>Type &amp; Created Documents</li> <li>Status &amp; Responsible Discipline</li> <li>Company &amp; Status of Execution</li> <li>Internal Variations</li> <li>Type of Change &amp; Status of Exec</li> <li>Exesons Learned</li> <li>Status &amp; Responsible Discipline</li> <li>Change Orders</li> <li>Status &amp; Basis</li> </ul>	sut		Car	ady to Send ncelled mpleted nt	4.5	Affected Party Number of Claims Company:	: 2 Transportatio	on GmbH
Incoming Claims Status & Affected Party					0	AG		-
Status & Affected Party	Rew C	laim 🔻 🦽 A	ctions -			AG an		
<ul> <li>Status &amp; Affected Party</li> <li>Claims</li> <li>Status &amp; Affected Party</li> </ul>	Rew C	laim 🔻 🥜 A			Status	AG AG	Created	۶
Status & Affected Party				I Cables and Ju				Modifier
<ul> <li>Status &amp; Affected Party</li> <li>Claims</li> <li>Status &amp; Affected Party</li> </ul>	Number		Subject		Status		Created	Modifier
<ul> <li>Status &amp; Affected Party</li> <li>Claims</li> <li>Status &amp; Affected Party</li> </ul>	Number C00001		Subject Numbering System for Electrica	66m to 80m	Status Ready to Send	Affected Party	Created 05.12.2012	Modified Syste
<ul> <li>Status &amp; Affected Party</li> <li>Claims</li> <li>Status &amp; Affected Party</li> </ul>	Number           C00001           C00002		Subject Numbering System for Electrica Increase in Stack heights from	66m to 80m	Status Ready to Send Sent	Affected Party	Created 05.12.2012 05.12.2012	Modified Syste Syste
<ul> <li>Status &amp; Affected Party</li> <li>Claims</li> <li>Status &amp; Affected Party</li> </ul>	Number           C00001           C00002           C00003		Subject Numbering System for Electrica Increase in Stack heights from Layoutänderung durch Kunden	66m to 80m	Status Ready to Send Sent Cancelled Cancelled	Affected Party AG	Created 05.12.2012 05.12.2012 05.12.2012	Modified Syste Syste Syste
<ul> <li>Status &amp; Affected Party</li> <li>Claims</li> <li>Status &amp; Affected Party</li> </ul>	Number           C00001           C00002           C00003           C00004		Subject Numbering System for Electrica Increase in Stack heights from Layoutänderung durch Kunden Additional feedwater pump	66m to 80m tplant Instrument	Status Ready to Send Sent Cancelled Cancelled	Affected Party AG	Created 05.12.2012 05.12.2012 05.12.2012 05.12.2012	Modifier Syste Syste Syste Syste
Claims I Status & Affected Party	Number           C00001           C00002           C00003           C00004           C00005		Subject Numbering System for Electrica Increase in Stack heights from Layoutänderung durch Kunden Additional feedwater pump Project specific forms for Smar	66m to 80m tplant Instrument	Status Ready to Send Sent Cancelled Cancelled Sent	Affected Party AG	Created 05.12.2012 05.12.2012 05.12.2012 05.12.2012 05.12.2012	Modified Syste Syste Syste Syste Syste

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.

PIRS Claim 1.4.0					Hello, Erica Murphey Help Log out
All Projects	<b>☆☆</b> +	💷 Dashbo	ard 📃 Reports 🗷		
Reports	Ξ				Q
Reports		Туре	Name 🔺	Category	Description
		1 🔤	Cross-project cause Analysis	Events	Cross Project Analyses of Event Type and potential claim
		2	Events by discipline	Events	Report of all events by discipline
		3 🜌	Project report	Claim	Cross Project Analyses of incoming and outgoing Claims by company

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.

🚝 PIRS:Claim 🛨		Dashbo	oard 📑 Reports 🗷					
📺 Views 🔸								P
Controlling and Reporting		Туре	Name 🔺		Category		Description	
⊿ 🖉 Events	1		Sample ChangeOrder Exp	port	ChangeOrder		Sample Export for ChangeOrder	
Type & Created Documents	2		Sample Claim Export		Claim		Sample Export for Claim	
Status & Responsible Discipline Company & Status of Execution	3		Sample Event Export	Opening Sam	ple_ChangeOrd	ler_Export13	384850022083.xls	
Internal Variations	4		Sample IncomingClaim Ex	Vou have d	nosen to open:			
Type of Change & Status of Execut	5		Sample InternalVariation I	_				
⊿ ∰ Lessons Learned	6		Sample LessonsLearned	💾 Samp	le_ChangeOrde	er_Export1	384850022083.xls	
Status & Responsible Discipline				which	is: Microsoft E	xcel 97-2003	Worksheet	
Change Orders				from:	https://demo.s	obis.com		
Status & Basis				-What shou	ld Firefox do wi	th this file?		
Status & Affected Party								
4 🤗 Claims				စ <u>O</u> p	en with Micro	osoft Excel (de	efault) 🔻	
Status & Affected Party				<u>     Sav</u>	e File			
Reports								
				Do:	this <u>a</u> utomatica	lly for files lik	e this from now on.	
							OK Cancel	
							Cancel	

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.

Number       Site Impact       ▲       ✓       Clear filters       Status       Estimated Cost Imp         ✓       E00023       Yes       ▲       ✓       Show Url for selected document       Active       0.00 EUF         E00021       Yes       ▲       ✓       Show access       Active       0.00 EUF         E00020       Yes       ▲       ✓       Show document log       Sere       Active       0.00 EUF         E00019       Yes       ▲       ✓       Export       0       Active       0.00 EUF         ✓       E0018       No       ▲       ✓       Delete       Active       0.00 EUF         ✓       E0017       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E0016       Yes       ▲       ✓       Refresh       Active       0.00 EUF         ✓       E0015       Yes       ▲       ✓       Design change requested by the customer       Completed       18,400.00 EUF         ✓       E00013       Yes       ▲       Ø       Design change       Completed       21,500.00 EUF         ✓       E00011       Yes       ▲       Ø       Design change requested by the custo	📰 Dashboard 📗 Reports 🛞 🕖 Events 🛞								
✓       E00023       Yes       ▲       ✓       Show Url for selected document       Active       0.00 EUF         E00022       Yes       ▲       ✓       Show access       Active       14,200.00 EUF         ✓       E00021       Yes       ▲       ✓       Show document log       Active       0.00 EUF         E00020       Yes       ▲       ✓       Show document log       Bere       Active       0.00 EUF         E00019       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00017       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00014       Yes       ▲       ✓       Design change requested by the customer       Completed       18,400.00 EUF         ✓       E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,00	New Event 👻 💭 Distribution List 👻 🌽 Actions 🗸							Q	
E00022       Yes       Yes       Show access       Active       14,200.00 EUF         E00021       Yes       Show access       Active       0.00 EUF         E00020       Yes       Show document log       Ere       Active       0.00 EUF         E00019       Yes       Yes       Yes       Yes       Image: Completed co	🔲 Number 🔻	Site Impact		9	Q	Clear filters		Status	Estimated Cost Imp
Image: Construction of the construc	V E00023	Yes			2	Show Url for selected document		Active	0.00 EUR
✓       E00021       Yes       ▲       ✓       Show document log       Active       0.00 EUF         E00019       Yes       ▲       ✓       Export       00       Active       0.00 EUF         ✓       E00019       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00017       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00016       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00016       Yes       ▲       ✓       Delete       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Lieferverzug von Baugruppe E.7900       Active       22,040.00 EUF         ✓       E00014       Yes       ▲       ✓       Design change requested by the customer       Completed       18,400.00 EUF         ✓       E00013       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00011       Yes       A       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00010       Yes       Supplier went bankrupt       Completed <td>E00022</td> <td>Yes</td> <td>▲</td> <td>I</td> <td></td> <td>Show access</td> <td></td> <td>Active</td> <td>14,200.00 EUR</td>	E00022	Yes	▲	I		Show access		Active	14,200.00 EUR
□       E00020       Yes       ▲       ↓       Export       ↓	<b>E00021</b>	Yes	≙		-			Active	0.00 EUR
■       E00019       Yes       ▲       Ø       Active       20,975.83 EUF         Ø       E00018       No       ▲       ▲       Ø       Active       0.00 EUF         Ø       E00017       Yes       ▲       Ø       Active       0.00 EUF         Ø       E00016       Yes       ▲       Ø       Active       27,880.00 EUF         Ø       E00016       Yes       ▲       Ø       Lieferverzug von Baugruppe E.7900       Active       22,040.00 EUF         Ø       E00014       Yes       ▲       Ø       Design change requested by the customer       Completed       18,400.00 EUF         Ø       E00013       Yes       ▲       Design change       Completed       21,500.00 EUF         E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         Ø       E00011       Yes       Employee strike       Completed       0.00 EUF         E00010       Yes       Supplier went bankrupt       Completed       170.78 EUF	E00020	Yes			-	-	3ere	Active	0.00 EUR
✓       E00017       Yes       ▲       ✓       Refresh       Active       27,880.00 EUF         ©       E00016       Yes       ▲       ✓       Refresh       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Lieferverzug von Baugruppe E.7900       Active       22,040.00 EUF         ✓       E00014       Yes       ▲       ✓       Design change requested by the customer       Completed       18,400.00 EUF         ✓       E00013       Yes       ▲       Design change       Completed       21,500.00 EUF         ✓       E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00011       Yes       Employee strike       Completed       0.00 EUF         ✓       E00010       Yes       Supplier went bankrupt       Completed       170.78 EUF	E00019	Yes		I	8	Export	00	Active	20,975.83 EUR
✓       E00017       Yes       ▲       ✓       Refresh       Active       27,880.00 EUF         E00016       Yes       ▲       ✓       Refresh       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Lieferverzug von Baugruppe E.7900       Active       22,040.00 EUF         ✓       E00014       Yes       ▲       ✓       Design change requested by the customer       Completed       18,400.00 EUF         ✓       E00013       Yes       ▲       Design change       Completed       21,500.00 EUF         ✓       E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00011       Yes       Employee strike       Completed       14,000.00 EUF         ✓       E00010       Yes       Supplier went bankrupt       Completed       170.78 EUF		No	≙		×	Delete		Active	0.00 EUR
E00016       Yes       ▲       ✓       Active       0.00 EUF         ✓       E00015       Yes       ▲       ✓       Lieferverzug von Baugruppe E.7900       Active       22,040.00 EUF         E00014       Yes       ▲       ✓       Design change requested by the customer       Completed       18,400.00 EUF         ✓       E00013       Yes       ▲       Design change       Completed       21,500.00 EUF         ©       E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00011       Yes       Employee strike       Completed       0.00 EUF         ●       E00010       Yes       Supplier went bankrupt       Completed       170.78 EUF		Yes	≙	I	~	Defeash		Active	27,880.00 EUR
E00014       Yes       Image: Completed of the customer in th	E00016	Yes		l	~~	Refresh	]	Active	0.00 EUR
✓       E00013       Yes       ▲       Design change       Completed       21,500.00 EUF         ©       E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00011       Yes       Employee strike       Completed       0.00 EUF         ✓       E00010       Yes       Supplier went bankrupt       Completed       170.78 EUF	<b>E00015</b>	Yes	≙	I	Lie	eferverzug von Baugruppe E.7900		Active	22,040.00 EUR
E00012       Yes       ▲       Dealy of pump delivery on site       Completed       14,000.00 EUF         ✓       E00011       Yes       Employee strike       Completed       0.00 EUF         E00010       Yes       Supplier went bankrupt       Completed       170.78 EUF	E00014	Yes	▲	I	De	sign change requested by the custom	er	Completed	18,400.00 EUR
Image: Weight of the strike         Completed         0.00 EUF           E00010         Yes         Supplier went bankrupt         Completed         170.78 EUF	V E00013	Yes	≙		De	sign change		Completed	21,500.00 EUR
E00010 Yes Supplier went bankrupt Completed 170.78 EUF	E00012	Yes	▲		De	Dealy of pump delivery on site		Completed	14,000.00 EUR
	<b>E00011</b>	Yes			Em	Employee strike		Completed	0.00 EUR
🔲 E00009 No 🖉 Engineering Management hours budget transfer Cancelled 552,700.00 EUF	E00010	Yes			Su	Supplier went bankrupt		Completed	170.78 EUR
	E00009	No		I	En	gineering Management hours budget ti	ansfer	Cancelled	552,700.00 EUR

## 7 Adress Book

PIRS Claim 3.0.1 -	Kuantan	
<sub>与</sub> PIRS:Claim	•	🔠 Dashboard
📷 Views	+	📩 Add widget
Controlling and Reporting	+	
🛄 Address Book		🕗 Events
Scontacts		😽 New Event
Contact Groups		Number
	J	E00024
		E00031

The PIRS:Claim address book is divided into three different areas that are interlinked with each other. First of all there are the contacts (

8

) 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 ( <sup>(A)</sup>) 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 ( I ) 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.

<sub>券</sub> PIRS:Claim 🔹	匪 Dashboard 🙎 Contacts 🛎	
📺 Views 🔳	🔱 Nw Contact 🥜 More 👻	1
🌍 Controlling and Reporting 🛛 💽	Last Name Create a new contact	First Name
🛄 Address Book 📃	Bauer	Alois
Contacts	Cianciotta	Alvaro
Contact Groups	Howryla	Amanda
	Miller	Andrew

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.

	First Name:	Alois		E-Mail:	management@dem	o.sobis.com
FV.	Last Name:	Bauer		Default Corr. Code:	SOB	~
600	Company:	SOBIS Software GmbH	*	Office Phone:	+49 621 329 1228	5600
	Contact Type:	Upper Management	*	Mobile:	+49 621 329 1228	5600
ick tile to	Address:	Fraunhoferstrasse, 8 68309 Mannheim, Germany, BW		Fax number:	+49 621 329 1228	5695
oload, chang delete picti			-	Country:	Germany	
	tes Member of Gr	oups / ∐ ABC   ≣ ≣ ≣   #	2.01	@= @=  AA A?  :=		

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.

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Address	The address field should be used to enter the address of the company location the project member is currently working at.
E-Mail	This field should contain the project member's email address or if he/she has more than one the email address that the project member is using for the project communication. This email address will be inserted into correspondence and document files. This value cannot be empty.
Default Corr. Code	The default correspondence code that is chosen for a contact stands for the sender / the recipient code that will be automatically selected for the reference number of a 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.
Office Phone	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
Mobile	document without having selected the country the project member is currently
Fax	located at. To maintain all address book information as plenary as possible it is recommended to enter all contact information that is available.
Country	

## 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.

Contact Group:	General Engineers				
Description:	all involved general engineers of the Kuantan project				
Members:	Kilian Walter <engineer@demo.sobis.com>×</engineer@demo.sobis.com>				
	Erica Murphey <engineer@demo.sobis.com>×</engineer@demo.sobis.com>				
• 1.01	iont Size →   B Z U ARG   플 플 플 =   🍠 (~   🌆 🛍   AB 🕼   ⊟ 🗄				

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.

FIRS:Claim	📰 Dashboard 🙎 Contacts 🕷 🚊 Co	ompanies 🗷 🔜 New Company 🛎	
Views	🔚 Save 🙁 Close		
Contacts Contacts Contact Groups Companies	Notes	Company*: Country: Type*: Vendor / Creditor No.: Web site:	Enter the name of the company  Enter the type of the company  Open
change or delete company logo.	Font Family  Font Size B	ע ע איי   דיי דיי פין איי ע   פי פֿע פיי   ייי שיי ע ויש פין ע   פי פֿע פיי   ייי שיי ע ויש פין ע	圖圖 船% Ⅲ·Ⅲ· 詳詳 44 Э

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		
2.4.4	Due constation Occamient		
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	
0.10		Highlights	
	Added new field "Contractual Party" in the header of DNR		
	'Bulk Change' available for all document types		
3.11	Presentation Overview	<u>PIRS Claim 3.11.</u> <u>Highlights</u>	
	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	<u>PIRS:Claim 3.10</u> <u>Highlights</u>	
	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		
3.2	Presentation Overview		
3.1	Presentation Overview		
3.0	Presentation Overview		
1.4	Favorite Entries	Select your favorite Events, Internal Variations, Lessons	Favor Entries
		Learned, Change Order, Claim, Incoming Claim or Contacts, Contact Groups	
		and Companies and access them form views or widgets	
	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	<u>Search</u> documents with full-text search

## 9 PIRS:Claim App

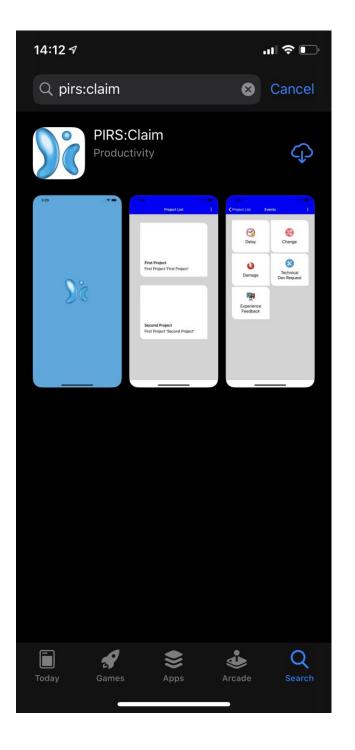
The PIRS:Claim App allows users to create and submit Events with a minimum amount of effort. The main goal is to document everything that happens out of the ordinary without having to rely on a laptop or having to sit down and write up a lengthy report.

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.



<b>14:13 √</b> ◀ App Store		al 🗢 💽
	LOGIN	



Server URL

Username

Password

LOGIN

**SOBIS** 

<b>14:15 √</b> ◀ App Store		🗢 🕞
	LOGIN	



https://claim.sobis.com/s/index...

Annabell Degler

LOGIN

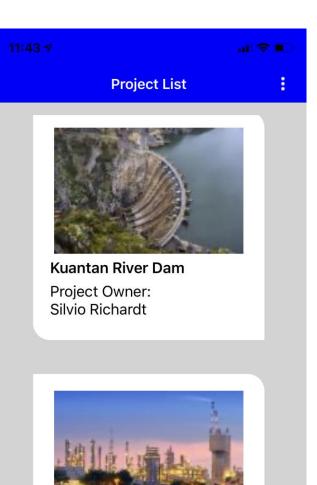
Once the app is downloaded you can open is directly or by clicking the PIRS:Claim symbol on your screen. Enter the URL for you PIRS:Claim Application into the first field. Next, enter your personal user name and password provided to you by SOBIS or your project manager.

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.



**Kuantan Biomass Power** 

Customer: Ministry of Electricity & Water Last sync status: 20-Feb-2020 12:20:37

Plant - MEW Project Owner: Annabell Degler

11:46 🛪 💼			
<	Project List Eve	ents :	
	<b>eee</b> NCR	<b>EXAMPLE</b> Damage	
	Delay	Experience Feedback	
	Natural catastrophy	(A) Other	
	A Behinderung	Leistungsänder ung	

11:47 🕫		<b>.ıl ≎ ■</b> ,
<b>く</b> Events	Event	
Kuanta	n Biomass Pov MEW - Damaç	
Subject		
Broken P	ipe	
Caused b	у	
Bewton C	Construction AG	
Potential Yes ()		
Potential	Incoming Claim	
● Yes ⊂		
Descripti	on	
<ul> <li>Pho</li> <li>IMG_</li> </ul>	<b>tos</b> _20200318_11473(	01 <b>@ </b>
	Submit	
		-

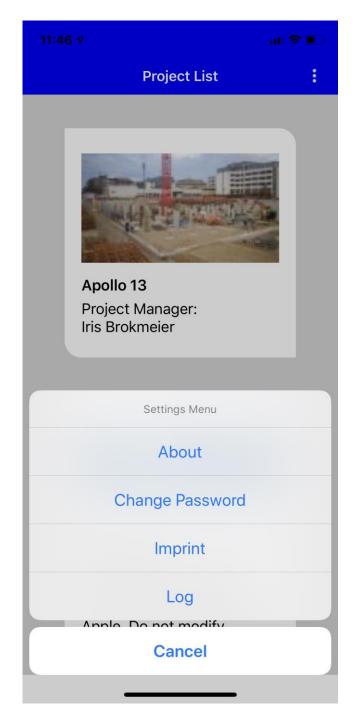
Next, you are asked the define the type of Event. After selecting a type, you are able to provide more details by entering a subject, selecting the party who caused the event and deciding whether or not this event might lead to a claim that your company may be able to pursue or that your company might 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  $\textcircled{igodymbol{\Theta}}$  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.