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Note: features mentioned in this newsletter are available in V4.2.4619

Spitfire on the iPad and Android Tablets

If you are on sfPMS V4.2, and have a public URL, you can log into Spitfire and access your dashboards (as you have permission to do so) from an iPad tablet or Android device running Google Chrome!



Watch our demo video on our website: www.spitfiremanagement.com

Feature Spotlight: Newer Options for Predefined Routes

sfPMS V4.2 offers new options in the Routes tool (found on the Manage Dashboard) for creating predefined routes.

ROUTE LIST											
NAME:		DOC TYPE				<input type="checkbox"/> Compliance Notification					
	Route Name	Active	UseCount								
	Pay Request	<input checked="" type="checkbox"/>	1								
DETAILS FOR SELECTED ROUTE											
STATUS:		<input type="checkbox"/> Destination									
Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	Due In	w/ Transmittal	At Source Contact	No Repeats	Emails From	Alerts
2	Project Manager	Project Manager	Collaborate	Pending		7.0000	X	X	1	X	X
3	Project Assistant	Project Assistant	Collaborate	Pending		9.0000	X	X	0	✓	X
4	Doc Source Contact	Vendor	View	CC'd			X	✓	0	X	X
4	Accounting	Accounting	Collaborate	Pending			X	X	0	X	X

- **Due In** – allows Spitfire to calculate the route due date that should appear for each routee, based on when the document is first routed (i.e., leaves Seq 1.) For example, if the document with the route above is routed on 9/1/12, then **9/8/12** (1+7) will appear as the route due date for Seq 2, the Project Manager, and **9/10/12** (1+9) will appear as the route due date for Seq 3, the Project Assistant. Aside from whole numbers, you can indicate decimal numbers to indicate a part of a day (0.5 = 12 hours; 0.04 = 1 hour, etc.)
- **No Repeats** – prevents a user from appearing on the route twice. You can enter a whole number to indicate how many sequences back the system should check to see if the person is a duplicate. For example, if the Project Manager is the one who creates the document (and therefore appears on Seq. 1), the system will not add him again in Seq. 2. In such a case, the document will go directly from Seq.1 to Seq. 3.
- **Emails From** – allows you to designate that routee as the “on behalf of” and “replies to” person for outbound emails sent after that Seq. (until another routee is designated as the Email From person). For example, when the document is routed to Seq. 4 – Accounting, the “on behalf of” person will be the Project Assistant. By default, the emails are from the person who created the document.

In addition, two new special roles can be used.

- **Doc From Addressee** and **Doc To Addressee**– the contact who is the “From” or “To” person on the Addr tab of the document.

Attachment Tip: How Attachments are Displayed for Items

If you have ever noticed a number of attachments on your document, and then notice that they “disappear” when you go to your Items tab, rest assured that your attachments are still there and that sfPMS is performing as designed.

In Item grid view, all attachments appear on Attachments tab, as usual:

Details	Scope	Addr	Liens	Dates	Items	Incl/Excl	Compliance
	Item	Cost Code	Description		Committed		
	0002	15410-	Plumbing - Piping	Plumbing	Item grid view		
	0001	15500-	HVAC	HVAC Unit (see spec)	\$12,054.00		

Attachments	Route Detail						
	Name	Size	Note	Item	Incl	Seq	Cataloged
	Commitment 32 Ton Chiller/Evaporator.doc			0001	PDF	↑ ↓	10/27/2006
	HVAC spec	27KB	po, HVAC,		Native	↑ ↓	10/7/2006

However, when you expand an Item and go into Item detail view, only attachments that are specifically attached to that Item will appear. For example:

Details	Scope	Addr	Liens	Dates	Items	Incl/Excl	Compliance
	Item	Cost Code	Description		Committed		
	0001	15500-	HVAC	HVAC Unit (see spec)	\$12,054.00		

COST CODE	15500-	ACCT CATEGORY	SUB
REQUIRED DATE	9/25/2012	GL ACCOUNT	4220
ITEM ID		SUB ACCOUNT	00
ORIGINAL UNITS	1.000	LABOR CLASS	
RATE	12054.0000	COMMITTED UNITS	1.00
ORIGINAL AMOUNT	12054.0000	UOM	Each
RETENTION METHOD	None	COMMITTED AMT	12054.00
UNITS _ APPROVED	0.00	PERCENT	0
AMOUNT _ APPROVED	0.00	PENDING CCO UNITS	0.00
		PENDING CCO AMT	0.00

Attachments	Route Detail						
	Name	Size	Note	Item	Incl	Seq	Cataloged
	Commitment 32 Ton Chiller/Evaporator.doc			0001	PDF	↑ ↓	10/27/2006

This means that if there are no attachments specifically attached to that Item, no attachments will appear. If you have only one Item on the Items tab, it will open in detail view, so the perception may be that when you click on the Items tab, the attachments disappear. To see all attachments, just return to grid view.

Spitfire Q&A: What is the Reference Tool For?

Q: How can I use the Reference tool? Does it refer to references we get from people?

A: No. The Reference tool, found on the Manage Dashboard, provides a way for you to categorize documents, if you need another way to categorize your documents. The Reference tool allows you to set references for specific Doc-types.

Doc Type	Reference	Rollup	Active
Project Setup	Commerical		✓
Project Setup	Healthcare		✓
Project Setup	Hospitality		✓
Project Setup	Industrial		✓
Project Setup	Retail		✓

Once you have references set up for a Doc type, you can use this information...

- On the document's Detail tab, for example:

- On a predefined route setup, for example:

Doc Type	Source Contact	Project	Doc Ref	Priority
Project Setup			Retail	

- On the Templates tool, for example:

Doc Type	Name	Type	Description	Division	Doc Ref
Project Setup	Project Setup Item Templ	Via XL	Spitfire Item Template for Project S		Retail

- On Catalog searches, for example:

- On Roles as a condition:

Role Name	Description	Conditions
Consultant	Consultant	✓ ✓ (Reference) ✗ ✗

Have You Read?

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

TWP: [Quick Doc Type Reference Guide](#)

TWP: [Bid Package – RFO Processing](#)

TWP: [Designing User Roles](#)

The following articles have recently been added to the Knowledgebase:

[KBA-01529](#) – External Web Links on the Project Dashboard



Have a Safe and Happy Labor day!

The Spitfire Offices will be Closed on Sept. 3



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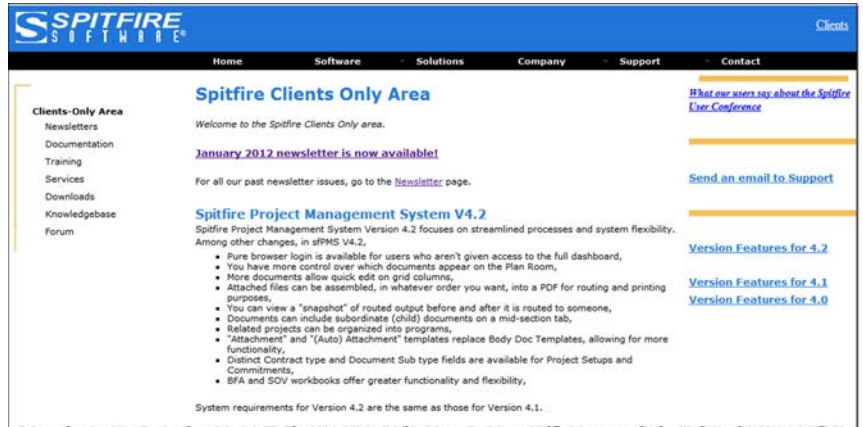
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Your Clients Area



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]