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Note: features mentioned in this newsletter are available in V4.2.4589

Support Announcement



Due to the significant interest in the tracking and annotation tools offered by PDF and Microsoft Office files, usage of Oracle AutoVue (formerly jVue and also known as the Spitfire Viewer in sfPMS) has declined dramatically.

Therefore, the integration between sfPMS and Oracle AutoVue will be discontinued in future releases. sfPMS v4.2 and Oracle AutoVue v20.1.1 will be the last versions to support integration.

For more information or assistance, contact support@spitfiremanagement.com.

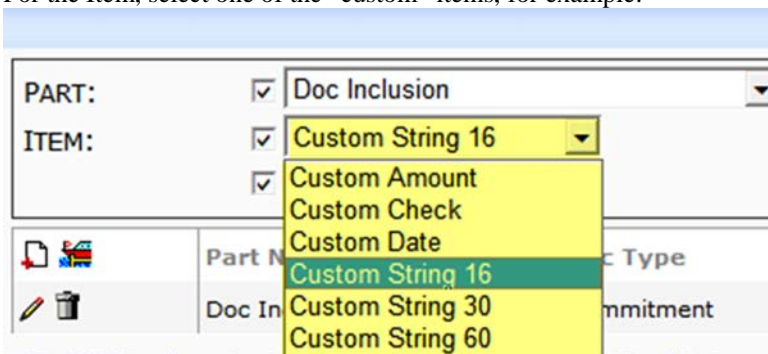
Feature Spotlight: Custom Fields on Documents

The Details tab, Attendee tab and the Incl/Excl tab on documents now allow for certain custom fields – 3 alphanumeric text fields, 1 amount field, 1 date field and 1 checkbox.

You can add any of these fields to your documents through the Customization tool, found on the System Admin Dashboard. You will likely want to re-label the fields.

To add a custom field to a Doc type:

1. On the Customization tool, select the **Doc Detail – Standard, Doc Attendee, or Doc Inclusion** part.
2. For the Item, select one of the “custom” items, for example:



Note: the number after “Custom String” indicates the length of the text box.

3. Click to add the row.
 4. Select a **Doc Type**.
 5. Give the field an appropriate **Label**.
- | Part Name | Doc Type | Capability | Item | Label |
|---------------|------------|------------|------------------|-----------|
| Doc Inclusion | Commitment | | Custom String 16 | New Label |
6. Click to accept the row.
 7. Repeat the process to add other custom rows.
 8. Click to save the Customization tool.

You Asked For It, You Got It : Improved Team Contacts

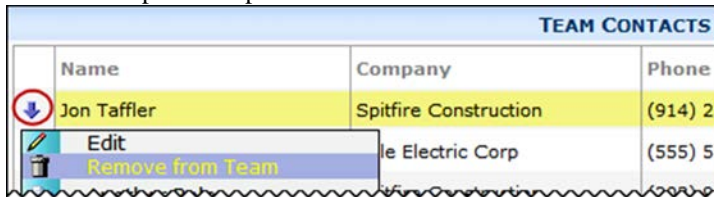
Request: Can there be a way to remove a person from the Project Team Contact list?
Request: Sometimes a team member has multiple roles/responsibilities on a project. Can there be a way to include all roles?

The Contacts part of the Project Dashboard has been renamed Team Contacts in sfPMS V4.2. Two new options give you greater functionality when managing the team members on a project.


Remove from Team

While it is still possible to merely hide or deactivate a Contact and have him/her not appear on the Project Dashboard, you can now also remove a Contact from the Team Contact list altogether.

1. On the Team Contacts list, find the Contact you want to remove.
2. Click ↓ to open the Options menu then select **Remove from Team**



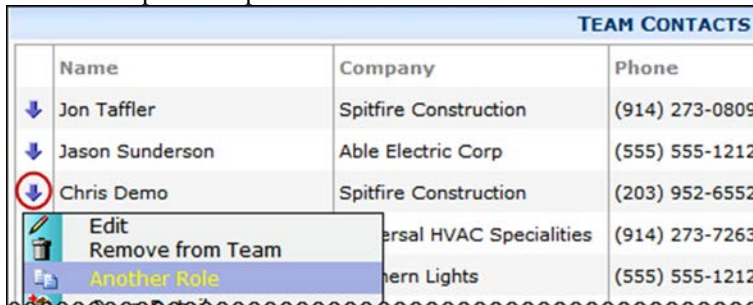
TEAM CONTACTS		
Name	Company	Phone
Jon Taffler	Spitfire Construction	(914) 273-0809
Jason Sunderson	Able Electric Corp	(555) 555-1212
Chris Demo	Spitfire Construction	(203) 952-6552
Chris Demo	Universal HVAC Specialities	(914) 273-7263
Chris Demo	Northern Lights	(555) 555-1212

3. Click  (which appears on the Team Contacts part) to complete the removal of the Contact from the list.
Note: removing a Contact from the Project Dashboard does **not** remove the Contact from the Contact list. It does, however, remove the corresponding project role from that Contact.

Another Role


You can now indicate that a Contact has more than one role on a project by adding a Contact to the list more than once.

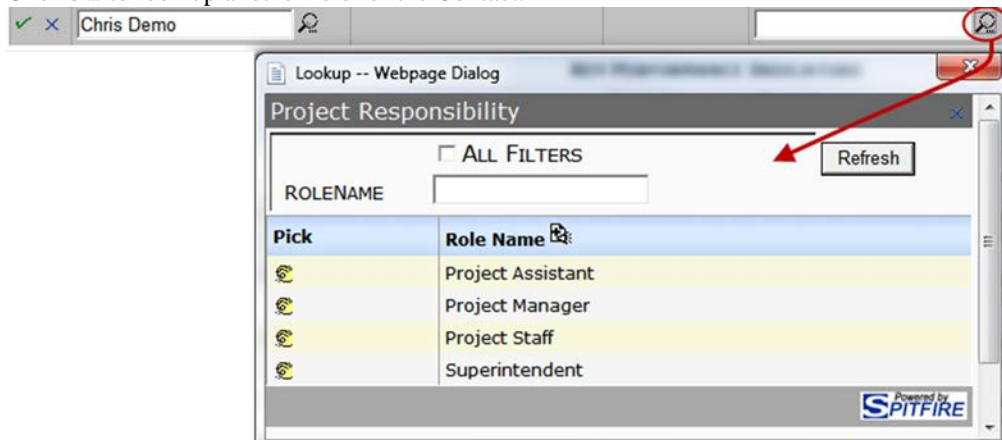
1. On the Team Contacts list, find the Contact who needs another role.
2. Click ↓ to open the Options menu then select **Another Role**.



TEAM CONTACTS		
Name	Company	Phone
Jon Taffler	Spitfire Construction	(914) 273-0809
Jason Sunderson	Able Electric Corp	(555) 555-1212
Chris Demo	Spitfire Construction	(203) 952-6552
Chris Demo	Universal HVAC Specialities	(914) 273-7263
Chris Demo	Northern Lights	(555) 555-1212

The Contact will appear on a new row.

3. Click  to look up another role for the Contact.



Chris Demo

Lookup -- Webpage Dialog

Project Responsibility

ALL FILTERS Refresh

ROLENAME

Pick	Role Name
<input type="radio"/>	Project Assistant
<input type="radio"/>	Project Manager
<input type="radio"/>	Project Staff
<input type="radio"/>	Superintendent

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4. Click ✓ to accept the new row. The Contact will appear twice on the Team Contacts list, once for each role.

Spitfire Q&A: How to Set Initial Default Doc Statuses

Q: How can we make a document default to a specific status when it is first created?

A: sfPMS lists document statuses in the drop-down in alphabetical order and displays the first alphabetical choice by default. The reason you see “In Process” as the starting status on many Doc types is because there is actually a space before the “I” in the Code Maintenance tool, making this DocStatus code the first code alphabetically.

If you want to ensure that a specific status will show up by default on a specific Doc type:

1. Expand **DocStatus** in the Code Maintenance tool.
2. Filter on the desired Doc Type.
3. Add or edit the row with your desired default status.
4. Add a space before the text.

Set Name	Set Type	Flag	Next Set	Size
DocStatus	DocTypeSubcodes	Alert	X	2

Doc Type	Code	Description	Alert
Drawings	C	Closed	X
Drawings	I	Initial	

5. Click ✓ to accept the row and to save.

Documents of that Doc type will now show that status as the initial default status, for example:

Drawings- New

Drawings 0003

DOCUMENT HEADER

DOC# 0003

PROJECT GC-003 Northern Lights Office Bldg

DESCRIPTION Drawings 0003

RESPONSIBLE

TYPE

STATUS Initial

DATE 7/17/2012

Have You Read?

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

TWP: [Data and Equipment Projects](#)

TWP: [Change Order Management](#)

TWP: [The Executive Dashboard and EDB Report Tool](#)

The following articles have recently been added to the Knowledgebase:

[KBA-01527](#) – Spitfire API Demo Tool

[KBA-01528](#) – Two Bookmarks for County data



**HOPE YOU ARE ENJOYING
YOUR SUMMER!**

Contact Us

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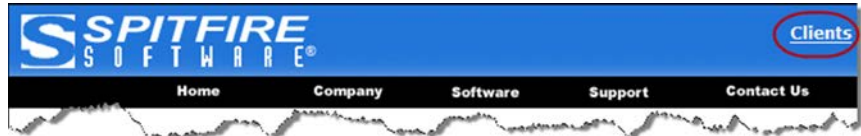
Phone: 888-287-4603
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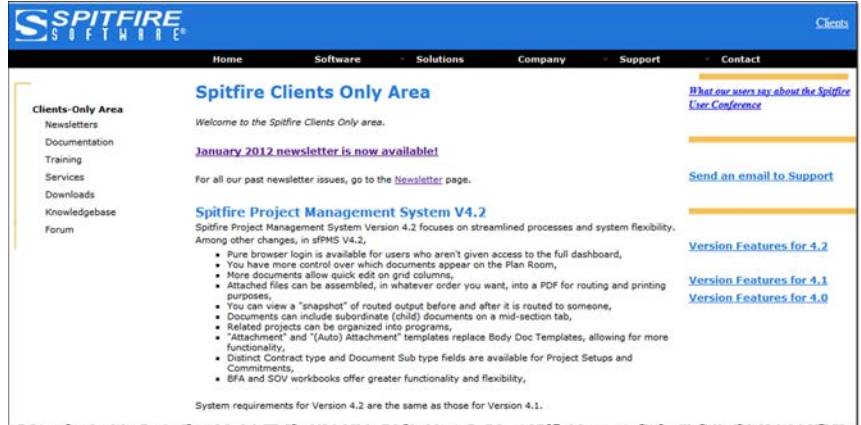
Training:
training@spitfiremanagement.com

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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](#):



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]