SPITFIRE SOFTWARE® **sfNews** September 2012
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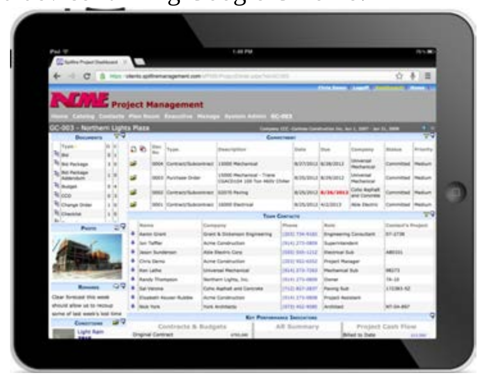
***Note**: features mentioned in this newsletter are available in V4.2.4619*

Spitfire on the iPad and Android Tablets

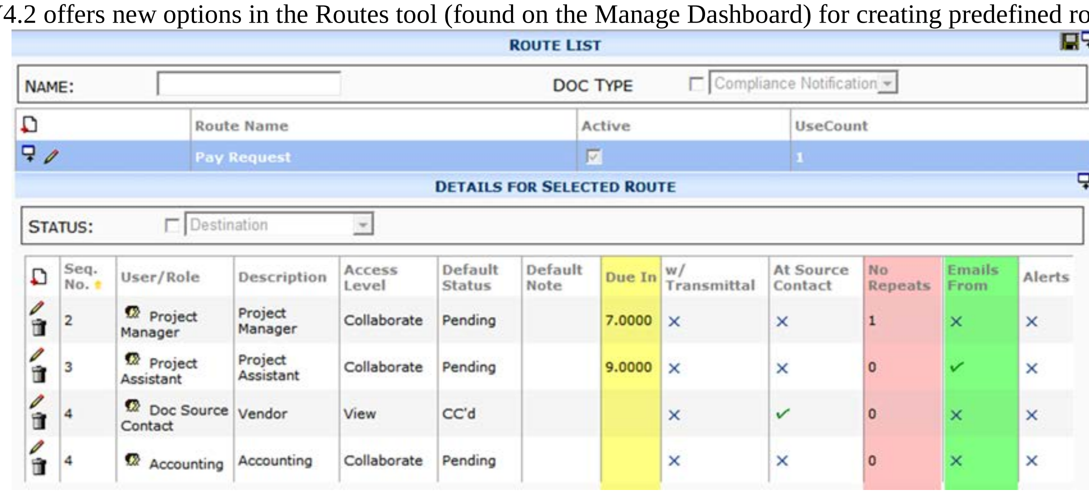
If you are on sfPMS V4.2, and have a public URL, you can log into Spitfire and access your dashboards (as you have permission to do so) from an iPad tablet or Android device running Google Chrome!



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 Compliance Notification

	Route Name	Active	UseCount
	Pay Request	✓	1

DETAILS FOR SELECTED ROUTE

STATUS: 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	×	×	1	×	×
3	Project Assistant	Project Assistant	Collaborate	Pending		9.0000	×	×	0	✓	×
4	Doc Source Contact	Vendor	View	CC'd			×	✓	0	×	×
4	Accounting	Accounting	Collaborate	Pending			×	×	0	×	×

- **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.

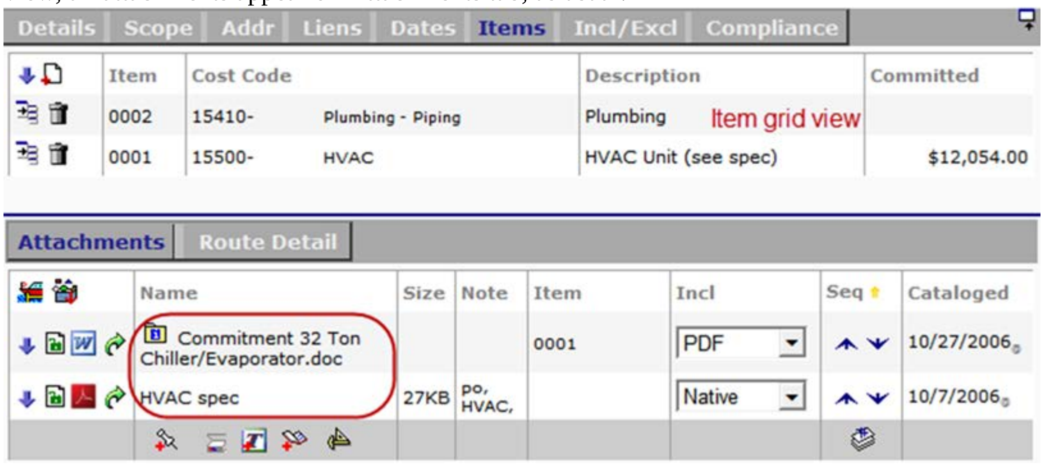
In addition, two new special roles can be used.

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

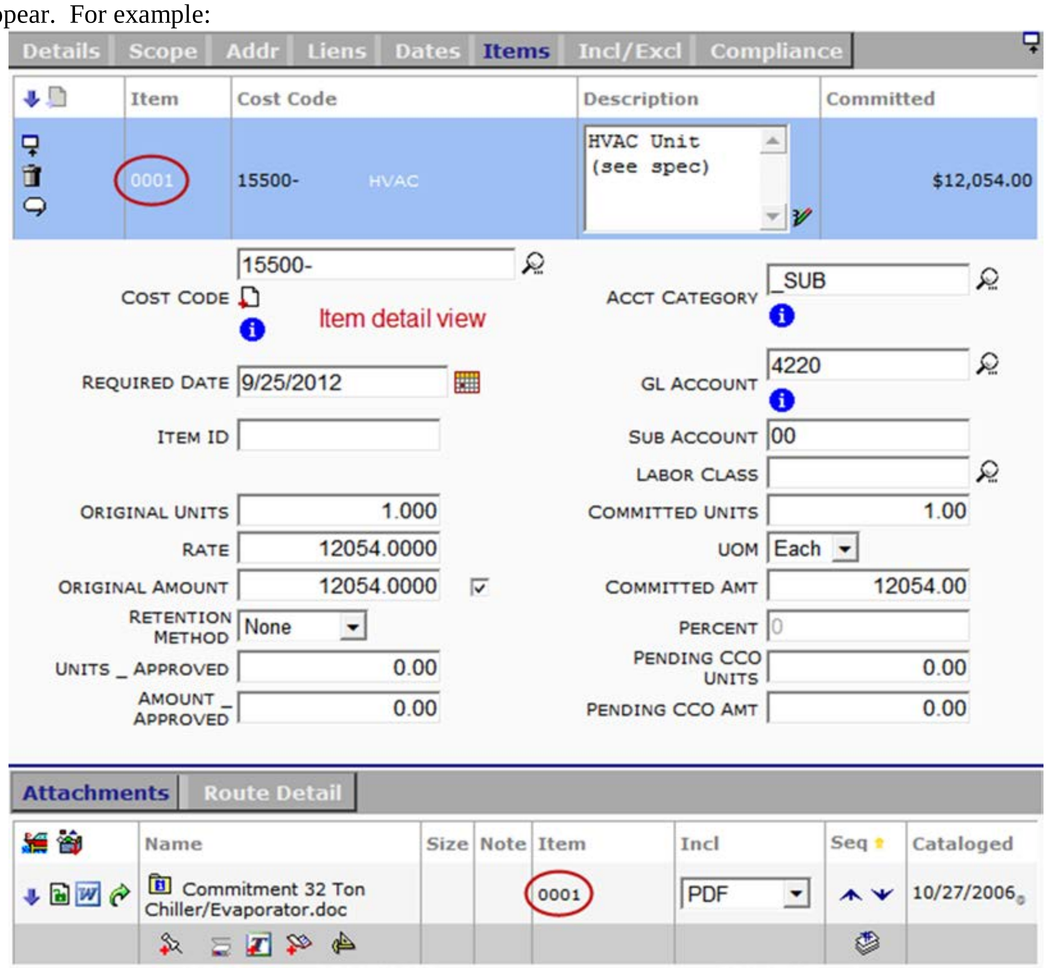
Attachment Tip: How Attachments are Displayed for Items

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:



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:



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.

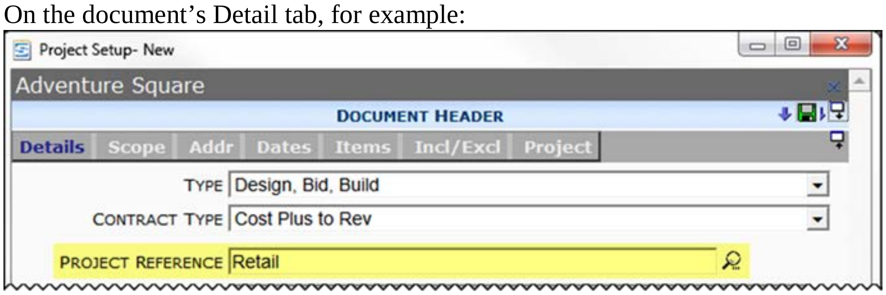
Spitfire Q&A: What is the Reference Tool For?

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

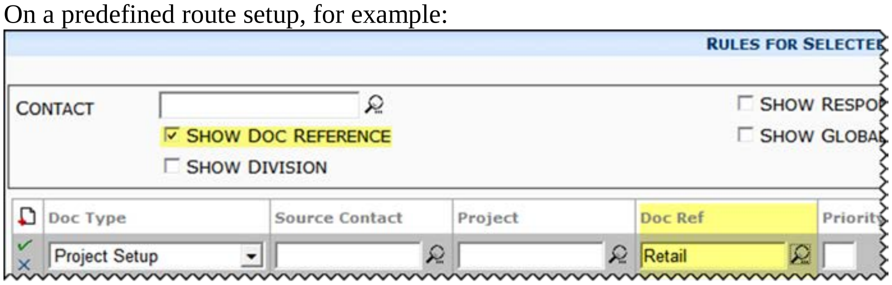
A: No. The Reference tool, found on the Manage Dashboard, provides a way for you to categorize documents, if you need another way to categorize your documents. The Reference tool allows you to set references for specific Doc-types.

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

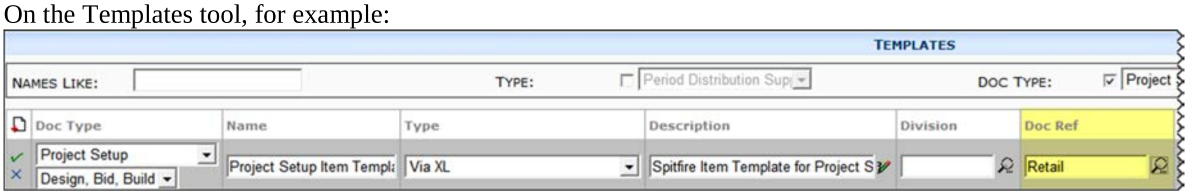
- On the document's Detail tab, for example:



- On a predefined route setup, for example:

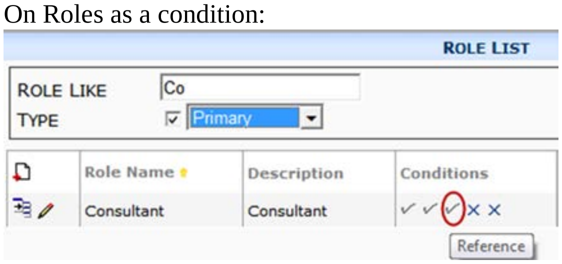


- On the Templates tool, for example:



- On Catalog searches, for example:

- On Roles as a condition:



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 – RFQ 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

Contact Us

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

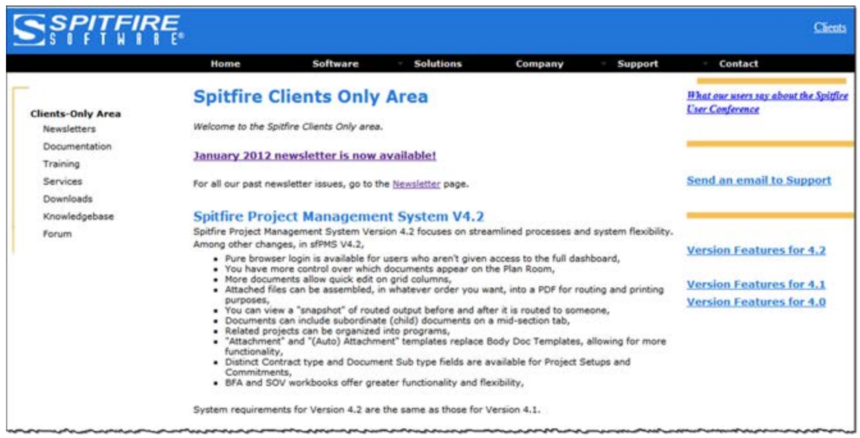
Phone:888-287-4603
Fax: 888-287-4603

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 , 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.