

Hard Copies of Spitfire Documents and Attachments



This Technical White Paper is designed for Spitfire Project Management users. It describes best practices in dealing with Hard Copy routees (i.e., those people who need to receive printouts of Spitfire documents and related attachments).

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Table of Contents

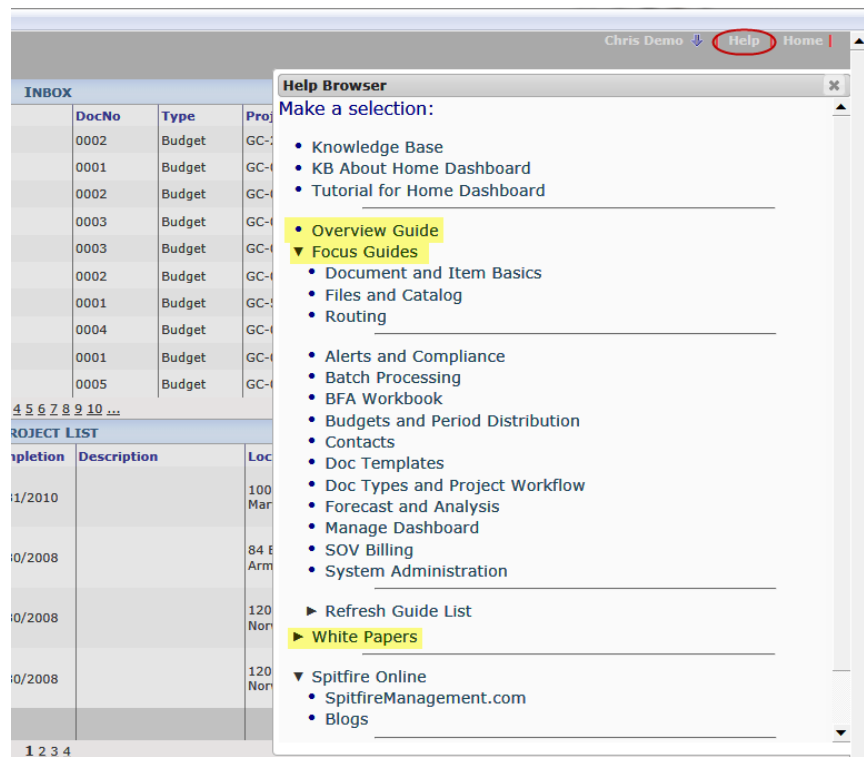
- Introduction 4**
- Concepts 5**
 - Templates 5
- The DocTypeConfig | HardCopyThru Rule 6**
 - Concept..... 6
 - Example..... 7
 - Setting the HardCopyThru Rule..... 8
- Printing the Routed Content 10**

Introduction

This white paper describes best practices in dealing with your Hard Copy routees (i.e., those people who need to receive printouts of Spitfire documents and related attachments).

This white paper assumes you have a basic understanding of sfPMS in general and Spitfire routing in specific. If not, please read the [Overview Guide](#) and the [Focus on Routes](#) guide first. The [Focus on Document and Item Basics](#) guide also could be helpful.

All documentation referred to within this white paper can be found on the Spitfire Help menu.



Note: aside from an updated picture, the information herein is the same as the information in the V4.3 documentation.

Concepts

Spitfire documents can be seamlessly routed to other people in various ways:

- **Via Web** – Spitfire documents are routed to the routee’s Spitfire Inbox. Attached files appear on the document’s Attachment tab.
- **Via E-mail** – Spitfire documents are converted into Microsoft Word printout files (through Attachment templates) and attached to the Spitfire document. All designated attachments are then either sent as attachments on emails to the routee’s external email application (for example, Microsoft Outlook) or accessible to the routee through a Download Wizard. (For more information, see the [Focus on Routes](#) guide.)
- **Via Fax** – Spitfire documents are converted into faxable form (through templates) and then sent to the routee’s fax machine. Files attached to the Spitfire document are also faxed, if the files are of an appropriate file type (.PDF, .TIF or .DOCX).

However, if you need to route a Spitfire document to someone who is not a Spitfire user, and who cannot be reached via fax or email (i.e., a routee who is **Via Hard Copy**), you or someone else needs to print out the printable version of the routed content before you can “snail mail” or hand over the printed pages.

Templates

All Doc types that may be routed to someone via email, via fax or via hard copy should have at least one Attachment or Transmittal template for sfPMS to use in routing.

Attachment templates are explained in the [Focus on Files, Attachments and the Catalog Dashboard](#) guide. Transmittal cover sheets are described in the [Focus on Routes](#) guide.

For information on how to create such templates, see your implementer or support technician. For information on how to upload such templates into sfPMS, see the [Focus on the Manage Dashboard](#) guide.

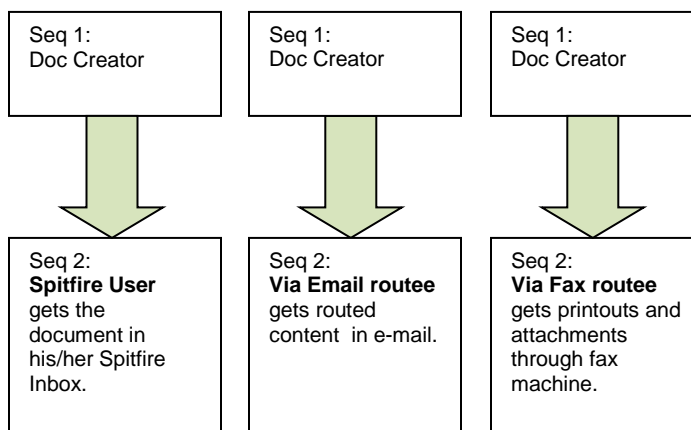
The DocTypeConfig | HardCopyThru Rule

Concept

Sometimes routees are added to documents through predefined routes (established through the Routes tool on the Manage Dashboard). When these routees are Spitfire users, or Via Email/Fax routees, documents are automatically routed to them

TIP

For more information about predefined routes, see the [Focus on the Manage Dashboard](#) guide.



However, when the next routee is a Hard Copy routee, the Spitfire document does not automatically go to that person. sfPMS cannot automatically print, envelope, mail, place in the person's cubby, etc. the printouts associated with the Spitfire document. So some Spitfire User must be the one to print out the routed content and send the hard copies to the Hard Copy routee(s).

The **DocTypeConfig** rule includes the **HardCopyThru** value, which allows you to indicate the person who should be inserted into a route sequence prior to any Hard Copy routee.

Example

For example, the following predefined route...

ROUTE						
NAME:	<input type="text"/>	DOC TYPE	<input type="checkbox"/> Col			
Route Name						
RFQ Vendors						
DETAILS FOR SEL						
STATUS:	<input type="checkbox"/> Destination					
Seq. No.	User/Role	Description	Access Level	Default Status	Defa	
2	Spitfire		View	Pending		
3	RFQ Vendor Contact		Collaborate	Pending		
4	Spitfire		View	Pending		
5	Doc Entered By		View	Pending		

...appears as the following routes on Spitfire documents:

Attachments	Route Detail					
	Seq	To	Status	Ins	Rsp	Notes
	1	Chris Demo (Project Manager)	Pending			
	2	Spitfire	Pending			
	3	Phil Sunderson (Able Electric Corp)	Pending			
	4	Spitfire	Pending			
	5	Chris Demo (Project Manager)	Pending			

Phil is a Via Email routee.

Attachments	Route Detail					
	Seq	To	Status	Ins	Rsp	Notes
	1	Chris Demo (Project Manager)	Pending			
	2	Spitfire	Pending			
	3	Kris Johnson (Active Electric)	Pending			
	4	Spitfire	Pending			
	5	Chris Demo (Project Manager)	Pending			

Kris is a Via Hard Copy routee.

However, if you use the **DocTypeConfig | HardCopyThru** rule, the predefined routes could appear as follows:

This route is the same as before.

Attachments	Route Detail					
	Seq	To	Status	Ins	Rsp	Notes
	1	Chris Demo (Project Manager)	Pending			
	2	Spitfire	Pending			
	3	Phil Sunderson Able Electric Corp	Pending			
	4	Spitfire	Pending			
	5	Chris Demo (Project Manager)	Pending			

Elizabeth has been inserted before the Hard Copy routee , Seq numbers have been adjusted, and Ins and Notes messages have been added automatically.

Attachments	Route Detail					
	Seq	To	Status	Ins	Rsp	Notes
	1	Chris Demo (Project Manager)	Pending			
	2	Spitfire	Pending	✓		
	3	Elizabeth Keyser-Rubble Clerk (Project Assistant)	Pending	✓		
	3	Kris Johnson Active Electric	Pending	✓		
	4	Spitfire	Pending	✓		
	5	Chris Demo (Project Manager)	Pending	✓		

Click for Route Actions

Review text - close window

Automatically Inserted

Please generate and send hard copy


Setting the HardCopyThru Rule

Only Spitfire Users who have access to the Rules Maintenance tool on the System Admin Dashboard can set up rules.

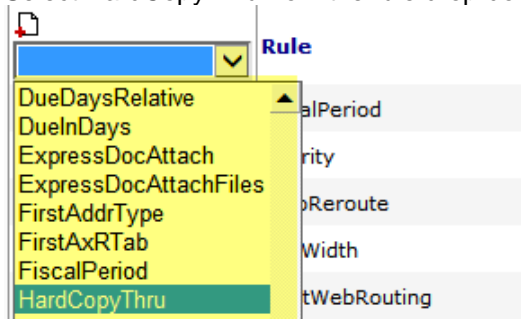
To establish a “Hard Copy Thru” person:


1. Find the **DocTypeConfig** rule group on the **Rules Maintenance** tool (on the System Admin Dashboard).

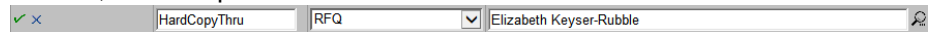
RULE MAINTENANCE				
GROUP:		DocT		
	Rule Group	Filter Info	Type	Description
	DocTypeConfig	DocTypeKey	String	Allows customize CanCopyItems.

2. Click  to get to the details.

- Select HardCopyThru from the rule drop-down menu.



- Click  to add a new HardCopyThru rule.
- In the Filter Value drop-down, select the Doc type to which this rule will apply. You can add the HardCopyThru value multiple times if you want to set this up for various Doc types.
- In the Result Value, look up or type the name of the Spitfire User who will receive documents that are routed to Hard Copy routees, for example:




- Click  to accept your values then  to save the rule.

TIP


You can also enter the GUID for the DocEnteredBy role as the result value for HardCopyThru. See [KBA-01407](#) for more information.








Printing the Routed Content

Whoever is printing out the routed content does so through the “view routed content”  icon.

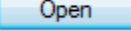
Note: the following instructions assume that the document has been routed to someone in order to print material for a Hard Copy routee, as described in the previous chapter.

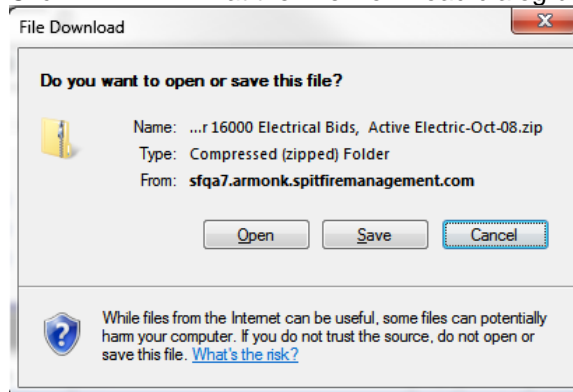
To print out routed content:

- Once the document has been routed to you, click on  on the row for the Hard Copy routee, for example:

Attachments	Route Detail			
	Seq	To	Status	Ins
	1	Chris Demo (Project Manager)	Responded	
	2	Spitfire	Sent On	
	3	Elizabeth Keyser-Rubble Clerk (Project Assistant)	Pending	Please generate and send hard copy
	3	Kris Johnson  Active Electric	Pending	
	4	Spitfire	Pending	
	5	Chris Demo (Project Manager)	Pending	

sfPMS will gather all route-able files and open a dialog box.

- Click  at the File Download dialog box.



Note: if a second dialog box appears, click  again.

All routed files will be listed.

- Open each file as you would normally and print it out.

