SPITFIRE SOFTWARE® sfNews January 2012
Vol. V, Issue 01

In This Issue

***Note**: features mentioned in this newsletter are available in V4.1.4370*

On the Horizon: sfPMS V4.2

There is still time to register for our

Preview of sfPMS V4.2 Webinar

January 5

9 – 11 a.m. or 2 – 4 p.m. (Eastern)

Learn about the exciting new features and improvements in our upcoming release of the Spitfire Project Management System.

Contact Steve Powers (spowers@spitfiremanagement.com) if you would like to attend one of the two webinar sessions.

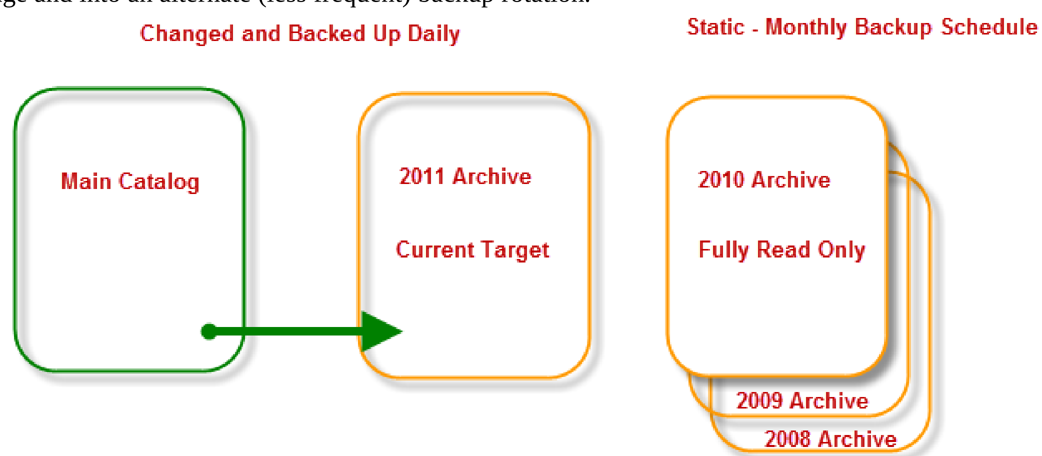
Feature Spotlight: Catalog Archiving

At the start of a new year, it is a good idea to review your archiving protocols. The archiving of Spitfire Catalog files is something that every company, especially those who have been using sfPMS for years, should have set up.

Every time that you and other users add another PDF, image or Microsoft Office file to the Catalog (either directly or through a document attachment or reply from an email, etc.) the catalog gets larger and takes up more disk space. And disk space is not unlimited. In addition, files that are important now become less relevant as months and years go by. While they need to be kept for future reference, they no longer change and are not actually viewed very often.

Spitfire has an archiving feature that is meant for these older files. Once archiving has been set up, files in the catalog that are older than a predetermined amount of time (6 months, 12 months, etc.) are moved from the main catalog into an archive catalog. However, they are still accessible and, in fact, their location is hidden from end users—archived files still show up in Catalog searches and can be viewed just the same as “newer” files. Newer versions of an archived file can even be checked in (and stored in the main catalog). The only thing that can no longer be done is deletion of a file that has been archived.

Archiving is recommended mostly for IT management. While some storage is fast and expensive, other storage is slower and cheaper. In addition, older files do not need to be backed-up as often as newer files. Archived files can be placed on slower storage and into an alternate (less frequent) backup rotation.



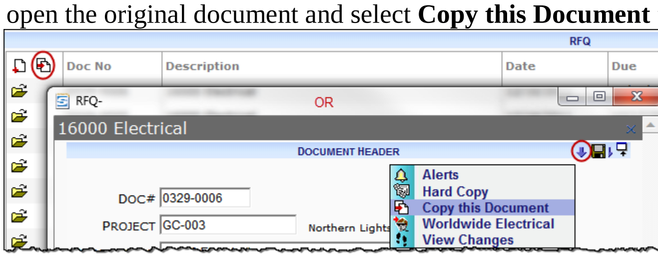
For help in setting up your Spitfire archiving, contact support@spitfiremanagement.com.

Item Tip: How to Copy Items

There are various ways to copy one document's Items onto another document. Depending on the situation, one of these methods will work best.

1) To copy a document and include its Items:
You can copy a whole document, including its Items, if your purpose is to create a new document that contains the same Items as an existing document. This method often involves a "template" document that provides the starting point for new documents of that Doc type.

1. Either click at the Project Dashboard after selecting the proper Doc type
   -or-
   open the original document and select **Copy this Document** from the Document Options Menu.

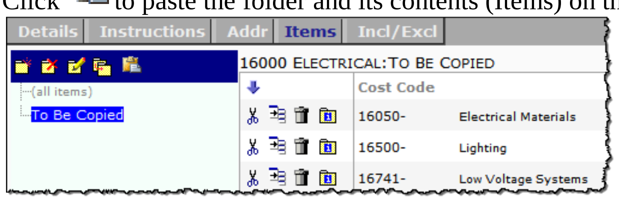


2. On the Copy Document dialog box, look up the original document (if necessary) and click the **Items** checkbox to check it. (You could also change other fields and checkboxes if appropriate.)
3. Click Copy to create a new document with the copied Items.

4) To Use a Workflow Script:
In a similar matter, you can also have Items copied from one document to another through an ATC workflow script, triggered through routing. The workflow script would need to include
ATC: COPY *project docno*; WITH ITEMS

2) To copy Items in folders:
You can copy Items by placing them on a folder and then copying the folder. You can copy folders across projects and Doc types.

1. On the original document's Item tab, create the folder, if necessary, and save the document. (You may need to unhide folders first through the **Show Folders** option.)
2. Click to select the Items you want copied, then click on the folder name.
3. Click to "paste" the Items into the folder.
4. Click to copy the whole folder to the Spitfire clipboard.
5. Open the target document and go to its Items tab. Make sure that folders are visible on this document.
6. Click to paste the folder and its contents (Items) on the target document.



3) To Get Items:
You can Get Items on certain documents if you want to copy Items from one document to another of the same Doc type.

1. Open the document that is to contain the copied Items.
2. On the Items tab, select the **Get Existing** option. Depending on the Doc type, you will be able to indicate that you want Items copied from another document or a register.
   Note: certain Doc types also allow you to **Get All** Items from a source.
3. Click to select the Items you want copied, then click Return.
4. Click to add the newly copied Items to your document.

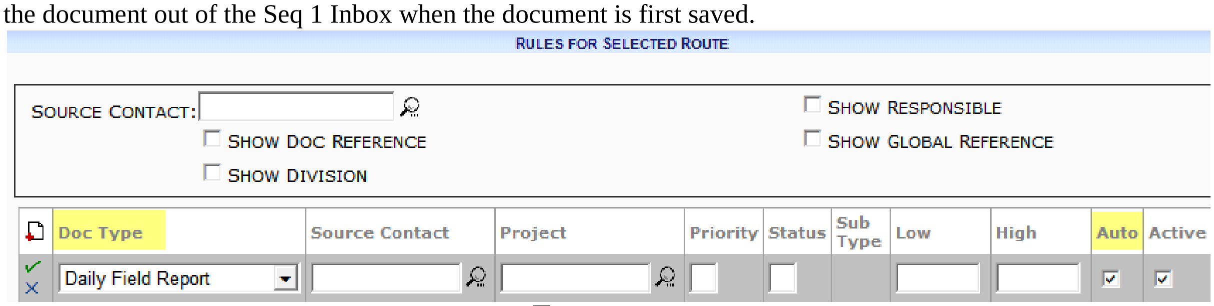
For more information, see the *Focus on Document and Item Basics* guide (and the *Focus on Routes and Automatic Workflow* guide for more about ATC script commands).

Spitfire Q&A: Closing Documents Automatically

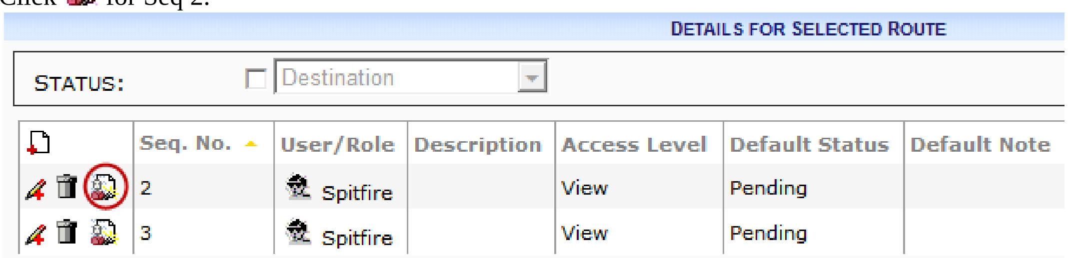
Q: I create certain documents every day that don't need to get routed (so they often just sit in my Inbox). Is there a way to close those documents automatically after, say, 7 days?

A: Yes. You can take advantage of ATC scripts and automated routes to have certain Doc types leave your Inbox and then close automatically after a set period of time.

1. Go to the Routes tool on the Manage Dashboard.
2. Click to name a new automated route, then click .
3. Click to get to the route details.
4. At the **Rules for Selected Routes** section, click to add a new row.
5. Select the appropriate Doc type (and Sub Type if appropriate).
6. If you don't want this Doc type to be in the Inbox at all, click the Auto checkbox. This will automatically move the document out of the Seq 1 Inbox when the document is first saved.



7. At the **Details for Selected Route** section, click to add a new row.
8. In the User/Role field, type **Spitfire** then click .
9. Repeat steps 7 and 8. You should have two Spitfire rows (one at Seq 2 and one at Seq 3).
10. Click for Seq 2.



11. Type the following ATC script in the window that appears:

    ATC: SEQ 3 NOW 7

    (This command sets the route due date for Seq 3 to 7 days from now.)
12. Click to save the script and close the window.
13. Click for Seq 3.
14. Type the following ATC script in the window that appears:

    ATC: CLOSE

    (This command sets the closed date on the document to the current day, effectively closing the document, regardless of status.)
15. Click to save the script and close the window.
16. Click at the Manage Dashboard to save your automated route.

Now, when someone creates a document of this Doc type and saves the document, the document will leave Seq 1 (out of the Inbox) and trigger the ATC script at Seq 2. The command at Seq 2 will set the route due date for Seq 3 and the document will wait at Seq 2 until that date. When that date arrives, the document will automatically route to Seq 3, where the command to close will automatically close the document.

Have You Read?

The following articles have been added to the Knowledgebase:

KBA-01507 – What kind of templates does the Template tool support?

KBA-01508 – Spell Checking

Office Closings

The Spitfire offices will be closed in 2012 on the following days:

New Year's Day Observed – Jan. 2
Memorial Day – May 28
Independence Day – July 4
Labor Day – Sep. 3
Thanksgiving – Nov. 22 and 23
Christmas Day – Dec. 25

Contact Us

84 Business Park Drive, Suite 111, Armonk, NY, 10504

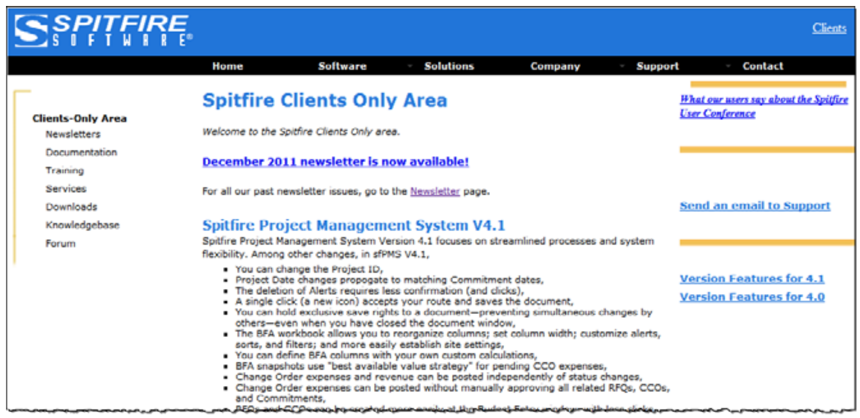
Phone:888-287-4603
Fax: 888-287-4603

Support:
support@spitfiremanagement.com

Training:
training@spitfiremanagement.com

Your Clients Area

The Clients area on our website includes links to our documentation, our Knowledgebase, our forum, our downloads, and a list of what's new in versions 4.0 and 4.1:



You will need your login and password to get to the Clients area. If you need or have forgotten your login and password, contact support@spitfiremanagement.com.

Training Classes

Spitfire offers training classes at various levels, such as **214-Intro to Budgeting** and **260-Processing Bid Packages**, to help you better learn the Spitfire Project Management System (sfPMS). Training class descriptions and schedules are available from the Clients area of our website.

JANUARY

Monday	Tuesday	Wednesday	Thursday	Friday
2 Closed for New Year's Day Observed	3	4	5 101-Basic Navigation 1:00-2:30	6 201-Documents, Items and Routes 1:00-2:30
9	10 205-Commitments and Related Info 1:00-2:30	11 210-Catalog and Files 1:00-2:30	12 270-Project Change Orders 1:00-2:30	13 214-Intro to Budgeting 1:00-2:30
16	17 216-Intro to SOV Billing 1:00-2:30	18	19 260-Processing Bid Packages 1:00-2:30	20
23	24 430-Spitfire Item Templates (for Via Excel) 1:00-2:30	25	26 220-Intro to Doc Templates 1:00-2:30	27 225-More Doc Templates 1:00-2:30
30	30 440-Compliance Setup 1:00-2:30			

Please note **our cancellation policy**: to avoid cancellation charges, your class registration must be cancelled or rescheduled at least one full business day prior to the class.