Files, Attachments and the Catalog Dashboard

Focus Guide

This Focus Guide is designed for Spitfire Project Management System users. In this guide you will learn how to use the Catalog Dashboard and its filter features; what you can do with files in your system; and how to work with attachments.

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About Our Documentation

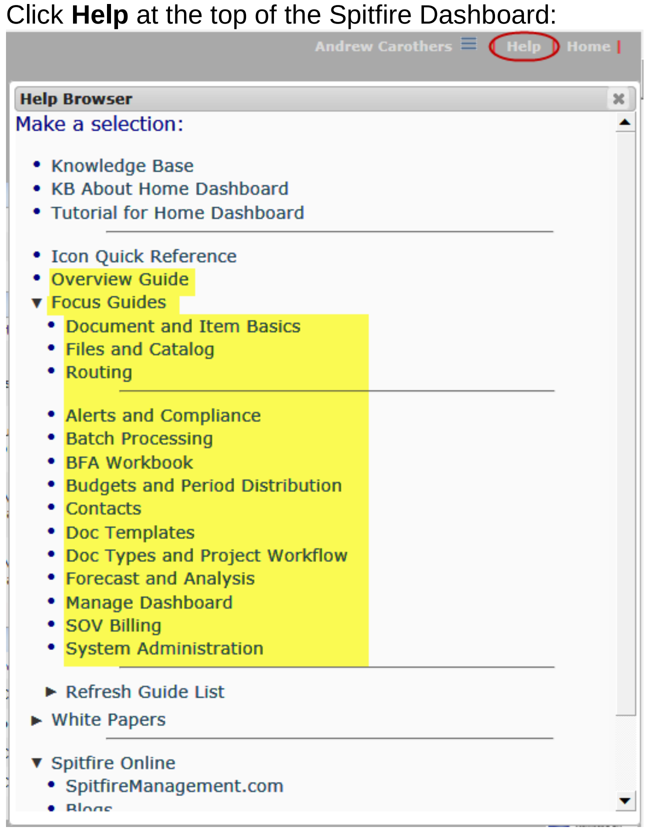
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller units of documentation—guides, knowledge base articles, and white papers.

Guides

Our guides, which include an *Overview Guide* and various other guides, focus on specific areas or tasks in sfPMS. Often, one Focus guide will refer you to a second Focus guide when an overlapping section is described in more detail in the second guide. By reading the guides, you will get a good understanding of the system in general and you will learn procedures for how to do many of the things that sfPMS allows you to do. We suggest you read the *Overview Guide* first, followed by other Focus guides as needed.

To access the guides:

1. Log in to sfPMS.
2. Click **Help** at the top of the Spitfire Dashboard:

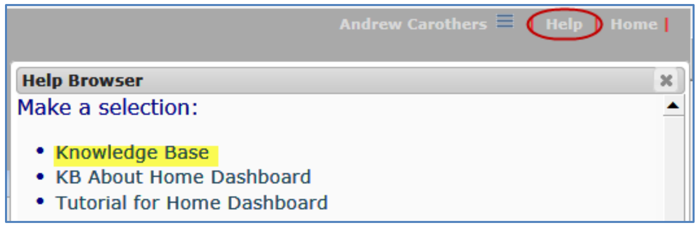


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

   The guide will appear as a PDF file.

The Knowledge Base

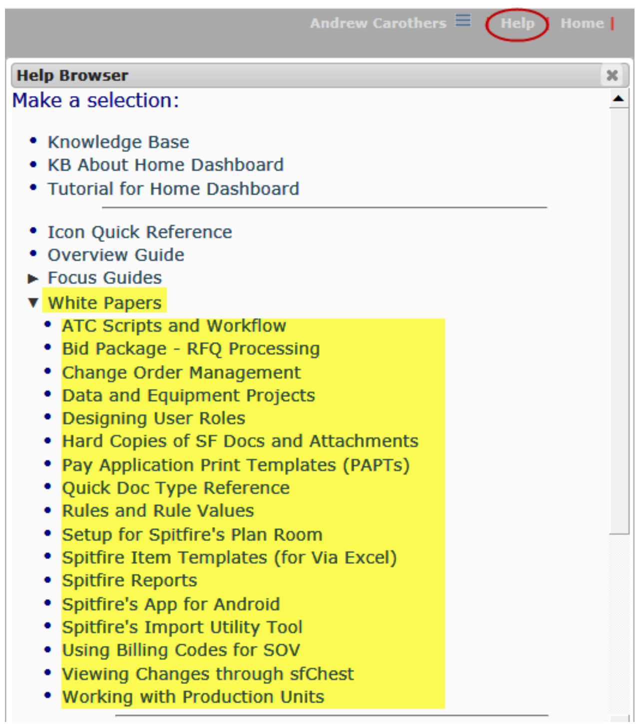
The Knowledgebase contains articles, often in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



Articles in the Knowledgebase are numbered, for example, KBA-01044.

White Papers

White papers are documents that delve into some of the more technical or specific aspects of sfPMS. White Papers are accessed through the same Help menu:



Introduction to This Guide

The Catalog Dashboard gives you quick access to all or some of the files uploaded or scanned into your Spitfire Project Management System (sfPMS) and all or some of the documents in your projects, depending on your access level.

Both Spitfire documents and files can be Attachments on a document.

This guide focuses on the Catalog Dashboard and its filter features; what you can do with files in your system; and how to work with attachments.

This guide assumes some familiarity with sfPMS and its dashboards as described in the *Overview Guide*. It also assumes a general understanding of the documents being used in your system. (See the *Focus on Document and Item Basics* guide for more information about documents.)

Note: Because sfPMS is configurable and because different users have different levels of access rights and permissions, the screens shown and the fields described in this guide may not be the same as those in your system.

Note: section, chapters and text that are new or changed from the V4.4 documentation appear with **green text** and sometimes an *.

Files vs. Documents

The terms “files” and “documents” are used very specifically in sfPMS to refer to two different things.

Files

A file is any electronic file uploaded or scanned into sfPMS, such as Microsoft Word documents, CAD files, PDF files, and scanned AP invoices. Links (such as website URLs) are a special type of file. Emails are another type of file. In short, if it is created outside of sfPMS and then uploaded or scanned in, it is a file. A file can be attached to a Spitfire document or just uploaded to the Catalog.

sfPMS stores all of your attached, uploaded and scanned files in the Catalog and is capable of storing multiple versions of the same file so that you can have a history of its versions. You can view as well as edit files that are in the Catalog.

Documents

A document is a specific entity created in sfPMS from one of the Spitfire Doc types. There are many Doc types in the system, each with its own specific purpose. In systems that are integrated with Microsoft Dynamics SL, some documents are linked to Microsoft Dynamics SL forms (e.g., Commitments, POs) and some are not (e.g., Meeting Minutes, Drawings). Because Doc types can be configured (in Spitfire-Enterprise), the Doc types available to you might not be the same as Doc types referred to in this guide. Some examples of Spitfire Doc types are Bid, Budget, Change Order, Commitment, Competitive Bid, Daily Field Report, Forecast, Inspections, Pay Applications, Pay Request, Punchlist, RFI, RFQ, Submittal, and Warranties. Most documents are created through the Project Dashboard. Documents can be attached to other Spitfire documents.

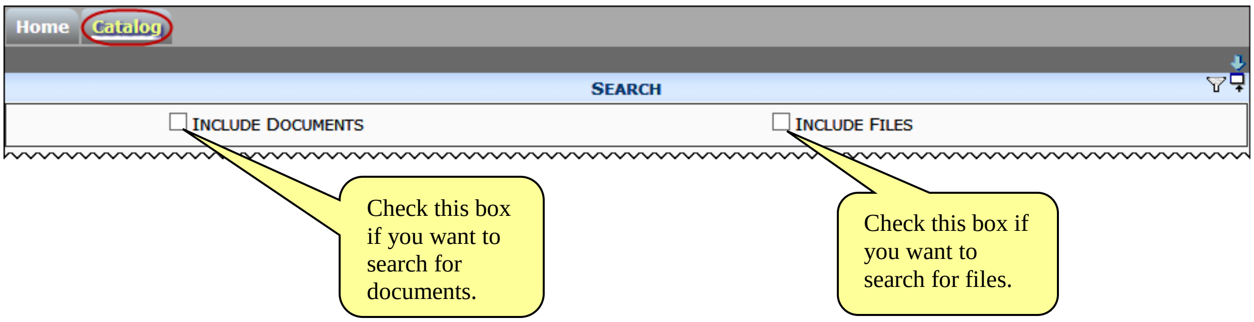
Documents are explained in greater detail in the *Focus on Document and Item Basics* and the *Focus on Doc Types and Project Workflow* guides.

The Catalog Dashboard

The Catalog Dashboard offers an overview or library of all of your files and documents. It can contain files not associated with a specific project, but nevertheless relevant to your company (budget templates, procedural documents, etc.).

Note: Security and permissions apply in the Catalog just as they do on other dashboards and projects. For example, if you cannot access a project, then you cannot access files linked to that project in the Catalog.

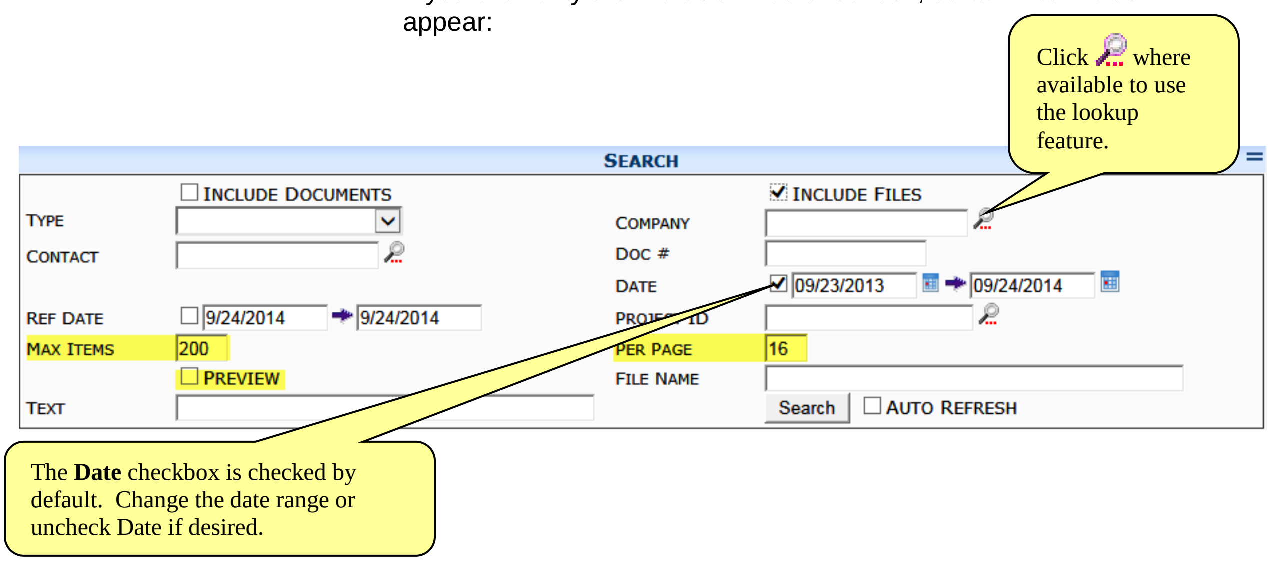
When you first access the Catalog Dashboard, only two filter parameters are displayed:



Filters

Include Files Only

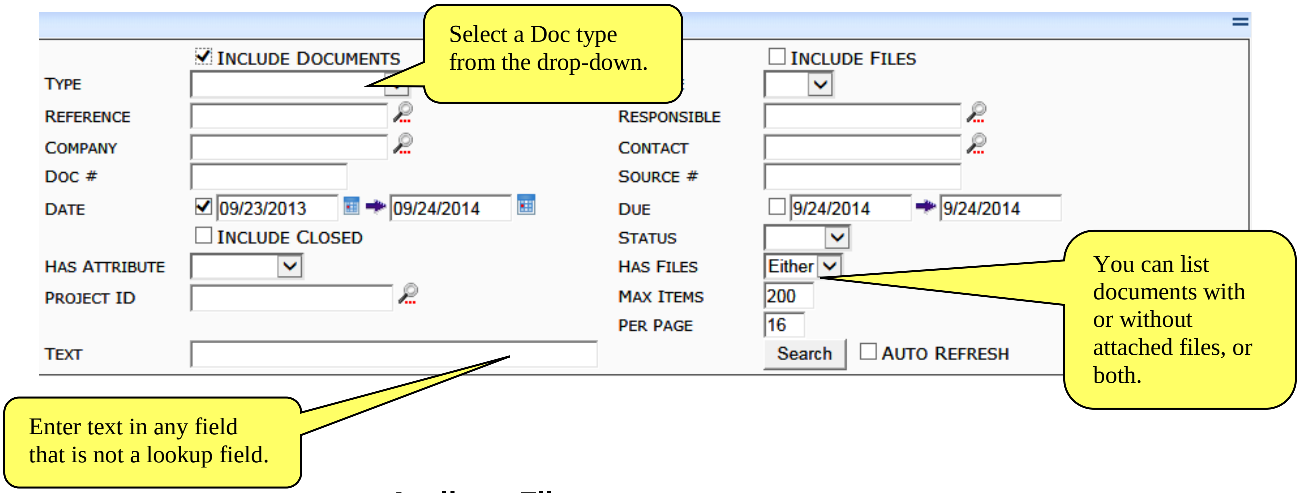
If you click only the **Include Files** checkbox, certain filter fields will appear:



Note: Per Page, Max Items and Preview are not filter fields. They affect how the results of your search will appear.

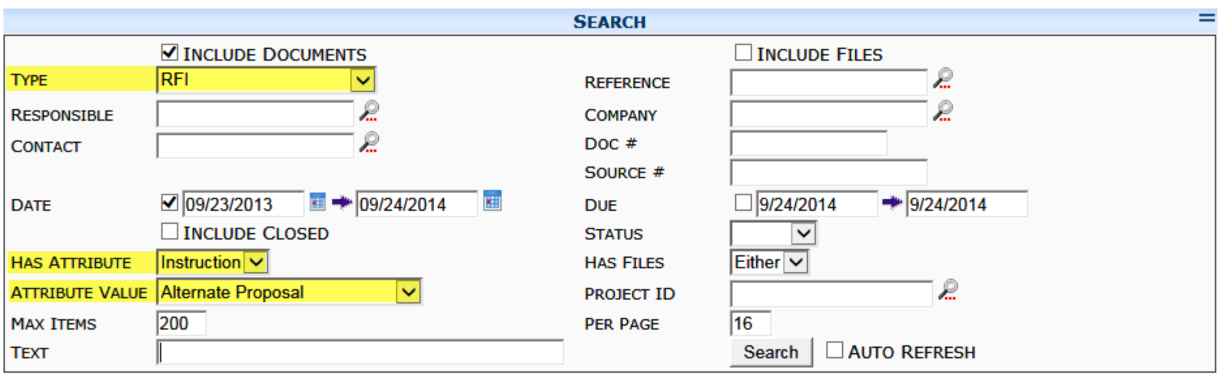
Include Documents Only

If you click only the **Include Documents** checkbox, certain filter fields will appear:



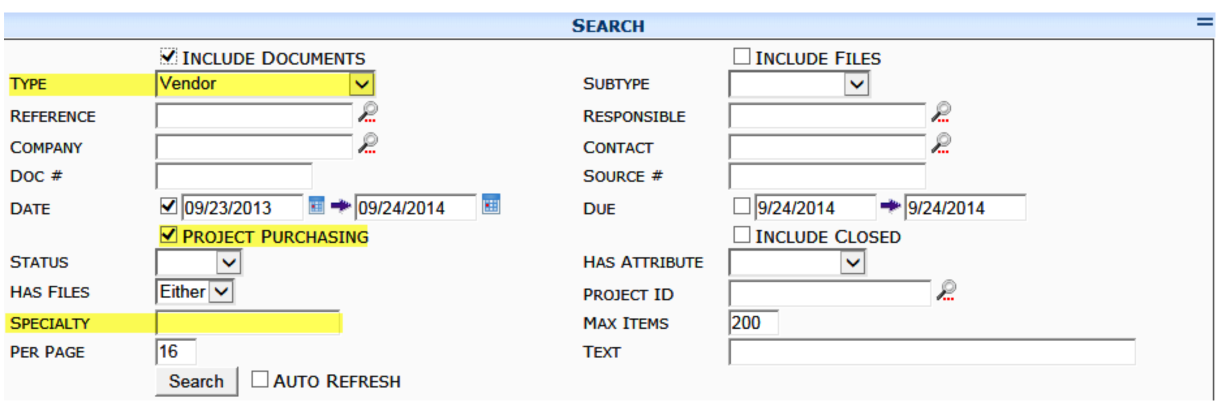
Attribute Filters

If you select a Doc **Type** (such as RFI), the **Has Attributes** filter appears. If you select an Attribute, the related **Attribute Value** filter appears:



Specialty Filter

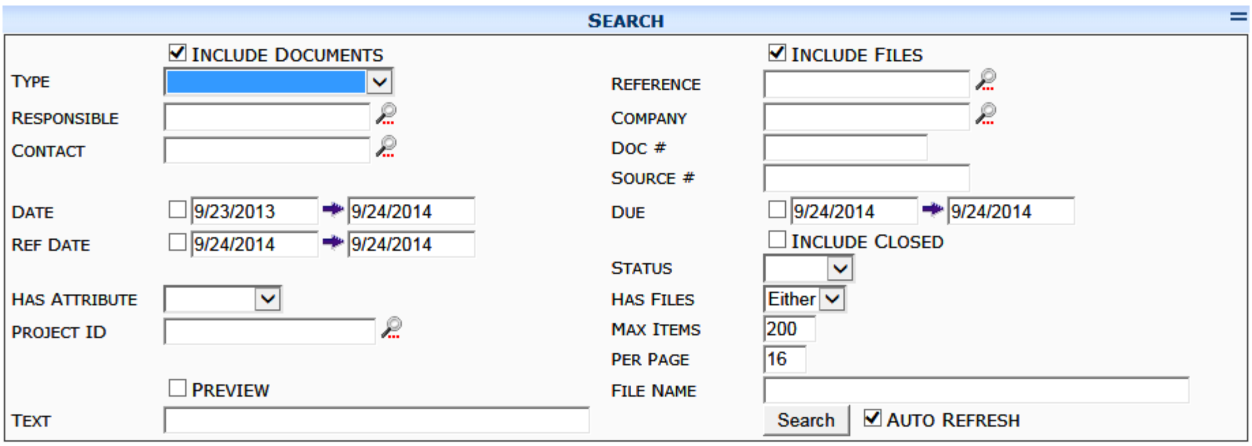
If you select **Vendor** as your Doc type, and click **Project Purchasing,** the **Specialty** filter appears:



The **Specialty** filter assumes a wildcard after what you type. Type the beginning of what you want to find and the filter will return all documents whose subcontractor CSI codes begins with those letters or numbers. For example, if you type **16** (for electrical) you might get documents whose CSI codes are 16000, 16100, 16202, etc.

Include Documents and Files

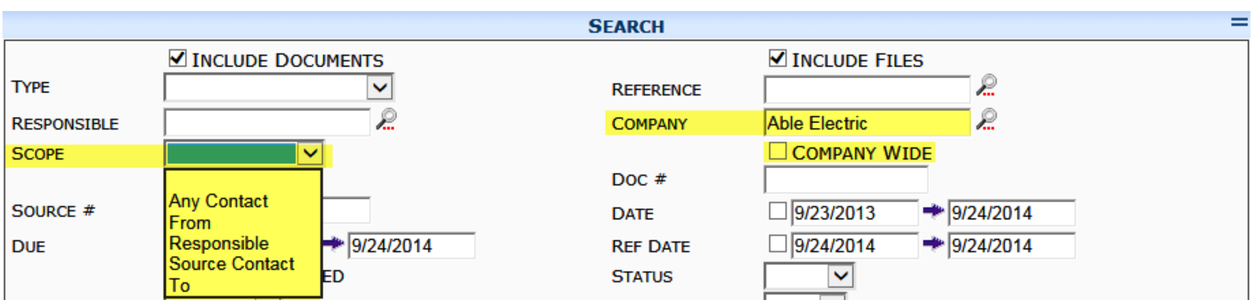
You can include both documents and files in your search. All the filter fields will then be available.



All filter fields serve to limit your search to the criteria you enter.

Contact and Company Fields

You cannot filter by **Company** and **Contact** at the same time. When one of these fields is populated, (and you <Tab> out) the other disappears until the first is blank again. In addition, when one of these filters is populated, two additional filters appear:



The **Scope** limits the search of the contact or company and the **Company Wide** checkbox expands it.

Note: in the Company field, as well as other lookup fields, you can type directly in the field and the system's autocomplete function will show you possible matches. You can select a match.

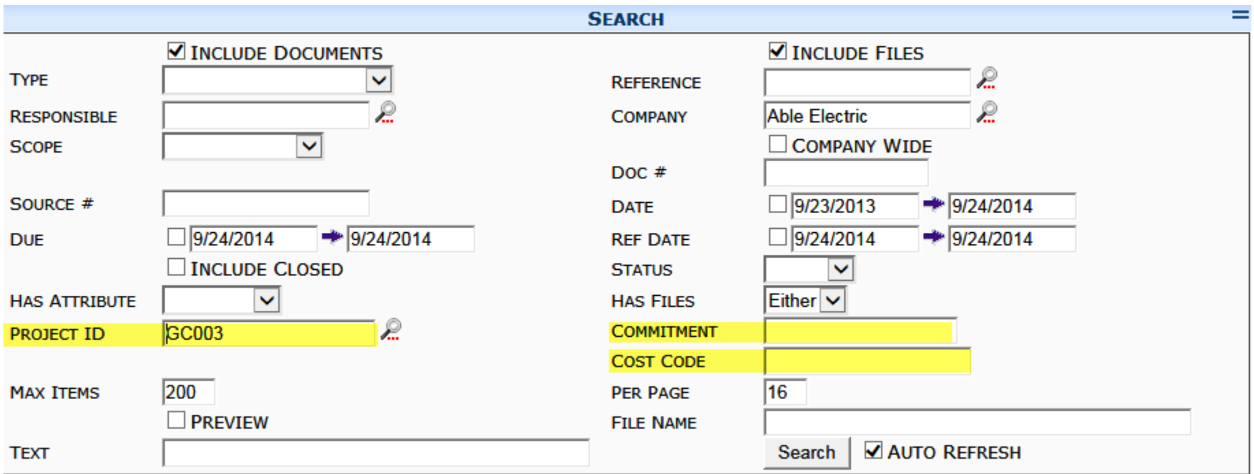
If this lookup	*And this Scope*	*And Company Wide*	*Results*
Company	From	Is not checked	Documents and files on which the From addressee is the company
Company	From	Is checked	Documents and files on which the From addressee is anyone linked to the company
Company	Responsible	Is not checked	Documents and files on which the Responsible party is the company
Company	Responsible	Is checked	Documents and files on which the Responsible party is anyone linked to the company
Company	Source Contact	Is not checked	Documents and files on which the Source Contact is the company
Company	Source Contact	Is checked	Documents and files on which the Source Contact is anyone linked to the company
Company	To	Is not checked	Documents and files on which the To addressee is the company
Company	To	Is checked	Documents and files on which the To addressee is anyone linked to the company
Company	Any Contact	Is not checked	Documents and files on which any of the above scopes is anyone linked to the company
Company	Any Contact	Is checked	Documents and files on which any of the above scopes is anyone linked to the company
Contact	From	Is not checked	Documents and files on which the From addressee is the contact
Contact	From	Is checked	Documents and files on which the From addressee is anyone linked to the same company as the contact
Contact	Responsible	Is not checked	Documents and files on which the Responsible party is the contact
Contact	Responsible	Is checked	Documents and files on which the Responsible party is anyone linked to the same company as the contact
Contact	Source Contact	Is not checked	Documents and files on which the Source Contact is the contact
Contact	Source Contact	Is checked	Documents and files on which the Source Contact is anyone linked to the same company as the contact
Contact	To	Is not checked	Documents and files on which the To addressee is the contact
Contact	To	Is checked	Documents and files on which the To addressee is anyone linked to the same company as the contact
Contact	Any Contact	Is not checked	Documents and files on which any of the above scopes is the contact
Contact	Any Contact	Is checked	Documents and files on which any of the above scopes is anyone linked to the same company as the contact

Project Field

You can type the full Project ID in the **Project** field, but if your Project ID is masked, you cannot include hyphens. For example, **GC003** will bring you results, but the masked **GC-003** will not.

Commitment and Cost Code Filters

If you enter a **Project** (and <Tab> out of the field), additional filters for documents (**Commitment** and **Cost Code**) appear:



You can type a DocNo in the Commitment field or use wildcards (see below) to identify a Commitment. All documents that are related to the identified Commitment(s) will be listed in the search results.

Wildcards and Logical Operators

Certain fields, such as **Doc #**, **File Name** and **Project**, allow you to use the wildcard **%** for your search. For example,

GC%	returns all projects beginning with GC
%123%	returns all projects with 123 in the Project ID
%001	returns all projects ending with 001
[cg]%	returns all projects beginning with c or g

TIP

Additional advanced searching techniques are described in KBA-01044.

In the **Text** filter you can use logical operators (common to SQL). Any phrases with two or more words that you want to search for as a unit must be within quotation marks. For example:

Logical Operator (in all caps)	***Returns documents/files that contain:***
hammer AND nail	the word **hammer** and the word **nail**
“knotty pine” AND NOT oak	the phrase **knotty pine** but not the word **oak**
“parking lot” OR “underground garage”	the phrase **parking lot** or the phrase **underground garage**
Electrical NEAR wiring	the word **electrical** near the word **wiring**

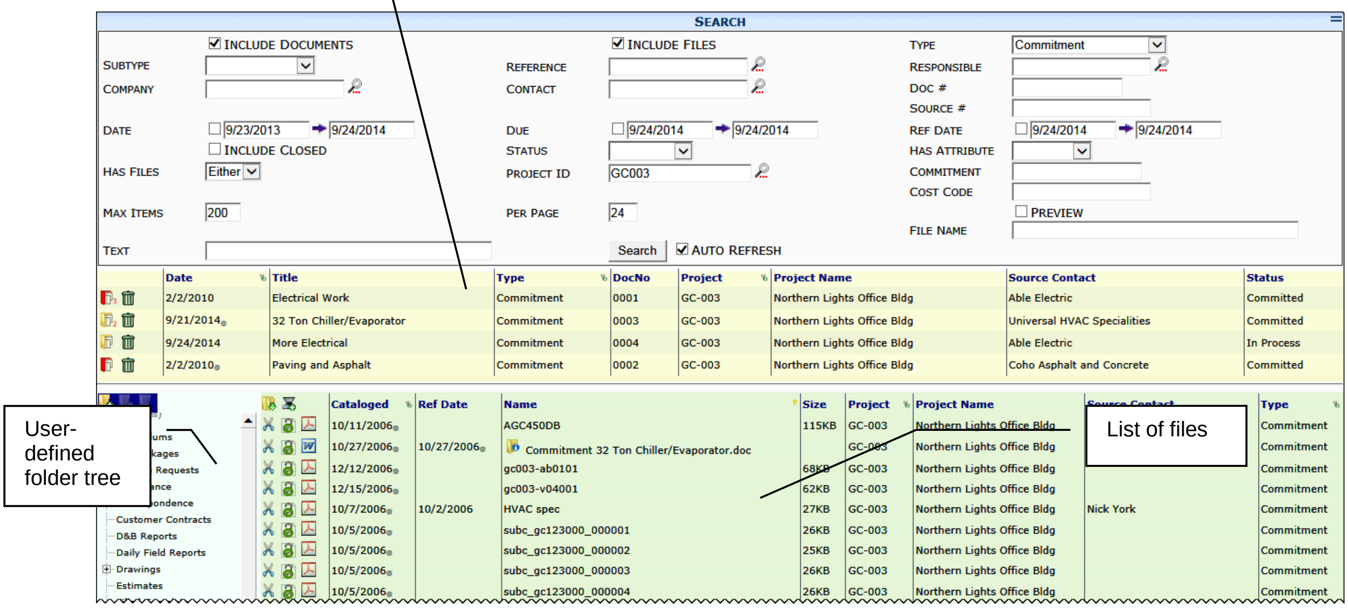
Search Results

To search for a document or file (or both):

1. Click either the **Include Document** or the **Include File** checkbox or both. The appropriate filter fields will appear.
2. Enter your criteria using the <Tab> key to get from one field to the next.
3. Click Search.

Search results appear below the filter section. Documents, if any, appear directly below the filter section. Files, if any, appear below the documents, as shown in the following example:

List of documents



TIP

If the folder tree is displayed, you can click on a particular folder if you want to limit the files displayed to that folder.

Note: After your results are displayed and while you are still in this dashboard, you can change certain filter information and the results will be updated immediately. However, if you leave the dashboard and return to it later, you will need to click Search again in order to update the results. Certain filters also require the Search button. If you don't see your results updated immediately, click Search.

Document List

Documents that match your filter criteria appear in a document list.

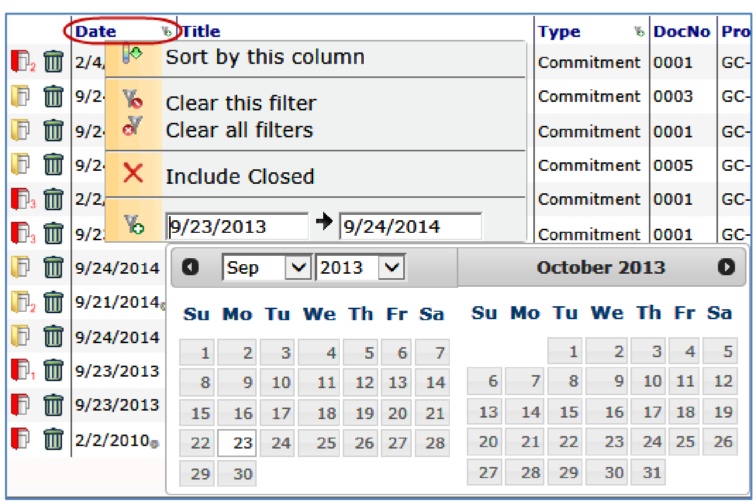
Date	Title	Type	DocNo	Project	Project Name	Source Contact	Status
2/4/2010	Commitment for Indoor Lights and Wiring	Commitment	0001	GC-202	KC Store	Margie and Sons	Committed
9/24/2014	Construction Engineering	Commitment	0003	GC-010	Le Restaurant de la Lune	Wingtip Engineers	Committed
9/24/2014	Site Work Excavation	Commitment	0001	GC-010	Le Restaurant de la Lune	Tailspin Excavation	Committed
9/24/2014	Metal work	Commitment	0005	GC-010	Le Restaurant de la Lune	Lucerne Metal Fabrication	Committed
2/2/2010	Electrical Work	Commitment	0001	GC-003	Northern Lights Office Bldg	Able Electric	Committed
9/23/2013	Electrical Work	Commitment	0001	GC-005	Fabrikam, Inc.	Able Electric	Committed
9/24/2014	Electrical Systems	Commitment	0004	GC-010	Le Restaurant de la Lune	Able Electric	Committed
9/21/2014	32 Ton Chiller/Evaporator	Commitment	0003	GC-003	Northern Lights Office Bldg	Universal HVAC Specialities	Committed
9/24/2014	More Electrical	Commitment	0004	GC-003	Northern Lights Office Bldg	Able Electric	In Process

Columns

- **Date**: the day the document was created.
- **Title**: the title of the document (from the document's Description field).
- **Type**: the Doc type.
- **DocNo**: the document number.
- **Project**: the project to which this document belongs.
- **Project Name**: the name of the project (from the Project Setup).
- **Source Contact**: the source contact on the document (for example, the Vendor or Responsible person) if any.
- **Status**: the current status of the document.

Column Filters

The **Date**, **Type**, **DocNo**, **Project** and **Status** columns offer a drop-down menu when you click anywhere on the header. This options menu allows you to sort the column, filter on the column, include closed documents, and clear filters.



Actions on Documents

To open and close a document:

1. Click (or , ,) at the row of the document you want to open. The document will appear in a separate window.
2. Click at the document header when you want to close the document.

TIP

For more information about role capabilities, see the System Administrator or the technical white paper [Designing User Roles](#).

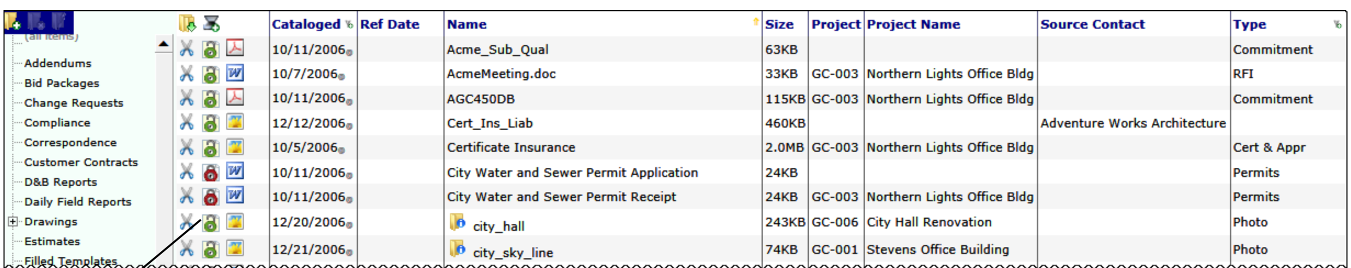
If you have the **DOC | Can Delete an entire document completely (RS)** role capability, you can delete documents that appear in the document list. (If you do not have this permission, the icon will not appear). **Note**: *Deleting a document should be done with caution!*

To delete a document:

1. Click at the row of the document you want to delete.
2. Click OK at the confirmation box that appears.
3. Click at the top of the Catalog Dashboard in order to make your deletions permanent.

File List

Files that match your filter criteria (or, optionally, are in a specified folder) appear in the file list.



Cataloged	Ref Date	Name	Size	Project	Project Name	Source Contact	Type
10/11/2006		Acme_Sub_Qual	63KB				Commitment
10/7/2006		AcmeMeeting.doc	33KB	GC-003	Northern Lights Office Bldg		RFI
10/11/2006		AGC450DB	115KB	GC-003	Northern Lights Office Bldg		Commitment
12/12/2006		Cert_Ins_Liab	460KB			Adventure Works Architecture	
10/5/2006		Certificate Insurance	2.0MB	GC-003	Northern Lights Office Bldg		Cert & Appr
10/11/2006		City Water and Sewer Permit Application	24KB				Permits
10/11/2006		City Water and Sewer Permit Receipt	24KB	GC-003	Northern Lights Office Bldg		Permits
12/20/2006		city_hall	243KB	GC-006	City Hall Renovation		Photo
12/21/2006		city_sky_line	74KB	GC-001	Stevens Office Building		Photo

These icons are explained in pages 21, 55 and 61.

Columns

- **Cataloged**: the date the file was added to the Catalog.
- **Ref Date**: a reference date for the file. A file can be associated with any date through the [Properties](#) option on the File Options menu (see page 57).
- **Name**: the name of the file.
- **Size**: the size of the file (KB or MB).
- **Project**: the project to which the file was added, if any.
- **Project Name**: the name of the project (from the Project Setup).
- **Source Contact**: a source contact associated with the file as entered through the [Properties](#) option on the File Options menu (see page 57).

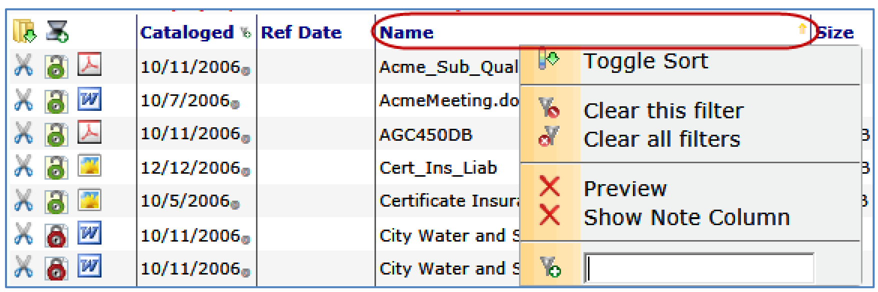
TIP

If you click on a link to get to another page in this guide, you can use the Alt + ← (left arrow) keys to return to the previous view.

- **Type**: the Doc type associated with the file. If a file is attached to a document, that document's Doc type is associated with the file. Otherwise, a file can be associated with a Doc type through the Properties option on the File Options menu (see page 57).
- **Note**: the note associated with the file, as entered through the Properties option on the File Options menu (see page 57). This column is normally hidden; see "Column Filters" below for how to show this column.

Column Filters

The **Cataloged**, **Ref Date**, **Name**, **Project,** and **Type** columns offer a drop-down menu when you click anywhere on the header. This options menu allows you to sort the column, filter on the column, show/hide preview thumbnails, show/hide the **Note** column, and clear filters.

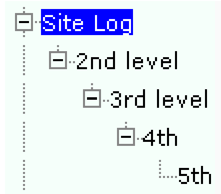


Actions on Files

The most common action to take on files is to open and view them from the files list. There are various other tasks you can do with files, all of which are explained beginning on page 25.

Folders

Folders provide an effective way of organizing your files in sfPMS. Files can be placed in folders and moved to other folders. Folders can contain sub-folders, which can contain their own subfolders, for example:

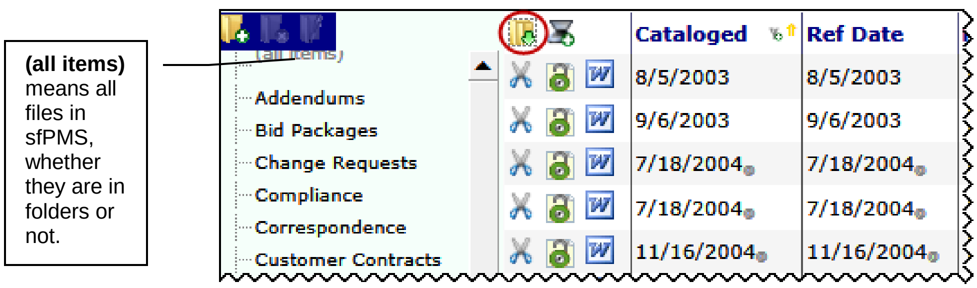


The folders that are established on the Catalog Dashboard can also be seen on all Project Dashboard's File part. This means that individual projects cannot have different folder trees—all projects share the folder structure from the Catalog Dashboard. For this reason, ***it is important to plan the Catalog folders appropriately***. Any changes to the folder structure made at the Catalog will affect all projects.

All folders in your system appear on the file folder tree. However, you might not have permission to see the contents of all the folders in your folder tree.

File Folder Tree

The file folder tree appears to the left of the file list. You can show or hide the folder tree through the toggle at the top of the file list:

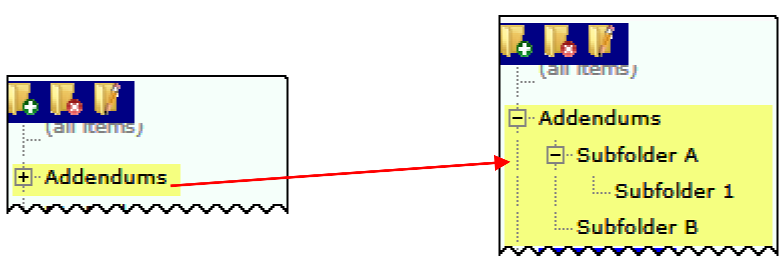


When looking for a file, you can find it by navigating to the appropriate folder in addition to, or instead of, using filters. When you click on a folder name, only files in that folder appear in the file list.

Note: You may have to expand a folder in order to get to the folder that contains the file(s) you want.

To expand folders:

- Folders preceded by can be expanded to show sub-folders. For example, if you clicked on on the Addendums folder and its subfolders, you would get the sub-folders shown on the right:



To collapse folders:

- To collapse sub-folders back into the main folder, click ⊟ by the main folder name.

Add, Delete, Rename Folders

TIP

For more information about role capabilities see the technical white paper *Designing User Roles.*

Some folders were probably created during your implementation of sfPMS. However, if you have the **PART | Maintain Catalog and Report folders (RIUD)** role capability, you can add, delete and rename folders at any time. Remember that what you add and delete will affect the Files part on all Project Dashboards.

To add a folder:

1. (*optional*) If you want the new folder to be a sub-folder under another folder, click on the existing folder name.
2. Click at the top of the folder tree.
3. In the dialog box that appears, enter a name for your folder, then click OK.
   Note: If your new folder is a main folder, it will appear at the bottom of the folder tree. If it is a sub-folder, then its main folder will have a ⊞ next to it. You have to click ⊞ to see or get to your new folder.

To rename a folder:

1. Click on the folder name you want to change.
2. Click at the top of the folder tree.
3. In the dialog box that appears, change the name of your folder then click OK.

To delete a folder:

Important Note: Deleting a folder does NOT delete the files in the folder.

WARNING

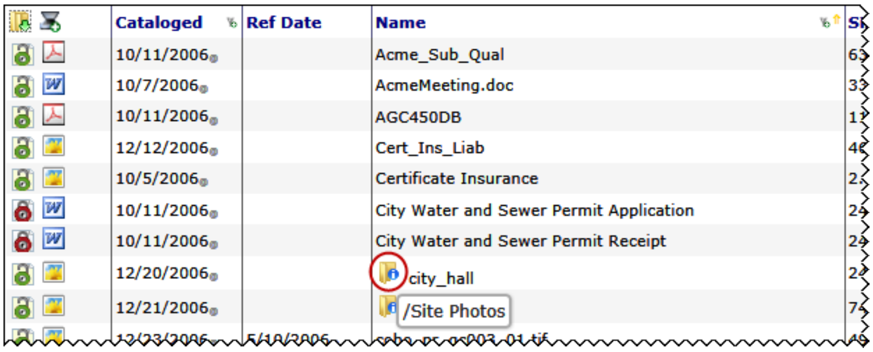
Since access to files in the catalog is controlled by permission to folders, deleting a folder can change the ability for certain users to see or access files.

1. Click on the folder you want to delete
   Note: if you want to delete a sub-folder, get to it by expanding its main folder.
2. Click at the top of the folder tree. A confirmation box will appear.
3. Click OK if you really want to delete the folder, or Cancel to cancel.

Note: If you delete a folder that had sub-folders, the folder will be deleted and the sub-folders will be promoted up one level. In addition, if you delete a folder that contains files, those files will be promoted up one level (either placed in another folder or in the root.)

Files in Folders

When you don't specify a folder for the file list, all files (that meet filtering criteria) are listed. Those that are in a folder are indicated by , for example:

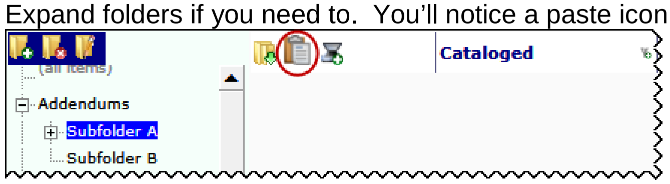


If you mouse over the , the name of the folder containing that file appears.

Files that do not contain the icon are not in any folder. Files in existing folders as well as files that are not in any folders can be moved into any of the folders in the folder tree.

To move a file into a folder:

1. Using filters if desired, search for your file so that it appears on the file list.
2. Click to show the folder tree, if it is hidden. The icons will not appear unless the folder tree is visible.
3. Click at the row of the file you want to place in the folder. The will change to .
4. (*optional*) Click at other files that you want to also move into the same folder.
   Note: You can click at any file to change it back to if you change your mind about wanting to move that file.
5. Click on the folder name where you want to move the file(s). Expand folders if you need to. You'll notice a paste icon.

6. Click . All marked files will be moved to the indicated folder

Overview on How to Add Files to the Catalog

There are several ways that files get added to the Spitfire Catalog. These methods are summarized below.

Upload Site Photo

From the Photo Part of the Project Dashboard

You can upload a photo for a specific project through an upload dialog opened from the Photo part. The uploaded file becomes the most recent photo shown on the Project Dashboard, shows up in the Files part of the Project Dashboard and is included in the Catalog Dashboard. For more information, see page 27.

Add Files Tool

From the Catalog Dashboard

You can use the Add Files tool to upload or scan a file, as well as to add a website link or email, to the Spitfire Catalog. Files that are thus added to the Catalog need not be part of any project, nor attached to any particular document.

From the File Part of a Project Dashboard

You can use the Add Files tool to upload or scan a file for a specific project. This file will show up in the project's File part (on the Project Dashboard), as well as in the Catalog Dashboard.

From the Attachment Tab

You can use the Add Files tool from a document's Attachment tab to attach a file to that particular document. Once attached to a document, the file will appear in the corresponding Project Dashboard as well as in the Catalog Dashboard.

You can attach a file to the document in general or to a specific Item on the document. For more information, see page 49. For more information about the Add Files tool, see page 28.

Drag and Drop

From the Attachment Tab

You can drag files from your computer onto a document's Attachment tab to attach those files to that particular document. Once attached to a document, the files will appear in the corresponding Project Dashboard as well as in the Catalog Dashboard. For more information, see page 45.

Create from Template Feature

From the Attachment Tab

If an Attachment template is available for the Doc type, you can create a file from the template through the icon. The file is attached to the document and thus also added to the Catalog. Files can also be created automatically from an Attachment (auto) or Attachment (all) template. For more information, see page 50.

Reply Emails

From Via Email Routees

If you route a document to a Via Email routee and that routee attaches a file in the reply email, that file is attached to the document's Attachment tab and thus also added to the Catalog (assuming the reply email is processed correctly). For more information, see the *Focus on Routes* guide.

Emails from Mobile Devices

From the Inbox

If properly set up, you can email any file to be attached to a particular document through the icon. The file would thus be added to the Catalog.

From the Attachment Tab

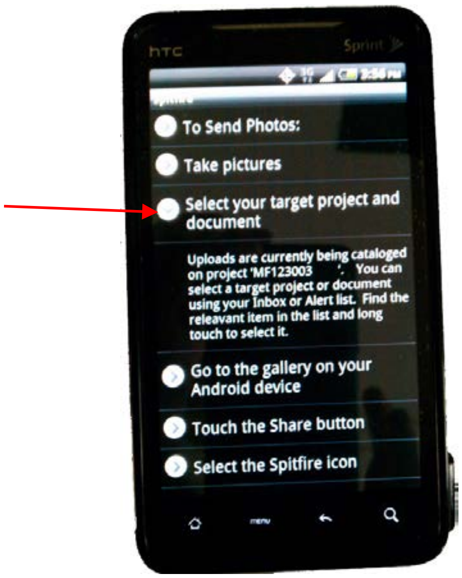
You can email any file to be attached to a particular document through the icon. The file would thus be added to the Catalog.

For more information, see page 76.

Spitfire App for Android

From a Mobile Device Running Android 2.2+

If you have downloaded the Spitfire App for Android on your smart phone or other mobile device running Google's Android 2.2 or later, you can upload a photo file to the Catalog through the app's Send Photo function. The photo can be attached to a specific document and project, as well.



For more information, see the technical white paper *Spitfire's App for Android*[tm] .

Overview on What You Can Do With Files

There are several things you can do with the files in the Catalog and with attached files on your documents. What you can do is described in detail where indicated and summarized below.

Note: all actions assume you have the necessary access and permissions.

Attach Catalog File to a Document

No matter how a file was added to the Catalog, that file can be attached to a particular document at any time through the **DocAttach** tool.

For more information, see page 46.

Route Files

Any file that is attached to a document can be routed to other people, as appropriate.

For more information, see the *Focus on Routes* guide.

Catalog files that are not attached to a document can nevertheless also be routed through a special **Catalog File Route** document.

For more information, see page 59.

Delete Files

You can delete files from the Catalog. Once deleted, files are permanently removed from the Spitfire system.

For more information, see page 60.

View Files

sfPMS allows for various ways to view a file. Depending on setup and the applications on your workstation, you may be able to view a file through its native application (e.g., in Adobe Reader or Microsoft Word or Microsoft Excel, etc.).

For more information, see page 61.

Edit Files

If you have the proper application (such as Microsoft Word or Excel) on your workstation, you can edit certain Catalog files and “check in” your revised versions.

For more information, see page 63.

Approve Files

Most sites approve files automatically when they are added to the system. However, if automatic approval has been turned off, you can manually approve files as well as revoke approval of files.

For more information, see page 67.

Export Files

You can export files from the Catalog onto your computer.

For more information, see page 69.

Download Files

You can download files from the Catalog onto your computer through a zipped file.

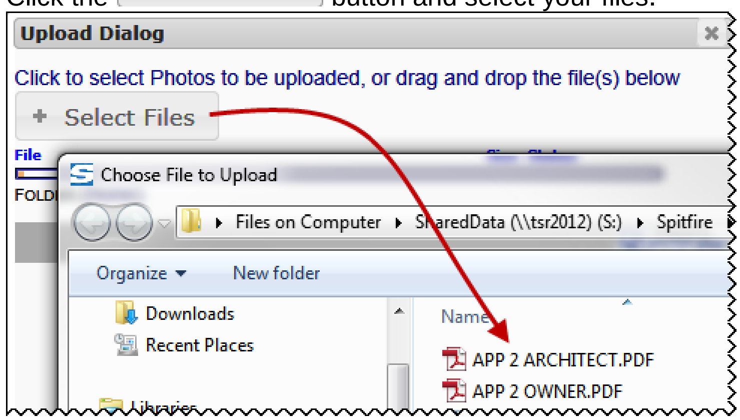
For more information, see page 73.

Upload Site Photo

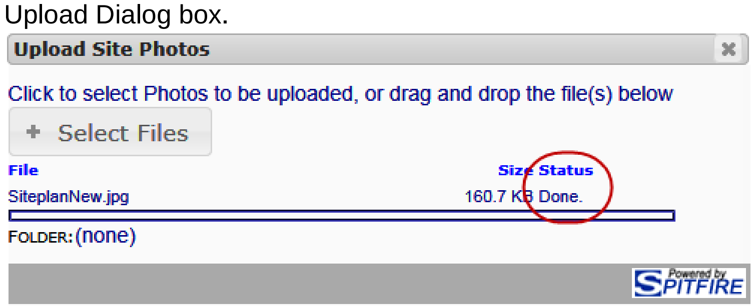
If you click the icon from the Photo part of a Project Dashboard, any uploaded file is defaulted into the Site Photo folder for the project and used as the most recent photo that appears on the Photo part.

To upload a photo:

1. Click to open the drop-down options menu.
2. Select **Add Image**. An Upload Dialog box will appear.
3. Click the button and select your files.



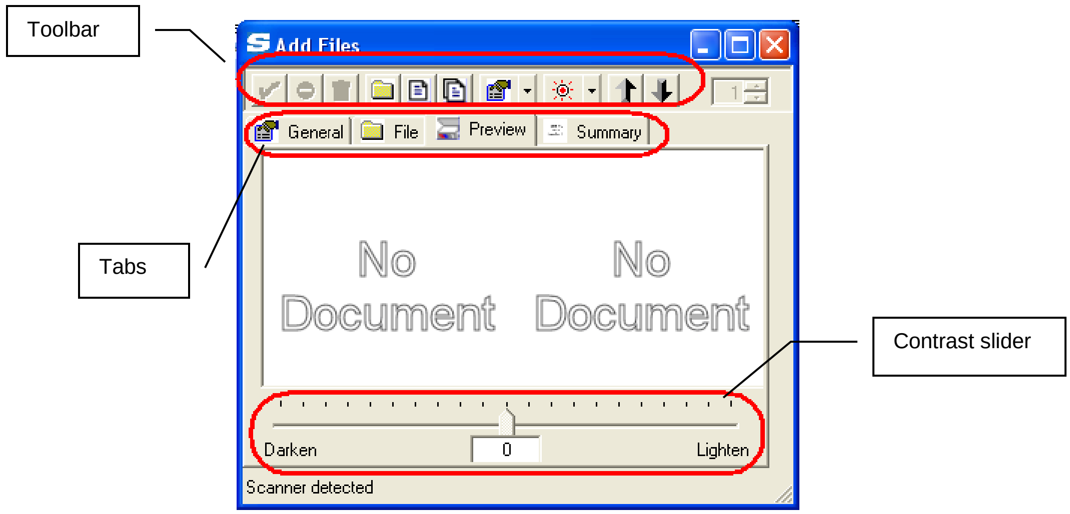
4. When the status on the window says Done, click to close the Upload Dialog box.



Your uploaded file will appear in the Photo part.

Add Files Tool

The Add Files tool has four tabs, a toolbar and (in the Preview tab) a contrast slider:

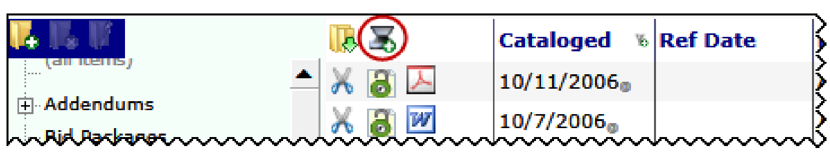


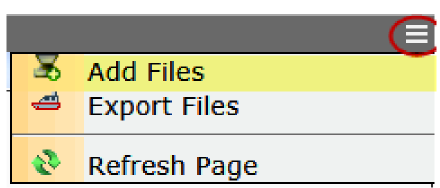
Access Points

You can add files to the catalog through the Add Files tool, which is accessed through the icon. The icon appears in various locations in sfPMS.

The Catalog Dashboard

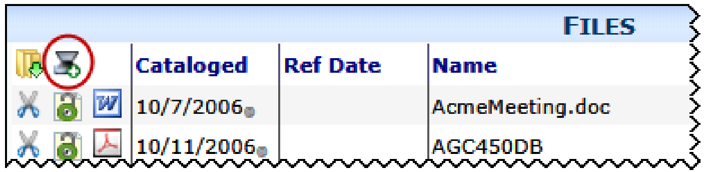
If you open the Add Files tool from the file list on the Catalog Dashboard or from the Catalog Options menu, you can upload or scan files that are not part of any project (although you can also specify a project for those files).





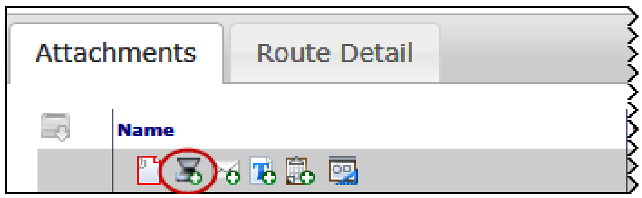
The Project Dashboard

If you open the Add Files tool from the Files part on a Project Dashboard, any files uploaded or scanned into the Catalog are also made part of, and available to, the particular project.



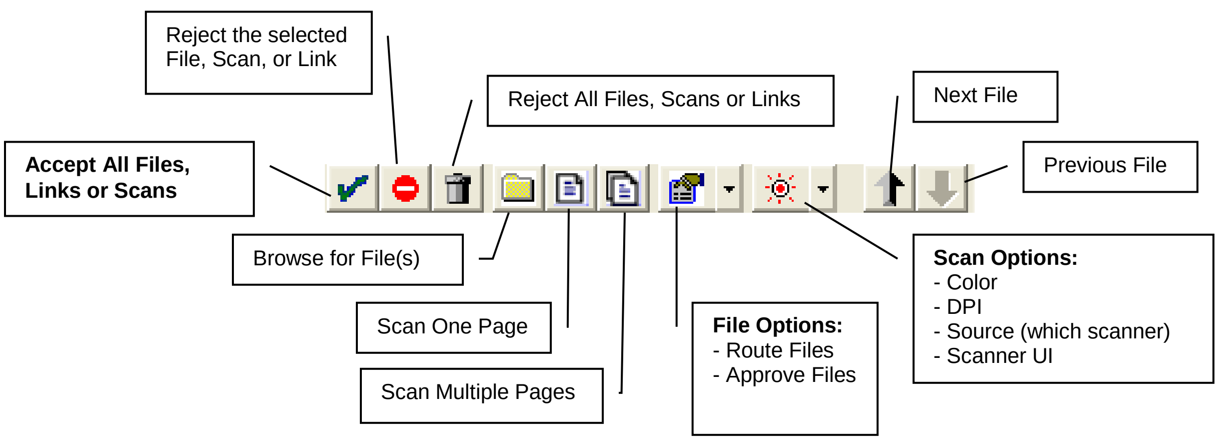
The Attachment Tab

If you open the Add Files tool from a document's Attachment tab, any files uploaded or scanned into the Catalog are also attached to the document and made part of, and available to, the particular project.



The Toolbar

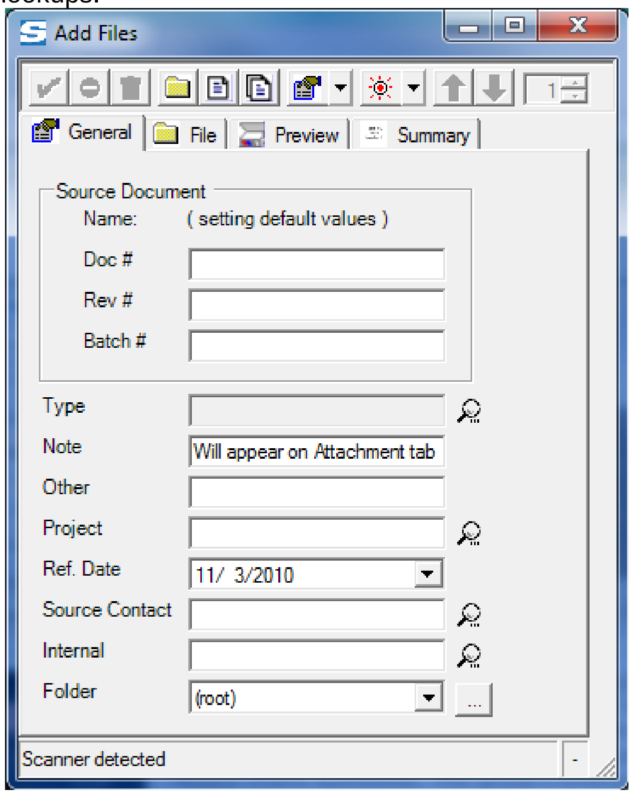
You can use the toolbar from the various tabs in the Add Files tool:



The Tabs

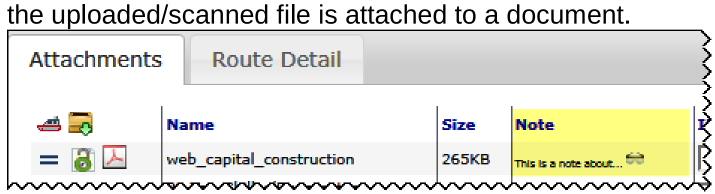
General Tab

The General tab displays information about the file. All of the information on this tab is very useful when you use the search feature to find a file, but none of the information is required. Some of the fields on this tab are lookups.



Notes

- The **Note** field populates the Note field on the Attachment tab, if the uploaded/scanned file is attached to a document.



  The **Note** field can also be used for image captions.

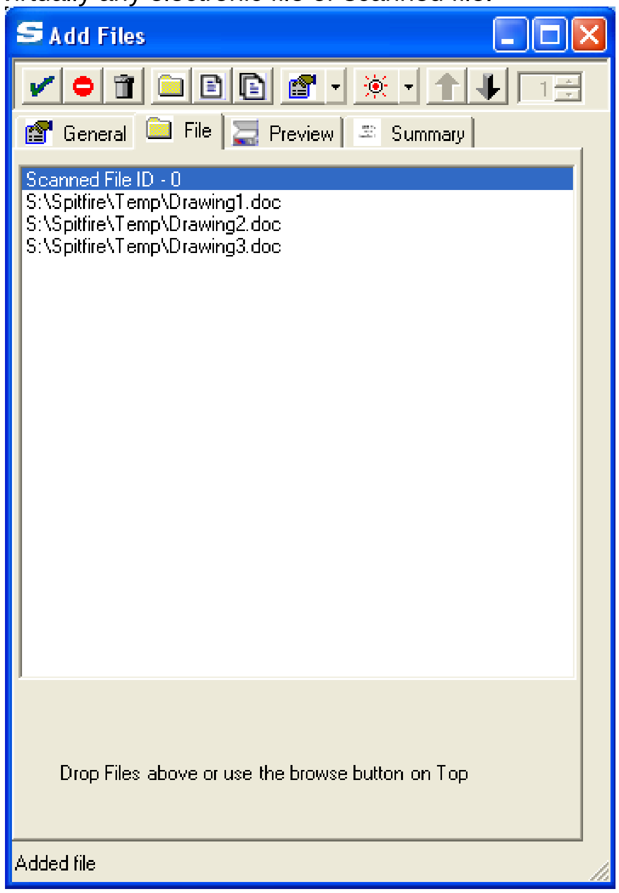
- To make the file part of a particular project, look up the desired **Project**.

- You can place the file in a particular **Folder** by browsing for the folder () or selecting a folder from the drop-down. When you browse, you will see the folder tree as set up on the Catalog Dashboard.

File Tab

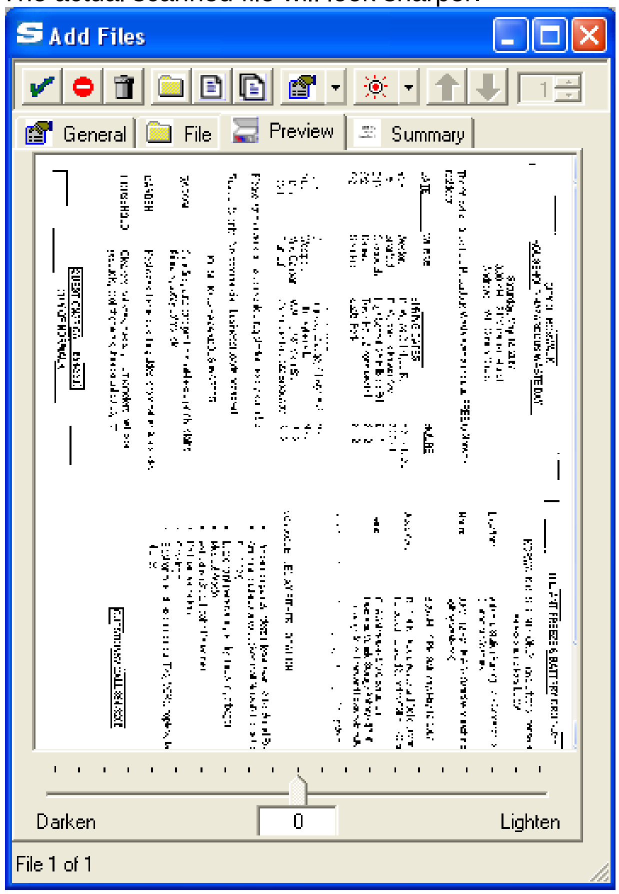
The File tab lists all the files that will be uploaded to sfPMS when you click the  button. Files can be images, text files, CAD files, or virtually any electronic file or scanned file.

TIP
For information on the maximum file size that can be uploaded, see KBA-01147.



Preview Tab

The Preview tab gives you an idea of what a scanned file will look like. The actual scanned file will look sharper.

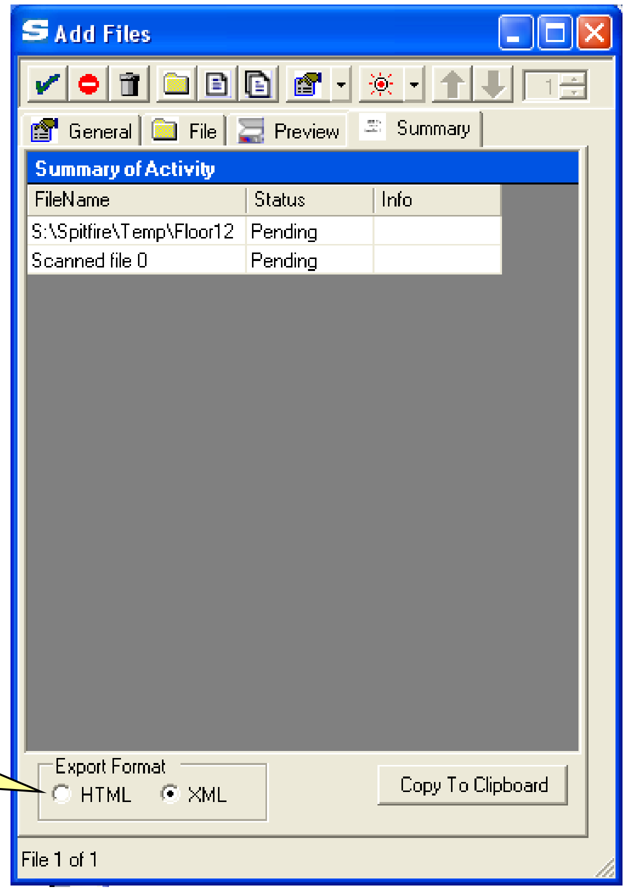


Note:

- You can use the slider at the bottom to lighten or darken the image.

Summary Tab

The Summary tab lists the files included in the upload, along with any error messages that might occur. You can copy the summary into a file outside of sfPMS:



Select the Export Format here if copying this information.

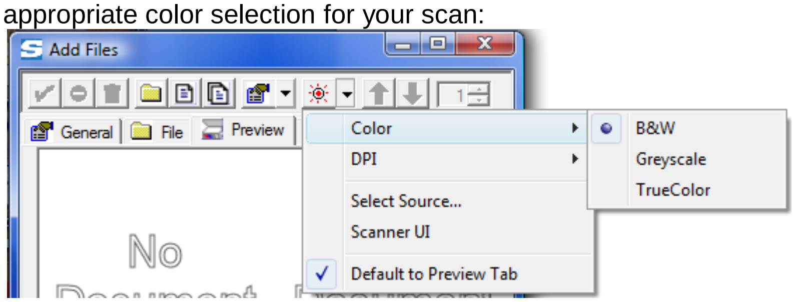
Scanning Files

TIP

For moderate scanning, any TWAIN compliant scanner will work with the Add File tool.

To scan a one-page file:

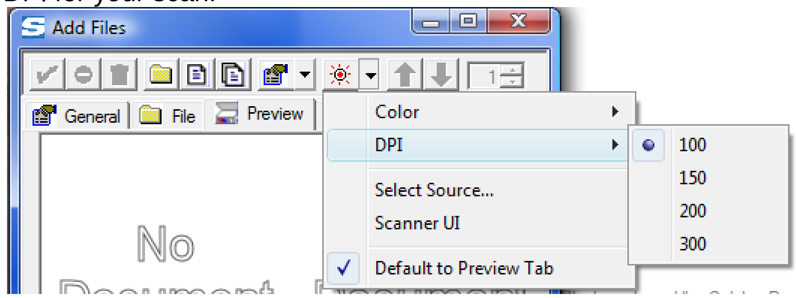
1. Place the page you want to scan on your scanner.
2. Click to open the Add Files tool.
3. Click on the Preview tab. When you scan the file, you'll be able to see it in the Preview tab.
4. (*optional*) Click , select **Color**, then click on the appropriate color selection for your scan:



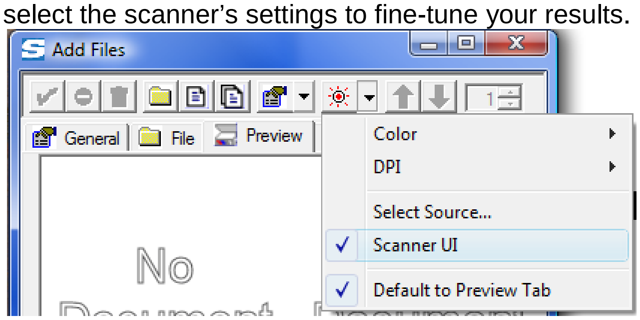
TIP

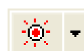
Scanner and Color Resolution Note:
Scanner: If you do not select a Scanner and set the Scanner UI, the settings you last set will be used.
Color Resolution: If you do not select a color resolution, the setting you last set will be used.

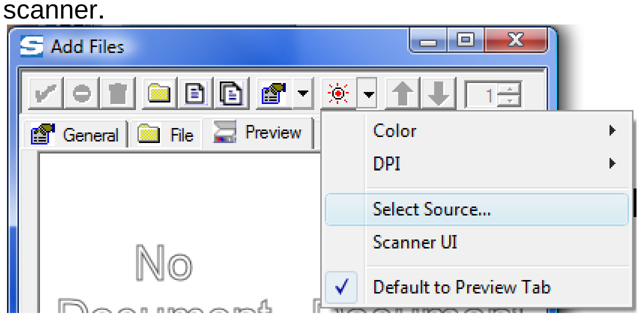
5. (*optional*) Click  select **DPI**, then click on the appropriate DPI for your scan:

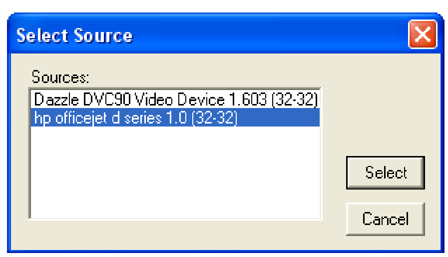


6. (*optional*) Click  then select **Scanner UI**. Additional prompts will appear after you begin scanning so that you can select the scanner's settings to fine-tune your results.

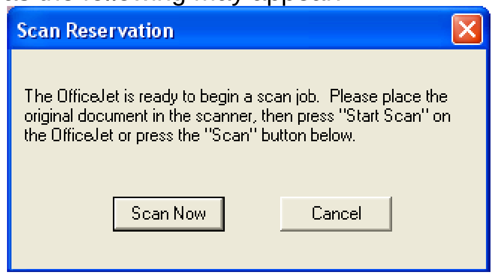


7. (*optional*) Click , select **Select Source,** then select your scanner.



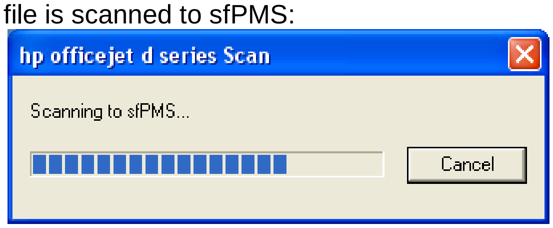


8. Click . Depending on your scanner set up, a message such as the following may appear:



   - Click Scan Now when you are ready to start scanning.

9. An information box such as the following will appear while your file is scanned to sfPMS:



   Your scanned file will appear in the Preview tab.

10. (*optional*) Click to reject the page (if you don't like the way it came out, for example. You can then click again to rescan).

11. (*optional*) Use the contrast slider at the bottom of the window to adjust the image's contrast.

12. Click the General tab and enter a Note, if you want a note to be associated with this file. You may also want to enter (or browse for) a **Folder** in which to put your scanned file. (More information about folders is found on page 19.)

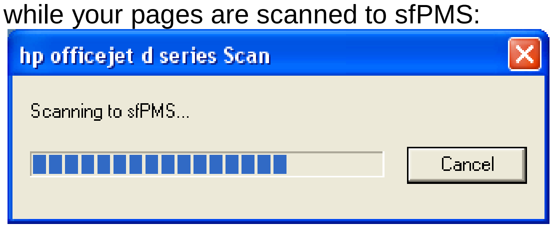
13. (*optional*) Approve or route the file as described on page 38.

14. Click to accept your scanned file (or click to reject the file).

To scan a multiple-page file or multiple files:

1. Start the same way you would if you were scanning one page (i.e., steps 1-7 described above).

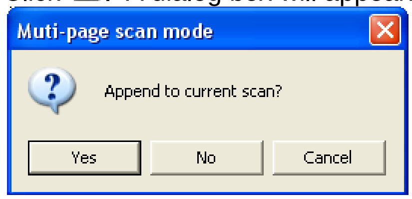
2. Click . An information box such as the following will appear while your pages are scanned to sfPMS:



TIP

If you scan your pages using an ADF (automatic document feeder), you can skip steps 3 and 4; all pages will be scanned when you click .

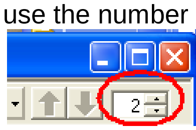
3. Click . A dialog box will appear:



4. If you want to scan a second page of the same file, click Yes. If you want to scan a second page that is actually a new file, click No. (In either case, you'll have to place the second page on the scanner first.) If you don't want to scan a second page after all, click Cancel.

5. (*optional*) After a page has been scanned, you can click to reject the page (if you don't like the way it came out, for example. You can then click again to rescan).

6. (*optional*) If your scanned file has more than one page, you can use the number box at the top to get to your pages:



7. (*optional*) If you scanned more than one file, you can click or to review your different files.

8. For each file, click the General tab and enter a keyword. (At least one keyword per file is suggested.) You may also want to enter (or browse for) a **Folder** in which to put your scanned file(s).

9. Click to accept all your scanned pages/files (or click to reject all the pages/files).

Uploading Files

TIP

If the Notes and Catalog folder for each uploaded file is the same, enter this information before you add your files to the File tab. That way your Note and Folder will apply to all the files you add to the File tab. If you add your files/links to the File tab and then move to the General tab to add Note and a Catalog Folder, use the   button to move to the Next or Previous file/link.

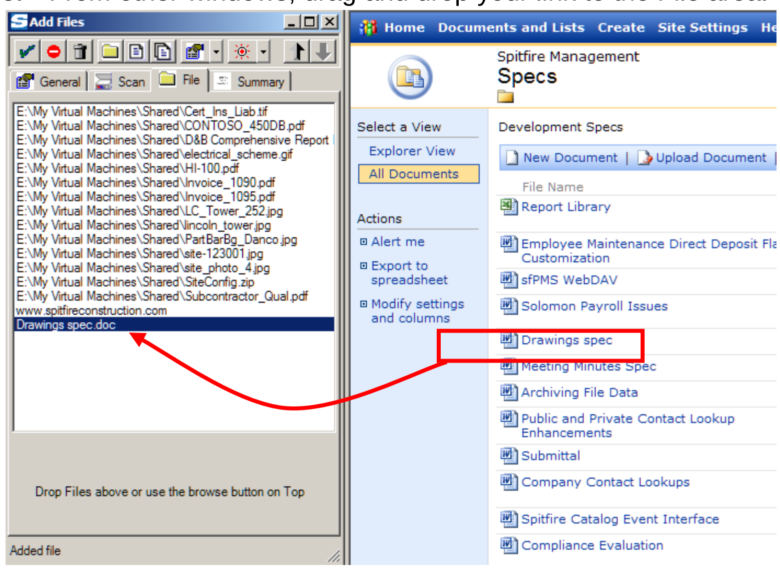
To upload a file that is on your workstation:

1. Click to open the Add Files tool.
2. Click the File tab.
3. Either drag-and-drop files from your computer to the File area
   -or-
   Click to browse your computer for the file(s) you want to upload then
   - Select the file(s) and click Open.
4. (*optional*) Select a file and click to remove it from the list. Click to remove all the files from the list.
5. Click to accept the file(s).

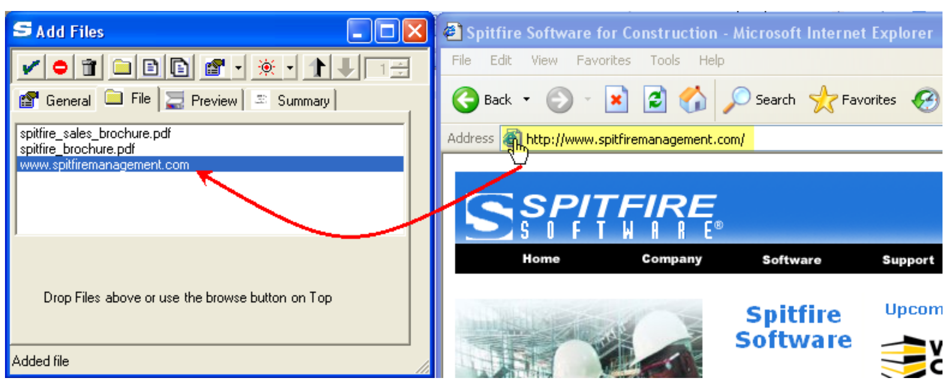
Links to information elsewhere, such as URLs that take you to websites, are considered a type of file in sfPMS. As such, you can add links to the Catalog and as attachment to documents.

To add a link:

1. Click to open the Add Files tool.
2. Click the File tab.
3. From other windows, drag and drop your link to the File area.



A link from a SharePoint file



A URL from the Internet

4. Click to accept your link(s).
5. Click to close the Add Files tool.
6. Back at the Catalog, the links will appear in the file list.
7. Click on a link to go directly to the external file or website.

TIP

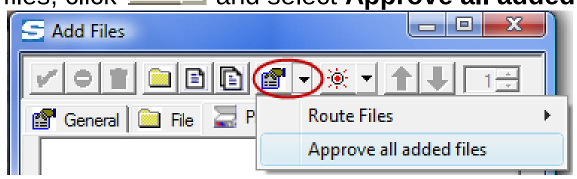
You can approve and route files that have been uploaded. See page 38.

Approving and Routing Scanned/ Uploaded Files

Your site may be set up so that all uploaded and scanned files are approved automatically. However, if automatic approval is turned off, and you have the permission to do so, you can approve files during the scan/upload process. You can also choose to route files either individually or as a group through the Catalog File Route document (see page 59).

To approve your scanned/uploaded file(s):

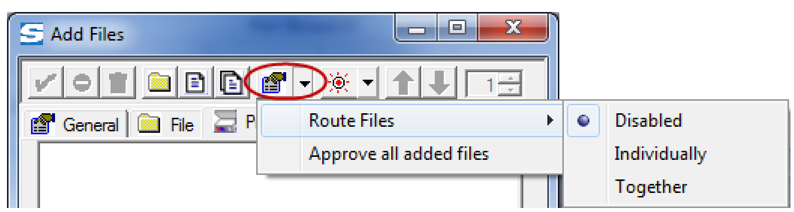
1. After scanning or uploading your files but before accepting your files, click  and select **Approve all added files**.



2. Click  to accept all your scanned pages/files. The files will be approved.

To route your scanned/uploaded file(s):

1. After scanning or uploading your files but before accepting your files, click  and select **Route File**.



2. If you are routing one file, select **Individually**; if you are routing multiple files, select either **Individually** or **Together**, depending on whether you want all files routed together or not.
3. Click  to accept all your scanned pages/files. Your file(s) will be routed through the Catalog File Route document.

TIP

For more information on setting up and using the Catalog File Route document, see KBA-01245.

Exporting the Upload Summary

The Summary tab lists the files uploaded to sfPMS as well as any errors in uploading. You can export (copy) this list to Microsoft Word or Excel.

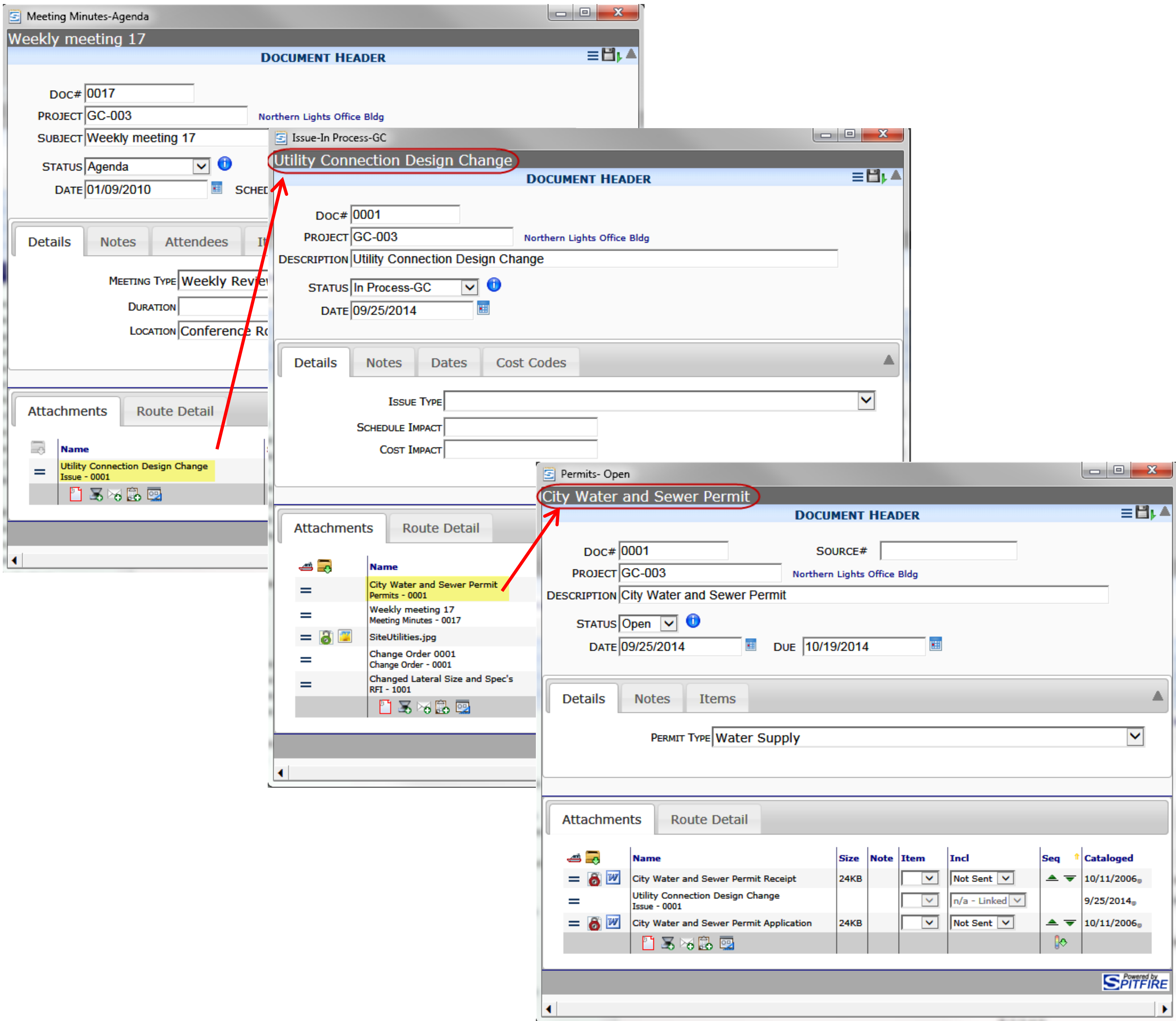
To copy the summary:

1. At the Summary tab, click the HTML radio button if you want the summary in a format suitable for an application such as Microsoft Word or click the XML radio button if you want the summary in a format suitable for Microsoft Excel.
2. Click Copy To Clipboard. The contents of the Summary tab will be placed in your Clipboard.
3. Open an application outside of sfPMS (for example, Microsoft Word or Microsoft Excel).
4. Paste the contents of the Clipboard into the application.

Attachments

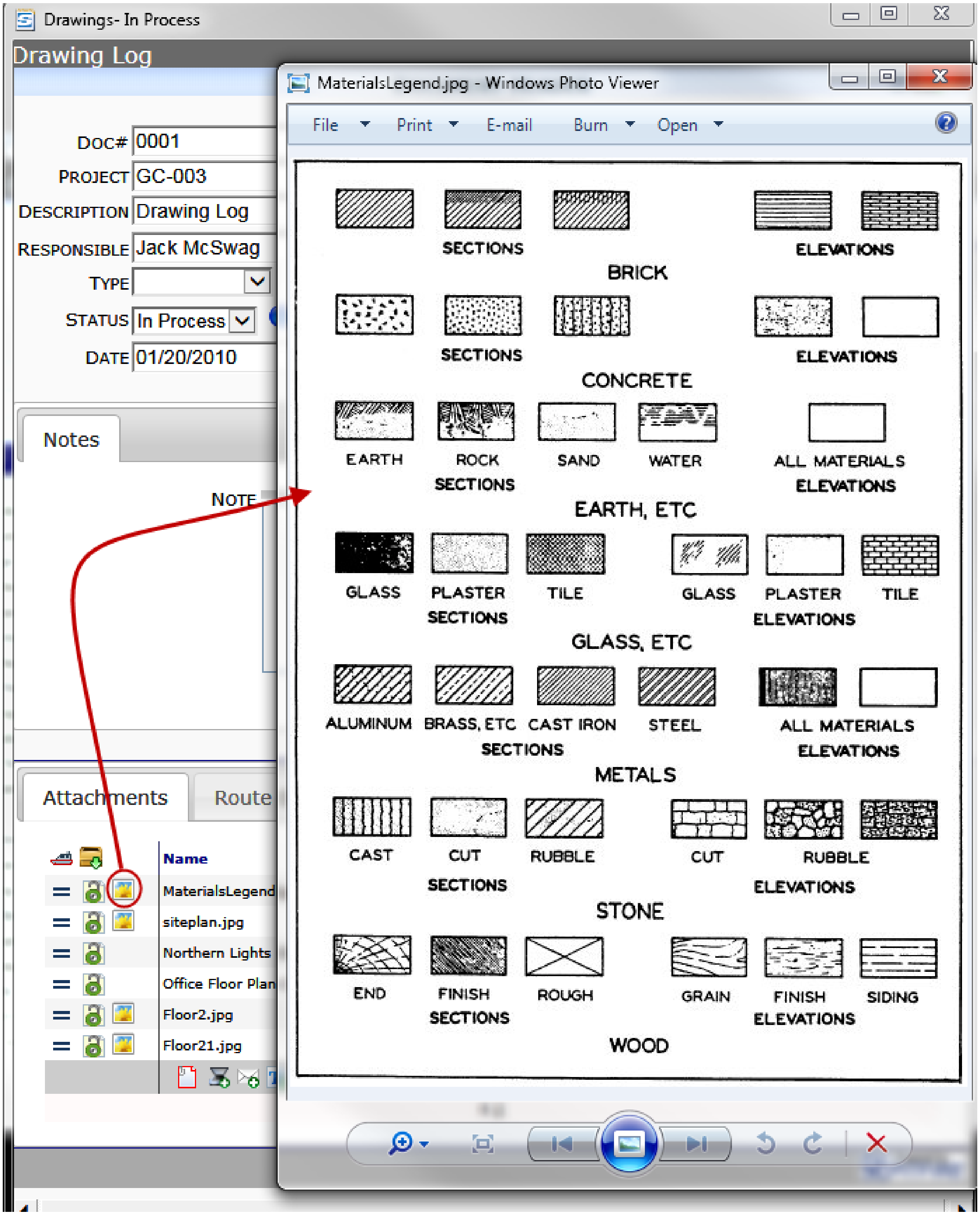
Documents can have attachments. Those attachments are any combination of scanned, uploaded or drag-and-dropped files and other documents.

Example 1



In Example 1, a Permit document has been attached to an Issue document. The Issue document, in turn, has been attached to a Meeting Minute document. This ability to form a document chain is a powerful tool that allows you to track items throughout the life of a project—Meeting Minutes → Issue → Permit.

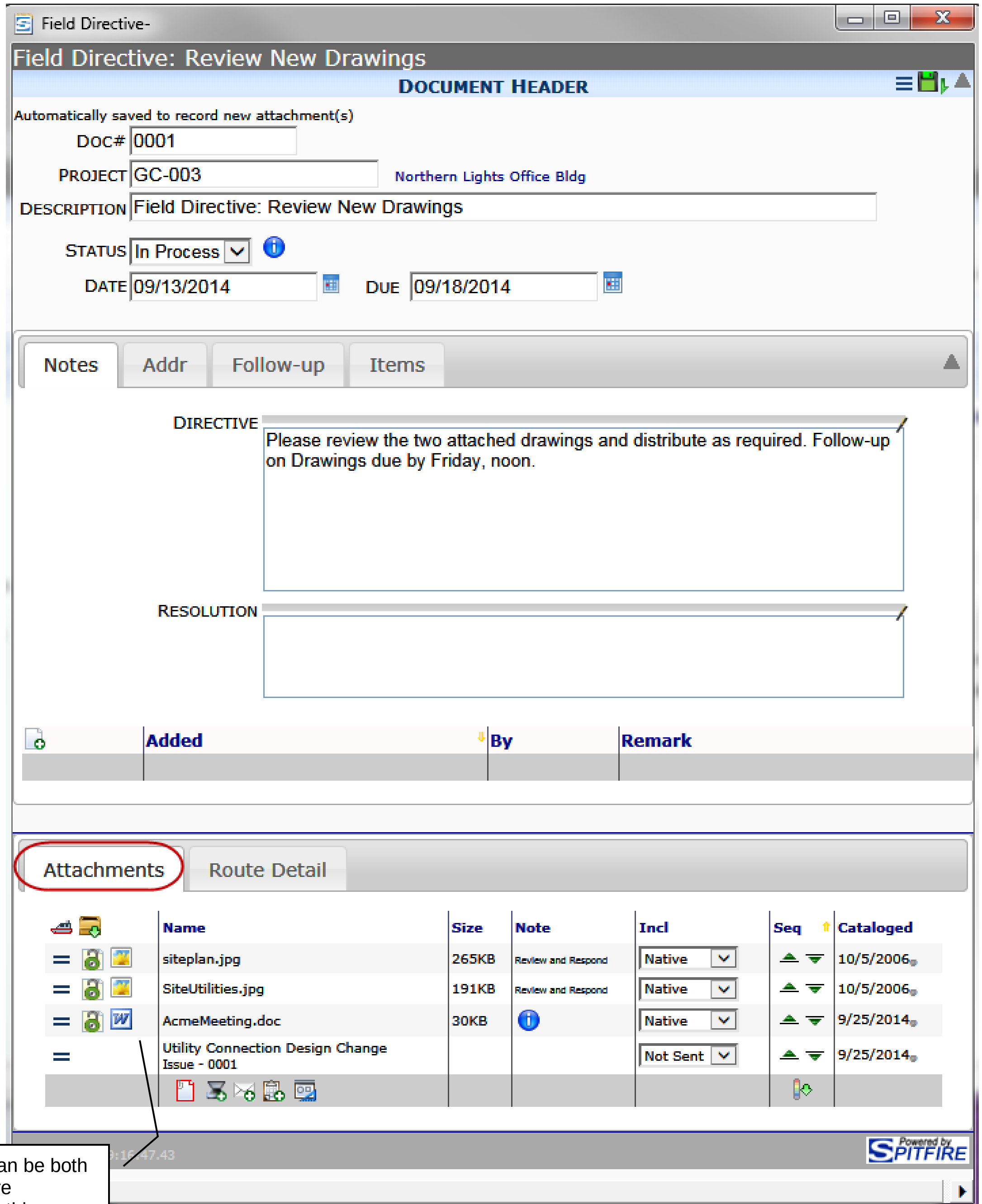
Example 2



In Example 2, several files have been attached to a Drawings document.

Attachments Tab

Attachments are added and accessed through the Attachments tab that appears on all Spitfire documents:



Attachments can be both files and Spitfire documents. In this case, the first two are JPG files, the next is a Microsoft Word file, and the last is a Spitfire document (Issue).

Attaching Files, Documents, and Links

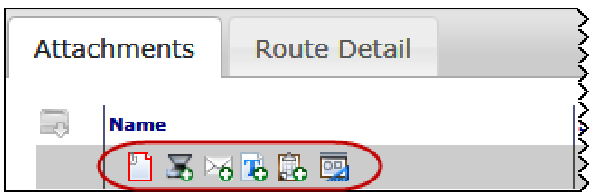
There are several methods for creating an attachment for a document:

- Drag and drop a file onto the Attachment tab (see page 45).
- Scan or upload a new file or link (see page 29).
- Attach a file or document already in the Spitfire Catalog (see page 46).
- Attach files that are already attached to a Drawings (or other) document (see page 48).
- Create a file from an Attachment template (see page 50).
- Attach a file via email from a mobile device (see page 76).

All of these types of attachments can also be attached to specific Items within the document, as described on page 49.

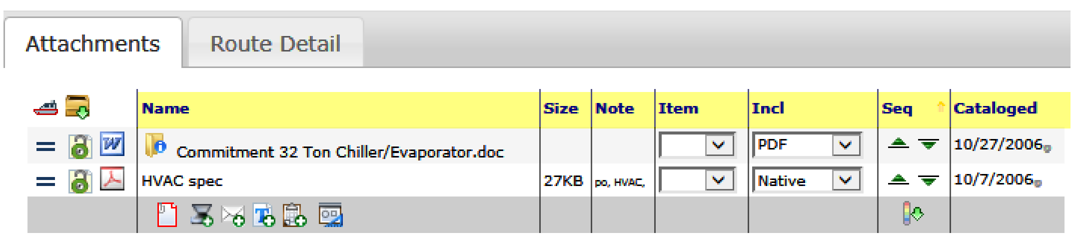
In addition, there is any easy way to attach an Issue (or other) document to another document (see page 47).

Note: Before an attachment can be added to a new Spitfire document, you must save the document by clicking at the Document Header. Once a document has been saved (and if you have the proper permissions), icons appear at the bottom of the Attachments tab:



New Document after Saving –Icons are now available.

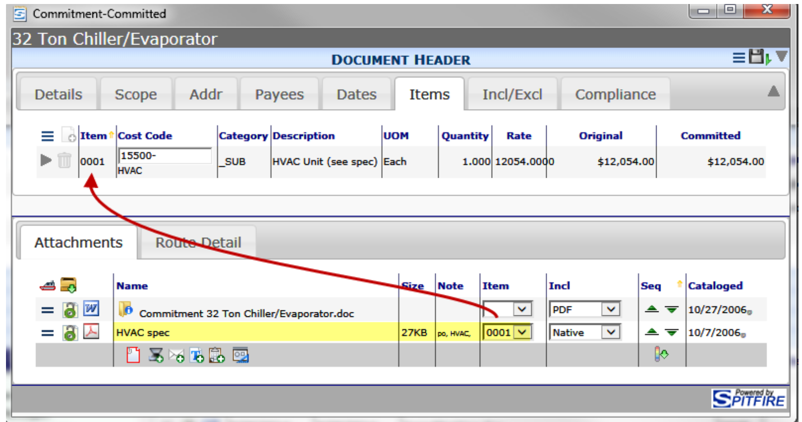
Attachments Tab Columns



The Attachments tab lists the files and documents that are attached to the document (and specific Items) and provides the following columns of information for each line item:

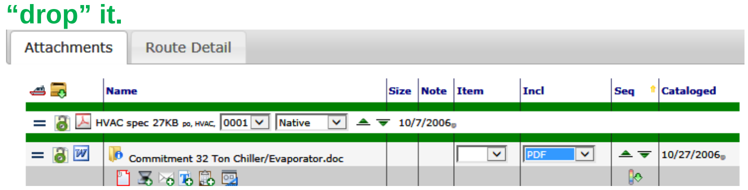
- **Name**: File names (which may include an extension). Document names and corresponding Doc types also appear here.
- **Size**: the size of the file in KB or MB.
- **Note**: The contents of the note field for each attachment. Notes are specified on the Add Files tool (see page 28) or the Properties window (see page 57). System notes, such as “Auto Attached” may also appear here.

- **Item:** The number of the Item if a file/document is attached to a particular document Item. For example, in the Commitment document shown on the next page, Floor2.jpg is actually attached to Item # 0001 on the Items tab. (See also page 49):



Note: the Item column is hidden if there are no Items on the document.

- **Incl:** the include status of the attached file/document. Possible options indicate if and how the file will be included in routed emails, faxes and hard copy output.
  - **Assemble** means to include this file in one merged PDF file (along with all other Assembled files).
  - **Native** means to include this file in its native format (for example, as a DOCX or PNG file).
  - **Not Sent** means to not include the file when it is routed via email or fax.
  - **PDF** means to convert the file (if possible) to a PDF file.
  - **n/a – Linked** (which is a read-only option) means a document that is attached because the current document is also attached to it (reciprocally).
- **Seq**: a way to change the order of included files. Files are assembled in the order they appear on the list. There are three ways to change the order of rows in the Attachment tab.
  - **Use the mouse to drag-and-drop a row up or down. Grab the row in the first column (you'll see the cursor change to a double-headed arrow). When you are moving the row, a green background will indicate where the row will be placed when you "drop" it.**



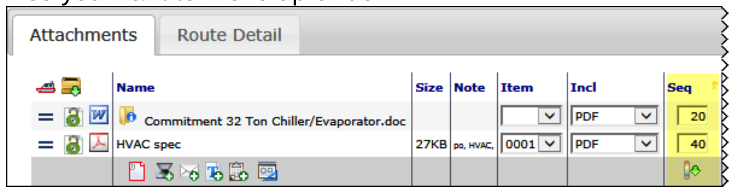
After you move all the rows you want to move, click ✔ at the bottom of the Attachments tab.

TIP
For more information about print formats for Spitfire documents, see "What Gets Routed" in the *Focus on Routes* guide.

TIP
If a file is too large, its Incl status will default to Never, because it cannot be emailed.

TIP
Attached documents can be set to Not Sent, PDF or Assembled. What gets sent is that document's assembled output excluding its nested documents.

- Click or to move a file up or down in the list.
- Click to toggle the Seq column and display numeric fields, in which you can indicate new numbers for the files you want to move up or down.



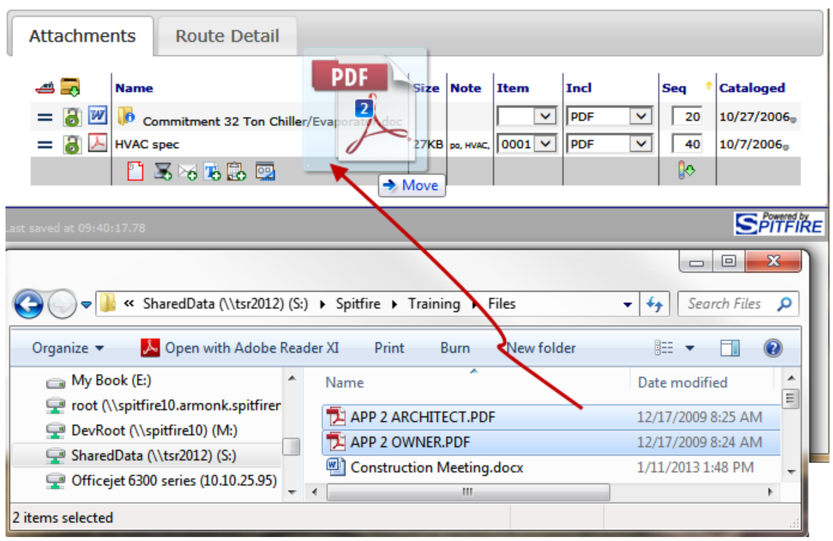
- **Cataloged:** The date the file was cataloged (i.e., added to the Spitfire Catalog).

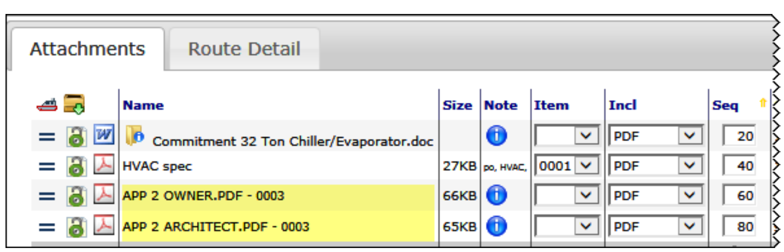
Drag and Drop

The easiest way to attach a file to a document is through drag and drop.

To attach a file through drag and drop:

1. Select the Attachments tab on a document.
2. Find the file(s) you want on your computer.
3. Highlight the file(s) and drag them to the Attachment tab.
4. Release the mouse button.





TIP

The text that says Move is misleading; the file is copied, not moved, from its original location. In Google Chrome, it says Copy; in Microsoft IE, it says Move, but in both cases, the file is copied.

Note: If you drag and drop a file that has the same name as a file that already exists in the Catalog, the Catalog will treat it as a newer version of the file. (See also the next section.)

Adding a File That Already Exists in the Catalog

TIP

If you use similar Customer, Vendor and Employee IDs, you should use different catalog folders to store files that are attached to your Customer, Vendor and Employee documents so as to prevent confusion over files that have the same name but are different files.

When you use the Add Files tool to attach a new version a file to a document, the Add Files tool acts like the Check-In feature (see page 62), adding a new version of the file to the Catalog. In order for this to work, the filename (Name), Project, Folder and Source Contact (if any) of the new version must match the existing information of the file already in the Catalog,

For example, if Project GC-003 already has AcmeMeeting.doc in the General folder, and you upload AcmeMeeting.doc again in the General folder of Project GC-003, both versions of the file will be kept in the Catalog, the one you just added being the "latest version." (On the other hand, if you add another file called AcmeMeeting.doc for a different project, both files will appear in the Catalog as distinct files.)

For more on file versions, see page 65.

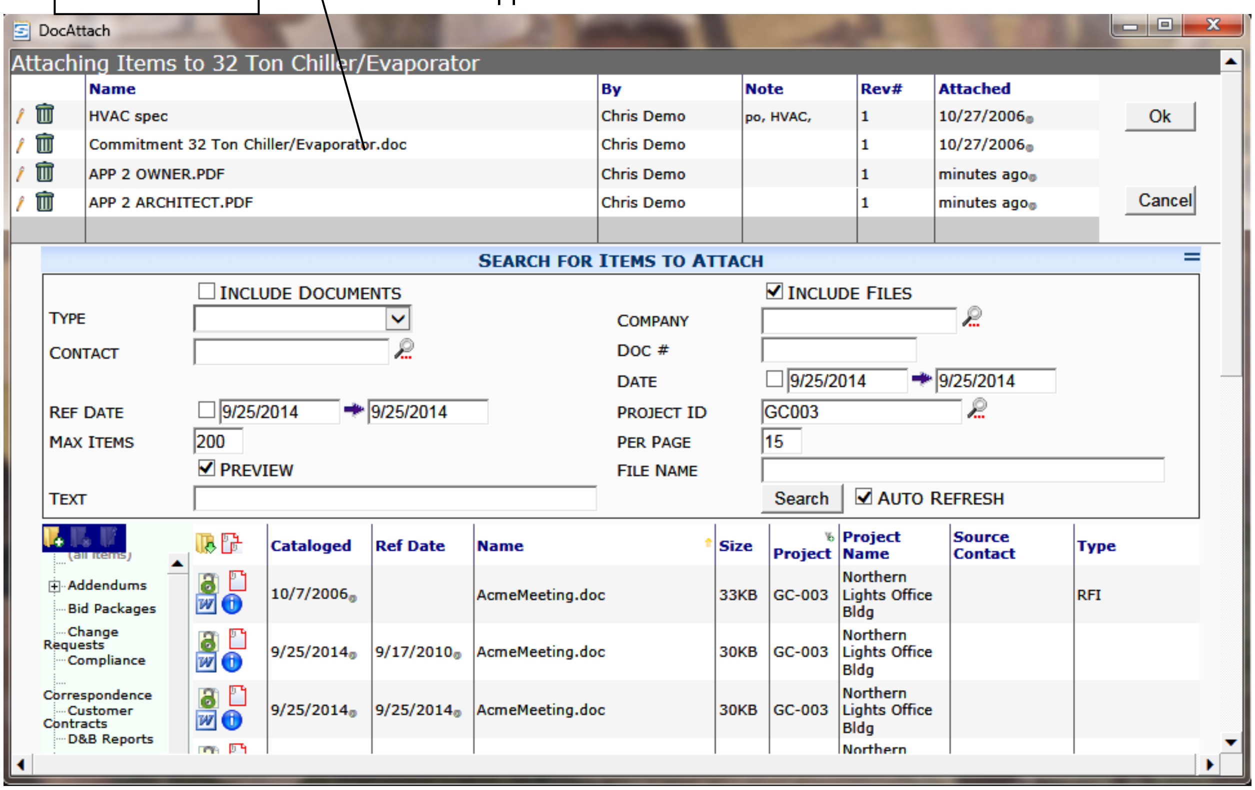
Attachments from Spitfire Catalog

If there are attachments for the document already, they are listed on top.

Both files and documents that are part of the Spitfire Catalog can be attached to a particular document through the **DocAttach** window.

To attach a Catalog file or document to your document:

1. At the Attachments tab, click . The DocAttach window will appear.



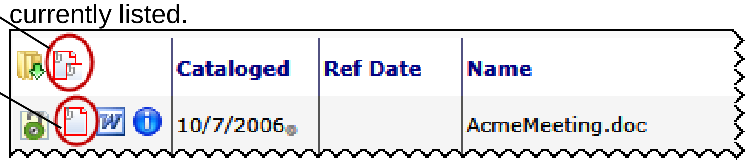
2. Use the filters (and/or use the folder tree) to find the documents and files that you want to attach to your document. The files on your project will be listed by default.

   Note: the filters are the same as those that appear on the Catalog dashboard and the resulting document and files lists are similar. (For more information on the Catalog Dashboard see page 10.)

3. Either click at the line item of each document(s) or file(s) that you want to attach or click to attach all files/documents currently listed.

Attach all

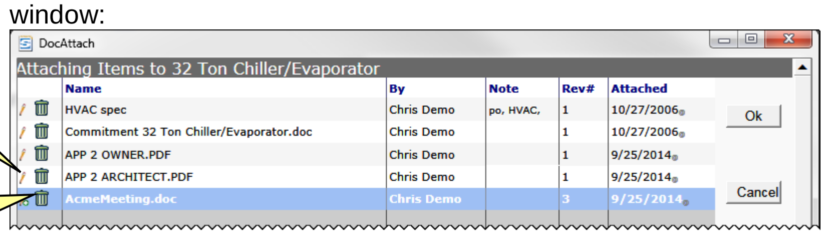
Attach this one



The selected attachments will appear on the list at the top of the window:

Click to edit the line item (e.g. to add a Note).

Click to un-attach a file or document. You will not be removing it from the Catalog.



4. When you have attached the files and documents you want, click Ok. Your attachments will now appear at the grid of the Attachment tab.
   Note: documents are saved automatically when you add attachments.

Issue Documents

TIP

Issue documents must already exist before they can be attached. See the *Focus on Doc Types and Project Workflow* guide.

TIP

The icon can be set up to filter by a Doc type other than Issue through the DocTypeConfig | ExpressDocAttach rule. The icon on a Bid Package document finds Invitation to Bid documents. For more information, see the technical white paper *Rules and Rule Values.*

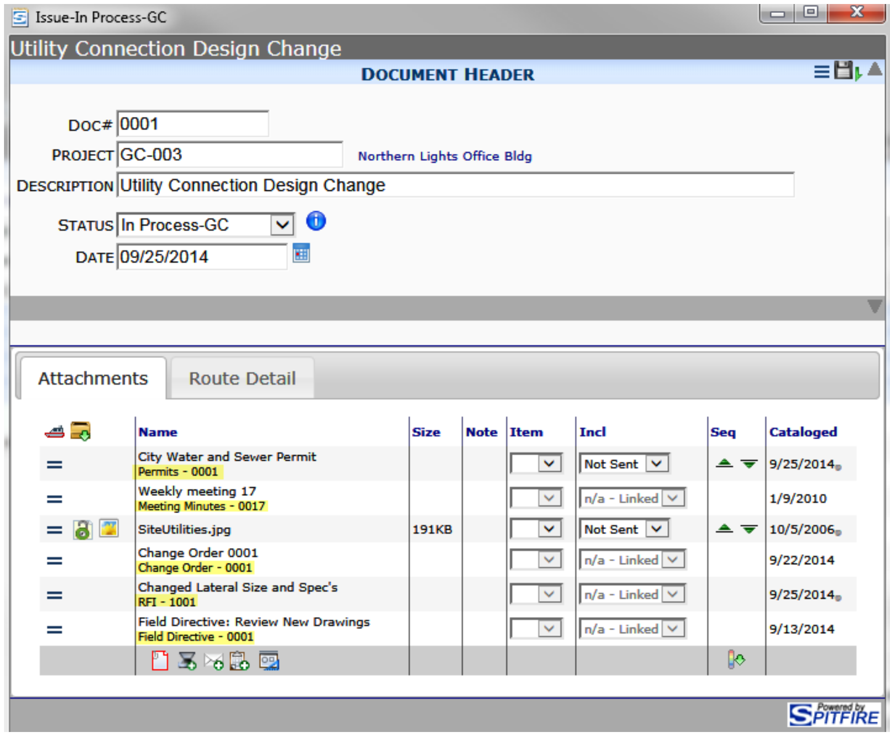
To attach an Issue document to a related document:

1. At the document to which you want to attach an Issue, click ., The DocAttach window will appear with possible Issue documents listed.

2. Click at the Issue that you want attached to your document. (You can attach more than one issue.) The Issue will be listed at top.

3. When all the Issues you want to attach are listed at the top, click Ok. The Issue(s) will appear on the document's Attachment tab.

Note: when you attach an Issue to a document, that document is also attached to the Issue. When you open the Issue document, therefore, you can quickly see which documents pertain to that project issue:



Files on Drawings Documents

If you have files attached to Drawings documents (drawing logs), you can easily attach those files to another document.

TIP

The icon can be set up to filter by a Doc type other than Drawings through the DocTypeConfig | ExpressDocAttachFiles rule. For more information, see the technical white paper *Rules and Rule Values.*

To attach files that are on a Drawings document (drawing log):

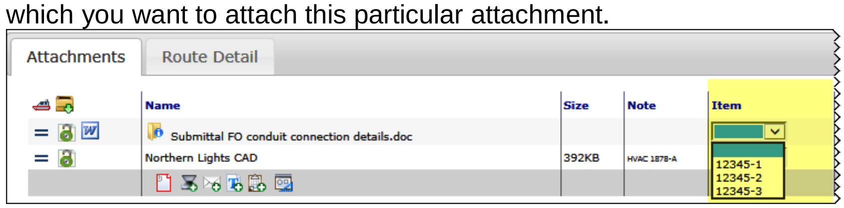
1. At the document to which you want to attach drawing log files, click . The DocAttach window will appear with Drawings documents listed.
2. Click at the Drawings document that holds the files you want to attach to your document. (You can attach files from more than one Drawings document.) All files from the Drawing document(s) will be listed at top.
3. Review each file listed at top. If there is any file that you do not want to attach, click on that row to remove the file from the attachment list. (You will **not** be deleting the file from the Catalog.)
4. When all the drawing files you want to attach are listed at the top, click Ok. The file(s) will appear on the document's Attachment tab.

Item Attachments

There are two ways to attach a file or document to a specific Item.

To attach a file or document to a specific Item when starting with the attachment:

1. Go to the row of the attachment that you want to attach to a specific Item
   Note: the Item must have been saved on the document first.
2. On the Item drop-down, select the Item (by Item number) to which you want to attach this particular attachment.



3. Click to save the change. The attachment row will now indicate the Item to which it is specifically attached.

TIP
Users who do not have access to a particular Item also do not have access to files/ documents attached to that Item.

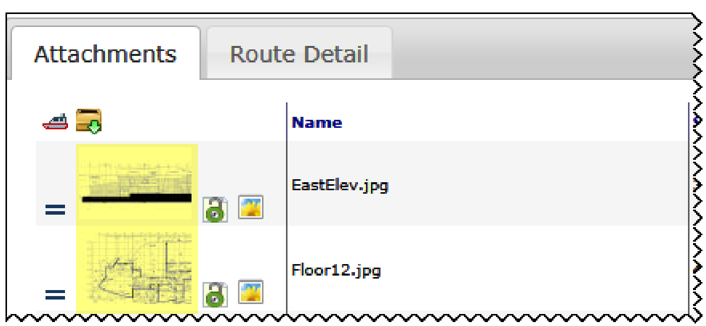
To attach a file or document to a specific Item when starting with the Item:

- Click to get to the Item's Detail view. While the Item is thus expanded,
  - drag and drop a file onto the Attachment tab (see page 45), or
  - click to scan or upload a file (see page 29) or
  - click to attach a file from the Catalog (see page 46).

  Your attachment will be specifically attached to the Item.

Optional Thumbnails

Your documents can be customized to show thumbnails of attached files on the Attachments grid through the **DocTypeConfig | Preview Attachments** rule. For more information, see the technical white paper *Rules and Rule Values*.



Attached File from Template Feature

It is possible to use merge and non-merge Attachment templates to create files that are then attached to the document and included, if appropriate, in the output that gets routed. (Merge templates use bookmarks to merge data from Spitfire onto the file.) Templates are added through the Templates tool on the Manage and System Admin Dashboards.

For information about the Templates tool, see the *Focus on the Manage Dashboard* guide.

Attachment (auto) and (all)

Attachment (auto)

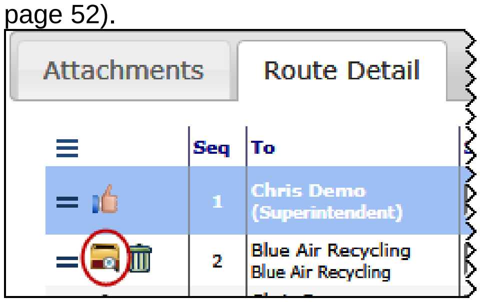
A document can have one and only file created from an **Attachment (auto)** template.

sfPMS creates a file from an **Attachment (auto)** template only if

- the document has no manually created file from a template (see page 51) and
- only one Attachment (auto) template criteria matches the document.
  For example, if there are two Attachment (auto) templates for Daily Field Reports without other criteria, neither will be used. However, if other criteria (such as Sub type or Customer) make the template unique, the template that matches the criteria of the document will be used.

sfPMS creates a file from an Attachment (auto) template when

- the document leaves Seq 1 of the route (i.e., when the document is first routed) or
- the preview routed content icon ( ) is clicked for a routee (see page 52).



(See the Note on the next page.)

Attachment (all)

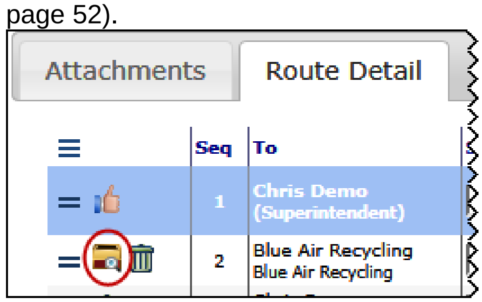
A document can have any number of files created from **Attachment (all)** templates.

sfPMS creates a file from an Attachment (all) template only if

- the document has no manually created file from a template (see page 51).

sfPMS creates files from Attachment (all) templates when

- the document leaves Seq 1 of the route (i.e., when the document is first routed) or
- the preview routed content icon ( ) is clicked for a routee (see page 52).



Note

If a file will be created when the document is routed (or content is previewed), the message "**One or more Attachments will be created from templates when this document is routed**" appears on the Attachments tab when the document is saved.

Create from Attachment

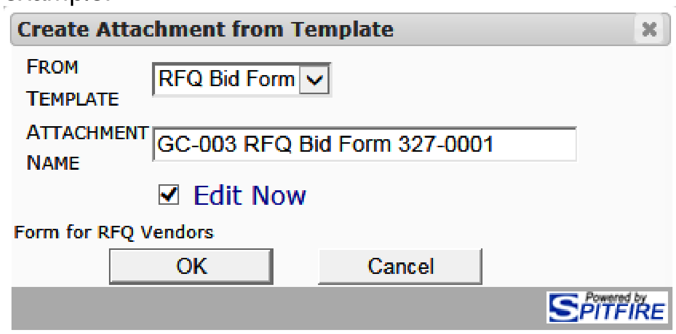
If a Doc Type has at least one Attachment template (in the template library), the icon appears on that document's Attachment tab. The icon allows you to manually create a file from a template as necessary.

The icon indicates that an Attachment template is available. You can choose to generate a file from that template at any time while the document is in an open status. The generated file will be automatically attached to the document (and thus also added to the Catalog). The file can be treated as any other file (i.e., edited, routed and included in assembled output as appropriate).

Note: both Microsoft Excel and Microsoft Word files can be created from Attachment templates. Only Word templates, however, allow for merged data

To generate a file from an Attachment template:

1. Click on the Attachments tab. A dialog box will appear, for example:



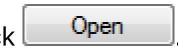
2. (*optional*) If the template that you want to use is not the one listed in the **From Template** field, select another from the drop-down.
   Note: Attachment templates, including Attachment (auto) templates, which are available for the particular Doc type appear as choices. Attachment (all) templates are not included.
3. In the **Attachment Name field**, type a name for the file you are creating. The default name is taken from the template.
4. (*optional*) If you do not want to edit the new file at the moment, click the **Edit Now** checkbox to uncheck it. If you choose to edit the file at a later time, the newly created and attached file will be identical to the template for the time being.
   (For more information on how to edit a file, see page 63.)
5. Click OK. If the **Edit Now** checkbox was checked, the newly created file will open.
   - Edit the file and then save it.
   - Close the file.
6. You can review/open the file from the Attachments tab, where the file is now listed.

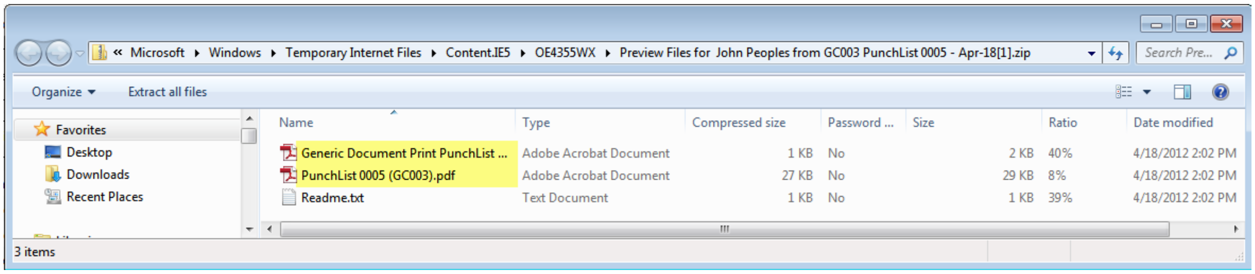
Viewing the Files

You can view a file created from an Attachment, Attachment (auto), or Attachment (all) template, either by previewing routed content or viewing the file as normal from the Attachments tab.

To preview files created from templates:

1. Add at least one routee to the document, as usual.
2. Save the document.
3. Click . A message will appear while sfPMS gathers and assembles files.

4. When the File Download dialog box appears, click . You may need to click the button twice.
5. Find the files you want to view on the Windows Explorer window, for example:



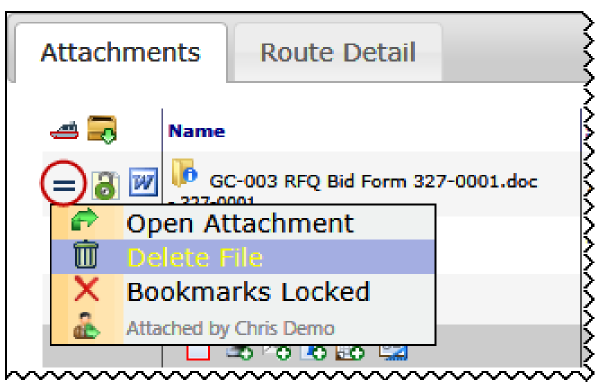
6. Double click to open any of the files.

For instructions on how to view the file from the Attachments tab, see page 61.

Attachment Options

Deletion of Files Created through Attachment Templates

If the document has not yet been routed, you can delete a file that was created from an Attachment, Attachment (auto), or Attachment (all) template (unless the file is also attached to another document). Deleting the file means removing it from the document as well as the Spitfire Catalog.

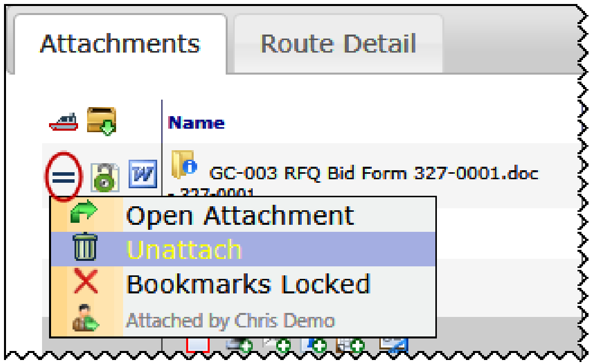


To remove a file from the document:

1. Click to open the Options menu for the file you want to remove from the document.
2. Select  **Delete File**.
3. Click  to save the document.

Unattachment of Files Created through Attachment Templates

After the document has been routed, a file created from an Attachment, Attachment (auto) or Attachment (all) template can no longer be deleted. However, such a file can be unattached from the document. Unattached files remain in the Spitfire Catalog and also in the routed content that was already routed to someone.

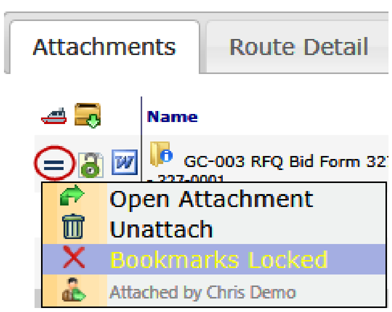


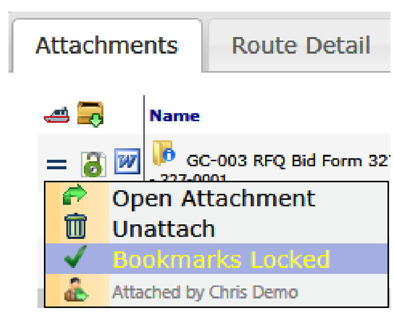
To remove a file from the document:

1. Click to open the Options menu for the file you want to remove from the document.
2. Select **Unattach**.
3. Click to save the document.

Locked Bookmarks

By default, sfPMS updates the bookmarks in a file created from a merge template each time the document is opened. The Bookmarks Locked toggle can be turned on to indicate that bookmarks should not be refreshed until such time as the Bookmarks Locked option is turned off again.



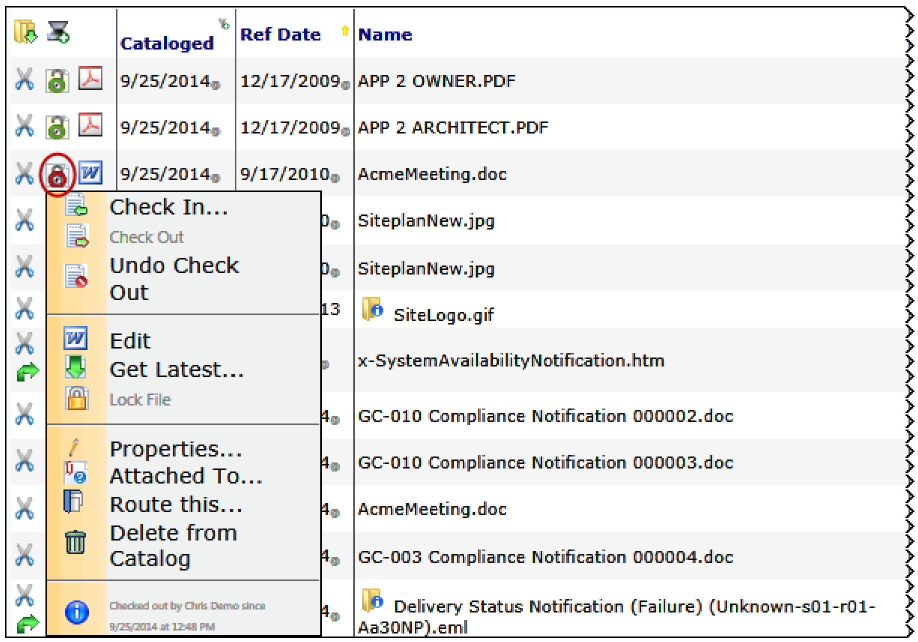


To lock down the bookmarks in a merge template:

1. Click to open the Options menu for the file on which you want to lock the bookmarks.
2. Select **Bookmarks Locked**.
3. Click OK at the confirmation box that appears.

File Options

Wherever you find files (on the Attachment tab, the Catalog or the Project Dashboard), you will find the or icon on each file row. The icons tell you whether a file is “checked in” or “checked out/locked” (explained on page 62). They also open a drop-down File Options menu. Using the options on this menu, you can perform various tasks with your files.



Check In/Check Out

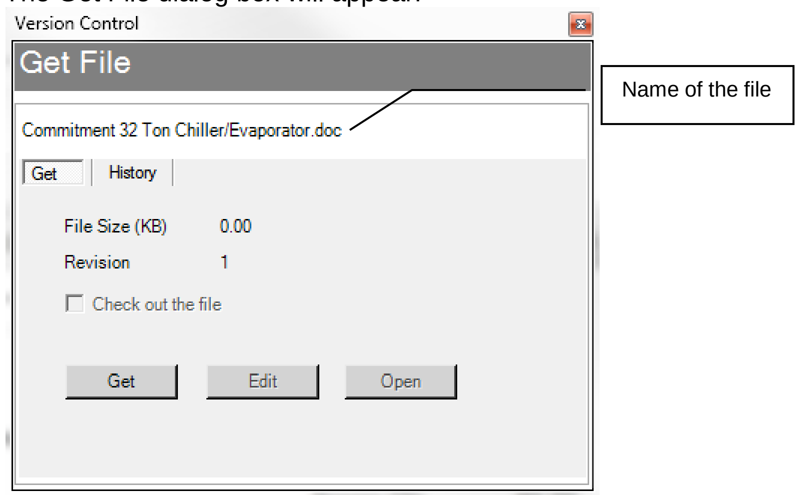
You can choose to manually check out and check in a file from the File Options menu. For more information, see page 62.

Get Latest

sfPMS can contain various versions of the files in your system. There may be times when you want to get a copy of the latest version of a file to place on your computer. You can copy the version of the file to your computer through the **Get Latest** option. If, however, you plan on making changes to the file and uploading your changed file back to sfPMS, you should edit the file instead, as described on page 63.

To get a copy of a file for your computer/network:

1. Click either or at the row of the file you want to copy. The File Options menu will open.
2. Select **Get Latest.**
   The Get File dialog box will appear:



   Note: the Get File dialog box allows you to check out the file. (See page 62 for more information about [checking out a file](#).) The Get File dialog box also allows you to [edit a file](#). (See page 63 for more information about editing a file.)

3. Click Get. A browser window will appear.
4. Navigate to a location on your computer or network where you'd like to save the copy of this file then click Save.
5. (*optional*) If you want to open the copied file, click Open back at the Get File box. The file will open in its native application.
   Note: You do not need to open the file at this point. Because the file is on your computer/network, you can open the file in its native application (outside of sfPMS) at any time using traditional means.
6. Click to close the Get File box.

TIP

Once you copy a file, that copy loses all connection to sfPMS. You can do whatever you want to the file on your computer independent of the file that still remains in sfPMS. But if your intention is to edit the file, see page 63.

View Latest

If you have read/view access to a file, you can choose to view the latest version of that file from the File Options menu. For more information, see page 61.

Edit

If you have edit permission for a file, you can choose to edit that file from the File Options menu. For more information, see page 63.

Lock/Unlock File

A file can be "locked" so that no user can edit the file. A file would need to be unlocked again before anyone could edit or check the file out. After a file has gone through all its revisions, it should be locked.

To lock a file:

1. Click on the line item of the file you want to lock.
2. From the File Options menu, select **Lock File.**

   The icon on the row will change to to indicate the locked file:

	Cataloged	Ref Date	Name
	10/7/2006		AcmeMeeting.doc
	10/11/2006		AGC450DB

To unlock a file:

- Click on the row of the file you want to unlock then, from the File Options menu, select **Unlock.** The icon for the file will change back to .

Properties…

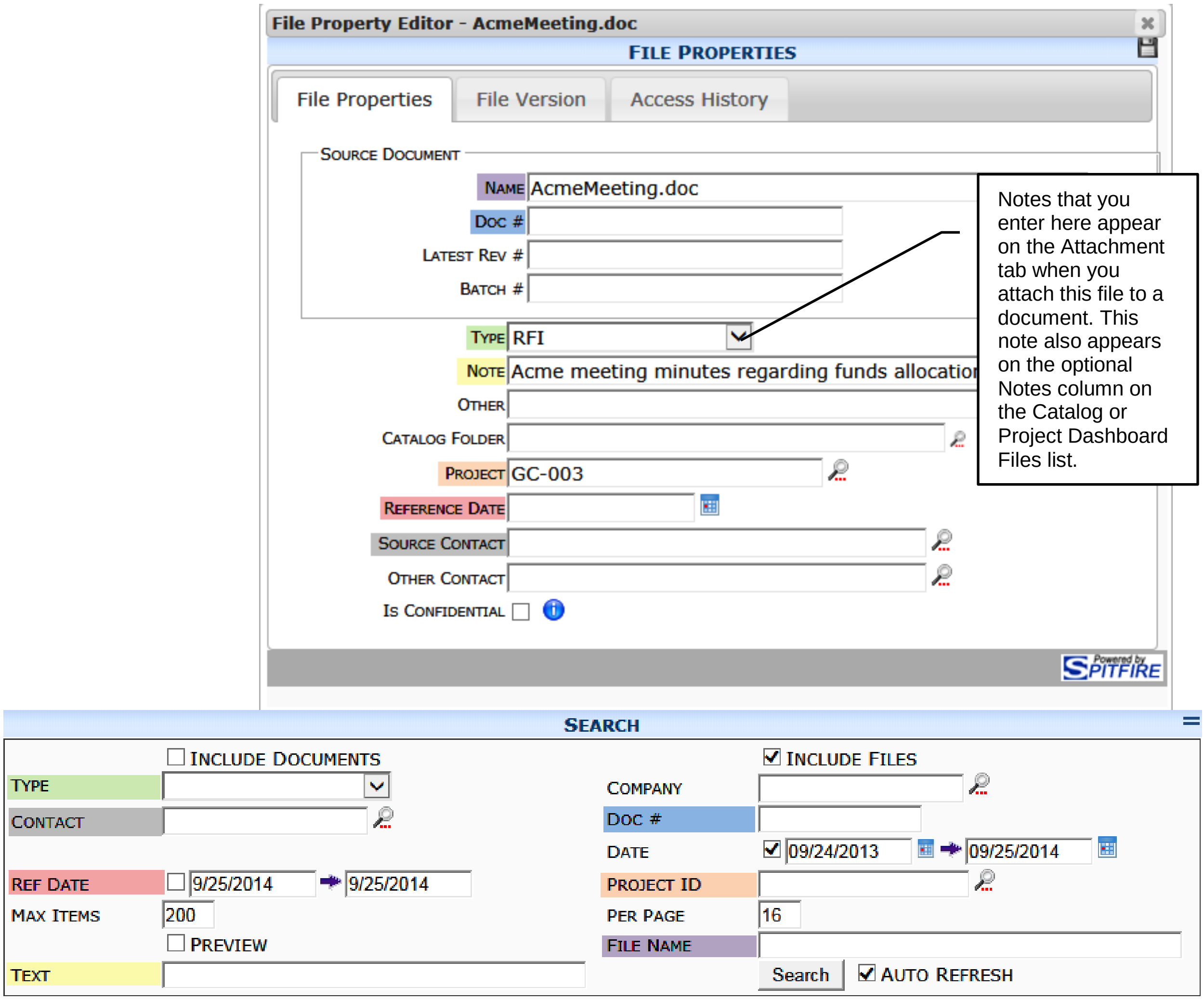
Depending on your permission level, you can view or edit additional information (properties) about each file. Properties give you more ways in which to search for the file.

TIP

The **Is Confidential** checkbox on the File Properties tab makes the file "confidential." This means that only people who get the file routed to them (through a Spitfire document) will be able to view it. Files attached to documents that are designated as "confidential" automatically get this checkbox checked.

To view or edit file properties:

1. Click to open the File Options menu for the file you want, then select **Properties.**
2. A File Property Editor dialog box will appear. Here you can view or enter information that may be useful when using the filters to conduct a file search, for example:



3. Click to save your changes, if any. Click to close the dialog box.

Attached To…

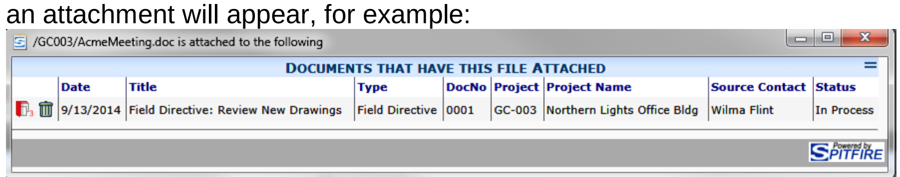
Since files can be attached to documents, you might want to see to which documents a file is attached.

To see what documents have a particular file as an attachment:

Tip

More information about Attachments can be found on page 40.

1. Click to open the File Options menu for the file you want, then select **Attached To**. A list of documents that have the file as an attachment will appear, for example:



2. Click to close the window.

Route This…

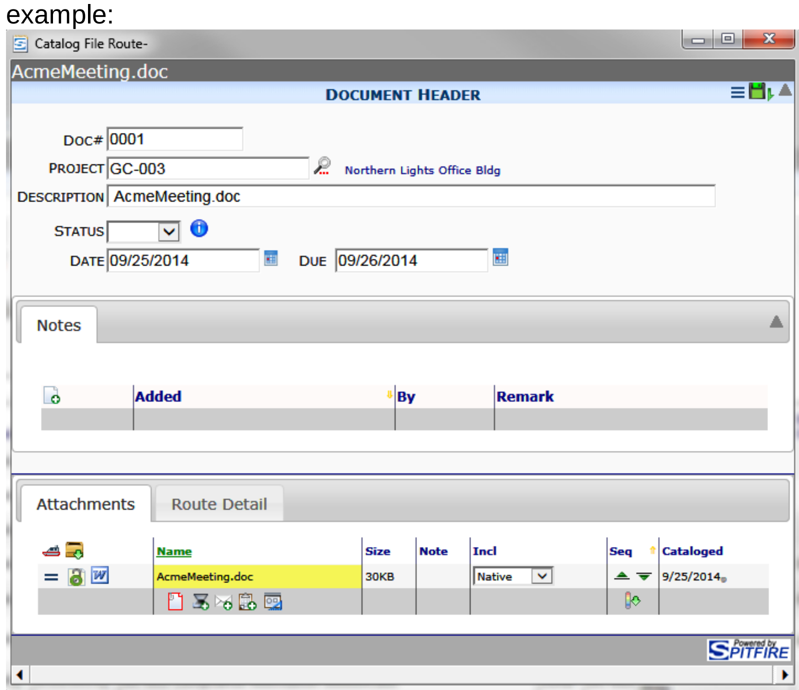
TIP

You can also route a file (through the Catalog File Route document) from [the Add File tool](). See page 38 .

Many Spitfire documents are routed with attached files that support the purpose of the document. However, you might sometimes want to route a file for its own purposes. In such situations, you can route the file through a special **Catalog File Route** document, which exists just for routing purposes.

To route a file from the file list:

1. Click to open the File Options menu for the file you want, then select **Route this.**
2. Click OK at the confirmation box that appears.
3. The Catalog File Route document window will appear. This special document will have the file as an attachment, for example:



4. Click the Route Detail tab to add routees to your route.
5. Click to send the document (and your file) on it route.
6. Click to close the document window.

TIP

For more information about routing, see the *Focus on Routes* guide.

Delete from Catalog

The option to delete a file from the catalog appears only for users who have the proper permission. Since deleting a file cannot be undone, *use this option with extreme caution*.

To delete a file:

1. Click to open the File Options menu for the file you want to delete, then select **Delete From Catalog.**
2. If you really want to delete the file, click OK at the warning box that appears.
3. Click at the top of the Catalog dashboard in order to make your deletions permanent.

Viewing a File

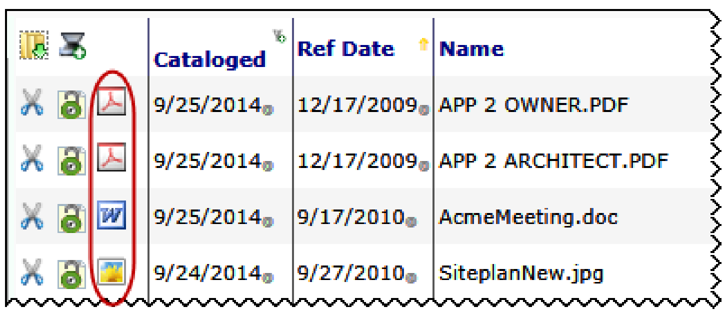
How and if you can view a file depends on several factors:

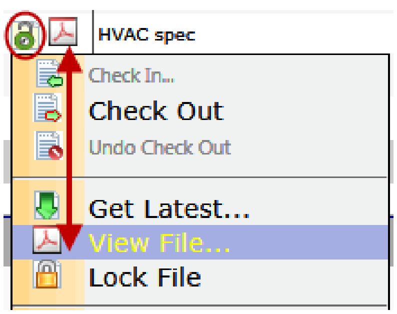
- If you have permission to view the file through your Spitfire role.
- If a view icon has been established for the file type.
- If you have the means (software) to view the file on your workstation. (In other words, would you be able to view the file outside of Spitfire?)

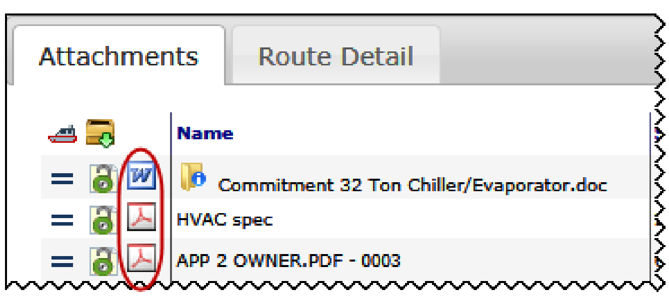
If there is another way for you to view a file, an icon will appear to the right of the / icon. This icon could look like

- (default for Adobe Reader)
- (default for Microsoft Word)
- (default for Microsoft Excel)
- (default for Microsoft Project)
- (default for Microsoft Outlook)
- (default for image files)
- (default for other file types)

These icons can appear wherever files are listed. The icons are also available from the File Options menu, where applicable. Click the icon to view the file.







To view a file:

- Click the appropriate icon on the file row. The file will open in the appropriate application.

File Revisions

sfPMS is a file management system. This means that you can store all project- and business- related files within the system (instead of having them on different user workstations). Because files may need to be revised over time, sfPMS allows you to edit certain files and then keeps all versions of the files for proper record keeping. The file revision workflow consists of checking the file out, making changes to the file, saving those changes, checking the file back in, and optionally, approving the file.

Check Out and Check In Concepts

Because various users can access files in sfPMS at the same time, the check-out/check-in feature exists to minimize overriding or conflicting edits. When you check out a file, sfPMS prevents anyone else from also checking the file out. You can then make changes to your file knowing that you started with the latest version, that no one else is simultaneously making changes to the same file, and that your revised file will become the new "latest" version when you check the file back in. While the file is checked out, the "red locked" icon () alerts others that the file is being worked on. Your co-workers can still view a read-only version of the unrevised file while you have the file checked out, but they will know that an update is coming. Furthermore, sfPMS will expect a new version of the file. When you are finished with your edits, you will check in the file. The checked in file becomes the latest version in sfPMS. The "green unlocked" icon () indicates that the file in checked in and available for check out.

Check Out Without Editing

TIP

At any time while your file is checked out, you can change your mind and cancel the check out. Click to open the drop-down menu again and then click . The information at the bottom of the drop-down menu will indicate that the file is unlocked and available to be checked out.

When you edit a file in Spitfire, that file is automatically checked out. It is also possible to just check out a file (to prevent other people from editing it for a period of time, for example).

To just check out a file:

1. Click on the line item of the file you want to check out.
2. From the File Options menu, select **Check Out** the file. The icon will change to on the row. The icon alerts all users that the file is checked out.

   Note: the information at the bottom of the drop-down (by the icon) indicates that the file has been checked out, by whom and since when.

Editing Files

TIP
If you are not sure if an icon means "view" or "edit" a file, mouse over the icon to find out.

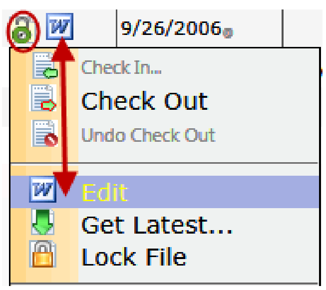
How and if you can edit a file depends on several factors:

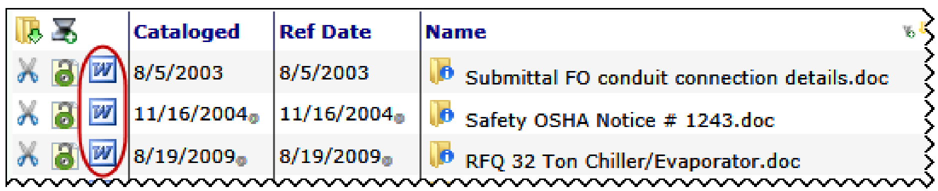
- If you have permission to edit the file through your Spitfire role.
- If an edit icon has been established for the file type.
- If you have the means (software) to edit the file on your workstation. (In other words, would you be able to edit the file outside of Spitfire?)

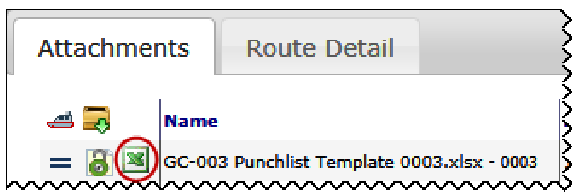
If a way to edit the file has been set up, an icon will appear to the right of the / icon. This icon could look like

- (default for Microsoft Excel)
- (default for Microsoft Word)
- (default for Microsoft Project)

These icons can appear wherever files are listed. The icons are also available from the File Options menu, where applicable. Click the icon to edit the file.

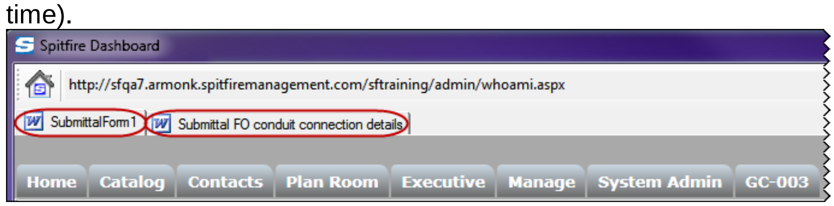






To edit a file:

1. Click the appropriate icon on the file row. The file will be automatically checked out and will open in the appropriate editing application.
   Note: when a Microsoft Word or Excel file is opened for editing, a file tab appears at the top of the dashboard window – one tab per file currently open (because you can edit multiple files at one time).

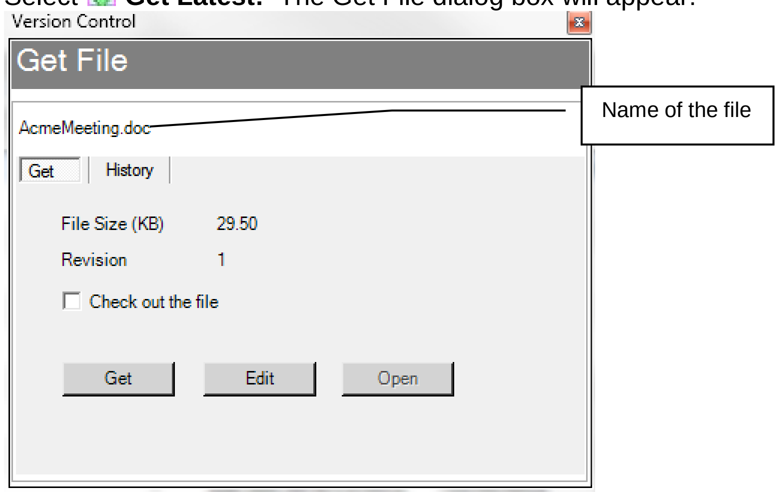
2. Edit the file and save your changes.
3. Close the file (i.e., the application). The file will be automatically checked in. If the file is a Microsoft Word or Excel file, the tab that appeared at the top of the dashboard window will now go away.

Alternate Revision Workflow

The edit icon allows you to make changes to your file as needed, while you are in sfPMS. It is also possible for you to get the latest approved version of a file, copy it to some other location, make changes to the file over time, and eventually check your revised file back in.

To edit a file elsewhere:

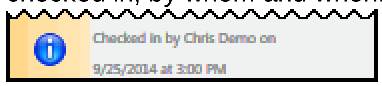
1. Click at the row of the file you want to edit. The File Options menu will open.
2. Select **Get Latest:** The Get File dialog box will appear:



3. Click the **Check out the file** checkbox to check the file out.
4. Click Get. A browser window will appear.
5. Navigate to a location on your computer or network where you'd like to save the copy of this file then click Save.
6. Click to close the Get File box.
7. Outside of Spitfire, at whatever time, make changes to your file. Your file will remain checked out during this time.
8. When you are ready to check the file back into Spitfire, click at the file row.
9. Select **Check In.** The Check In File dialog box will appear.
10. Click ... to locate the edited copy of the file on your hard drive/network.
11. Enter a **Source Rev #** if appropriate. (Use this field to cross-reference your customer's or vendor's version number.)
12. (*optional*) Click any of the checkboxes if you want any of the check in options:

- **Route File**: this option is the same as the Route This option (see page 59).
- **Approve File**: this option approves the file, if automatic approval has been turned off at your site.
- **Keep checked-out**: this option is the equivalent of checking the file in and immediately checking it again—your newly revised file becomes the latest approved version, but the file appears as still being checked out.

13. Click Check In then close the Check In File dialog box. If you click that now appears, it will indicate that the file was checked in, by whom and when:



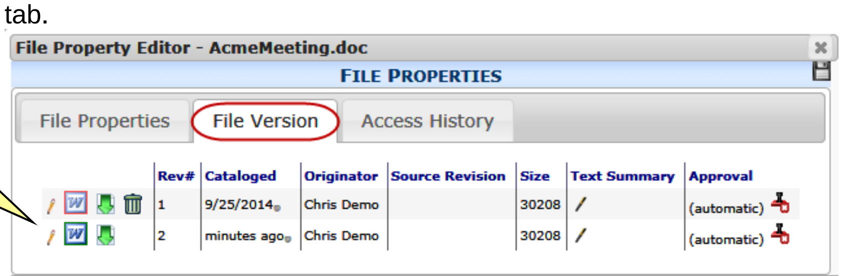
Versions of the File

When someone checks in a file, that version of the file becomes the "latest" version. You can get the latest version of the file as well as previous versions. If you have permission to do so, you can view all versions of the file without checking the file out.

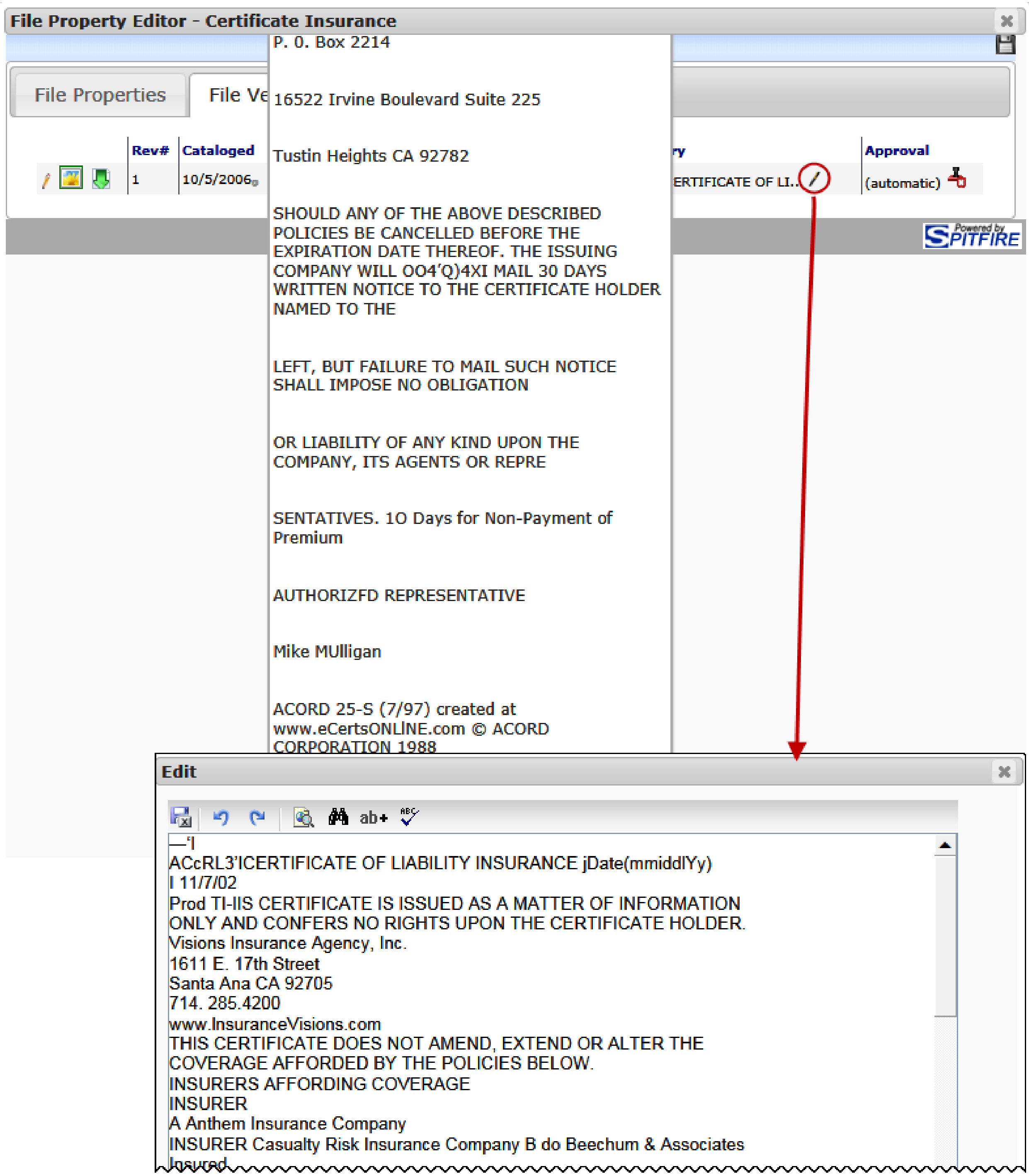
Click to edit the version information; or to open a read-only copy of an older or latest approved version of the file in the Spitfire Viewer; to get a copy of the file version to save on your computer (in the same way as Get Latest) and to delete the version.

To view all versions of a file:

1. Click or to open the File Options menu for the file you want.
2. Select **Properties**.
3. The File Property Editor dialog box will appear. Click on the **File Version** tab. Each version of the file is listed in the File Version tab.



Note: the **Text Summary** column shows an extracted plain text abstract for non-text files (such as .TIF or .PDF) when possible. Mouse over the column to see the text (if any). Click to edit that extract or to add any kind of note to other file types.


File Property Editor - Certificate Insurance
File Properties
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1
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ry
ERTIFICATE OF LI..
Approval
(automatic)
Powered by SPITFIRE
P. 0. Box 2214
16522 Irvine Boulevard Suite 225
Tustin Heights CA 92782
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF. THE ISSUING COMPANY WILL OO4'Q)4XI MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE
LEFT, BUT FAILURE TO MAIL SUCH NOTICE SHALL IMPOSE NO OBLIGATION
OR LIABILITY OF ANY KIND UPON THE COMPANY, ITS AGENTS OR REPRE
SENTATIVES. 1O Days for Non-Payment of Premium
AUTHORIZFD REPRESENTATIVE
Mike MUlligan
ACORD 25-S (7/97) created at www.eCertsONLINE.com © ACORD CORPORATION 1988
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1611 E. 17th Street
Santa Ana CA 92705
714. 285.4200
www.InsuranceVisions.com
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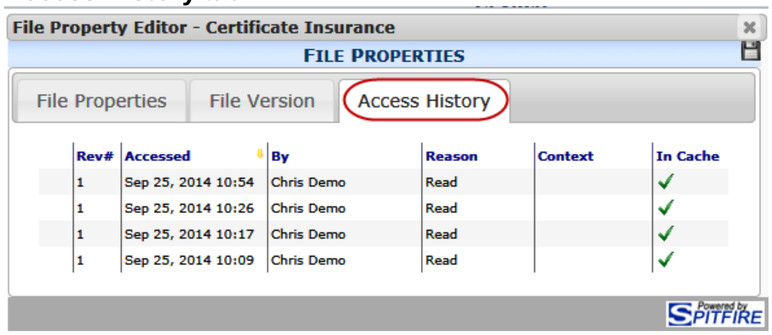
A Anthem Insurance Company
INSURER Casualty Risk Insurance Company B do Beechum & Associates
Insured

Access History

If you have permission to do so, you can view activity (file checked out, saved, checked in) on a file.

To view the access history of a file:

1. Click or to open the File Options menu for the file you want.
2. Select **Properties**.
3. The File Property Editor dialog box will appear. Click on the **Access History** tab.



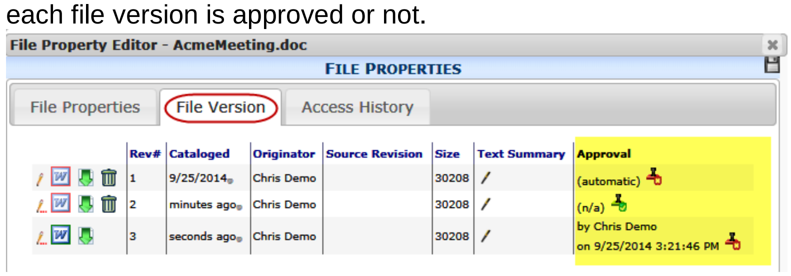
File Approval

If your site has automatic file approval (set up by default), every version of a file that you check in will be approved. However, if your site has turned off automatic file approval, manual approval on a version is needed before all users can view and access that version. In such a situation, if you check in a file without approving it, only those users with permission to see unapproved files will be able to access it; others will access the latest approved version.

File Properties

To approve/un-approve a file through File Properties:

1. Click to open the File Options menu for the file you want.
2. Select **Properties**.
3. Click on the File Version tab. The Approval column tells you if each file version is approved or not.



- **(automatic)** means that this version of the file was approved automatically when the file was catalogued or checked in.

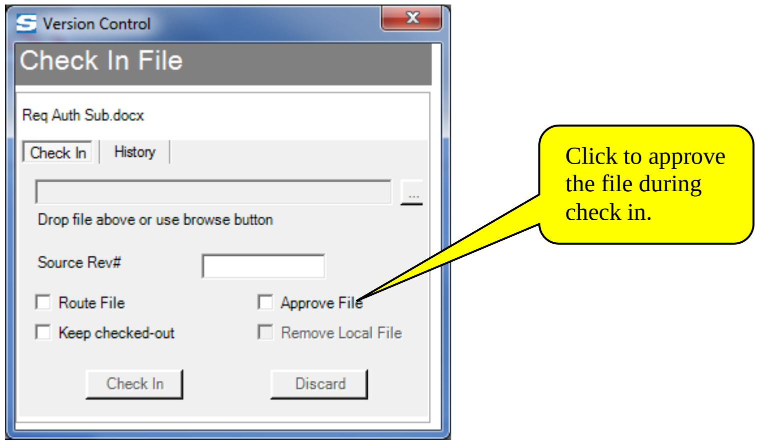
TIP
For more information about role capabilities see the [Designing User Roles](#) technical white paper.

- o **(n/a)** means that this version of the file is not approved. It can be approved by someone with the **PART | Catalog File Version History (RS)** role capability.
- o **By *person* on *date time*** means that this person approved the file on the specified date and time.

4. Click to approve a file that is not approved, or to unapproved a file that is currently approved.

Check In

You can also approve a file at the Check In File dialog box.



Add Files

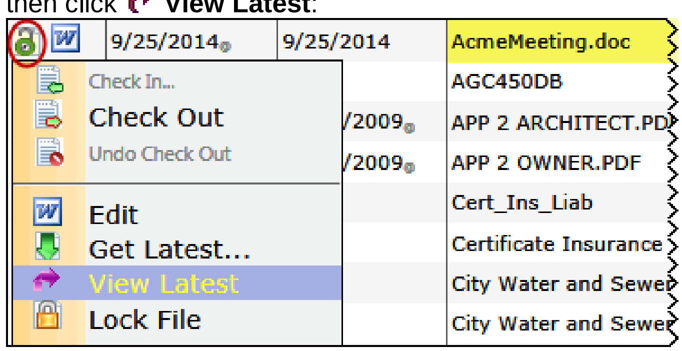
You can also approve files when uploading them [through the Add Files](#) too. See page 38 for more information.

View Latest Unapproved Version

If there is a version of the file that has not yet been approved since the latest approved version, a new choice appears on the File Options menu.

To view the latest unapproved version of a file:

- Click to open the Files Options menu for the file you want, then click **View Latest**:



File Export

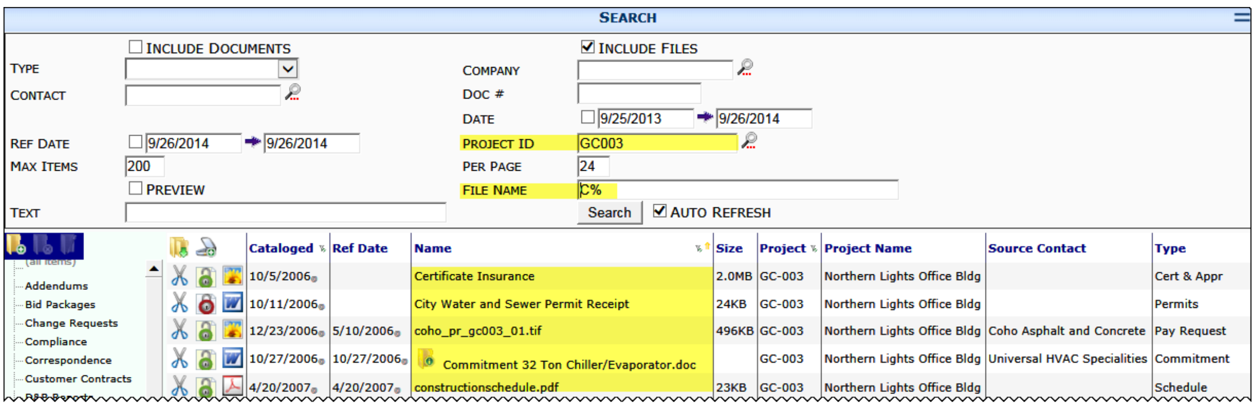
If you need copies of several files on your computer or perhaps a CD (for archival purposes, for example), you can export a number of files all at once from sfPMS. Exporting does not remove files from sfPMS and exported copies no longer have any relation to other files or versions in sfPMS.

You can export files from both the Catalog Dashboard and a document's Attachment tab.

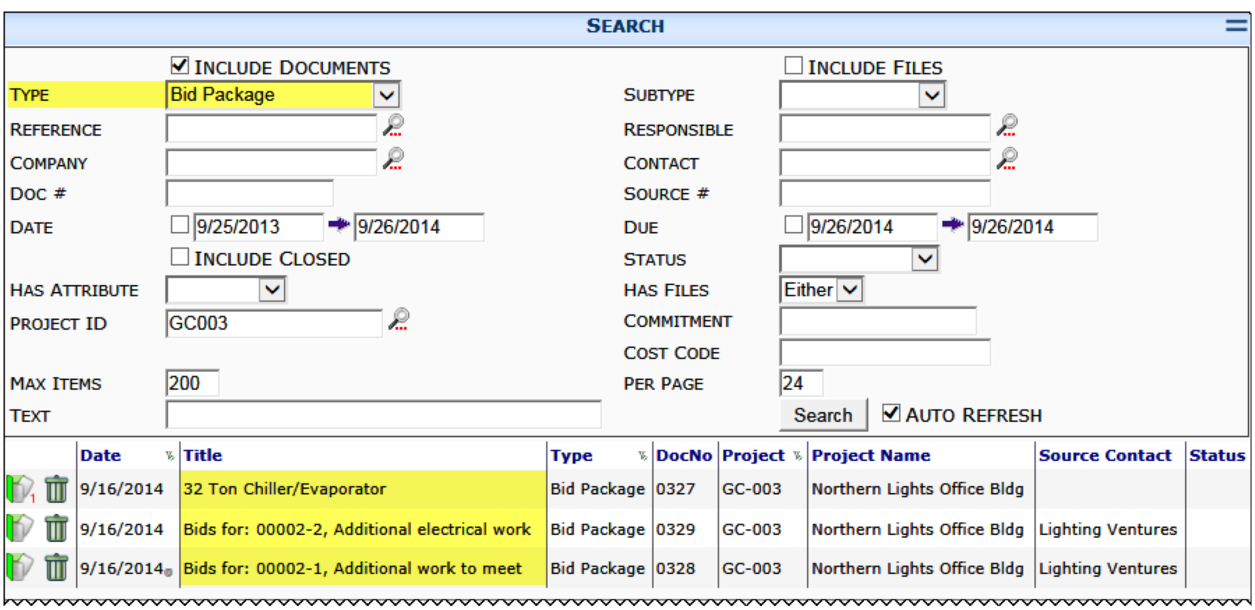
From Catalog Dashboard

To export files from the Catalog:

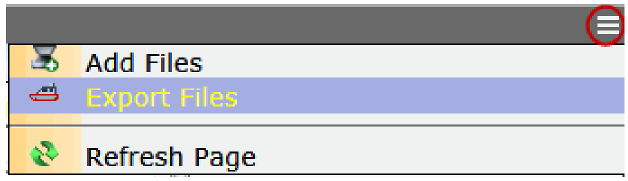
1. Because the Export Files tool uses the current list of files, use the filters and/or file folders to narrow down the files to just those you want to export, for example:



Note: you can use the filters to search for documents also. The Export Files tool will list the files attached to those documents only.

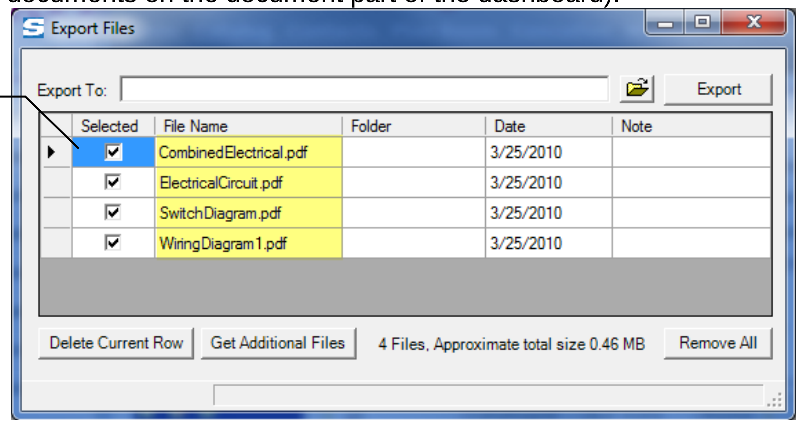


2. Click to open the Options Menu, then select **Export Files**:

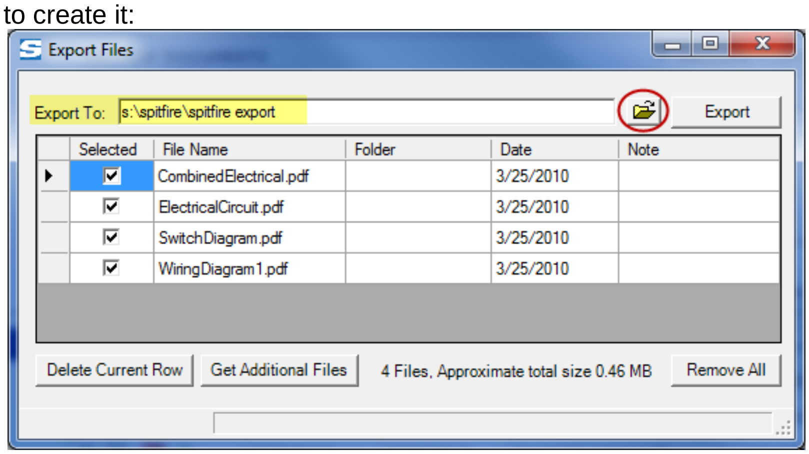


The Export Files window will appear, listing the files currently on the files part of the dashboard (and/or the files attached to the documents on the document part of the dashboard).

You can de-select or re-select any particular file. If you right-click on any row, you will get options to clear, remove and select the row or all rows.



3. Click to browse for the folder to which you will export your files or type a folder path in the Export To field. If you type a folder name that does not yet exist, you will be asked if you want to create it:

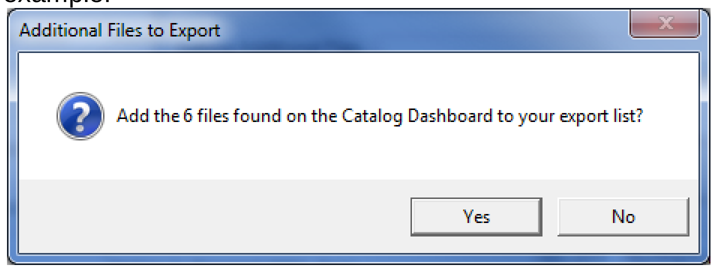


4. (*optional*) If you realize that you want to export other files also, go back to your Catalog and use the filters or folders to find other files.

   Note: you can either close the Export Files window or keep it open while you do this. In either case, the files you already chose to export will remain in the export list.

   - If you closed the Export Files window, click to add the new files to the list.

- If you kept the Export Files window open, click Get Additional Files. A confirmation box will tell you how many files you will be adding from the Catalog, for example:

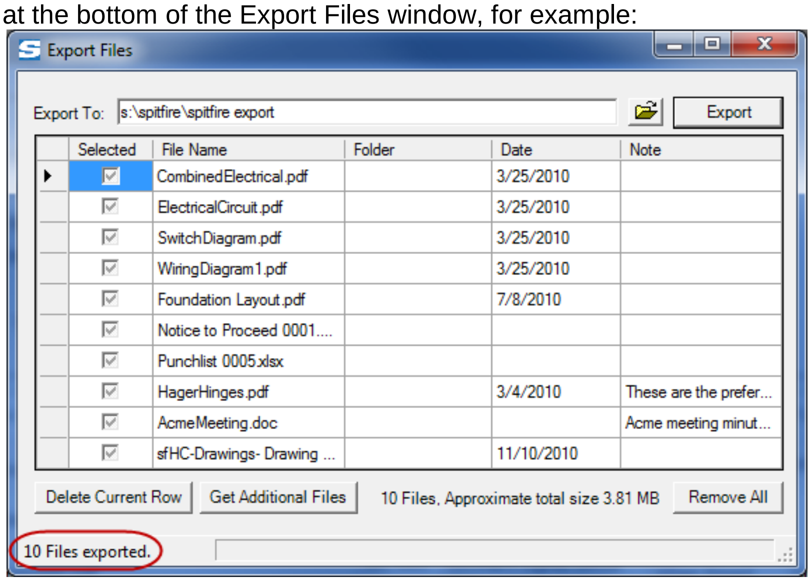


- If you want to add all the files to the Export File list, click Yes; if there are too many files and you want to filter them more, click No and go back to the Catalog.

TIP
Once you start exporting, if you want to stop the process, click Stop. Files that have not already been exported will remain in the Export Files window for you to delete or export at another time.

5. When you are ready to export, click Export. After all files have been exported, a message to that effect appears:

6. Click OK. The number of files exported will also appear at the bottom of the Export Files window, for example:



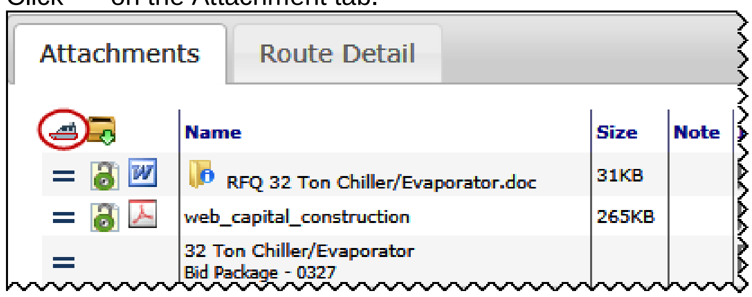
7. Click Remove All to clear the list then X to close the **Export Files** window.

From Attachment Tab

You can export all files that are attached to a document or just files that are attached to a particular Item on the document.

To export document attachments:

1. Open the document that contains the files (in the Attachment tab) that you want to export.
2. (*optional*) If you want to export only files that are attached to a particular Item, go to the Items tab and expand that Item.
3. Click on the Attachment tab.



The Export Files window will open.

4. Proceed with the instructions on page 70.

File Download

If you would like copies of certain files on your computer, you can download a zipped file of those files. Downloading does not remove files from sfPMS and downloaded copies no longer have any relation to other files or versions in sfPMS.

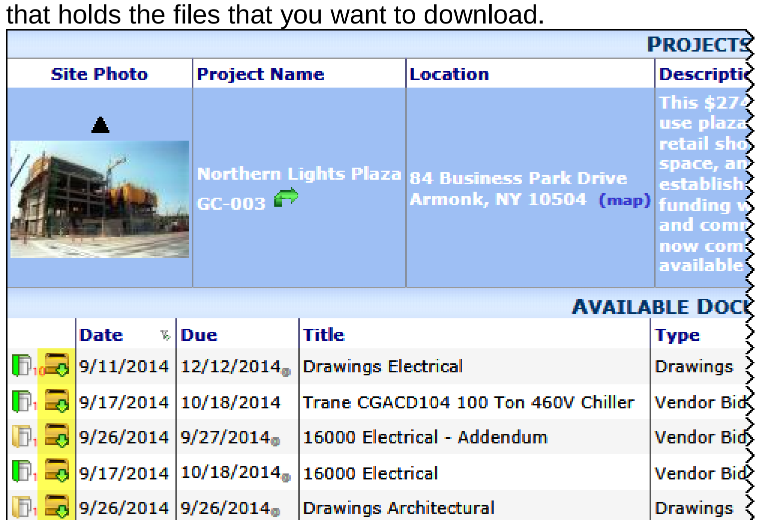
You can download files from both the Plan Room Dashboard and a document's Attachment tab. In both cases, you download all files attached to a particular document.

From Plan Room Dashboard

To download files from the Plan Room:

Note: only one project must be selected in the Plan Room before the Available Documents are listed.

1. At the Available Documents list, click at the document row that holds the files that you want to download.



   sfPMS will gather data and then the File Download dialog box will appear.

2. Click Save to specify a location (and, optionally, a different filename) for the zip file.

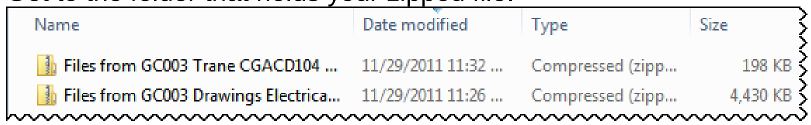
3. Click Save again. When the download is complete, the dialog box will say so.

4. You can

   - Click Close to close the dialog box (and deal with your zipped file separately) or
   - Click Open folder to get to the folder that holds your zipped file or
   - Click Open to see the contents of the zipped file.

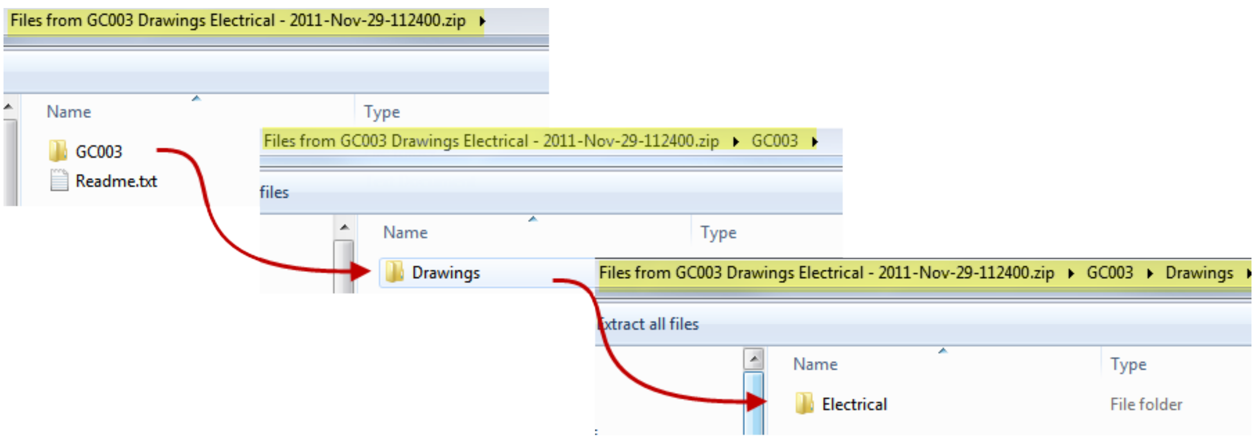
To unzip the downloaded file:

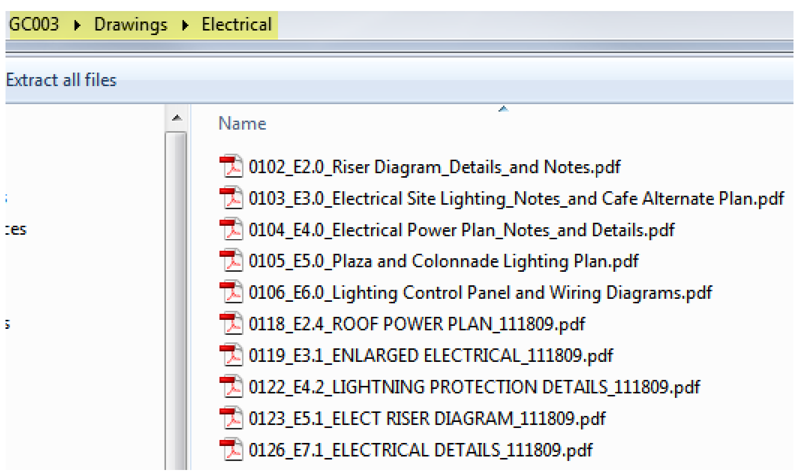
1. Get to the folder that holds your zipped file.



2. Double-click on the filename. A new directory, containing the contents of the zipped file plus a ReadMe file, will appear.

   Note: files are organized by project, Doc type and Subtype. You will need to drill down to get to the attached files.



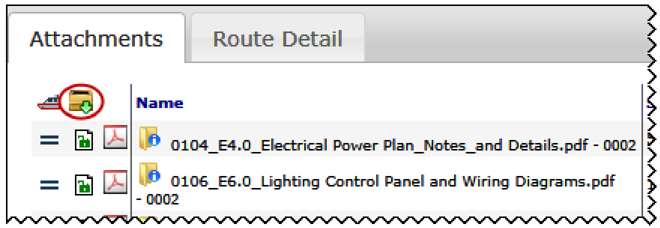


From Attachment Tab

You can download all files that are attached to a document.

To download document attachments:

1. Open the document that contains the files (in the Attachment tab).
2. Click on the Attachment tab:



The File Download dialog box will appear.

3. Proceed with step 2 on page 73.

Mobile Attach Via Email

When you are using sfPMS from a mobile device such as a tablet, the easiest way to attach a file to a document is through the email functionality of Spitfire.

From the Home Inbox

Documents that have been set up for this functionality will display the icon on the document row.

To attach a file to a document via email:

1. Click at the desired document row.

   (You may be asked which email app you want to use to complete the action. If so, select one.)

2. When the email opens, attach a file or photo to it as you would attach any file to an email on your mobile device. **Important**: Leave the To address and Subject line as is. This information tells sfPMS where to attach the file.

3. Send the email. The email will get processed by sfPMS and the attached file will appear on the document's Attachment tab, as well as in the Catalog.

TIP

In order to see the icon on your Inbox, you must have a role with the DOC | User Inbox Inbound Email Attachment Link capability, limited by the Doc type.

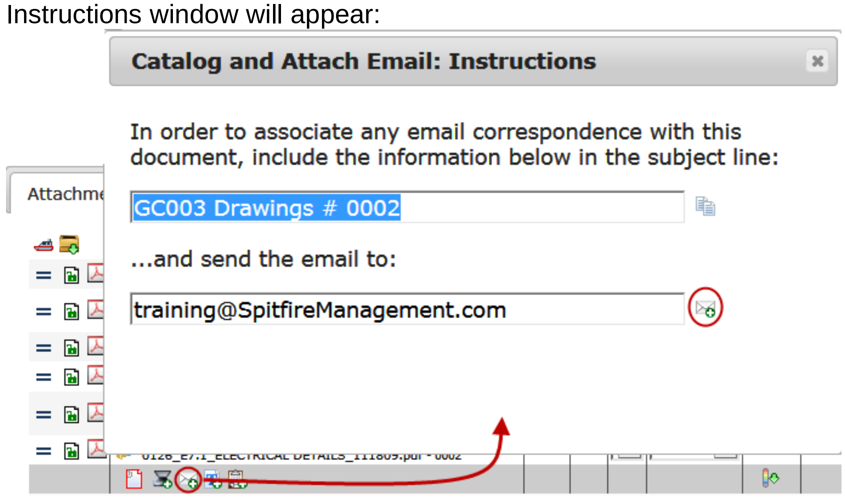
See the *Designing User Roles* technical white paper for more information.

From the Attachments Tab

All documents include the icon on the Attachments tab.

To attach a file to the document via email:

1. Open the document to which you want to attach a file.
2. Click on the Attachments tab. A Catalog and Attach Email: Instructions window will appear:



3. Click on the window. (You may be asked which email app you want to use to complete the action. If so, select one.)
4. When the email opens, attach a file or photo to it as you would attach any file to an email on your mobile device.
   Important: Leave the To address and Subject line as is. This information tells sfPMS where to attach the file.
5. Send the email. The email will get processed by sfPMS and the attached file will appear on the document's Attachment tab, as well as in the Catalog.

Appendix A: Watched Folder

You can set up a “watched” folder on your computer as another way to add files to the Catalog. When you drag-and-drop or save files into your watched folder, the Add Files window appears, enabling you to directly add those files to sfPMS.

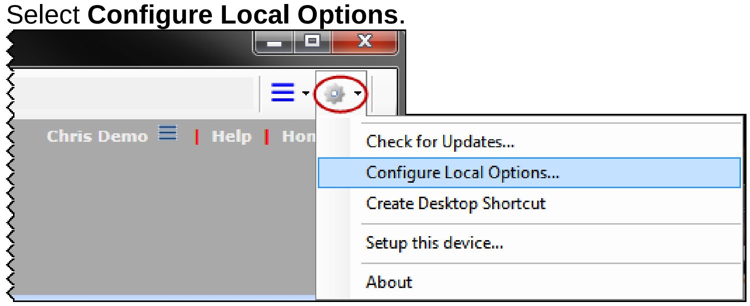
Note: a watched folder should be used exclusively for files that are to be added to the Spitfire Catalog. When the contents of this folder are uploaded into Spitfire, they are removed from your local hard drive. You should not use this feature if you want to keep local copies of these files. Also, your watched folder should not point to your desktop or “My Documents”.

Folder Set-Up

Before you can use a Watched Folder, you must designate its location on your computer (see note above). You do this through the Dashboard Configuration.

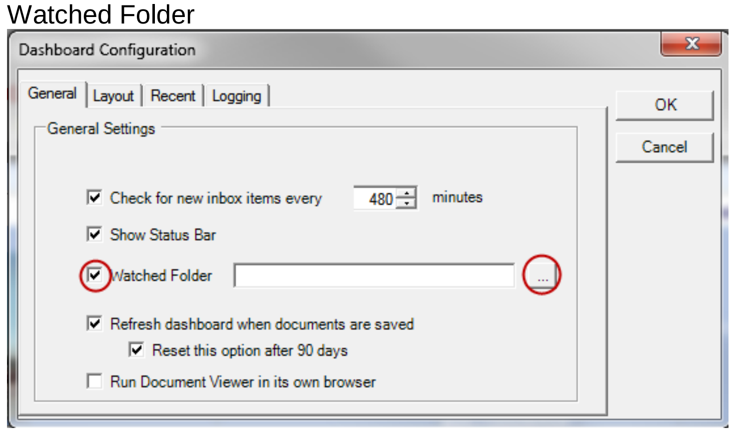
To set up your Watched Folder:

1. Click  at the top of your sfPMS window.
2. Select **Configure Local Options**.



The Dashboard Configuration box will appear.

3. Click the checkbox next to **Watched Folder.**
4. Click to browse for the folder you want to designate as your Watched Folder



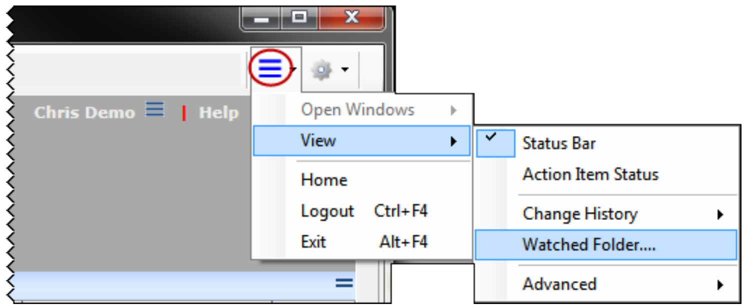
5. Click .

Use of the Watched Folder

The Watched Folder serves as a “stepping stone” when you want to copy certain types of files (such as emails or PDF files) into the Spitfire Catalog.

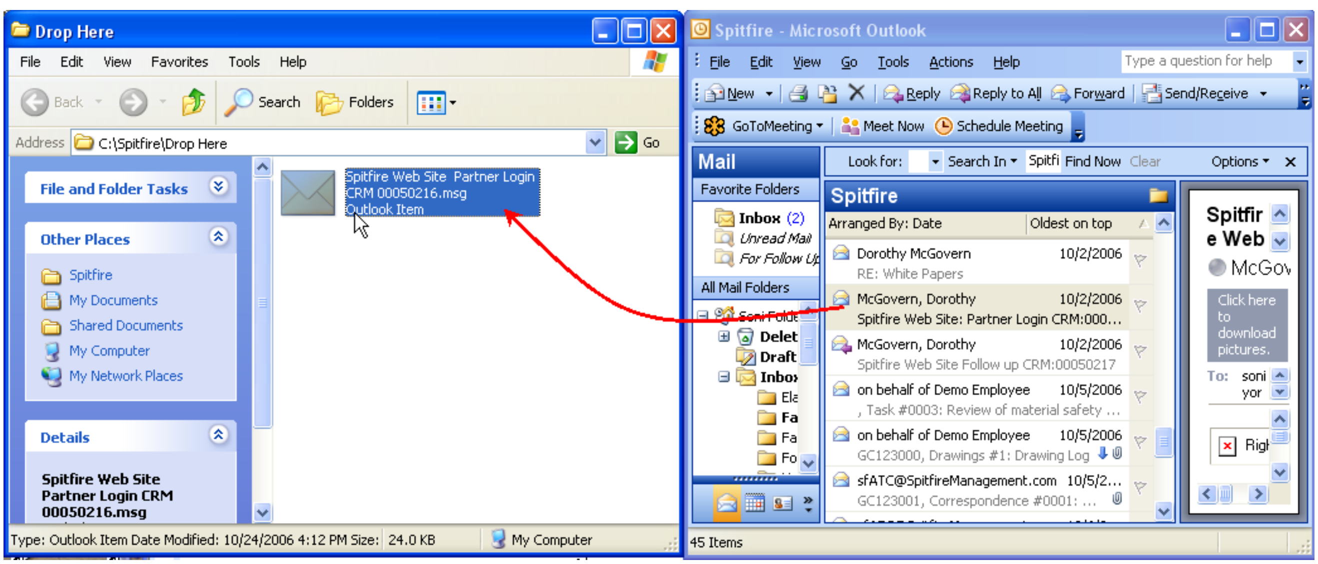
To add files through the Watched Folder:

1. Click at the top of the sfPMS window.
2. Select **View** then **Watched Folder Window.**



A folder window will appear.

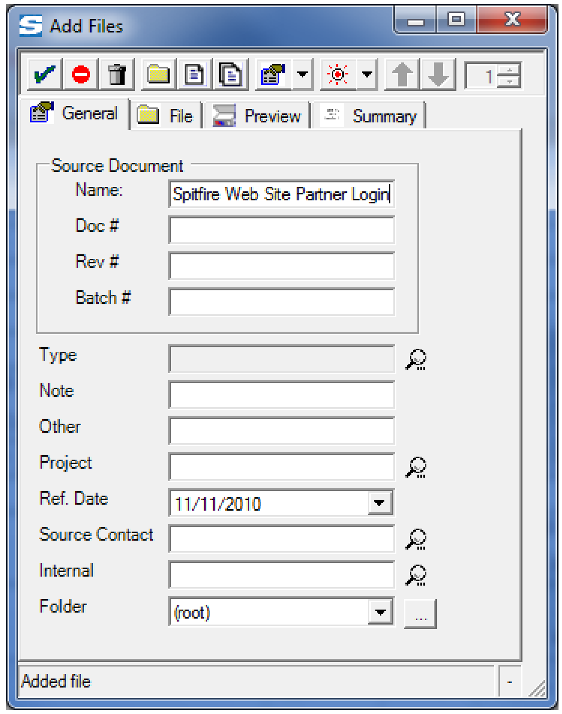
3. Drag-and-drop a file from any source (e.g., Microsoft Outlook, a USB thumb driver, your desktop). The file will appear briefly in the folder window, for example:



The Add Files tool will then appear with the name of your file filled in, for example:

TIP

While no field in the General tab is required, it is useful to look up a **Project** as well as to browse for a **Folder**.



4. Fill in other fields under the General tab then click .
5. Click on the Add Files tool and the folder window to close each.