SPITFIRE SOFTWARE®
sfNews
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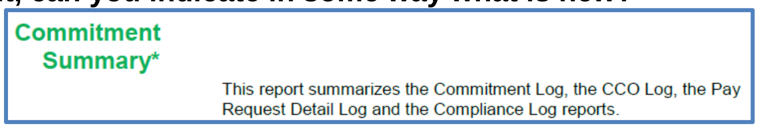
In This Issue

***Note**: where applicable features mentioned in this newsletter are available in V4.3.4800.*

You Asked For It, You Got It

Request: When a new version of documentation comes out, can you indicate in some way what is new?

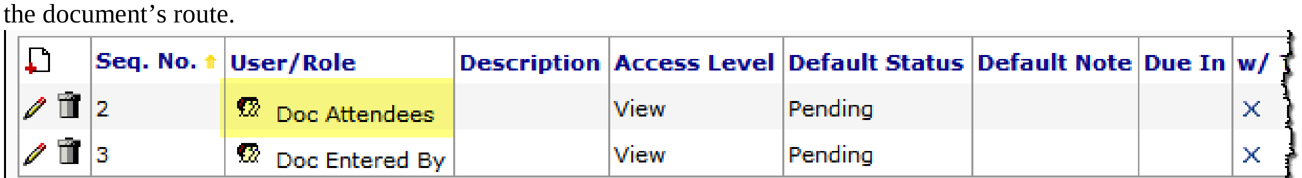


With the documentation for sfPMS V4.3, we make it clearer what chapters, sections, paragraphs, definitions or instructions have been added or changed. Text that is **green** indicates that something is new. If a chapter title is green, that means the whole chapter is new; if a subheading is green, it means that that section is new, etc. In addition, an asterisk at the end of the text makes it clear on the table of contents which chapters and sections are new or changed.

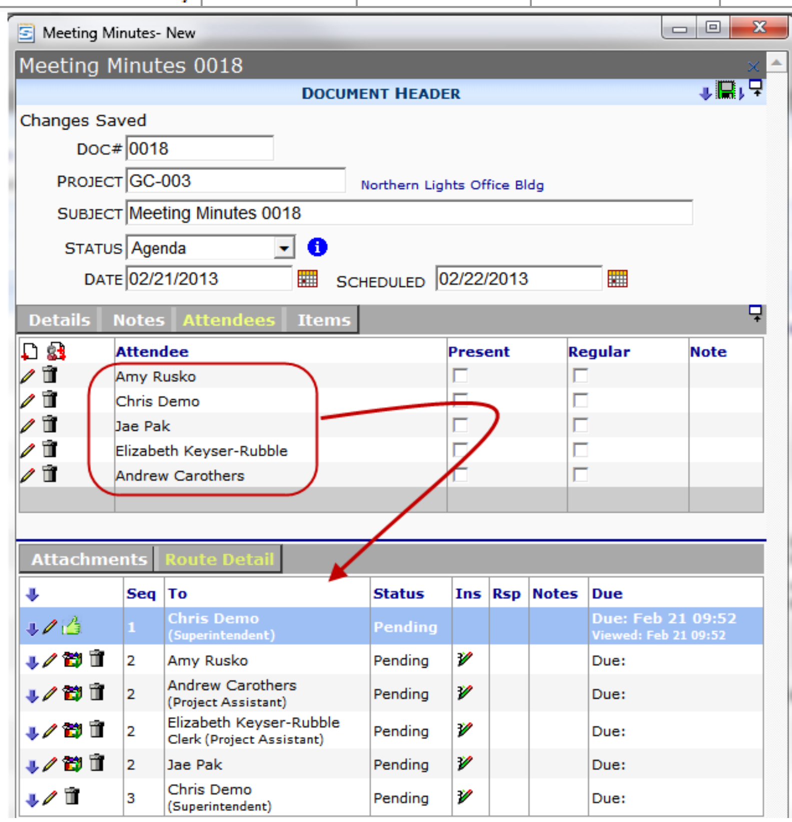
Note: Minor changes such as reworded sentences and new pictures are not be indicated.

New Role: Doc Attendees

A new special role, Doc Attendees, has been added to sfPMS for use in predefined routes. The role identifies "every person on the document's Attendee tab." Using this role in a predefined route means that all Attendees will be added to the document's route.



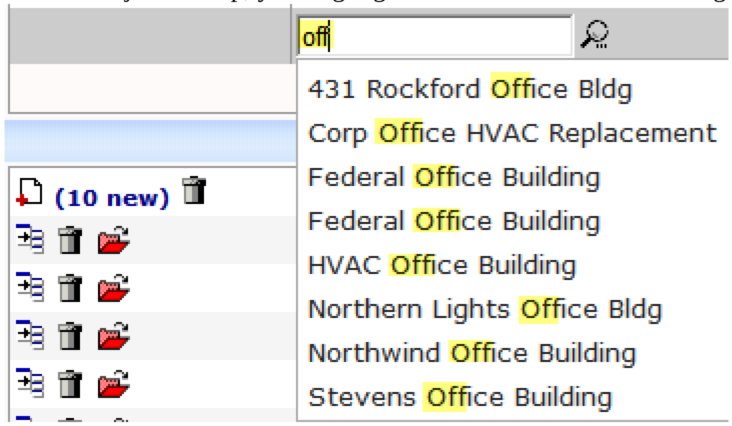
	Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	Due In	w/
	2	Doc Attendees		View	Pending			X
	3	Doc Entered By		View	Pending			X



New Feature: AutoComplete on Lookup Fields

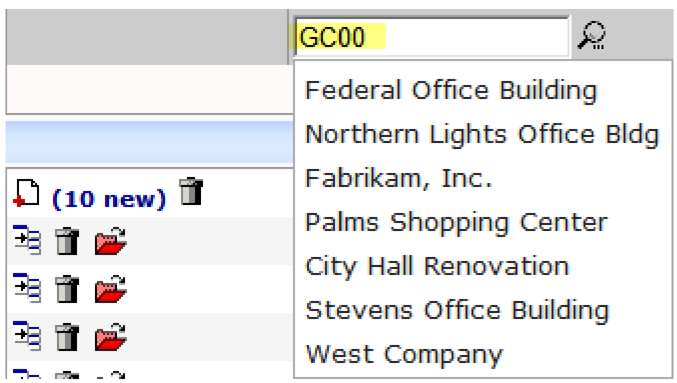
New in sfPMS V4.3, lookup fields offer one more way to input data in the field. As before, you can use the icon to access filters and select your choice from the list of possible options or you can type the exact match from the list (for example, **Chris Demo**) directly on the field. However, now, if you type at least 3 characters of text or an ID, possible matches will appear in a drop-down, from which you can select your choice. (The more characters you type, the further refined the drop-down list will be.)

For example, if you type **off** in the Project lookup, you might get choices such as the following:



- To select a choice from the drop-down, use the Up and Down arrow keys to get to your choice, then press Enter.

Note: You can type IDs on the lookup fields. The system will show you names , titles or descriptions as your choices, for example:



- Once you start moving from one choice to another (through the Up and Down keys on your keyboard), the ID field will show the exact match for your selection, for example:

For more information, see [KBA-01538](KBA-01538).

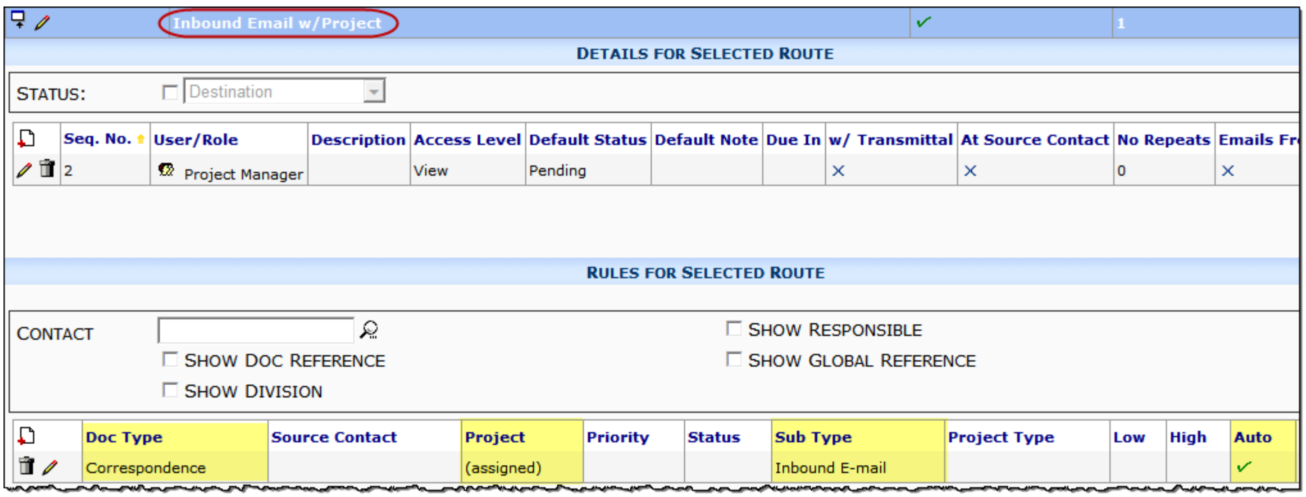
Spitfire Q&A: Predefined Routes for Inbound Email

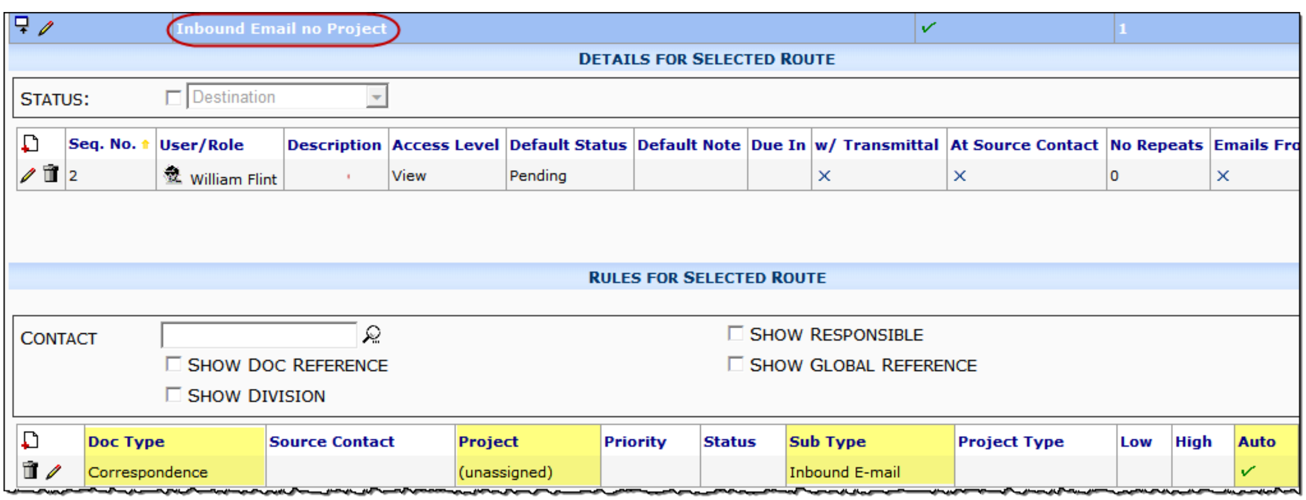
Q: I understand that sfPMS can process unsolicited inbound email. How can I best take advantage of this feature?

A: The unsolicited inbound email feature (i.e., emails sent from any internal or external project participant) makes use of the Correspondence Doc type. Basically, when unsolicited inbound email comes to Spitfire, the system attaches the email to a Correspondence document. However, unless some predefined routing has been set up, those Correspondence documents may not be seen in any timely manner. They will appear on the Catalog, but not in anyone's Inbox. So, it is important that you set up predefined routing for these Correspondence documents.

An **Inbound E-mail** subtype code for the Correspondence Doc type (**EM**) is now distributed. This subtype can thus be used in predefined routes.

We recommend that you create a predefined route for Correspondence documents with attached emails that have a clearly specified project as well as a predefined route for Correspondence documents with attached emails that do not specify a project . In the first case, you will likely want someone involved with the project to receive the Correspondence documents. In the second case, you will want the Correspondence document to go to someone who can determine how best to route the document. Both of these predefined routes should have the Auto option checked.





For more information about inbound email, see the October 2012 issue of this newsletter and also KBA-01532.

Have You Read?

The following guides and other documentation has been updated for sfPMS V4.3 since February 1:

Focus on Document and Item Basics

TWP: *Spitfire Reports*

TWP: *Setup for Spitfire's Plan Room*

TWP: *Designing User Roles*

How to Use the Plan Room (from a vendor login)

How to Use the Plan Room (from a public login)

The following articles have been added to the Knowledgebase:

KBA-01538 – Using the Autocomplete Feature

KBA-01540 – Custom Lookups and AutoComplete

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 4.1, 4.2 and 4.3.

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Training
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Spitfire Clients Only Area

Welcome to the Spitfire Clients Only area.

December 2012 newsletter is now available!

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

Announcing Spitfire Project Management System V4.3

Spitfire Project Management System Version 4.3 focuses on an improved user experience and full support for iPads and Android tablets. Among other changes, in sfPMS V4.3,

- Lookups, editors, and mouse-over text are supported on tablets,
- You can use formatting options, such as bold, text color and numbered lists, on text fields on Spitfire documents. This formatting is preserved in Microsoft Word templates and emails,
- The icon to open a document is color-coded to tell you the due date status of the document,
- Priority level icons visually indicate a document's priority level,
- The "closed" column on the Document Menu has been replaced by a "overdue" column,
- A color-coded stacked bar appears under each Doc type in the Document Menu, indicating the number of documents meeting each due criteria. Mousing over the "overdue" column displays a larger stacked bar,
- You can add team members to a Project's Team Contact part more easily and automatically,
- You can adjust column labels, visibility, calculations and more for the SOV workbook through a new Setup worksheet,
- The SOV workbook and Pay Requests allow amounts to be broken into Work and Materials,
- You can access a new Commitment vs. Budget report,

If you are interested in upgrading, or for more information, write to support@spitfiremanagement.com.

What our users say about the Spitfire User Conference

Send an email to Support

What's New in sfPMS V4.3

Version Features for 4.2

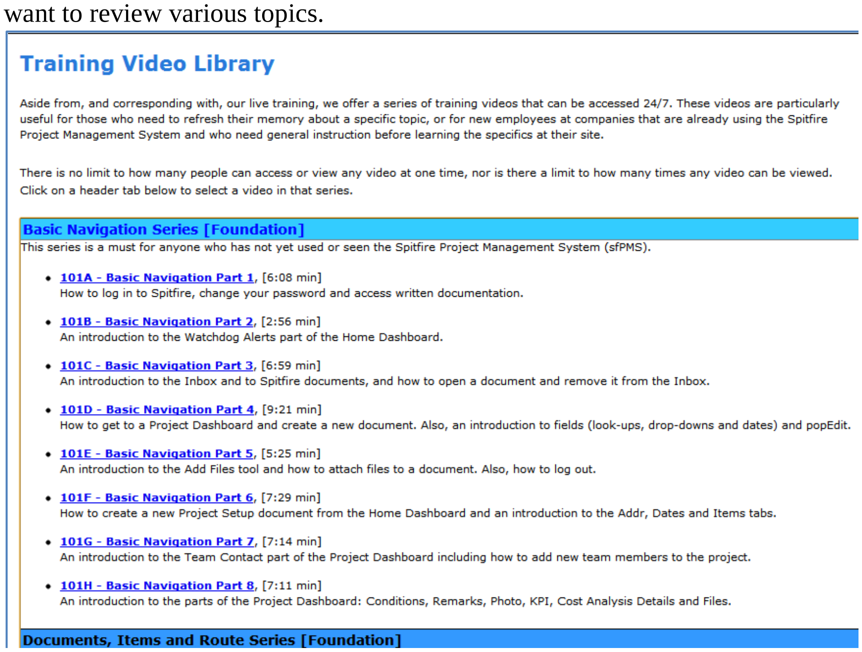
Version Features for 4.1

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]