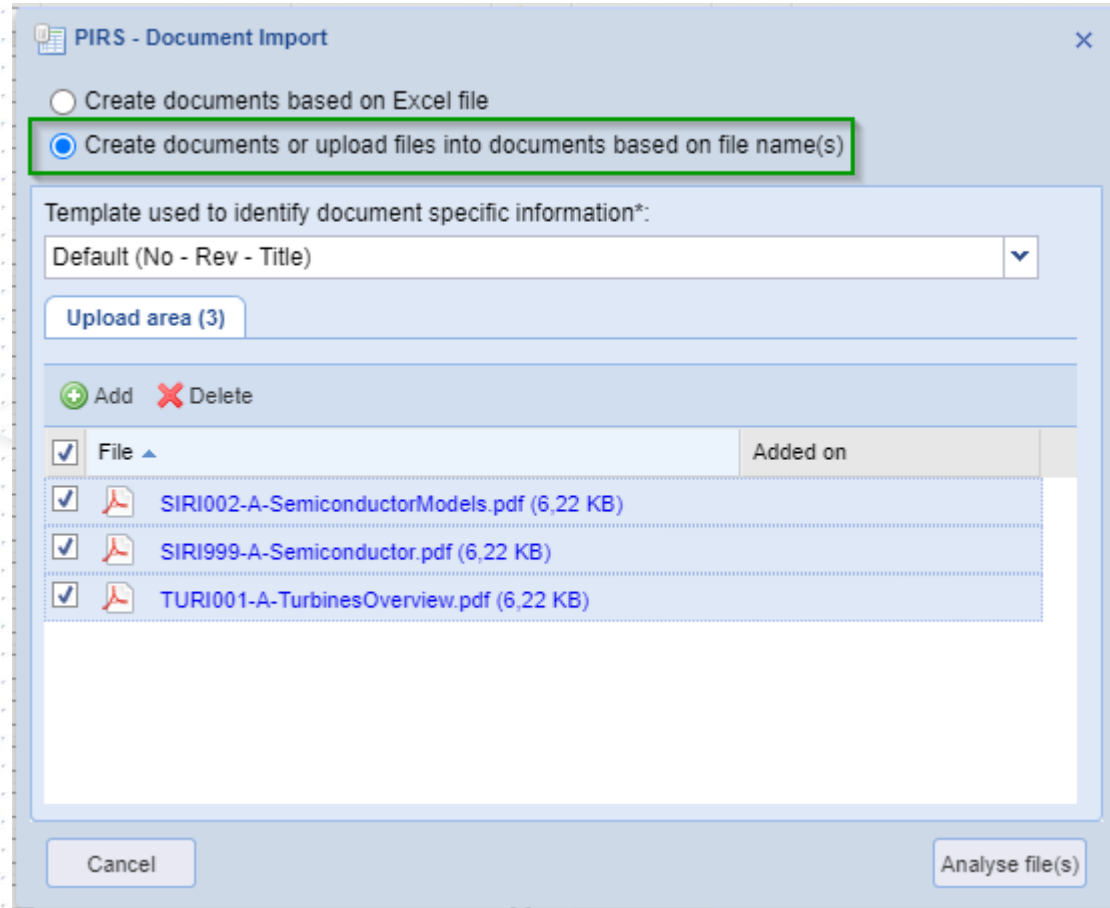


## **PIRS – Highlights and Improvements**

**Release 3.58**

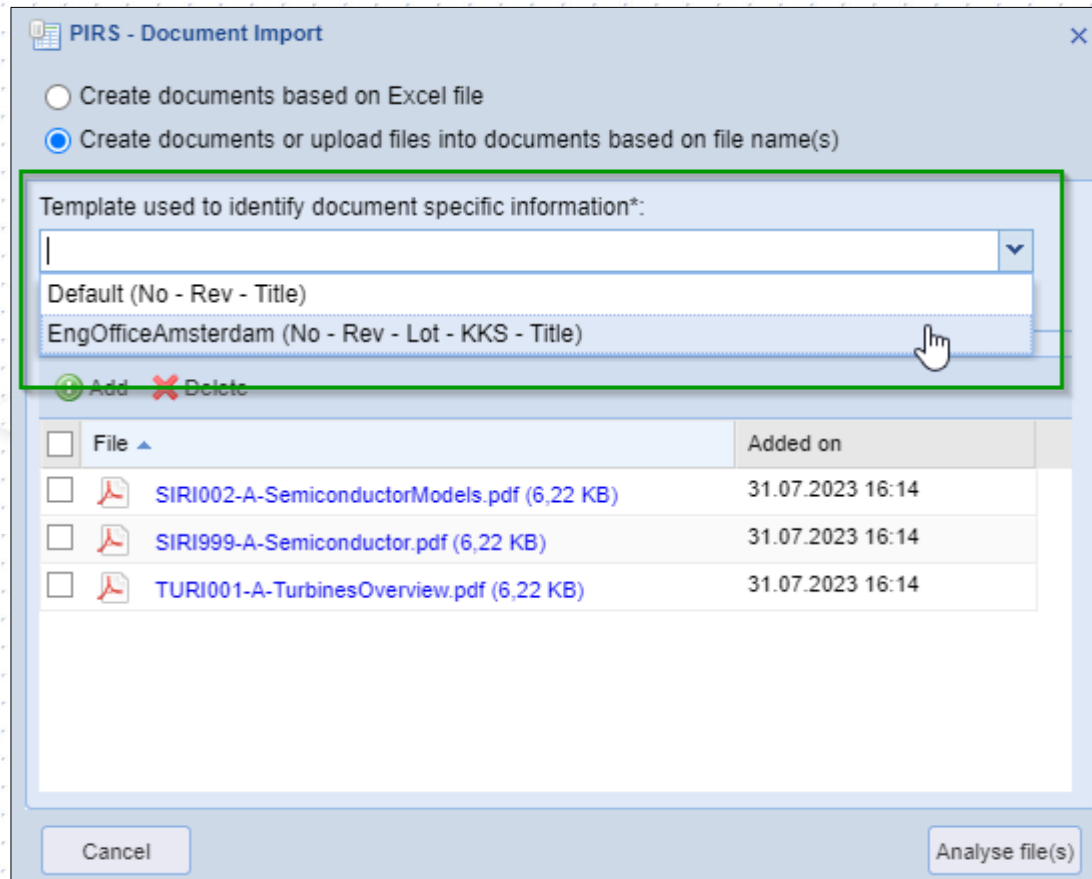
# Create and Update Documents with File Import I



## Official published

- The document import has been extended by a new option to
- Create new documents based on a file name
  - Upload files into document based on file name

# Create and Update Documents with File Import II



Based on project requirements it is possible to define multiple templates. Each template allows to map file names to document fields and to set further (mandatory) meta information.

# Create and Update Documents with File Import III

**PIRS - Document Import** ✕

Create documents based on Excel file  
 Create documents or upload files into documents based on file name(s)

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**Import analysis result**

Number of entries that can be imported: 2  
Number of entries that cannot be imported: 1

Please download and review the analysis result file for more information:

[HTML Import files result \(silvio on 2023-07-31T16-46-01.420009\).html](#)

The analysis results help to detect any issues before the document import or update is done.

Files to import: 3  
Files ready to import: 2

| File name                          | Status | Details  |
|------------------------------------|--------|--|
| SIRI001-A-Semiconductor.pdf        | ERROR  | The existing document already has an attachment with this name |
| SIRI001-B-Semiconductor.pdf        | OK     | Update   |
| SIRI071-A-ElectricalComponents.pdf | OK     | Create   |

# Set Document Status as default value in Transmittal Slip Actions

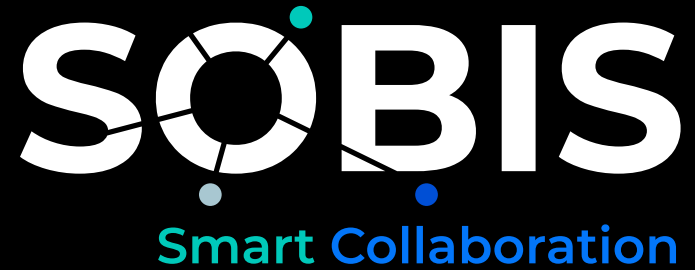
Possibility to display the actual Document, Customer or Supplier Status directly within a Transmittal / Comment / Notice:

| Subject*:  |                | General information |       |                |                                       |        |
|--|----------------|---------------------|-------|----------------|---------------------------------------|--------|
| Ref. No.*:   |                | FAN/FAN/<Number> T  |       |                |                                       |        |
| Your reference:  |                |                     |       |                |                                       |        |
| <div style="display: flex; justify-content: space-between;"> <span>Documents (1)</span> <span>Body</span> <span>Attachments</span> <span>External Links</span> <span>Custom Fields</span> <span>Access</span> </div>                                     |                |                     |       |                |                                       |        |
| <div style="display: flex; justify-content: space-between;"> <span> Add / Remove document(s)</span> <span> Fill document grid...</span> <span> Remove selected document(s)</span> <span> Download attachments</span> <span> Bulk change...</span> </div> |                |                     |       |                |                                       |        |
| <input type="checkbox"/>   | Doc Number ▲   | Revision            | Valid | Title          | Document Status                       | Action |
| <input type="checkbox"/>   | PIRSJAVA-15159 | 00                  | Yes   | PIRSJAVA-15159 | 14. Approved and ready for submission |        |

Could also be configured within Predefined Document Actions:



|                    |  |
|--------------------|--|
| Action:            |  |
| Document Status:   |  |
| Customer Status:   | [Display current value from Document]                |
| Supplier Status:   | 10. Draft  |
| Required Response: | 10.1 Internally Rejected                             |
| Notes:             | 11. Waiting for internal check by Order Responsible  |
|                    | 12. Waiting for internal approval by Lead Engineer   |
|                    | 13. Waiting for internal approval by Project Manager |
|                    | 14. Approved and ready for submission                |
|                    | 20. Sent to customer for approval                    |
|                    | 21. Customer comments received                       |
| Attachments:       |  |
|                    | <input type="checkbox"/> Use regular expressions     |



**MERCI!**

**THANK YOU!**

**VIELEN DANK!**

**GRAZIE!**