In This Issue

Note: where applicable features mentioned in this newsletter are available in 4.3.4953.

Improvement: Auto-Complete Fields

Lookup fields and ZIP code fields try to find matches to your entries as you type. You can select a choice from the drop-down using the keyboard's arrow keys as before. And now you can use the mouse to select your choice.

In address fields, entering a ZIP code in either the City or ZIP code field will fill in the State, City and ZIP code fields correctly.

- Select the City and State using the mouse or keyboard arrow, then leave the City or ZIP code field. The City, ST and ZIP code fields will be filled in.

New Feature: Working with Production Units

sfPMS allows you to track units of production on the BFA workbook. These units are entered as part of the WBS data when you create your budget. Once your budget is approved, Production Unit documents can be used to enter unit information.

When you open the Production Units document, the system looks for and loads the latest financial snapshot information for the project.

When you enter new information on your Production Units document and then Approve the document, the Cost Codes listed within its Items are updated on the next BFA workbook snapshot to reflect the corresponding unit amounts (on the Actual Units column).

For more information and instructions, see the new *Working with Production Units* technical white paper, available from the Clients area of the website and the Spitfire V4.3 Help Menu.

New Rules in V4.3 Since February

A list of new V4.3 rules appeared in the February issue of this newsletter. Since then, a few more rules have been added to sfPMS V4.3.

RouteConfig | Seq1DueInDays (See KBA-01391)
This rule specifies the number of days used to set the Due date for the initial routee (Seq 1, normally the document's creator) on a document. The default is **0** (which means "today"). Use **-1** for no default, **1** for "tomorrow", **2** for "day after tomorrow" etc. This rule is often used in for Doc types that are created by automatic workflow so that the first route is not due immediately.

Rule	Filter Value	Result Value	SF
Seq1DueInDays	Compliance Notification	1	✕

WBSConfig | Add:*costcode* (See KBA-01358)
This rule indicates the description of the specified Cost Code that should be automatically added to every new project. (You can see the Cost Code in the Cost Code Maintenance window.) This rule is often used to add ubiquitous Cost Codes that are company-wide. It is particularly helpful Commitment Items (which require Cost Codes) need to be entered before the budget has been created.

Rule	Filter Value	Result Value	SF
Add:16000		Electrical	✕

**BudgetConfig | BFASnapshot** (See KBA-01176)
This rule specifies how financial snapshots of a project are to be created. The rule was added so that an Analysis snapshot could be created and loaded with a Production Unit documents (if the result value is **136**).

Rule	Filter Value	Result Value	SF
BFASnapshot	Production Units	136	✔

DocItemConfig | ExpandWhenAdded (See KBA-01530)
This rule allows you to keep a document's Items tab in grid view when adding Items. By default, Items go into detail view when added. Specify **0** (uncheck) if you want the Items to stay in grid view.

| Rule	Filter Value	Result Value	SF
ExpandWhenAdded	PunchList	✕	✕
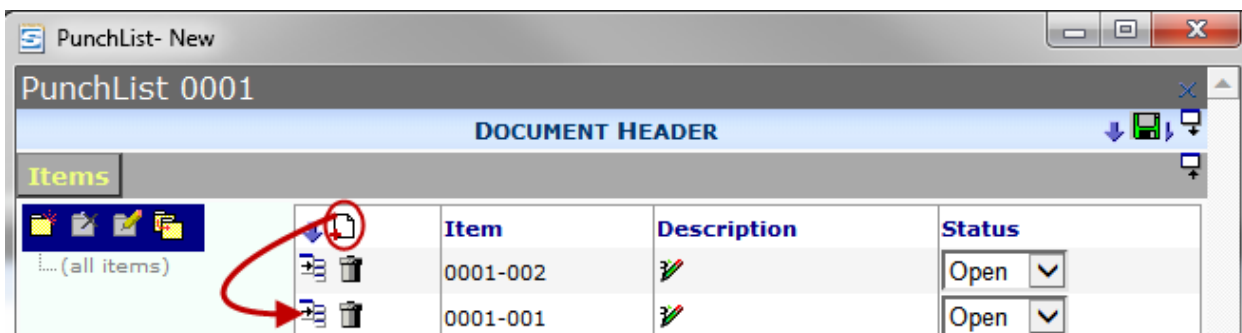
Spitfire Q&A: Uploading Files into the Same Folder

Q: When we use the Add Files tool to upload multiple files, those files do not get placed in the indicated folder. Only the first file does. Is there a way to have the folder apply to all files?

A: Yes. There are two ways to do this, depending on the order that you use the File and General tabs.

1) If you know that you will be uploading multiple files and you want any of the General fields to apply to all these files, go first to the **General** tab and fill out your fields (for example, Folder or Note). Then go to the **File** tab, and either browse for your files or drag them from Windows Explorer.
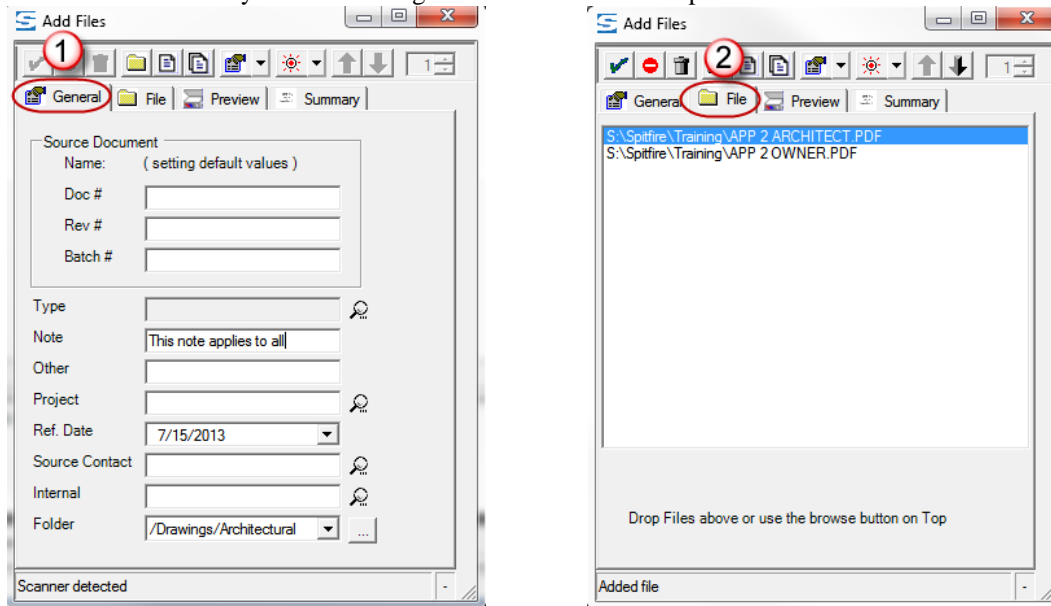
When you click ✔ the files will be uploaded into sfPMS and all the fields in the General tab will apply to all files.

2) If you start at the File tab and have your list of files and then want to indicate fields on the General tab for these files, fill out the fields on the General tab for the first file, then use the ⬆ and ⬇ arrows to get to the next file and the next, etc. You will need to fill out the fields for each file, which means they can be the same or different.
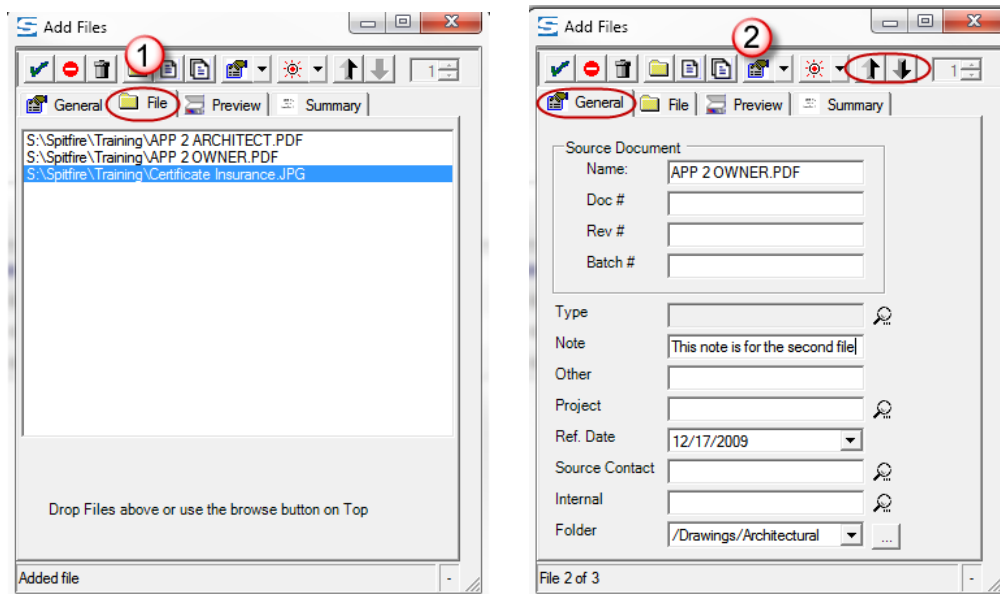
Have You Read?

The following technical white paper has been written since July 1:

TWP: *Working with Production Units*

In addition, the following articles have been added to the Knowledgebase:

KBA-01550: When You Do Not Want to Print Certain SOV Line Items

KBA-01551: Unit Columns on the SOV Workbook

Contact Us

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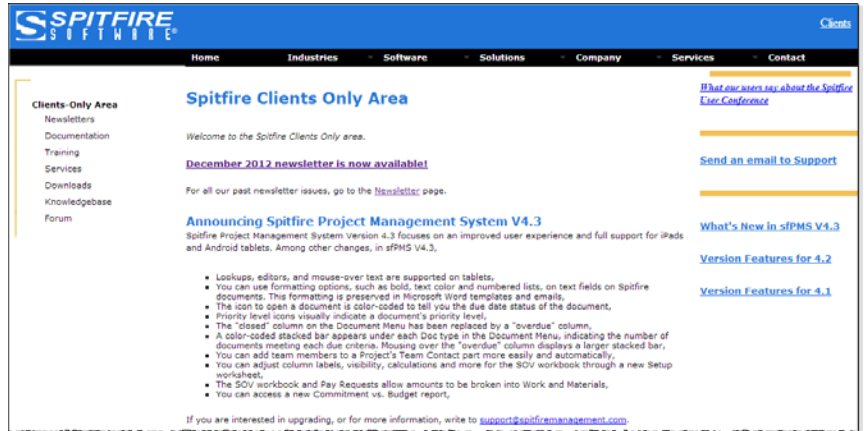Fax: 888-287-4603

Support:
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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 4.1, 4.2 and 4.3.

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]