SPITFIRE SOFTWARE® sfNews November 2012
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# In This Issue



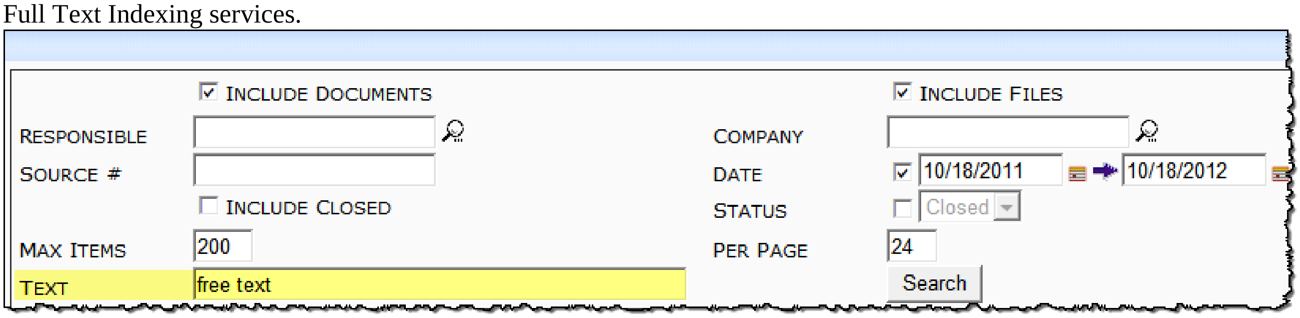
***Note**: features mentioned in this newsletter are available in V4.2.4678*

# Spitfire at DBIA

Spitfire Management will be exhibiting at the 2012 Design-Build Conference and Expo on November 7 - 9 in New Orleans. If you are attending this conference, stop by our booth and tell us how things are going!

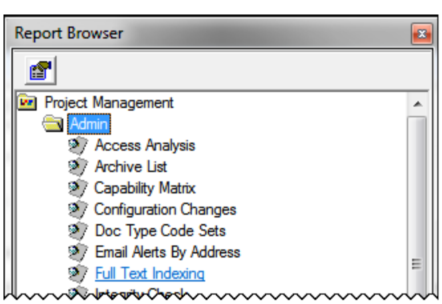

# Text Search Tip: You May Need a Microsoft Addin

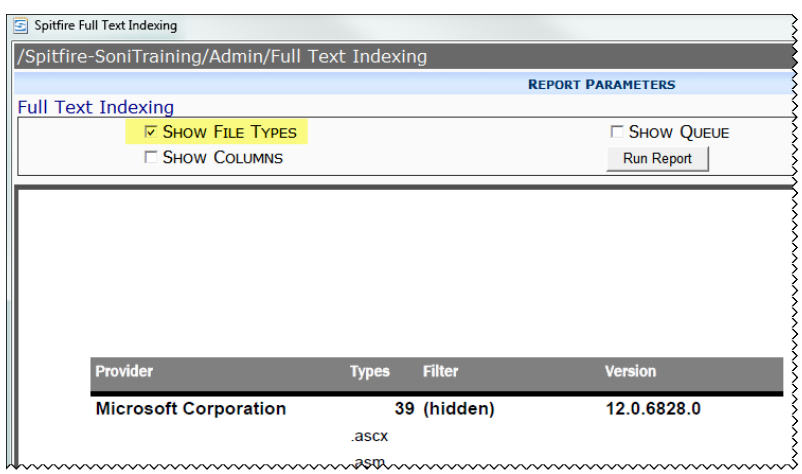
When you search for files or documents on the Catalog Dashboard using the text filter, sfPMS relies on Microsoft SQL Full Text Indexing services.




It may come as a surprise that neither SQL 2008 R2 nor the recently released SQL 2012 support the Microsoft Office 2007 (and later) formats unless the correct Microsoft Addin has been installed on the SQL server.

1. To check your SQL server, run the Full Text Indexing report (in the Admin folder) with the Show File Types option checked.
2. Search the output (Ctrl + F) for .docx. If you cannot find the file type, it means that your server needs the Microsoft iFilter update.



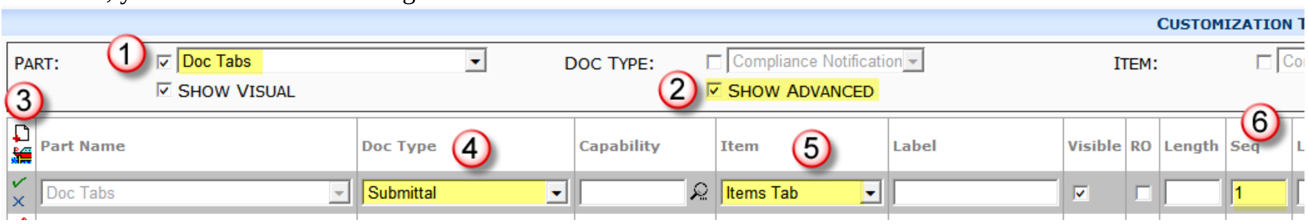




For more information, see KBA-01533.

# Spitfire Q&A: Some Advanced Customization Options

## Q: Is it possible to change the order of the mid-section tabs on a document?

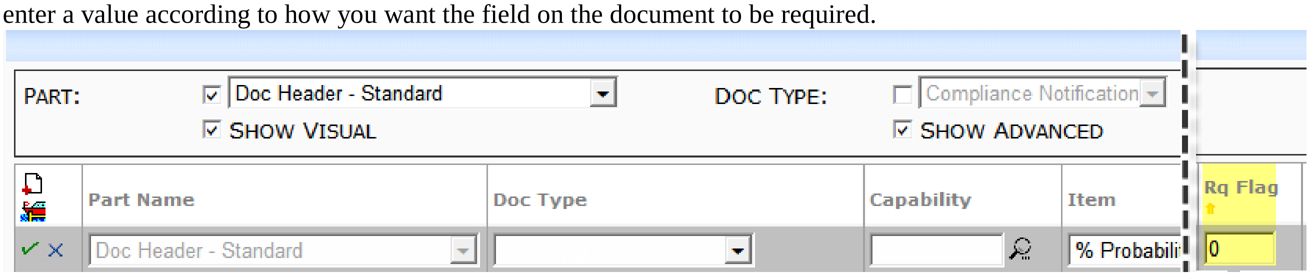
A: Yes, through the Customization tool. For example, if you wanted to make the Items tab be the first tab on a Submittal document, you would do the following:




1. On the Customization tool, select the **Doc Tabs** part.
2. Click the **Show Advanced** checkbox.
3. Click to add a new row.
4. Select the Doc Type.
5. Select the tab that you want to order (in this example, the Items tab).
6. Enter **1** for the Seq. (If you wanted to order other tabs, you would repeat steps 3-6 and use “2” for the second tab, “3” for the third tab, etc.)
7. Click to accept the row and to save your changes.

## Q: Is it possible to make a field on a document required?

A: Yes, also through the Customization tool. The **Rq Flag** field is another advanced option so you would start as described above, selecting the appropriate Part, Item and Doc type. Then you would scroll over to the **Rq Flag** field and enter a value according to how you want the field on the document to be required.




| Enter as the Rq Flag | If you want the following for the field |
|---|---|
| **0** | no value to be required |
| **1** | a value to be required before before the document can be saved, even on a brand new document |
| **2** | a value to be required before the document can be saved, after the initial save (creation) of the document |
| **4** | a value to be required before the document can be saved into a Pending/Committed status |
| **8** | a value to be required before expenses can be posted |
| **16** | a value to be required before revenue can be posted |
| **32** | a value to be required before the document can be set to any closed status |
| **64** | a value to be required before the document can be saved into an Approved status |

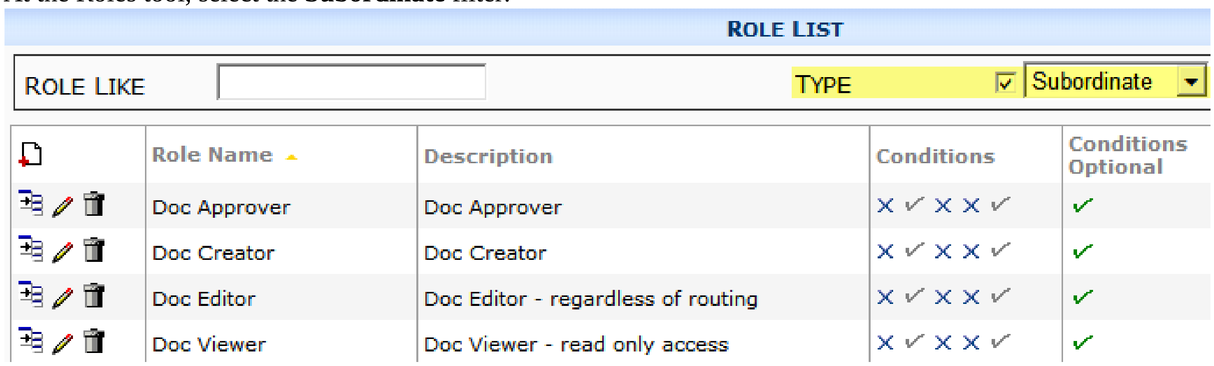
For more information about the Customization tool, see the *Focus on System Administration* guide.

# Role Tip: Using Doc-Type-Specific SubRoles

The Roles tool on the System Admin Dashboard lets you define both primary and subordinate roles. Primary roles can include one or more SubRoles in a building block fashion. By default, sfPMS includes several SubRoles that make the granting of several Doc-type-specific tasks easier to do.

**To see the SubRoles:**

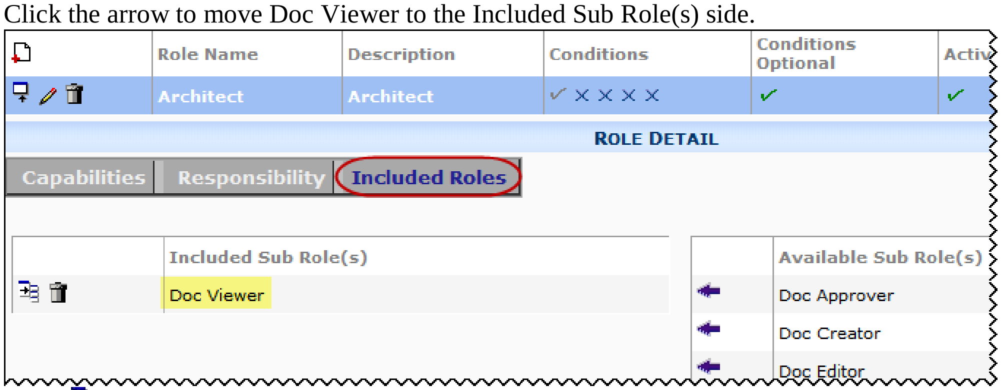
1. At the Roles tool, select the **Subordinate** filter.



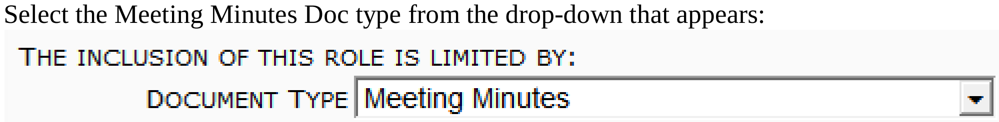

- **Doc Approver** allows the user to change the document's status to Committed/Pending and Approved.
- **Doc Creator** allows the user to create new documents.
- **Doc Editor** allows the user to make changes to the document.
- **Doc Viewer** grants the viewer read-only access to the document.

These SubRoles accept the Doc-type condition. This means that when you include one of these SubRoles in another role you can make the permissions be for specific Doc-types. For example, let's say you want to give all those with the Architect role view-only access to Meeting Minutes and creation permission for Drawings documents. You would do the following:

1. Expand the Architect role and click on the Included Roles tab.
2. Click the arrow to move Doc Viewer to the Included Sub Role(s) side.




3. Click to expand the SubRole.
4. Select the Meeting Minutes Doc type from the drop-down that appears:




5. Click on the arrow to bring Doc Creator over to the Included Sub Role(s) side.
6. Expand the Doc Creator subrole and select Drawings from the drop-down that appears.
7. Click to save your roles.

Architects are now allowed to view Meeting Minutes and create Drawings documents. You could further restrict the architect on the project level by making the Architect role be project-specific, but that is a separate decision.

# Have You Read?

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

*Focus on Budgets and Period Distribution*

*Focus on the BFA Workbook*

*Focus on Forecast and Analysis*

TWP: *The BFA Report Tool*

TWP: *Hard Copies of Spitfire Documents and Attachments*

TWP: *Rules and Rule Values*

TWP: *Spitfire's Import Utility Tool*

*TWP: Supplemental Workbooks*

TWP: *Viewing Changes through sfChest*

The following articles have recently been added to the Knowledgebase:

KBA-01533 – Processing Inbound Emails Overview

KBA-01534 – Implications of Custom Internal Staff Capability

KBA-01535 – Using Customization to make a standard field into a lookup.

# Contact Us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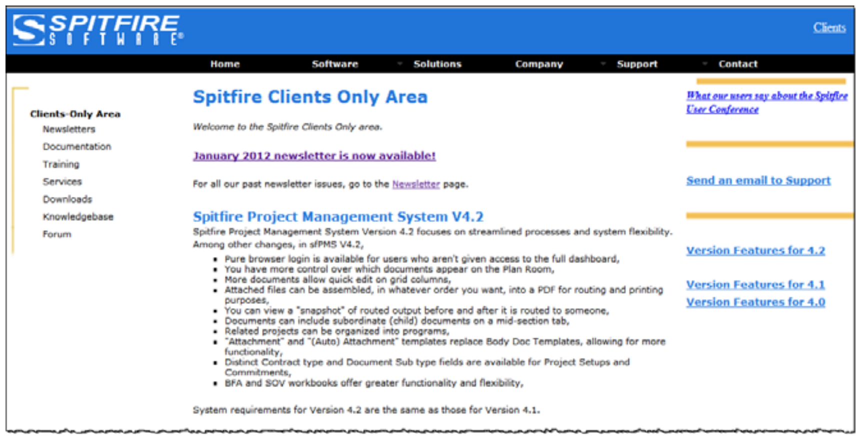
# Your Clients Area


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:



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## 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

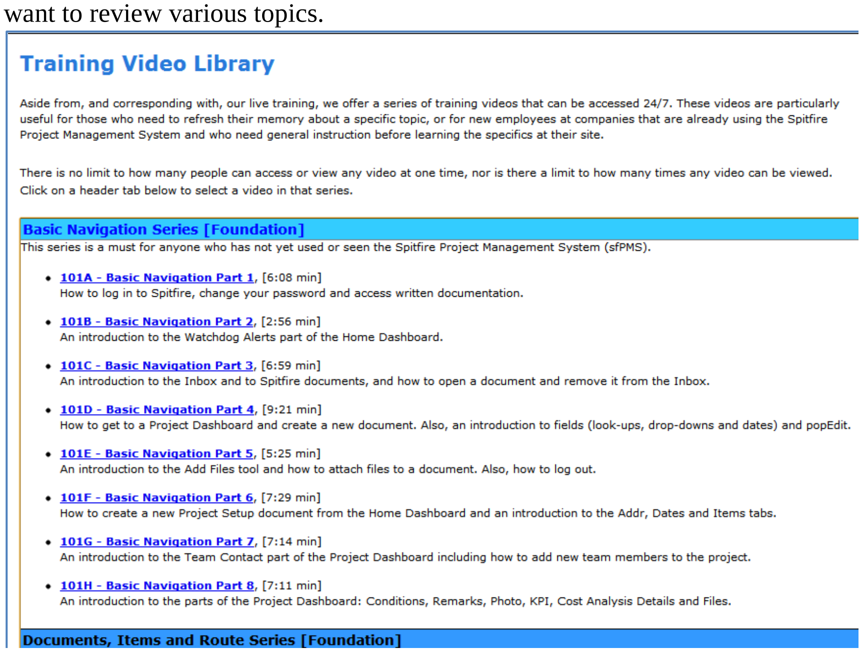
Version Features for 4.0

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]**