SPITFIRE SOFTWARE®

sfNews

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In This Issue

***Note**: where applicable features mentioned in this newsletter are available in 4.3.4862.*

Support of Windows IE10

Microsoft has released its latest browser: Internet Explorer 10. According to Microsoft, IE10 is fast and fluid, easy, perfect for touchscreens and safer, with more privacy settings.

We at Spitfire recommend IE10 and have made sfPMS V4.3 compatible with IE10. (sfPMS is compatible with IE9 and IE8 as well.)

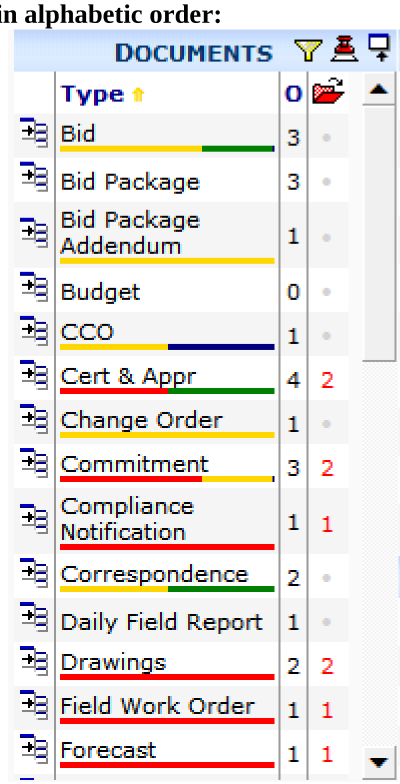
For more information about IE 10, visit http://windows.microsoft.com/en-us/windows-8/internet-explorer

You Asked For It, You Got It: Document Overdue Column

Request: When we sort the documents on the Document List on the Overdue column, the list is sorted in ascending order. Can it default to descending order instead?

Yes. Now, when you click on at the top of the column, the results will be in descending order. This means that the Doc types with the most overdue documents will be listed on top.

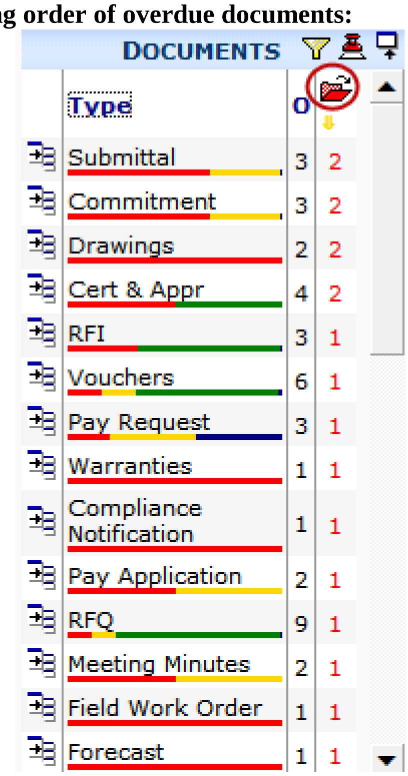
When you first get to the Document menu, Doc types are listed in alphabetic order:



DOCUMENTS

Type	O	
Bid	3	·
Bid Package	3	·
Bid Package Addendum	1	·
Budget	0	·
CCO	1	·
Cert & Appr	4	2
Change Order	1	·
Commitment	3	2
Compliance Notification	1	1
Correspondence	2	·
Daily Field Report	1	·
Drawings	2	2
Field Work Order	1	1
Forecast	1	1

If you click , the Doc types will be ordered in descending order of overdue documents:



DOCUMENTS

Type	O	
Submittal	3	2
Commitment	3	2
Drawings	2	2
Cert & Appr	4	2
RFI	3	1
Vouchers	6	1
Pay Request	3	1
Warranties	1	1
Compliance Notification	1	1
Pay Application	2	1
RFQ	9	1
Meeting Minutes	2	1
Field Work Order	1	1
Forecast	1	1

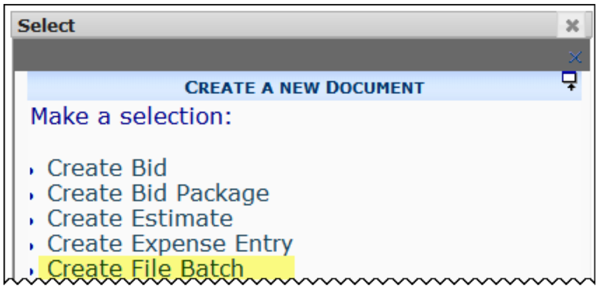
Improvements to Batch Scanning

sfPMS has long supported the batch scanning of files, usually invoices, through a tool called the Batch Upload Tool. This tool was most useful when invoices came in hard copy form and needed to be scanned and uploaded into the system. Recognizing that invoices now often come as PDF files, we have new workflows that bypass the Batch Upload Tool.

Step One – Create a File Batch document:

1. Select **Create Document** from the Site Options menu:

2. Select **Create File Batch**:



3. Save the document.

Step Two – Attach the PDF (or any other) files:

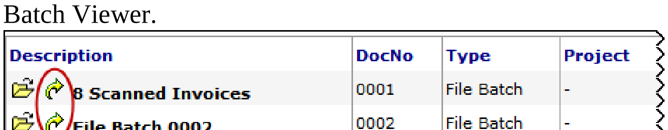
1. Use the Add Files tool ( ) to attach the files to the File Batch document. You can attach as many files as you want in this "batch". An easy way to do this is to organize your files as they come in into one folder on your computer then use the Add Files tool to grab them all at once. Whereas the Batch Viewer used to support only TIFF files, it now supports PDF, DOC*, DOT*, RTF, HTM*, and TXT files, so any of those file types can be attached to the File Batch document.

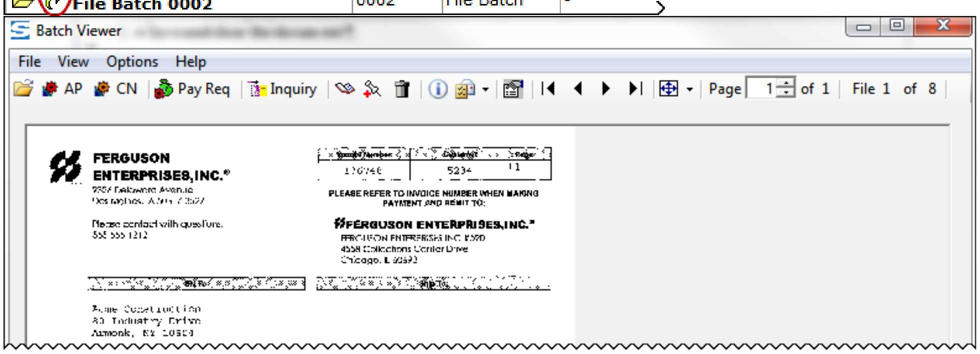
Step Three (*optional*) – Route the document:

1. Unless you are the person who will be processing the files (or a predefined route has been set up for the File Batch Doc type), route the document to the correct person as you would normally.
2. Save and close the document.

Step Four – Open the Batch Viewer:

1. (*Whoever is going to process the files*) From the Inbox, click next to the File Batch document to open the Batch Viewer.





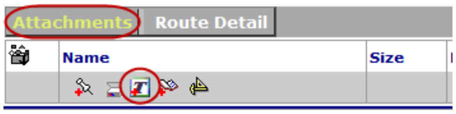
Information about the Batch Viewer can be found in the *Focus on Batch Processing* guide.

Note: a different workflow can take advantage of Spitfire's inbound processing. If you set up inbound processing and a predefined route for the File Batch Doc type, emails with **File Batch** in the subject line will automatically appear in the correct person's Inbox with all attached files. (See KBA-01531 and KBA-01532.)

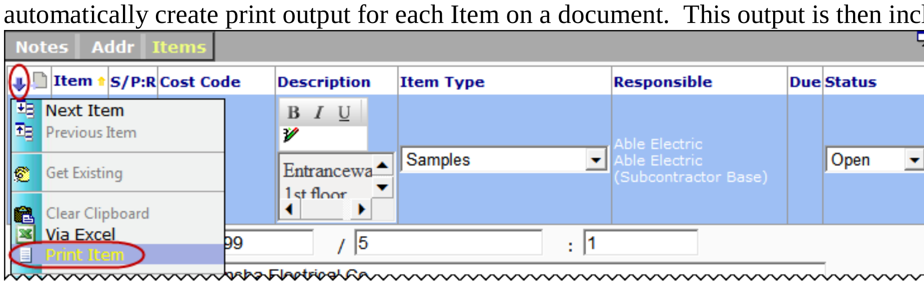
Feature Spotlight: Template Types

sfPMS allows you to upload several different types of template files into the Template library though the use of the Templates tool, found on both the Manage Dashboard and the System Admin Dashboard.

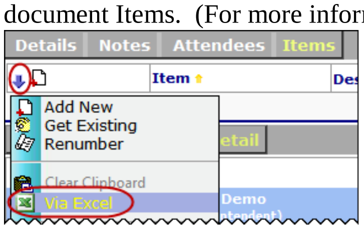
- **Attachment –** these Microsoft Word templates can include bookmarks that merge document data. They are selected from a document's Attachments tab to create the print output for routing purposes.



- **Attachment (all)** – these Microsoft Word templates are similar to the Attachment templates but are automatically selected for output when the document is routed.
- **Attachment (auto)** – this Microsoft Word template is similar to the Attachment type, but is automatically selected for output when the document is routed. A Doc type can have only one Attachment (auto) template file. (For more information, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.)
- **Email Body** – these Microsoft Word templates can include bookmarks that merge document data. They configure the body of the email when a document is routed via email.
- **Item Cover** – these Microsoft Word templates can include bookmarks that merge document data. They automatically create print output for each Item on a document. This output is then included in routed content.



- **Transmittals** – these Microsoft Word templates can include bookmarks that merge document data to create output that is included in routed content as transmittal cover sheets. (For more information, see the *Focus on Routes* guide.)
- **BFA Supplemental** – these Microsoft Excel templates are selected through the **Supplemental Workbook** option on the BFA workbook to create additional workbooks. (For more information, see the technical white paper, *The BFA Report Tool*.)
- **Period Distribution Supplemental** – these Microsoft Excel templates are selected through the **Supplemental Workbook** option on the Period Distribution workbook to create additional workbooks.
- **Exec Dashboard Export** – this Microsoft Excel template is selected when exporting data from the Executive Dashboard to create a custom workbook for the data. (For more information, see the technical white paper *The Executive Dashboard and EDB Report Tool*.)
- **Bid Analysis** – this Microsoft Excel file is accessed as the Competitive Bid Response Analysis (CoBRA) workbook from either a Bid Package's Options menu or the Project Options menu (on the Project Dashboard). (For more information, see the technical white paper *Bid Package – RFQ Processing.)*
- **PAPT** – these Microsoft Excel templates are selected from the SOV workbook to create Pay Application Print worksheets. (For more information see the technical white paper *Pay Application Print Templates (PAPTs)*.)
- **Via XL** – these Microsoft Excel templates are accessed from the Items Options menu and used to add and edit document Items. (For more information, see the technical white paper *Spitfire Item Templates (for Via Excel)*.)



- **BFA Budget Import Maps** – this Microsoft Excel template is used to map data to the BFA workbook when entering information through the Import Wizard. (For more information, see the *Focus on Budgets and Period Distribution* guide.)
- **BFA Site Settings** – this Microsoft Excel file saves site settings for the BFA workbook. (For more information, see the *Focus on the BFA Workbook* guide.)
- **Pay App (SOV) Site Settings –** this Microsoft Excel file saves site settings for the SOV workbook.

Have You Read?

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

Focus on Batch Processing

Focus on Doc Types and Project Workflow

Quick Doc Type Reference Guide

TWP: *Data and Equipment Projects*

TWP: *The Executive Dashboard and EDB Report Tool*

The following articles have recently been added to the Knowledgebase.

KBA-01543: Adding custom entries to the Spitfire Site Option (drop-down) menu

KBA-01544: Bid Log

KBA-01545: Executive Dashboard Custom Formulas in Supplemental Workbooks

KBA-01546: Eliminating extra line spacing in templates

KBA-01547: Adding a Custom Theme to your Spitfire Site

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

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