SPITFIRE SOFTWARE®

sfNews

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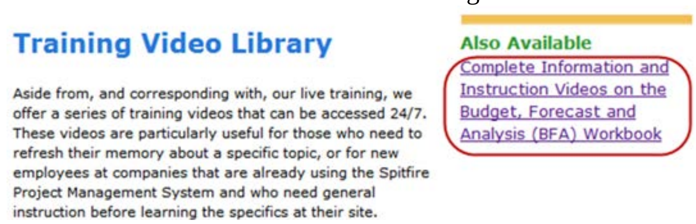
In This Issue

***Note**: features mentioned in this newsletter are available in V4.2.4559*

All About BFA

We recently added approximately 100 new videos on how to use the Budget, Forecast and Analysis (BFA) workbook to our video library. These videos include both informational presentations and how-to instructions. The videos are mp4 files and require an mp4 player, such as Window Media Player V12.

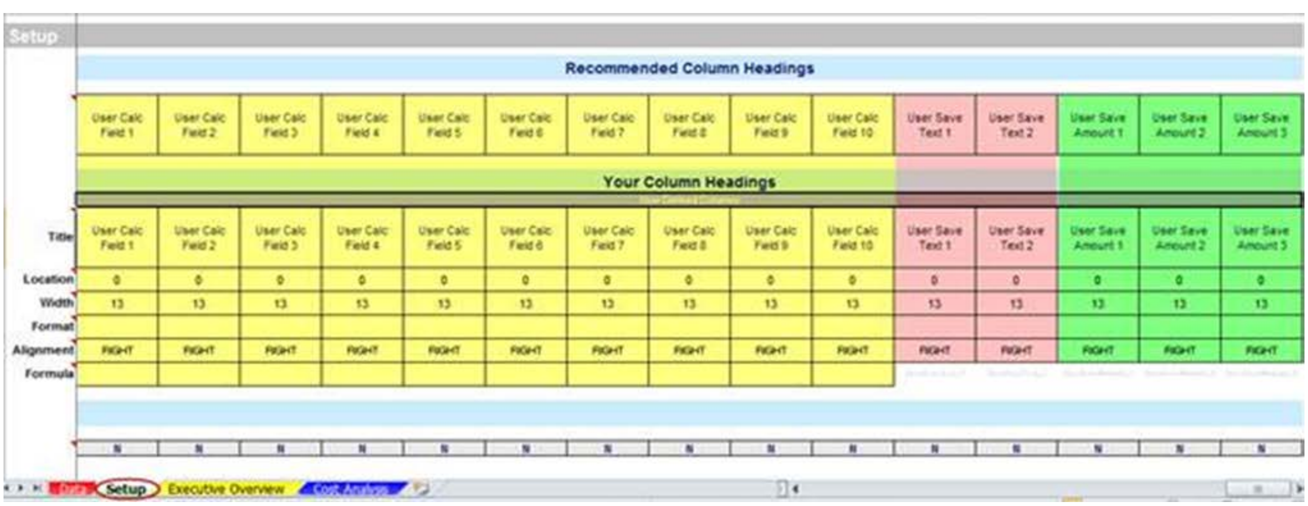
To find these videos, go to the **Client** area of our website, click on **Training** on the left-hand menu, click on **Training Videos** on the right-hand menu, then click the link under **Also Available** on the right-hand side.



Feature Spotlight: BFA User-Defined Fields

In sfPMS V4.2, the number of user-defined Calc columns for the BFA workbook has been extended to ten. In addition, three text columns (for the saving and retrieving of text values) and three amount columns (for the saving and retrieving of amounts) are available.

These columns can be titled and defined in the Setup worksheet:



The User Calc Fields accept formulas; the User Save Text and User Save Amount fields do not.

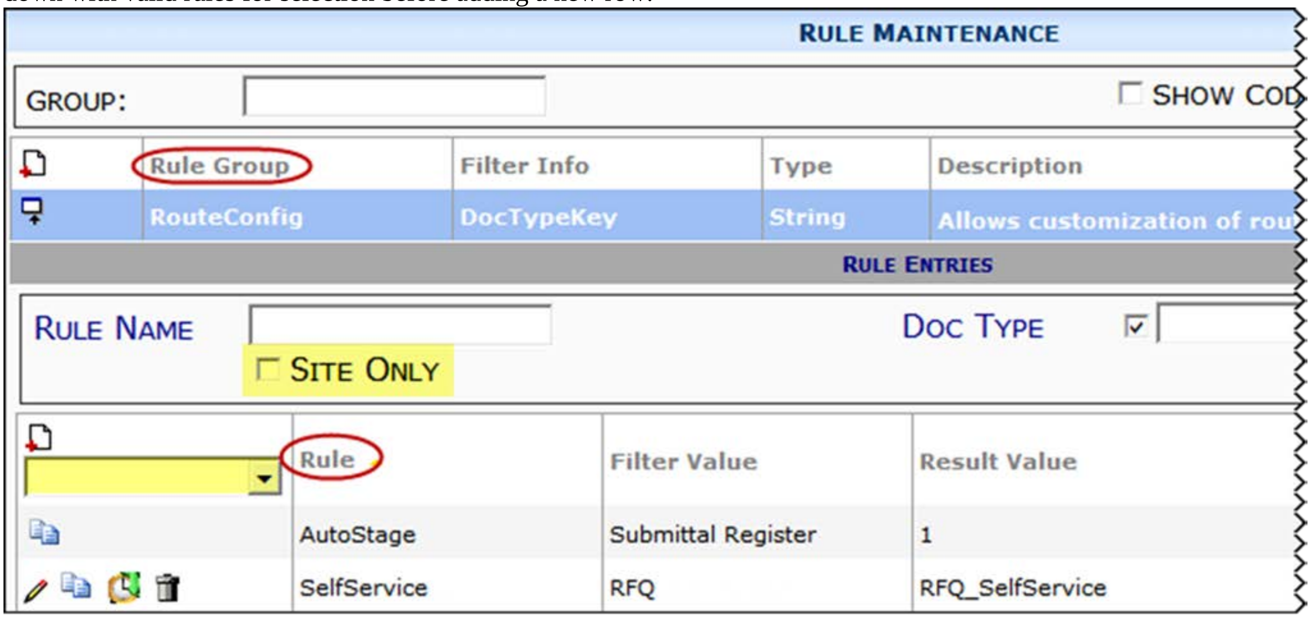
Notes:

- A user formula created in a User Calc Field column can reference a User Save Text or User Save Amount column.
- User Save Text 1 can be populated using the Import Wizard and appropriate mapping, allowing specific text to be imported for each source row in the budget.
- All three types of columns can be used as a data source for any of the three Alerts, any of the three user-definable Filters and/or Sort options, and any of the eight Executive Overview Graph columns.
- All three types of columns are available for the BFA Report Tool.

New Rules and Rule Groups

In sfPMS V4.2, we have changed the nomenclature in the Rules Maintenance tool. What used to be called Rules are now called Rule Groups, and what used to be called Test Values are now called Rules. For example, whereas before it would have been correct to say “use the SelfService test value of the RouteConfig rule” we now say “use the SelfService rule (in RouteConfig)”. In documentation, we would refer to it as the **RouteConfig | SelfService** rule.

New features in the Rule Maintenance tool include a **Site Only** filter to exclude Spitfire-distributed settings and a drop-down with valid rules for selection before adding a new row.



We have added several new rule groups and new rules to existing rule groups in sfPMS V4.2. For more information, see the *What’s New in Version 4.2* document as well as the knowledgebase articles indicated for each rule group.

There are new rules in the following rule groups:

- BudgetConfig (KBA-01176)
- DocItemConfig (KBA-01158)
- DocNumbering (KBA-01126)
- DocTypeConfig (KBA-01154)
- EmailText (KBA-01394)
- FileCatalogConfig (KBA-01265)
- ProjectConfig (KBA-01153)
- ReportConfig (KBA-01445)
- RouteConfig (KBA-01391)
- SOVConfig (KBA-01369)
- VendorConfig (KBA-01304)
- WordTemplateConfig (KBA-01323)

The following new rule groups have been added:

- DocFormula (KBA-01521)
- DocStatusIsInPlanRoom (KBA-01442)
- NextDocFlow (KBA-01517)
- RouteResponseIsYes (KBA-01518)

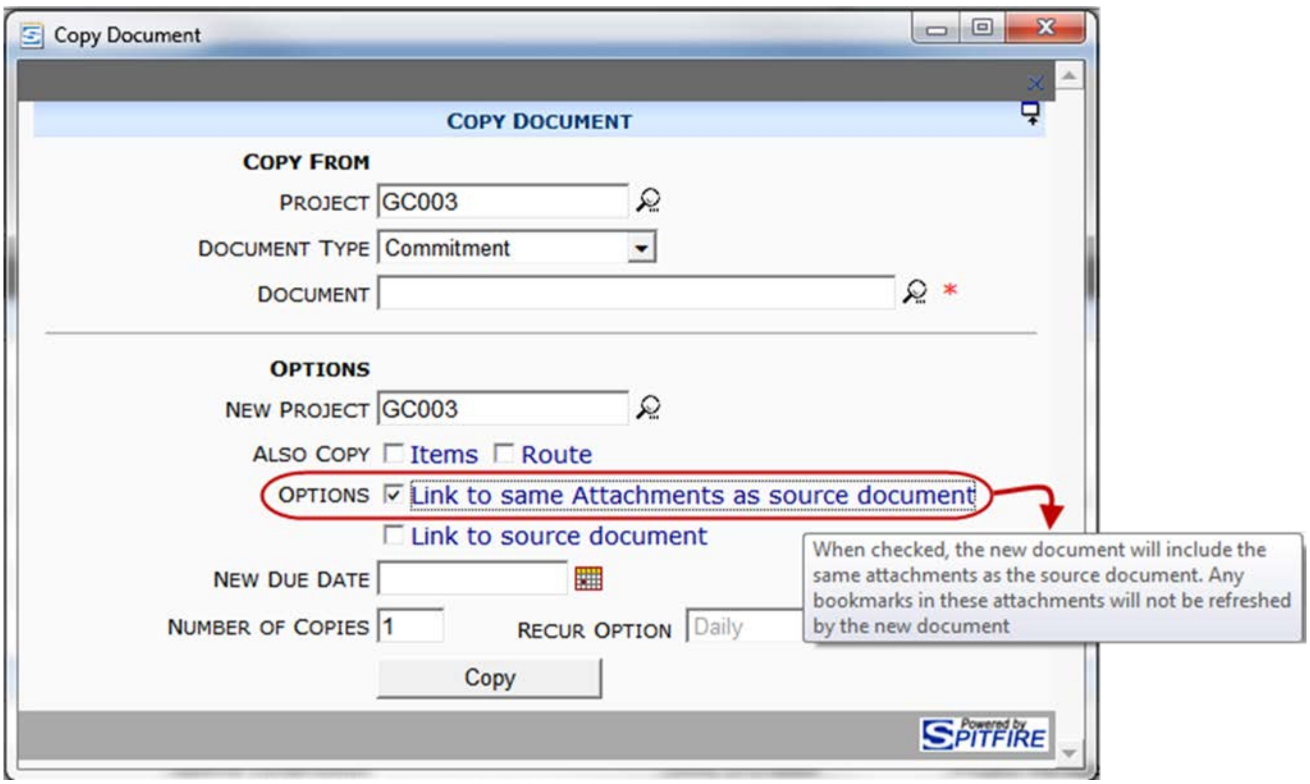
Spitfire Q&A: Copying Attachments when Copying Documents

Q: When I'm copying a document, I can choose to also copy the attachments on that document. Will files created from merge templates, when copied to the new document, update the bookmarks with data from the new document?

A: No. When you copy attachments from one document to another, you are not actually copying anything. You are merely providing another link or access point to the documents and files that are attached to the original document. For this reason, files from templates are not regenerated and bookmarks are not updated.

For example, if the first document has a file generated from a template with the vendor listed as Joe Smith, that same file, if "copied" to a new document, will still list Joe Smith, even if the new document has a different vendor. The file would be the same file. Changes made to the file in one document would appear when that same file is opened from the second document. (If the intention is to create a new file with appropriate data, a new file should be generated from the template directly on the new document.)

In order to be less confusing about this matter, the Copy Document dialog box has been modified and includes a tool tip:



Note that sfPMS has special functionality for certain Doc types. When RFQs are created froma Bid Package, the template on the Bid Package is indeed copied to the RFQs and new files are generated for each RFQ. This functionality, however, is hard-coded and currently only available for the Bid Package – RFQ workflow.

For more information about copying documents and the Copy Document dialog box, see the *Focus on Document and Item Basics* guide.

Have You Read?

The following guides and white papers have been updated for sfPMS V4.2 since June 1.

Focus on Document and Item Basics

Focus on Contacts

Focus on Doc Types and Project Workflow

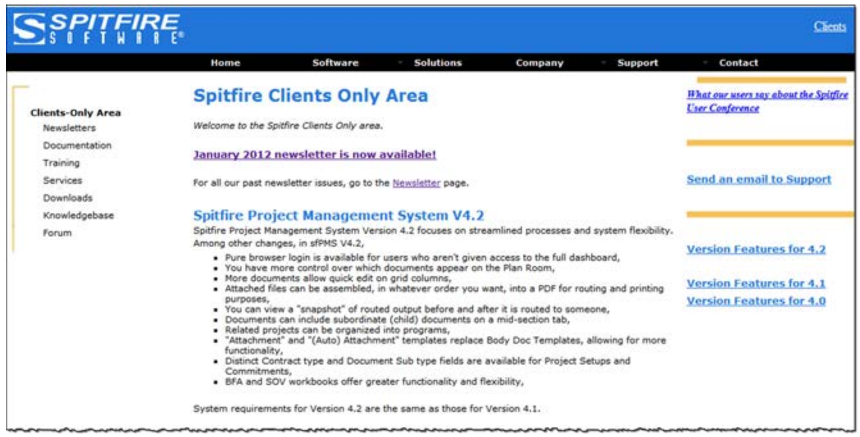
The following article has recently been added to the Knowledgebase:

KBA-01526 – How can I print the Commitment (Change Order) amount in text (like on a check)?

HAPPY 4TH OF JULY

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 , 4.1 and 4.2:



SPITFIRE SOFTWARE

Clients

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Clients-Only Area
- Newsletters
- Documentation
- Training
- Services
- Downloads
- Knowledgebase
- Forum

Spitfire Clients Only Area

Welcome to the Spitfire Clients Only area.

January 2012 newsletter is now available!

For all our past newsletter issues, go to the Newsletter page.

Spitfire Project Management System V4.2

Spitfire Project Management System Version 4.2 focuses on streamlined processes and system flexibility. Among other changes, in sfPMS V4.2,

- Pure browser login is available for users who aren't given access to the full dashboard,
- You have more control over which documents appear on the Plan Room,
- More documents allow quick edit on grid columns,
- Attached files can be assembled, in whatever order you want, into a PDF for routing and printing purposes,
- You can view a "snapshot" of routed output before and after it is routed to someone,
- Documents can include subordinate (child) documents on a mid-section tab,
- Related projects can be organized into programs,
- "Attachment" and "(Auto) Attachment" templates replace Body Doc Templates, allowing for more functionality,
- Distinct Contract type and Document Sub type fields are available for Project Setups and Commitments,
- BFA and SOV workbooks offer greater functionality and flexibility,

System requirements for Version 4.2 are the same as those for Version 4.1.

What our users say about the Spitfire User Conference

Send an email to Support

Version Features for 4.2

Version Features for 4.1

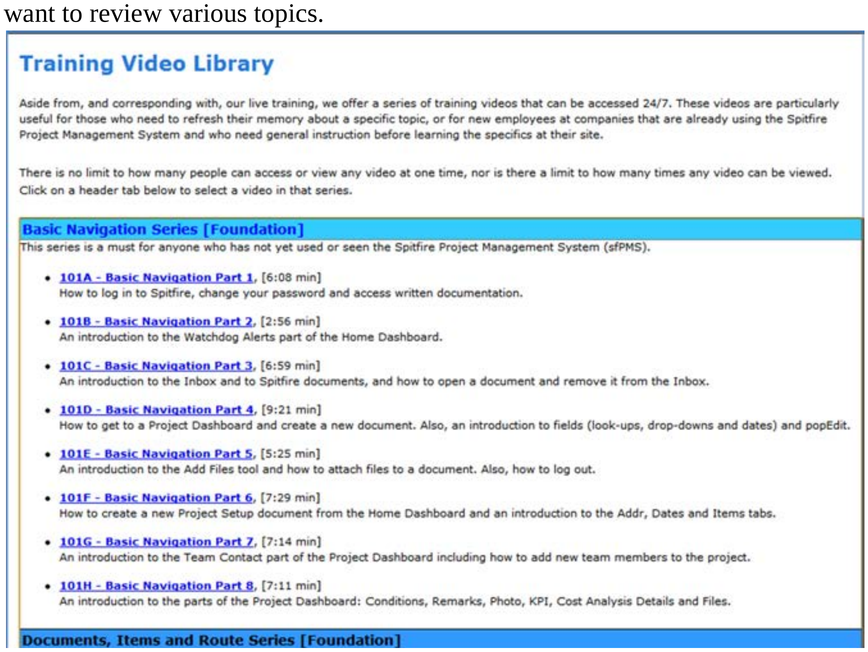
Version Features for 4.0

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 and Videos

We offer live training classes by appointment for those who request them. Training class descriptions are available from the Clients area of our website.

We also offer training videos from the client area of our website for those who want to review various topics.



Training Video Library

Aside from, and corresponding with, our live training, we offer a series of training videos that can be accessed 24/7. These videos are particularly useful for those who need to refresh their memory about a specific topic, or for new employees at companies that are already using the Spitfire Project Management System and who need general instruction before learning the specifics at their site.

There is no limit to how many people can access or view any video at one time, nor is there a limit to how many times any video can be viewed. Click on a header tab below to select a video in that series.

Basic Navigation Series [Foundation]

This series is a must for anyone who has not yet used or seen the Spitfire Project Management System (sfPMS).

- 101A - Basic Navigation Part 1, [6:08 min]
  How to log in to Spitfire, change your password and access written documentation.
- 101B - Basic Navigation Part 2, [2:56 min]
  An introduction to the Watchdog Alerts part of the Home Dashboard.
- 101C - Basic Navigation Part 3, [6:59 min]
  An introduction to the Inbox and to Spitfire documents, and how to open a document and remove it from the Inbox.
- 101D - Basic Navigation Part 4, [9:21 min]
  How to get to a Project Dashboard and create a new document. Also, an introduction to fields (look-ups, drop-downs and dates) and popEdit.
- 101E - Basic Navigation Part 5, [5:25 min]
  An introduction to the Add Files tool and how to attach files to a document. Also, how to log out.
- 101F - Basic Navigation Part 6, [7:29 min]
  How to create a new Project Setup document from the Home Dashboard and an introduction to the Addr, Dates and Items tabs.
- 101G - Basic Navigation Part 7, [7:14 min]
  An introduction to the Team Contact part of the Project Dashboard including how to add new team members to the project.
- 101H - Basic Navigation Part 8, [7:11 min]
  An introduction to the parts of the Project Dashboard: Conditions, Remarks, Photo, KPI, Cost Analysis Details and Files.

Documents, Items and Route Series [Foundation]

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