

What's New in Spitfire Project Management System Version 4.5

General Release - September 2014

Appendix 1 – 4th Quarter 2014 Additions

Appendix 2 – January 2015 Additions

Once again Spitfire has packed an incredible number of features and improvements into its newest version, and to complete the good news, the prerequisites for Spitfire Project Management System V4.5 are the same as our previous version. So there are no excuses for holding up your upgrade from the previous version of Spitfire to our latest offering.

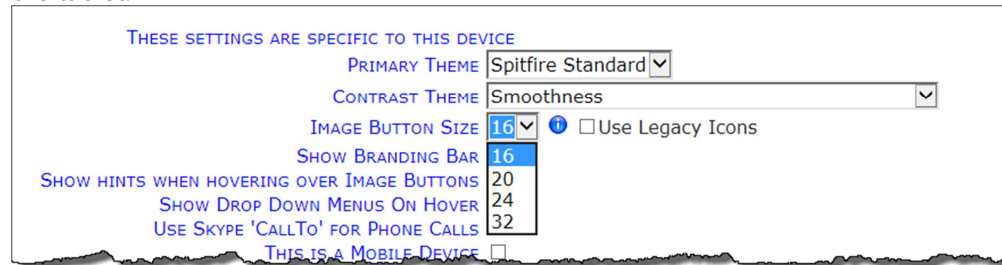
Infrastructure


- **XTS** – Spitfire has added a new integration tool to map data between the Spitfire Project Management System and another application.
 - **Acumatica**, a cloud-based ERP system that supports project accounting, inventory & distribution besides the accounting foundation of GL, AR, and AP, is the first application that we have chosen for this XTS integration.
- **SQL indexes** – The SQL indexes in the Spitfire database are now automatically tuned for improved performance. No more relying on an IT guy that understands SQL Maintenance Plans!






System Wide

- **Icons** – We have updated our icons, and now offer you the ability to choose from 4 icon sizes.
 - The System Admin can set a default size for all users, but each user has the ability to choose an icon size for her/his devices: for example, 20pt for the workstation and 24 for

the tablet.



- The  Open Document icon now indicates the number of Attachments on the document.

	Doc No	Type	Description
	0004	Engineering	Drawings 0004
	0003	Architectural	Drawings Architectural
	0002	Electrical	Drawings Electrical
	0001	Structural	Drawings Structural

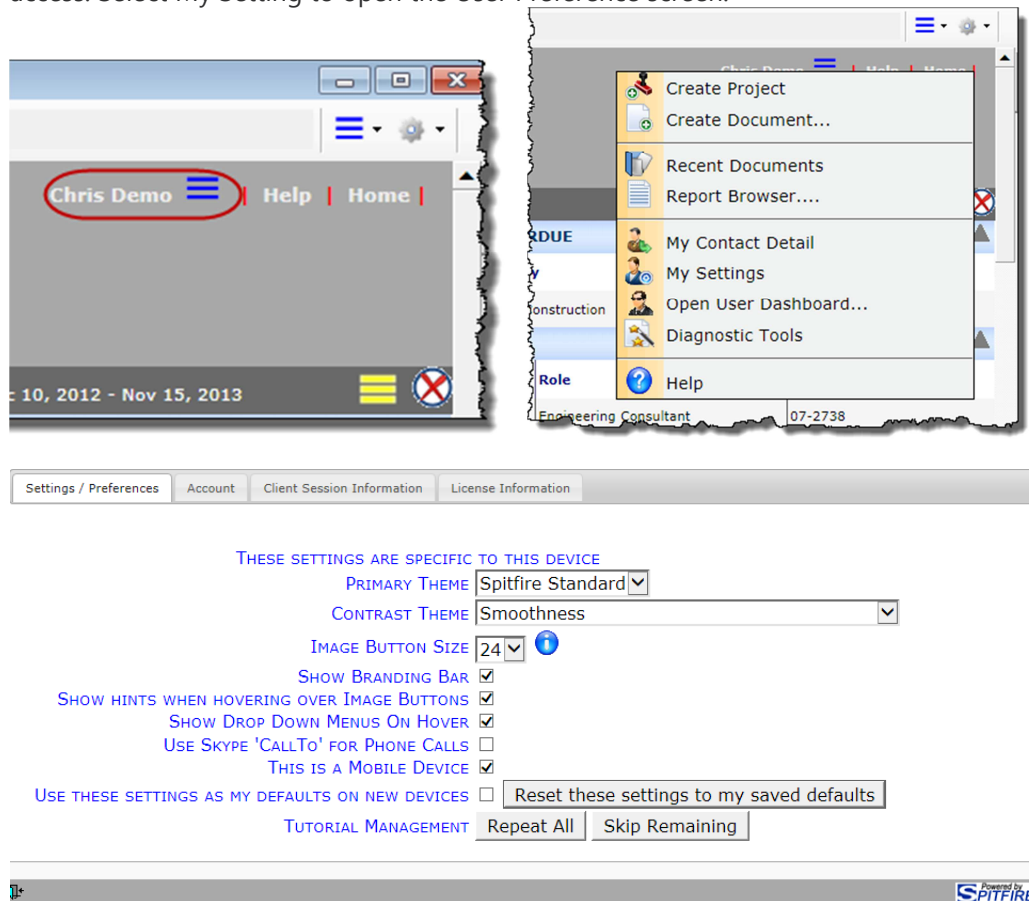
- We will support the old legacy icons for one year to allow clients with their own documentation to ease into the new icons.
- **Part Menus** – We have added a Part Menu for the different parts on the Home and Project Dashboards.
 - **Looks** - Part Menus include the looks available for the part; this allows you to choose the specific look you want for the part vs. cycling through the different looks. Below are few examples:

PROJECT LIST			
	Description	Start	Complete
ve map)	This \$274 million mixed use plaza will contain retail shopping, office space, and food service. This set of existing buildings was renovated including seismic, mechanical, and electrical.	12/10/2012	11/15/2012
map)	Acme completed the build out of 32,000 SF.	4/10/2012	11/30/2012

KEY PERFORMANCE INDICATORS			
AR Summary		Project Cash Flow	
AR Summary	Billed to Date	CASH IN	\$247,590
Under 30	Less Open AR		
30 - 60 Days	Less Retention		

GC-003 - Northern Lights Plaza			
DOCUMENTS			
Type	Count	Look	Description
Customer Bid	0		
Customer Change Order	1		
Customer Inv & Adj	3		
Customer Pay Application	3		
Customer Proposed CO	3		
Budget	1		
Checklist	1		
Correspondence	1		

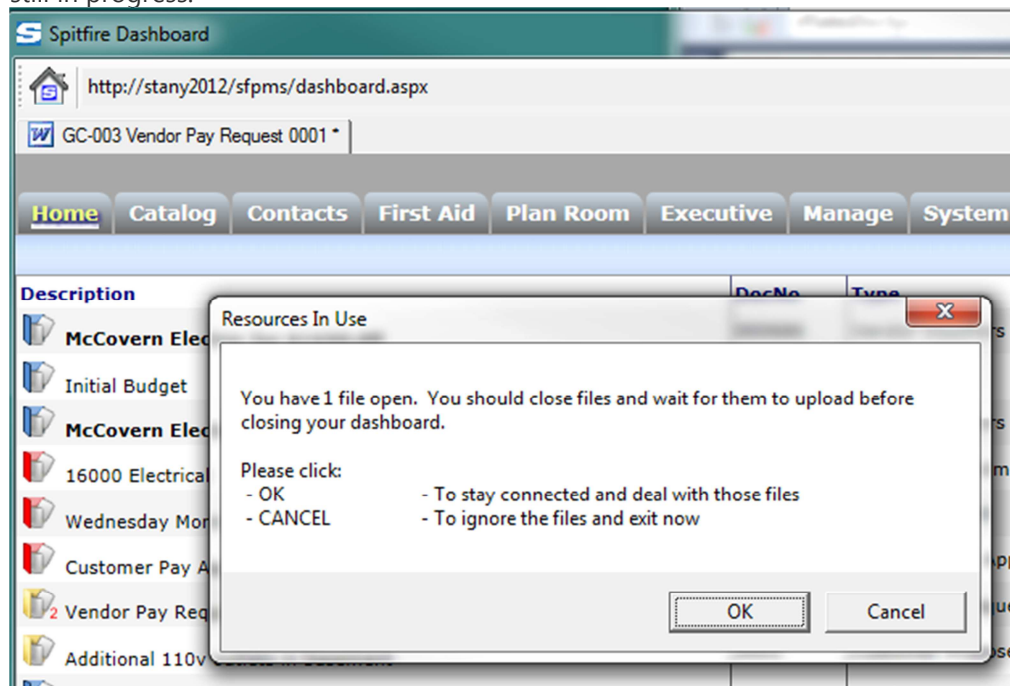
- **Maximize** - The Part menu allows you to select one part per dashboard to Maximize. The Maximize functionality allows the part to be expanded up to 100 line items. Please note, only one part per dashboard can be maximize at a time. Maximizing another part returns the previously maximized part to its standard view.
- **Welcome Message** – You can now customize the Welcome message sent to each new user. This is a specific Task document in your system. As System Admin, you can now access this specific Task document and make edits to Title and Assignment. See *Knowledge Base Article KBA-01578* for details.
- **User Preferences** – We have consolidated the User Preferences and the Site Menu into one click access. Select My Setting to open the User Preference screen.



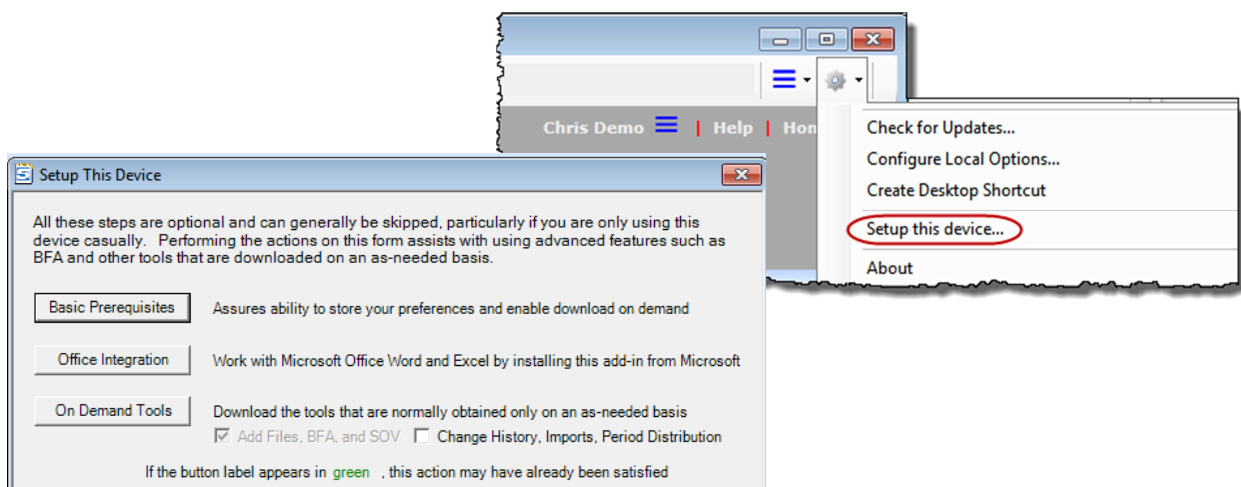
- **Settings to consider on the Setting/Preference tab:**

- **Image Button Size** – Choose 16-Legacy, 16, 20, 24, or 32.
 - **Show Hints when Hovering over Image Button (icon)** – Once you are familiar with all the new icons, come back here and turn this option off. Recommended for iPads.
 - **Show Drop-Down menus on Hover** – again, once you are familiar with the drop-down menus, return here and turn the option off.
 - **This is a mobile device** – Spitfire does try to set this by default, but some devices like to “hide” the info that they are primarily used as a mobile device. Important Note: If you access Spitfire on a workstation and a Mobile Device, your setting can vary for each device. For example, you’ll want larger icons on your Mobile Device.
 - **Tutorial Management** – When you need a refresh, return here to turn your tutorials back on.
 - **Primary Theme** – If you are displaying Spitfire on a projector, or on a web connection, consider selecting the Enlarged Theme.
-
- **Microsoft Office Integration** – We have improved the upload of your Office files by adding a progress bar for the upload and we have also added a warning when you logout if an upload is

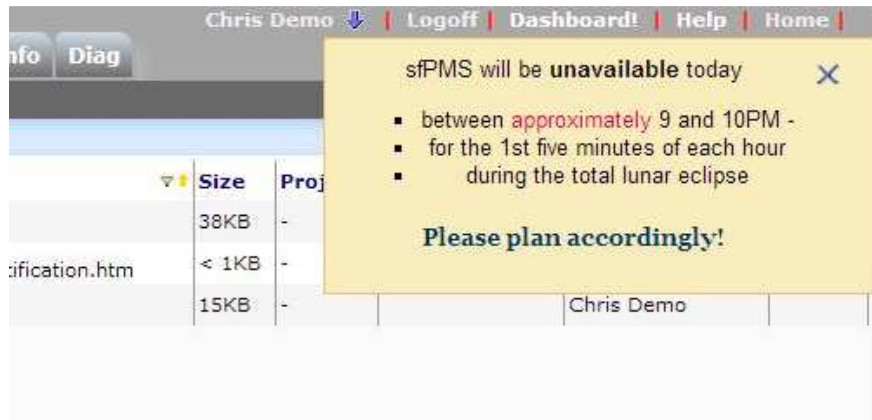
still in progress.



- **Add Files** – The Add Files dialog box now default to Files instead of Scans. The scanning functionality is still available; just select it from the Add Files toolbar.
- **Set up This Device** – IT staff will appreciate this new dialog that tests the local workstation for prerequisites and displays color-coded buttons indicating what setup is necessary.



- **System Notifications** – You can now enable a displayed notification in your system that a planned update to Spitfire will occur on xxxxxx (i.e., Today, Saturday morning).



Your users can close it by clicking on the **X**, but if you modify the message, even just the formatting, it will pop up again. When you update Spitfire from the ICTOOL, the message will no longer display.

Note: See Knowledge Base Article: *KBA-01576: System Availability Notification* for complete details.





Login Dashboard



- **Add HTML Info** – Your Spitfire Login page can now include HTML text.

Note: Knowledge Base Article 01565 provides more detailed information on how to setup this feature.

Home Dashboard

- **Project List** – This part now supports a choice to display only the Project Lookup bar.



PROJECT LIST						
Select	Project Name	Location	Description	Start	Completion	
	Northern Lights Plaza GC-003	84 Business Park Drive Armonk, NY 10504 (map)	This \$274 million mixed use plaza will contain retail shopping, office space, and food service establishments. REIT funding was completed and commercial leases are now completed for 60% of available space	12/10/2012	11/15/2013	
	City Hall Renovation GC-006	121 N La Salle St Chicago, IL 60602 (map)	This set of existing buildings was renovated including seismic, mechanical, electrical and code up-grades including a new computer center building complete with a new emergency power service. Our services included <i>from the architect and other design services, insurance permits and</i> <i>Acme recently completed the approximately 608,403 SF three level</i>	4/10/2012	11/30/2012	

PROJECT LIST						
 - NEW PROJECT		Find / Open Project 				

- **Alert List**

- Uses Grid Column filters, including an option to hide emailed alerts.

WATCHDOG ALERTS				
MATCHING...		<input type="checkbox"/> UNVIEWED ONLY <input checked="" type="checkbox"/> WEB ONLY		
	Description	Date	Project Name	Type
	Milestone is overdue	9/5/2014	Northern Lights Plaza	Doc Overdue
	Milestone is overdue	9/4/2014	Northern Lights Plaza	Doc Overdue
	Real Time Workflow Issue	9/4/2014	Northern Lights Plaza	SFATC
	Vendor Submittal is overdue	9/4/2014	Northern Lights Plaza	Action Overdue

- Displays an email icon  (vs. an info icon ) for alerts that have been emailed
- Columns are now customizable, including a new, optional Document Info column.

Project Dashboard

- **Weather** — The Weather part now is loaded asynchronously and updates automatically every 20 minutes while the page is idle. This change allows the Project Dashboard to load and display quicker than in previous versions of Spitfire.
- **Key Performance Indicators** — The Project KPI has been enhanced
 - The KPI data now renders after the project dashboard has been loaded
 - Every line in the KPI can be positioned by both column and sequence
 - You can design a layout with 1 to 5 columns
 - You can add actions to values (using ProjectKPIFormulas rule group)
 - You can specify the data format and display class
- **Project KPI Formulas**
 - **Act:%** - Specifies an action for the corresponding KPI item, for example see the distributed rule for act:ApprovedSC.

Custom Dashboards


Add HTML Info –Like the Spitfire Login page, your custom tabbed dashboard can also display HTML text.

Notes:

See Rules Maintenance on Page 14 for info on two new rules: PresetSearch | SortDocs and PresetSearch | SortFiles.

See Knowledge Base Article: KBA-01564: *Overview of the PresetSearch Rule Group and Creating a Custom Tab* for more information.

Catalog and Files

- **File Properties** – We have added a Confidential Flag to File Properties. Now when you make a Document "Confidential," the Attached Files will also be flagged as Confidential. This new functionality makes it easier to automatically make your attachments Confidential. The Spitfire document and all the attachments are now marked Confidential with one click.
- **Edit HTML files** - Click the  Edit icon to edit the file in the popup HTML editor.

 	Cataloged	%	Ref Date	Name	%
   	3/31/2014		4/1/2014	x-SystemAvailabilityNotification.htm	

Contacts

- Notifications: Send Email Notice** – The Contact's Notification tab has been updated. The user now has a drop-down options list with additional choices.

Name	Company	Email	Phone	Fax	Type	Ext ID
Chris Demo	Spitfire Construction	stanyork@gmail.com	(203) 952-6552	(888) 287-4603	Employee	DEMO

CONTACT DETAIL

General Address Member Of Connections **Notification** Comments

☐ SHOW DEFAULTS INCLUDES ☐ WITH FORWARDING

Document Type	Send Emails For these Priorities	Forward Inbound Emails*	System Default
Meeting Minutes	{ all }	<input checked="" type="checkbox"/>	X
RFI	Medium, High, Urgent	<input checked="" type="checkbox"/>	X
Safety Incident	{ none }	<input type="checkbox"/>	X
Vendor Vouchers	High, Urgent	<input type="checkbox"/>	X

*Inbound Emails are only forwarded with 'email from' sender on the document

- Notifications: Forwarding** – We have added a new feature: you now have the ability to forward email responses on the Spitfire Document to your Mail Client. This allows you to check on your email on your mobile phone for any last minute or late night responses. Forwarding only applies to the Spitfire Doc Types that have a Forward Inbound Email option selected (see screen shot above) on the Contact Detail record, and that Contact is designated as the Email From routee (usually the Document Creator) on the Spitfire Document.




Attachments Route Detail

Seq	To
1	Chris Demo (Project Manager)
2	McSwag (Superintendent)
3	Phil Sunderson (Able Electric Corp)
4	Chris Demo (Project Manager)





☒ THIS STAGE
 ☐ CONFIDENTIAL

Spitfire Documents






- **Icons** – The Open Document icon now includes the number of attachments.

	Doc No	Description
	1002	Tolerance Level for the Pr
	1001	Changed Lateral Size and

- **Tabs** – The Item tabs are now large and provide better information.
- **Masked Document Numbers** – If you are using a Masked Document Number on a Doc Type, you now have more options. In Spitfire's Customization Tool, we have added the following options:

CUSTOMIZATION TOOL																				
DOC TYPE:	Drawings				PART:	Doc Header - Standard														
ITEM:					<input type="checkbox"/> SHOW LIVE CONFIGURATION <input checked="" type="checkbox"/> SHOW GUIDE <input checked="" type="checkbox"/> SHOW VISIBLE ONLY															
<input checked="" type="checkbox"/> SHOW ADVANCED																				
		Part Name	Doc Type	%	Context	Capability	Item	Label	Visible	RO	Length	Seq	Lookup	Format	Help	Tip	Rq Flag	Extended	SF	Active
		Doc Header - Standard	Drawings				Doc Num		✓	X				Kxxxx-Rev#xx			0	Overlay=1		<input checked="" type="checkbox"/>

Here's an example of the Mask Maintenance for the Drawings Doc Type in my example above:

MASK DEFINITIONS						
	Mask Name	Max Segments	Max Length			
	MaskDocNo	6	16			
MASK DETAIL						
	Segment #	Length	Name	Mask Type	Lookup	Values
	1	4	Set	Numeric		
	2	2	Rev	Uppercase Alphanumeric		

- **Overlay** – Displays the Segment Names in the empty fields. Notice how the second segment displays the Segment 2 name: Rev.

DOCUMENT HEADER	
DOC#	0001 - Rev ✓ ✗
PROJECT	GC-006 City Hall Renovation
DESCRIPTION	Drawings 0001

- **Format** – Allows you to divide the Doc Number and even add verbiage. Notice how the Rev# verbiage appears in the Doc # field:

Drawings- In Process

Drawings 0001A

DOCUMENT HEADER

DOC# 0001-Rev#A

PROJECT GC-006 City Hall Renovation

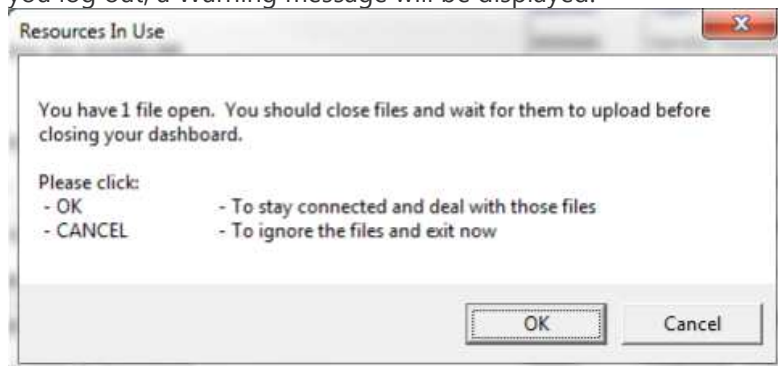
DESCRIPTION Drawings 0001A


- **Attachments**

- **Item Column** – The Item column is hidden if there are no items on the document.
- **Item Field** – The Item field is now accessible directly in the Attachment line item

Name	Size	Note	Item	Incl	Seq	Cataloged
GC-003 Submittal 0001.doc - 0001	37KB		00002 00003 00007 00008 00009 00010	Assemble		12/15/2013

- **Open Attachment** – The Open Attachment box will now include a progress bar while uploading a large file into Spitfire. In addition, if the Open Attachment box is open when you log out, a Warning message will be displayed.



- **Drag-and-Drop** – Use drag and drop to sequence files on the attachment tab
Just hover your cursor over the attachment's Action menu icon  until the double-

headed arrow cursor appears, then drag the attachment to its new location.

Attachments		Route Detail						
		Name	Size	Note	Item	Incl	Seq	Cataloged
		GC-003 Daily Field Report 0001.docx - 0001	26KB		<input type="text"/>	Assemble		8/1/2014 _o
		DSCN2031.JPG - 0001	844KB	First floor restroom...	<input type="text"/>	Assemble		5/4/2009 _o
		DSCN2036.JPG - 0001	822KB	Third floor lighting	<input type="text"/>	Assemble		5/4/2009 _o
		DSCN2039.JPG - 0001	804KB	Third floor hung cel...	<input type="text"/>	Assemble		5/4/2009 _o
		DSCN2043.JPG - 0001	760KB	Second floor northw...	<input type="text"/>	Assemble		5/4/2009 _o
		IMG_7286.JPG - 0001	406KB	Printers	<input type="text"/>	Assemble		3/20/2012 _o

Attachments		Route Detail						
		Name	Size	Note	Item	Incl	Seq	Cataloged
		GC-003 Daily Field Report 0001.docx - 0001	26KB		<input type="text"/>	Assemble		8/1/2014 _o
		DSCN2036.JPG - 0001	822KB	Third floor lighting	<input type="text"/>	Assemble		5/4/2009 _o
		DSCN2031.JPG - 0001	844KB	First floor restroom...	<input type="text"/>	Assemble		5/4/2009 _o
		DSCN2043.JPG - 0001	760KB	Second floor northw...	<input type="text"/>	Assemble		5/4/2009 _o
		IMG_7286.JPG - 0001	406KB	Printers	<input type="text"/>	Assemble		3/20/2012 _o

- **Routing Detail**

- **Route Grid** – The following improvements have been added to the Route Detail Grid:


- **Routee Status** – The drop-down is now available for edits in the Grid View.
- **Routee Response** – The Response text box is always quick edit. The edit icon will pop up the text editor.

- **Route Via** – The Route Via icon now aligns to the right edge of the To column.
Note: RouteVia can now be set by a Workflow script; see Workflow on Page 15.
- **Updates Current Routee** – The Route Detail grid now updates to the Current Routee whenever the document is saved. Proxy access rights are also updated with every save.



The screenshot shows the 'Route Detail' tab in the Spitfire interface. It features a grid with columns: Seq, To, Status, Ins, Rsp, Notes, and Due. There are three rows of routees. The first row is for 'Chris Demo (Project Manager)' with status 'Responded'. The second row is for 'Jack McInerney (Project Staff)' with status 'Pending'. The third row is for 'Chris Demo (Project Manager)' with status 'Pending'. Each row has an action menu icon (three horizontal lines) on the left. The 'Rsp' column contains a text input field with the value 'this is my route respo...'. The 'Due' column shows dates: 'Due: Jul 05 09:22' and 'Acctd: Aug 12 12:04'. At the bottom, there are checkboxes for 'This Stage' and 'CONFIDENTIAL', and a 'Priority' dropdown set to 'Medium'.

Seq	To	Status	Ins	Rsp	Notes	Due
1	Chris Demo (Project Manager)	Responded		this is my route respo...		Due: Jul 05 09:22 Acctd: Aug 12 12:04
2	Jack McInerney (Project Staff)	Pending				
4	Chris Demo (Project Manager)	Pending				

- **Drag-and-Drop** – Use drag and drop to sequence routees on the Route Detail tab
Just hover your cursor over the Routee's Action menu icon  until the double-headed arrow cursor appears, then drag the attachment to its new location
 - **Email Routing** – Email routees will continue to receive the Spitfire Document routed to them in their Mail Client (vs. their Spitfire Inbox) to avoid duplicate deliveries. However, we have now extended permission for email routees who also have a web login and password. These Email routees will now be able to access the Spitfire Documents routed to them by email on the Project Dashboard.
 - **Forward Inbound Email** - We have added a new feature: you now have the ability to forward a routee's email responses to your Mail Client. Great for those last minute or late night responses; now your mobile phone can alert you to these types of responses. See Contacts for setup information.
 - **View Email Message** – If you want to view or preview just the email message that will be routed to the routee click on the email envelope icon. If you want to view the email and all the attachments, you will still need to view the package.
- **Compliance** – The Track column on the Compliance tab can now be configured in the Customization Tool

- **Project Setup document** – If the Project Setup document detects a Revenue Budget and does not have an item, it will automatically add a single line for Contract Amount equal to your Revenue Budget Amount.

Rule Maintenance – The following rules have been added or modified:

- **CommitmentBudgeting** – The rule has been moved from BudgetConfig to ProjectConfig and now supports subtype..
- **DocItemConfig**
 - **Sparse** — This new rule controls where on not the DocItemTask rows that contain no data are persisted to the database or not. The default is to not store such rows.
Note: Item data is stored in two tables: xsfDocItem and xsfDocItemTask. The DocItemTask rows contain expense and revenue information whereas the DocItem rows contain the general information. For example, an Item on a Commitment would contain both general and expense information, but an Item on a Meeting Minutes document would contain only general information.
- **NextDocFlow** – This new rule group includes the following rules:
 - **FieldList** – This new rule allows you to specify the fields to be copied when you choose the “Create Next Document” option.
 - **LinkDocs** – This new rule allows you to indicate if the source document and the new “Next Doc” should be linked.
 - **RunScript** – This new rule allows you to specify if a workflow script from the Workflow Scripts library should be run on this newly created document.
 - **RunScriptOnSourceDoc** – This new rule allows you to specific if a workflow script from the Workflow Scripts library should be run on the source document of the newly created document.
- **PresetSearch** has two new rules:
 - Note:** If you leave the Filter value blank, these rules would apply to the Catalog dashboard.
 - **SortDocs** — This new rule allows you set your preferred Sort Order of Documents. Default is DocDate DESC, Title.

- **SortFiles** — This new rule allows you set your preferred Sort Order of Files. Default is Filename.
- **WordTemplateConfig** – This rule group has a change to the default for the following rule:
 - **xSendExceptionsOnly** - This rule now defaults to TRUE.

Workflow Scripts – The following commands have been added for workflow scripts:

- ATC: ATTACH TEMPLATE [name]
- ATC: SET = EMPTY
- ATC: SEQ *n* VIA E | W

Reports – The following reports have been added or substantially changed:

- **Catalog Archive** – This report allows you to track files in the catalog that have aged enough to be moved to an archive database. It now also displays the total number and size of files by year and database location.
- **Email Sent** – This new report allows you track what emails have been sent from Spitfire in a given date range.

Upgrade Considerations

Review SiteConfig.xml

Why: Some changes were made to part settings in page.config

Potential Problem: Minor, aesthetic issue: Refresh Data icon may be missing on Project Cost Analysis and/or Project KPI; menu choice says Load Data instead of Refresh Data

Suggested Solution: Review your SiteConfig.XML - most commonly for a <Url>ProjectKPI</Url> or <Url>ProjectCA</Url>. The PropData in the corresponding <Pane> might include **<CustomButton>~/images/1x1.gif;Load Data</CustomButton>** -- if so, carefully remove that section.

During the upgrade: No action

Appendix 1 – Additions

Third Quarter 2014

Project KPI

- **KPI Formulas** – Act%: Specifies an action for the corresponding KPI Item, for example, see the distributed rule for ACT:ApprovedSC.


WorkflowScripts

- **ATC: ATTACH Template [name]** – Act%: Specifies an action for the corresponding KPI Item, for example, see the distributed rule for ACT:ApprovedSC.
- **ATC: EXIT THIS** – Act%: Specifies an action for the corresponding KPI Item, for example, see the distributed rule for ACT:ApprovedSC.
- **ATC: SET = EMPTY or = table.fieldname or =@.fieldname**
- **ATC: SEQ n VIA E | W**

Route Sequences on a Document's Route Detail tab

- **Drag-and-Drop** – Route sequences (future only) can now be rearranged using drag-and-drop.

Attachment Sequences on a Document's Attachment tab

- **Drag-and-Drop** – Attachments can be set to new sequences by using drag-and-drop. Don't forget to confirm your new sequence by clicking the accept  and saving the document.

Templates

- **qTeam** – New qAlias distributed with the system. The qTeam bookmark pulls all the team members from the Project Dashboard's Team Contact part. Options are: qTeam_TeamRole,

qTeam_UserName, qTeam_Company, qTeam_Addr1, qTeam_Addr2, qTeam_City, qTeam_State, qTeam_Zip, qTeam_Phone, qTeam_Fax, qTeam_Cell, and qTeam_Email.

- **New FNTX prefix** – This new prefix will print your number in text without adding the dollar check format.

System Admin | Roles

- **Has (capability)** – We added a new filter parameter to help you find which roles have a specific capability.

Contacts

- **Signature field** – New field available for signature images that can be included in Bookmark templates. This field only applies for employee and internal contacts.

User Preference

- **DocType** – New field for preferred DocType, the DocType you'd like to track across logins – or lock in on a specific.

Document

- **Masked DocNo** – If you configure a Masked Document Number for a specific Doc Type, the Doc No segments will work similar to the Masked Document Number on the Project Setup document.

System Admin | Customization

- **Part tool** – Now updates the guide image and field information when you click on a row.
- **DocHeader | DocNo** – The segments now support formats and overtext.
- **Alert part on Home Dashboard** – Now allows you to customize the following columns: Date, Description, Document, Project Name, Type.

- **Document Priority field** – Can now be customized to appear in the Document Header or in the Route Details tab.
- **New Filter on Label column** – Filters on Text anywhere in the Customization Line.

January 2015

Cloud Storage Feature - (License and service agreement required)

Document attachments are mirrored to cloud folders and can be updated/added from Box.com, Google Drive, Microsoft OneDrive, AWS S3 (and others)

- **DocType Tool** – Includes “publish-to-Cloud” flag.
- **DocStatus** – Supports document statuses that are published to the cloud and other options (See KBA-01588).
- **System Admin | Cloud Drives** – Allow you to configure your Cloud drive storage providers, and Project Setup tab selections.

Documents

- **FileCatalogConfig | TemplateAttachEdit rule** – Allows configuration of Templates opening for edits when newly added – or a just a simple add (editing is still available by clicking the file’s Edit icon).
- **Assemble Page Numbers** – Supports adding Page Numbers to the Assembled PDF file: Start At and S.
- **DocType Tool** – Includes “publish-to-Cloud” flag.
- **Priority** – The Priority drop-down on the Routing grid can now be customized (label, visibility, read-only) and moved to the Document Header.
Note: The Priority field should only be visible in one location on the document.
- **Email Response Wizard** – now supports File uploads, Route Instructions and Page timeouts.
- **Item tab** – The Item tab filter will now include a filter for Shop, if Shop is added to the Doc Items part.
- **Adding a Cost Code** – This functionality has been improved.

Word Templates

- **DSIG_prefix** – This new prefix will print the contents of the Signature field on the Contact Record. This field can hold a signature image file. See KBA-01586 for info on uploading image files to HTML fields.
- **FNTX_prefix** – This new prefix print a number as text with no Dollar formatting.
- **Inclusion (exclusion, etc.)** – These bookmarks now support xFilters.
- **xFilter & xSort** – These functions now support filtering or sorting of data in a table as long as the table is bookmarked as Tablexxxx or xxxxTable.

Workflow Scripts

- **ATC: SET** – This workflow function now support [=@.fieldname](#).
- **ACT: EXIT THIS** – This now workflow function supports exiting the loop when the first matching data is found.

Infrastruture

- **Catalog File Names** – now supports file names longer than 80 characters.
- **Web service** – can now return report output.
- **DV.ashx/CI request** – returns JSON performance data.