SPITFIRE SOFTWARE®

sfNews

October 2013
Vol. VI, Issue 10

In This Issue

***Note**: where applicable features mentioned in this newsletter are available in 4.4. now available for interested beta sites.*

Last Call: Preview of V4.4 Webinar

Have you signed up yet? Space is running out! See new features in sfPMS V4.4 during one of our live webinars on

Wednesday, October 2, or
Thursday, October 3, at **2 PM EDT**.

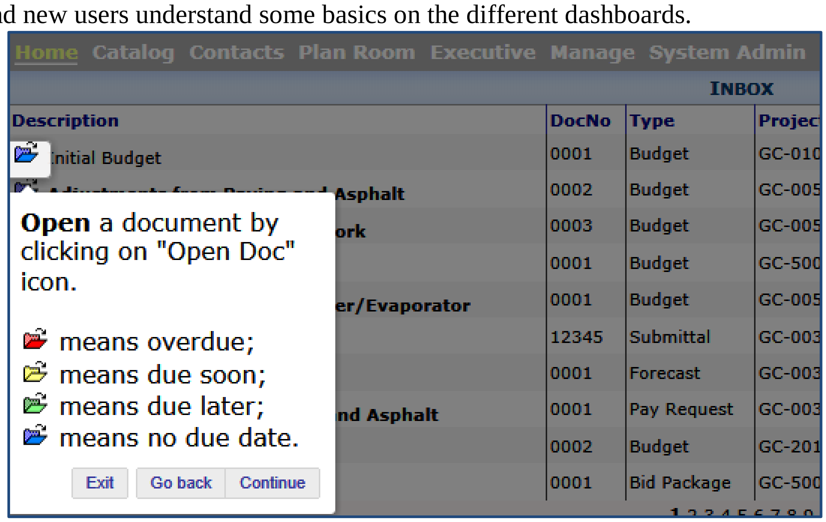
Each webinar will present the same information for about 30 minutes and then allow time for questions.

Go to Eventbrite to sign up for one of the two webinars!
Oct 2 - http://www.eventbrite.com/event/8041041973

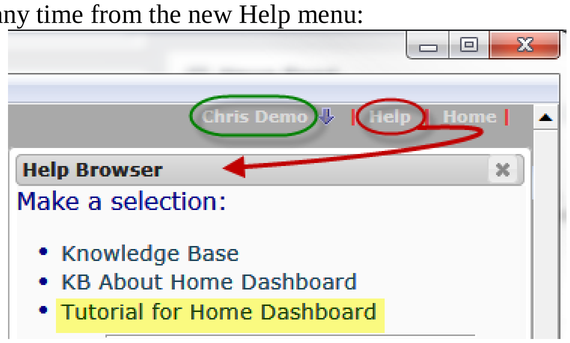
Oct 3 - http://www.eventbrite.com/event/8057479137

First Looks: Pop-Up Tutorials in sfPMS V4.4

They don't replace our training videos, our live training classes, or our extensive documentation, but the new pop-up tutorials can help brand new users understand some basics on the different dashboards.



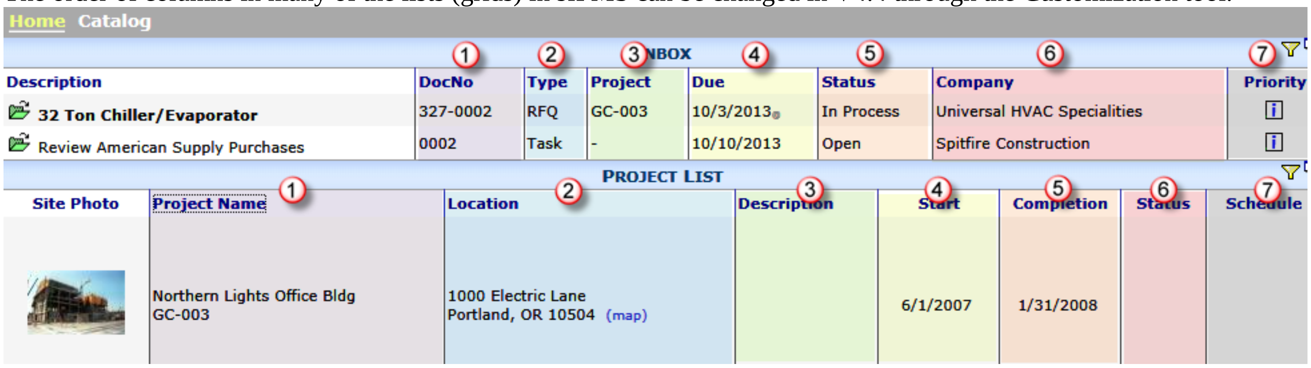
By default, the tutorial for each dashboard will appear the first time (and first time only) a user accesses that dashboard. Tutorials can also be accessed at any time from the new Help menu:



In addition, there is a setting on the User Preference page that allows Tutorials to be repeated (pop-up again after the first time) or skipped on other new dashboards. You can get to your User Preference page by clicking on your name as shown in the picture above.

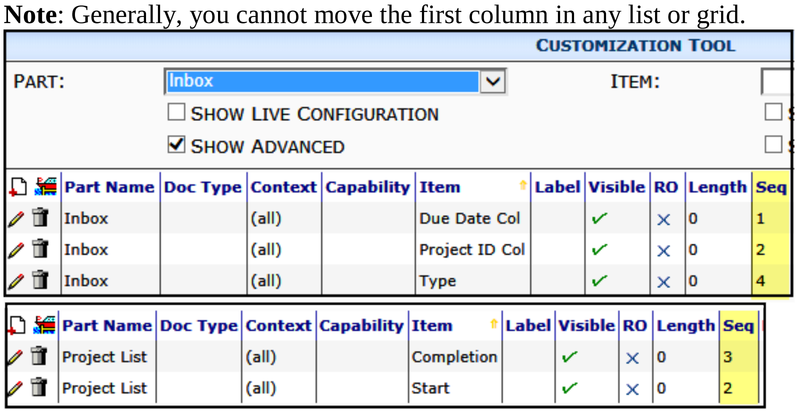
Feature Spotlight: Changing the Order of Columns in V4.4

The order of columns in many of the lists (grids) in sfPMS can be changed in V4.4 through the Customization tool.

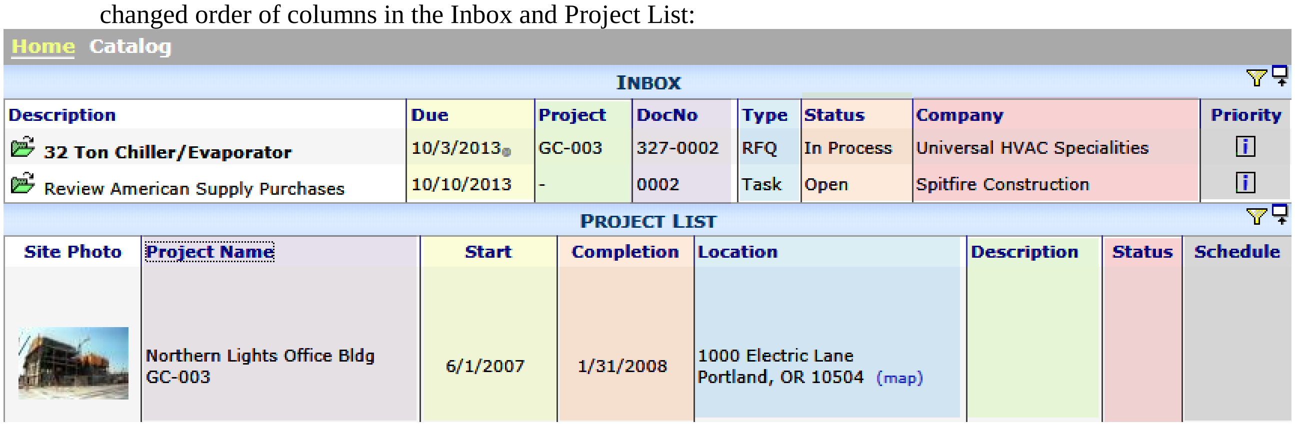


To reorder columns:

1. At the Customization tool, select the part that you want to reorder and, if for a specific Doc type, select the Doc type.
2. Find and select the first column (item) that you want to move.
3. Click to add a customization row, to copy or to edit an existing row.
4. Enter a number in the **Seq** field to indicate the position of the column, counting the currently visible columns from left to right where the leftmost column is 0 and the one to the right of that column is 1 and the next is column 2 etc. as shown above.
   Note: Generally, you cannot move the first column in any list or grid.



5. Click to accept the change.
6. Repeat as necessary to move other columns.
7. Click to save your all customizations. For example, the Seq numbers indicated above would result in the changed order of columns in the Inbox and Project List:



Note: if two columns have the same Seq number, the system will select one to be at that sequence and the other to be next to it, based alphabetically on internal name. When you give a column a particular Seq number, the column currently in that position and all columns to the right of that column will be shifted to the right.

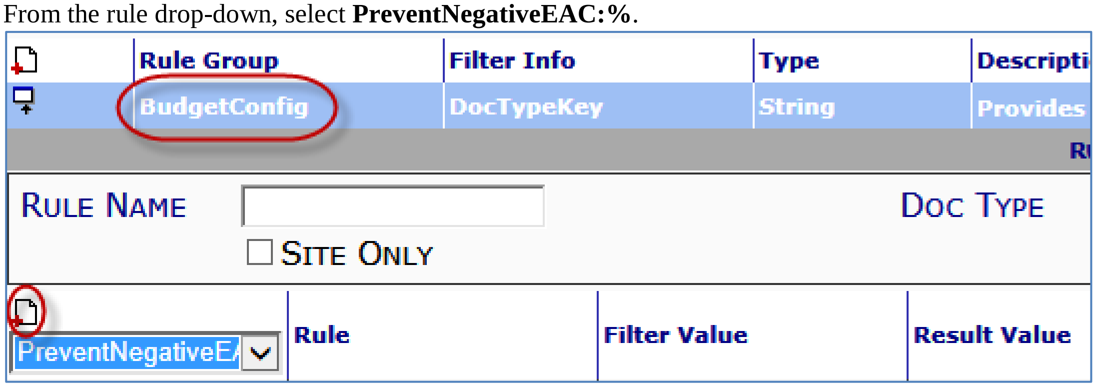
You Asked For It, You Got It: Blocked Budget Postings in V4.4

Q: We would like to block budget revisions from posting when any budget line goes negative. Can Spitfire do that?

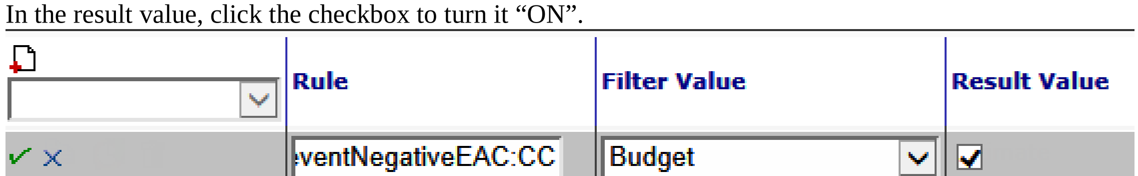
A: Yes, in V4.4. You would need to first set up the **PreventNegativeEAC** rule. Then, if you create a budget revision for the indicated subtype(s) that pushes a budget line into the red, you will not be able to post that expense revision. This means, for example, that you would not be able to approve a Budget document or post the expense from a CCO.

To set the rule:

1. Go to the Rules Maintenance tool on the System Admin Dashboard.
2. Expand the **BudgetConfig** rule group.
3. From the rule drop-down, select **PreventNegativeEAC:%**.

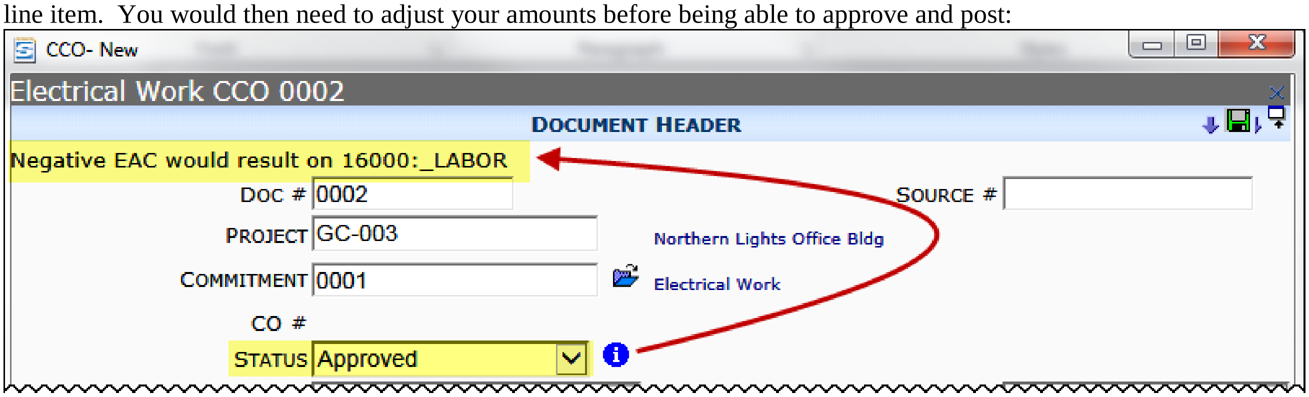


4. Click .
5. In the rule value, replace the **%** with the two-letter code for the subtype that you want. By default, these are
   - **CC** = CCO
   - **CM** = Commitment
   - **CO** = Change Order
   - **MM** = Manual Revision
   - **PC** = Project Setup/Contract
   - **PD** = Period Distribution
6. In the filter value, select **Budget**.
7. In the result value, click the checkbox to turn it "ON".



8. Click ✓ to accept your changes, then to save them.

Once the rule is in place, a message such as the following will appear if a change to the budget would result in a negative line item. You would then need to adjust your amounts before being able to approve and post:



Have You Read?

The following technical white paper has been written for V4.3 since September 1:

TWP: *Setup for Spitfire's Plan Room*

In addition, the following article has been added to the Knowledgebase:

KBA-01554: Construction Billing Entry must have an application with status 'In Process' for AIA Item

Beta Sites Wanted

Spitfire Project Management System V4.4 is due to be released in November.

If you are interested in being upgraded to V4.4 as a beta site, contact Support. support@spitfiremanagement.com

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
- Services
- Downloads
- Knowledgebase
- Forum

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

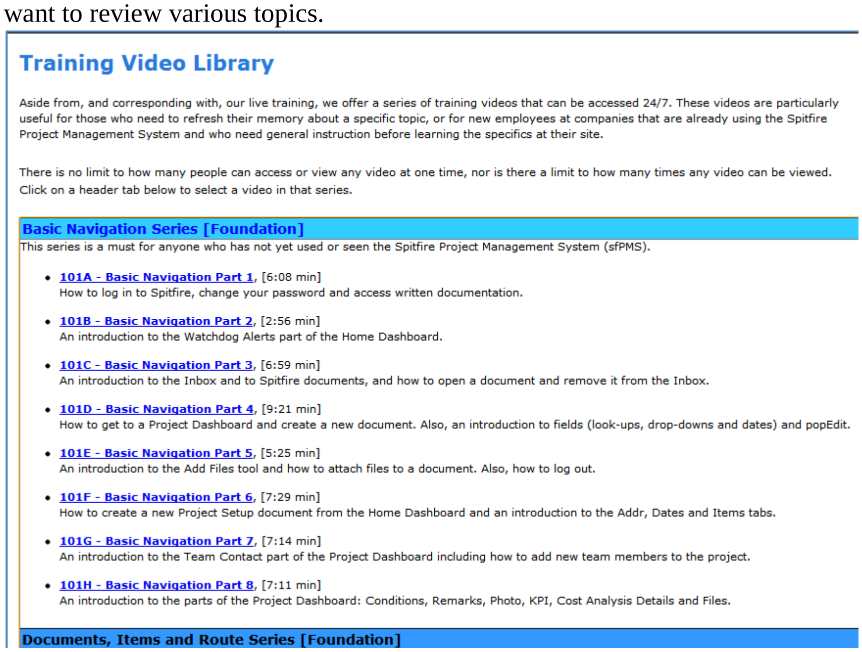
Version Features for 4.1

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]