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Our software and your power for successful projects

# PIRS 3.4

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## Improvements and Highlights

## **Release Notes Overview (Improvements)**

- 1. Show number of selected records within page navigation**
- 2. Modify multiple Action Items in one step via Bulk Changes**
- 3. Allow to set filter in Correspondence Code administration**
- 4. Use definition of Predefined Document Actions also if documents are added afterwards**
- 5. Select All option in column filter to allow easier and faster selections**
- 6. Allow Customer- and Supplier Document Number to be generated automatically by external systems (requires the setup and connection of external web service interfaces)**

## Release Notes Continued...

**7. Improve File Upload**

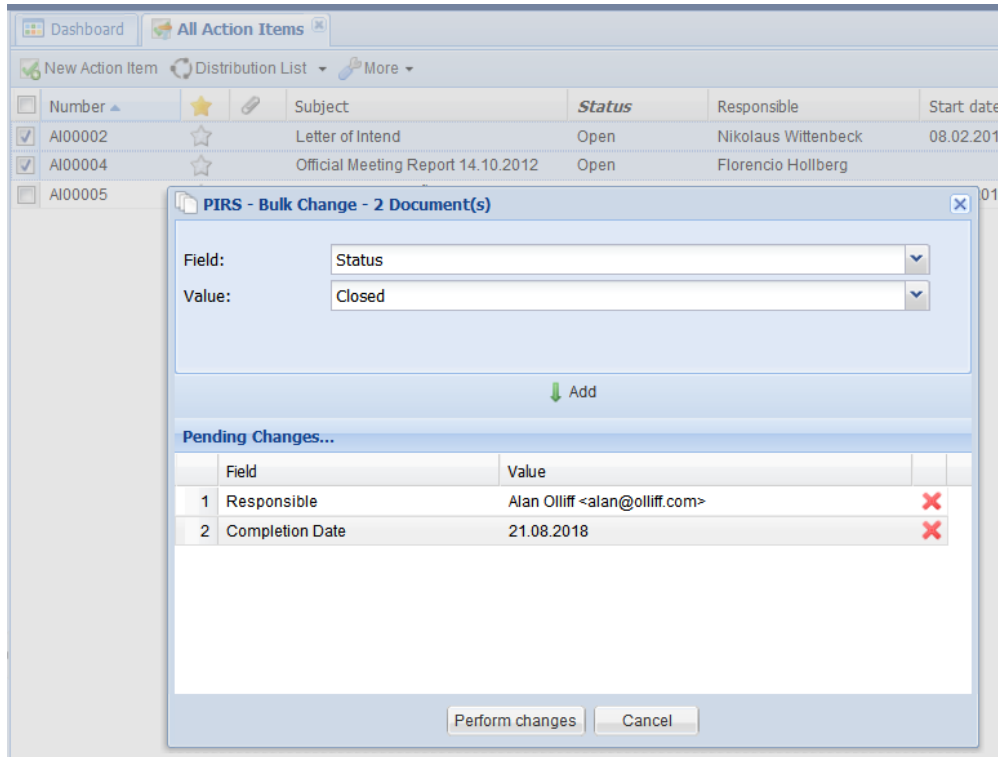
**8. Enhance Create File from Template (Export from Search Query)**

# 1. Show number of selected records

<input type="checkbox"/>	Doc number	Revision	★	Valid		Title	Type	Last transmittal	Last transmittal date	Last
<input type="checkbox"/>	Test doc 8	A	☆	●		sec test 1	Map			
<input type="checkbox"/>	Test doc 6	A	☆	●		Test Karsten Inherit C...	Calculation			
<input type="checkbox"/>	2SOB3460	01	☆	●		DD20151002-33-BIL	Calculation	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB3459	01	☆	●		DD20150928-3-BIL	Specification	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB3458	01	☆	●		E_10197 Bottom ash ...	Order	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB3457	01	☆	●		Steelwork WSC Secti...	Offer	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB34567	02	☆	●		Overall Plan Mechanical	Drawing	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB3456	01	☆	●		List of Subcontractors	Calculation	MEW-SOBIN-0...	08.06.2018	08.0
<input checked="" type="checkbox"/>	2SOB3456	C	☆	●		Pneumatic Grate Ridd...	Drawing	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB3456	00	☆	●		Area Handover - PMG ...	Map	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	2SOB3456	A	☆	●		Outdoor Support OPA...	Progress Report	MEW-SOBIN-0...	08.06.2018	08.0
<input checked="" type="checkbox"/>	2SOB3456	B	☆	●		DD20151009-38-BIL	Drawing	MEW-SOBIN-0...	08.06.2018	08.0
<input type="checkbox"/>	1-PRE-MA-KBN-AA-...	00	☆	●		Test subfolder 3 4	Drawing			
<input type="checkbox"/>	1-PRE-MA-KBN-AA-...	00	☆	●		Test subfolder 3 3	Map			
<input type="checkbox"/>	1-PRE-MA-KBN-AA-...	00	☆	●		Test subfolder 3 2	Calculation			
<input type="checkbox"/>	1-PRE-MA-KBN-AA-...	00	☆	●		Test subfolder 3 1	Drawing			

Page 1 of 1      Entries 1 - 16 of ~ 16 (2 selected)      Entries per page 80

## 2. Modify multiple Action Items in one step via Bulk Changes



The screenshot shows the 'All Action Items' interface with a modal dialog box titled 'PIRS - Bulk Change - 2 Document(s)'. The dialog allows for bulk modifications to selected action items. The 'Field' is set to 'Status' and the 'Value' is 'Closed'. Below the dialog, a 'Pending Changes...' table lists the changes to be applied to two documents.

	Field	Value	
1	Responsible	Alan Olliff <alan@olliff.com>	✘
2	Completion Date	21.08.2018	✘

Buttons at the bottom of the dialog: Perform changes, Cancel

### 3. Allow to set filter in Correspondence Code administration

The screenshot shows the 'Keywords - Correspondence Code' administration interface. On the left, a navigation tree includes 'Keywords', 'Action Item', 'Contact', 'Correspondence', 'Correspondence Category', 'Correspondence Code' (selected), 'Reference Number Category', 'Document Numbering', 'Document', 'Tags', 'Document Controlling', and 'Folder Administration'. The main content area features a 'New correspondence code' button and a 'More' dropdown. Below this is a table with columns for checkboxes, 'Soft deleted', 'Code', and 'Long Code'. The 'Code' column is currently selected, and a dropdown menu is open, showing 'Sort Ascending', 'Sort Descending', and 'Filters' (checked). A filter box on the right contains the text 'SOB'.

<input type="checkbox"/>	Soft deleted	Code	Long Code
<input type="checkbox"/>		SOB	
<input type="checkbox"/>		SOB-CH	
<input type="checkbox"/>		SOBDE	
<input type="checkbox"/>		SOBIN	

## 4. Use definition of Predefined Document Actions...

Save Close Send Delivery Options Organise

**From:** Alan Olliff

**To:** Amanda Howryla <amanda@howryla.com>

**Cc:**

**Bcc:**

**Doclink:**

**Subject\*:** I4003 Specification of scaffold

**Ref. No.\*:** SOB-MEW-<Number> T **Folder\*:** 12.00 Global Application Team

**Your reference:**  **Your reference dated:**

Documents Body Attachments Access

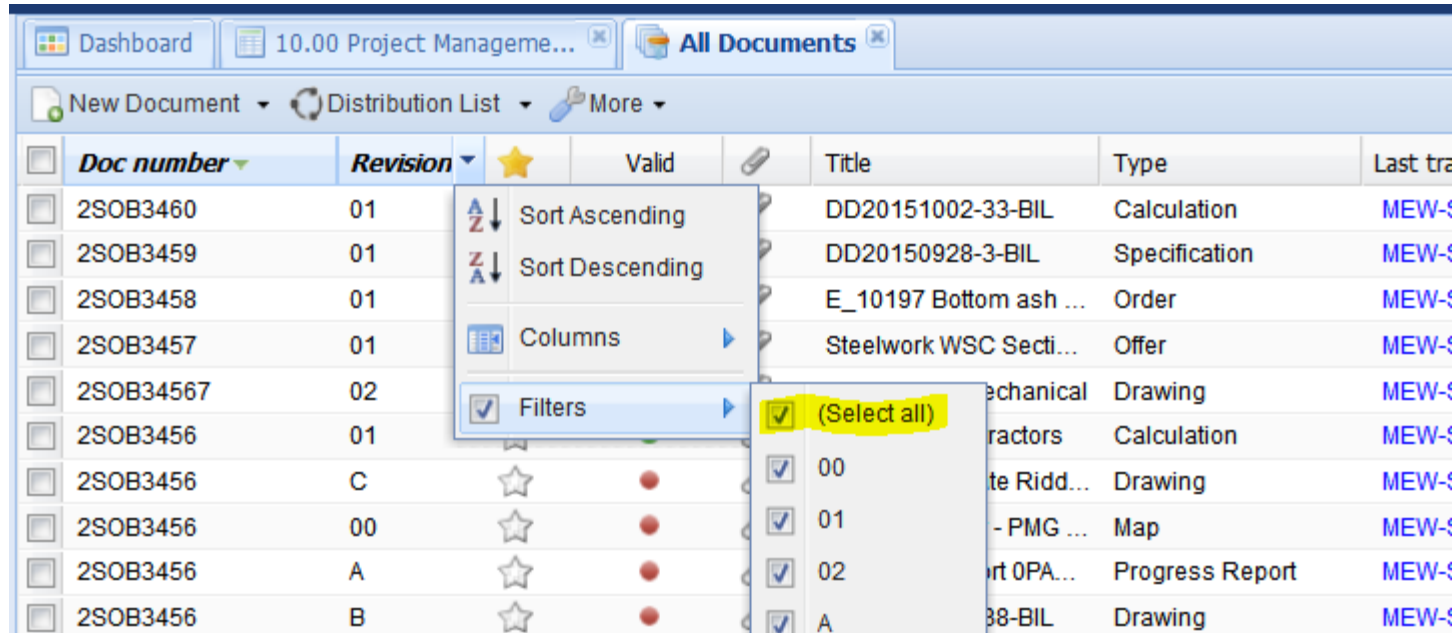
Add / Remove document(s) Fill document grid... Remove selected document(s) Download attachments

	Doc number	Revision	Valid	Title	Document Status	Action	Required R...		Attachments
<input type="checkbox"/>	1	2SOB34567	02	●	Overall Plan Mechanical	20. Sent to cust...	For Approval	04.09.2018	attachment.pdf
<input type="checkbox"/>	2	2SOB3457	01	●	Steelwork WSC Section GL UHA 5.1	20. Sent to cust...	For Approval	04.09.2018	attachment.pdf
<input type="checkbox"/>	3	2SOB3460	01	●	DD20151002-33-BIL	20. Sent to cust...	For Approval	04.09.2018	ct.18.09.172-177 (1).pdf
<input type="checkbox"/>	4	2SOB3456	01	●	List of Subcontractors	20. Sent to cust...	For Approval	04.09.2018	attachment.pdf

Documents 1, 2 and 3 were created via Predefined Document Action.  
 Document 4 has been added afterwards directly in the Transmittal.



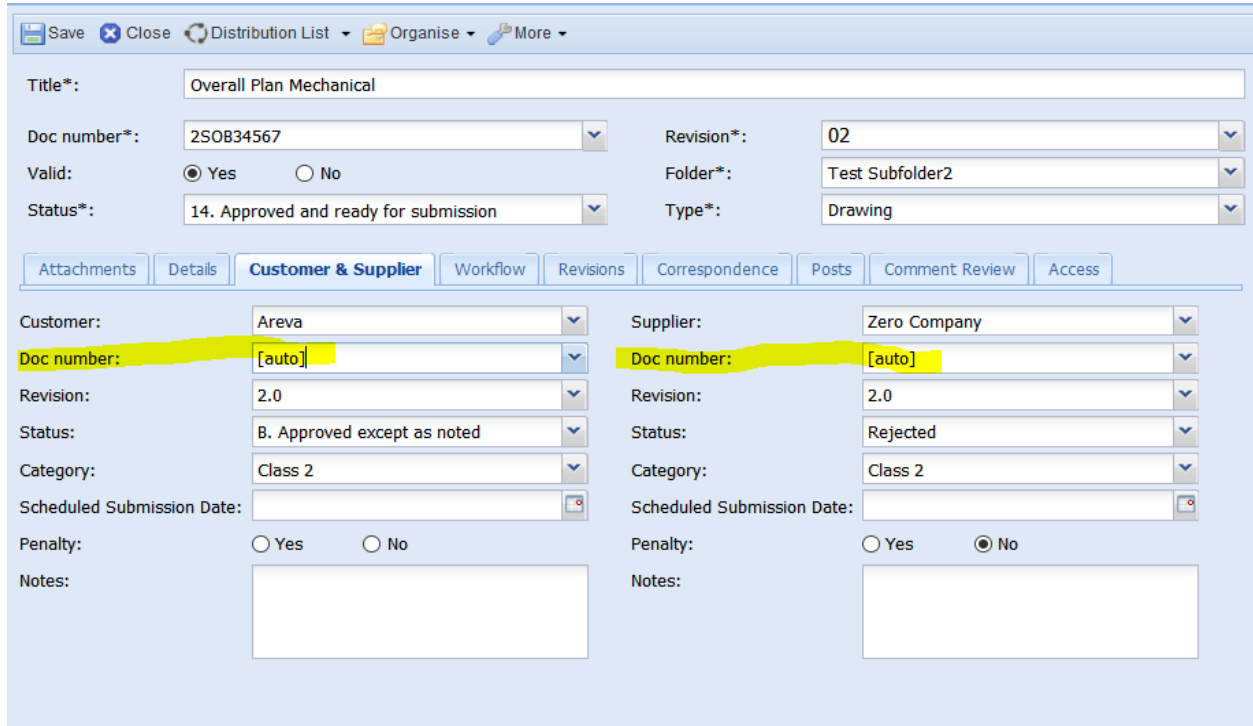
## 5. Select All option in column filters



The screenshot shows a software interface with a table of documents. The table has columns for 'Doc number', 'Revision', 'Valid', 'Title', 'Type', and 'Last tra'. A context menu is open over the 'Revision' column, showing options: 'Sort Ascending', 'Sort Descending', 'Columns', and 'Filters'. The 'Filters' option is selected, and a sub-menu is open showing the '(Select all)' option highlighted.

<input type="checkbox"/>	<i>Doc number</i>	<i>Revision</i>	★	Valid	Title	Type	Last tra
<input type="checkbox"/>	2SOB3460	01			DD20151002-33-BIL	Calculation	MEW-9
<input type="checkbox"/>	2SOB3459	01			DD20150928-3-BIL	Specification	MEW-9
<input type="checkbox"/>	2SOB3458	01			E_10197 Bottom ash ...	Order	MEW-9
<input type="checkbox"/>	2SOB3457	01			Steelwork WSC Secti...	Offer	MEW-9
<input type="checkbox"/>	2SOB34567	02			Mechanical	Drawing	MEW-9
<input type="checkbox"/>	2SOB3456	01			tractors	Calculation	MEW-9
<input type="checkbox"/>	2SOB3456	C	★	●	ite Ridd...	Drawing	MEW-9
<input type="checkbox"/>	2SOB3456	00	★	●	- PMG ...	Map	MEW-9
<input type="checkbox"/>	2SOB3456	A	★	●	rt OPA...	Progress Report	MEW-9
<input type="checkbox"/>	2SOB3456	B	★	●	38-BIL	Drawing	MEW-9

## 6. Allow Customer- and Supplier No to be generated automatically by external systems



Save Close Distribution List Organise More

Title\*: Overall Plan Mechanical

Doc number\*: 2SOB34567 Revision\*: 02

Valid:  Yes  No Folder\*: Test Subfolder2

Status\*: 14. Approved and ready for submission Type\*: Drawing

Attachments Details **Customer & Supplier** Workflow Revisions Correspondence Posts Comment Review Access

Customer: Areva Supplier: Zero Company

Doc number: [auto] Doc number: [auto]

Revision: 2.0 Revision: 2.0

Status: B. Approved except as noted Status: Rejected

Category: Class 2 Category: Class 2

Scheduled Submission Date: Scheduled Submission Date:

Penalty:  Yes  No Penalty:  Yes  No

Notes: Notes:

Note: a setup of the connection to external web service interfaces is required and might cause additional cost.

## 7. Improve File Upload

The screenshot illustrates the SOBIS software interface with several key features and annotations:

- Document Grid:** A table with columns for Revision, Valid, and Title. A document thumbnail is shown in the first row.
- Document Details:** Fields for Subject\* (New marketing brochure), Ref. No.\* (SOB/SOB/<Number> MoM), and Folder\* (0. Folder on RootLevel).
- Attachments Tab:** Shows a file upload area with a "Drop files here to upload..." instruction. A red 'X' is drawn over this area, indicating it is no longer required.
- Annotations:**
  - 1. Drag-over activates appropriate tabs...**: A yellow box pointing to the document thumbnail in the grid.
  - 2. ...where you can drop your files.**: A yellow box pointing to the document thumbnail in the grid.
  - 3. No special region anymore required.**: A yellow box pointing to the attachment area.

## 8. Enhance Create File from Template

» allow export of documents based on search query

The screenshot illustrates the process of creating a document from a template based on a search query. It shows the SOBIS software interface with the 'More' menu open, highlighting the 'Create file from template' option. A dialog box prompts the user to 'Enter the WBS code' and lists allowed wildcards: '?' for any single character and '\*' for any number of characters. An arrow points to an Excel spreadsheet titled 'Export from Meta Document-8.xlsx' which contains a 'Table of Contents' table.

Doc number	Title	Revision	WBS	Format	Total Pages
2SOB3456	Pneumatic Grate Riddling - OM and Spare	C	K123	DIN A1	7
2SOB3457	Steelwork WSC Section GL UHA 5.1	01	K123	DIN A3	54

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