SPITFIRE SOFTWARE®

sfNews

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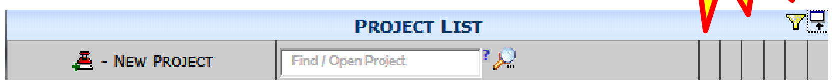
In This Issue

***Note**: where applicable, features mentioned in this newsletter are available in the newly released V4.4 of sfPMS.*

Did You Know?

In sfPMS V4.4, you can look up and open projects, as well as create new projects, while the Project List part is collapsed.

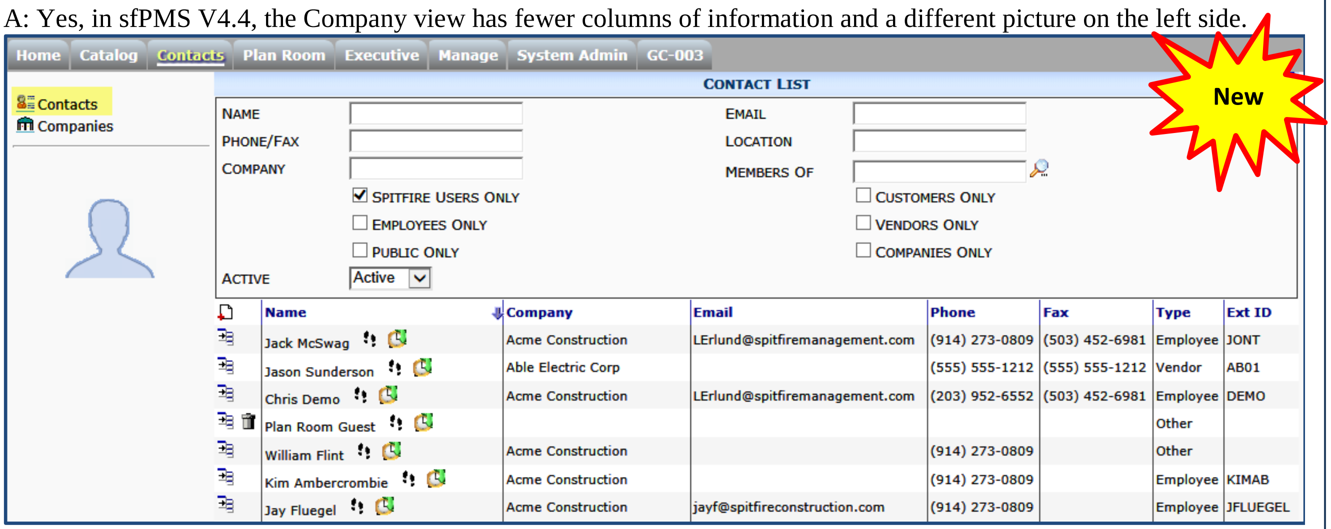


- To create a new project, click .
- To open a project, type all or some of the Project ID in the field, or click to select the project from a lookup.

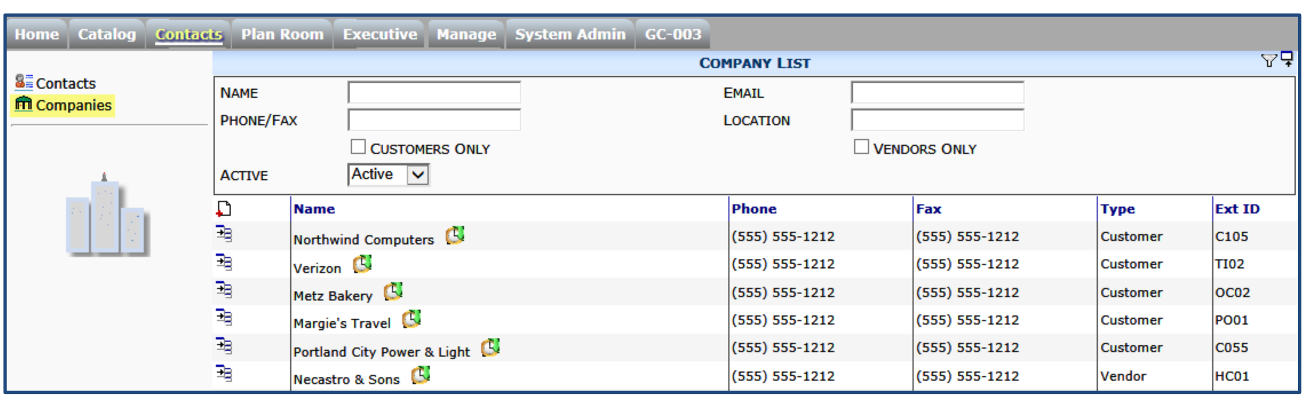
You Asked For It, You Got It: Contact Dashboard Views

Q: Can the two views in the Contact Dashboard (Contacts vs. Company) be more clearly differentiated?

A: Yes, in sfPMS V4.4, the Company view has fewer columns of information and a different picture on the left side.



Name	Company	Email	Phone	Fax	Type	Ext ID
Jack McSwag	Acme Construction	LErlund@spitfiremanagement.com	(914) 273-0809	(503) 452-6981	Employee	JONT
Jason Sunderson	Able Electric Corp		(555) 555-1212	(555) 555-1212	Vendor	AB01
Chris Demo	Acme Construction	LErlund@spitfiremanagement.com	(203) 952-6552	(503) 452-6981	Employee	DEMO
Plan Room Guest					Other	
William Flint	Acme Construction		(914) 273-0809		Other	
Kim Ambercrombie	Acme Construction		(914) 273-0809		Employee	KIMAB
Jay Fluegel	Acme Construction	jayf@spitfireconstruction.com	(914) 273-0809		Employee	JFLUEGEL



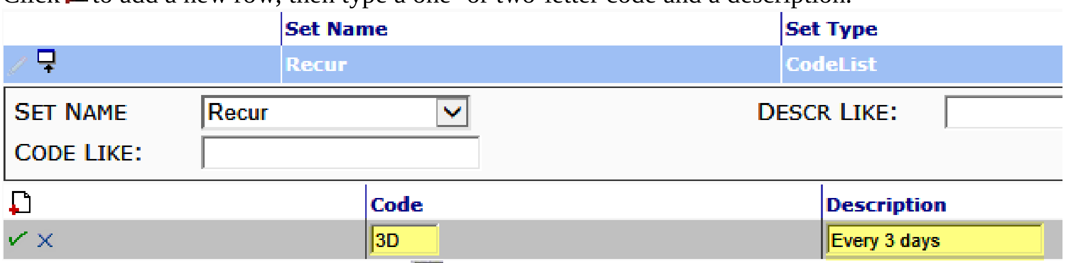
Name	Phone	Fax	Type	Ext ID
Northwind Computers	(555) 555-1212	(555) 555-1212	Customer	C105
Verizon	(555) 555-1212	(555) 555-1212	Customer	TI02
Metz Bakery	(555) 555-1212	(555) 555-1212	Customer	OC02
Margie's Travel	(555) 555-1212	(555) 555-1212	Customer	PO01
Portland City Power & Light	(555) 555-1212	(555) 555-1212	Customer	C055
Necastro & Sons	(555) 555-1212	(555) 555-1212	Vendor	HC01

Feature Spotlight: Setting a New Recur Interval

The Compliance Type, Alert Type and Alert Subscription tools allow you to set the Recurs interval for different compliances and alerts. By default, the choices offered are Daily, Monthly, Bi-Monthly (every two months), Quarterly, Semi-Annually (every six months), Every 18 Months, Weekly, Fortnightly (every two weeks), Yearly, and Bi-Yearly (every two years). But what if you want a different interval, say, every 3 days or every 4 months? Did you know that you can set that up?

First, you need to create a new **Recur** code in the Code Maintenance tool (found on both the Manage and System Admin dashboards).

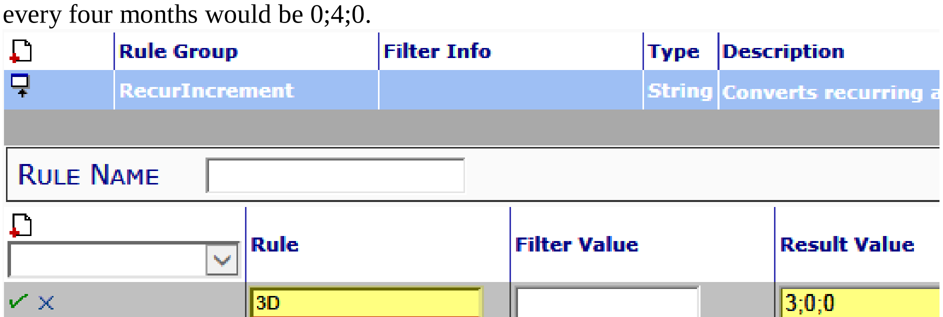
1. Click to add a new row, then type a one- or two-letter code and a description.



2. Click to accept your changes, then to save.

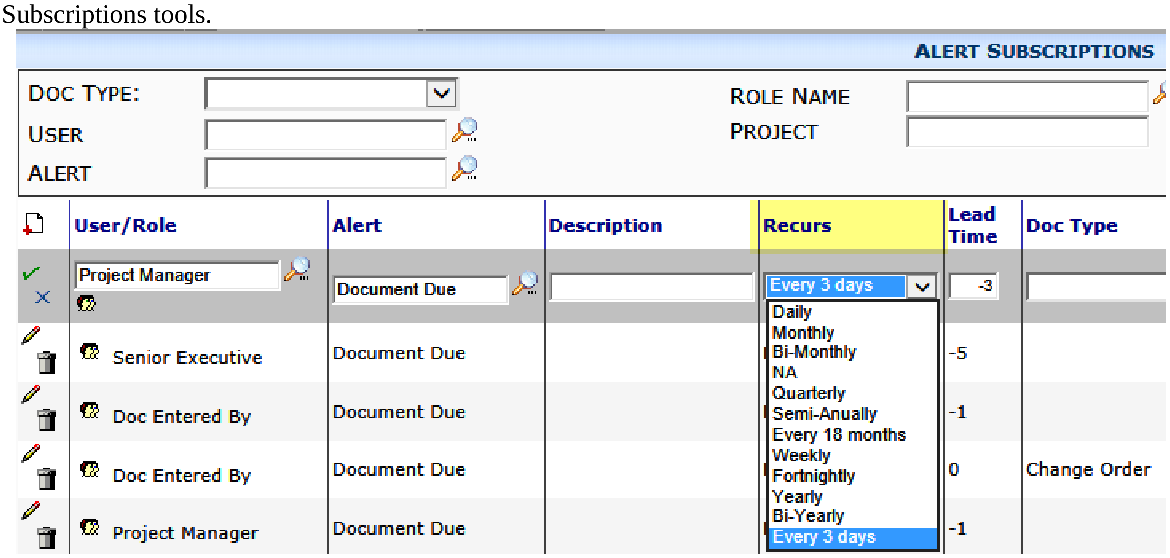
Then you need to define that new code in the Rules Maintenance tool (found on the System Admin Dashboard).

1. Expand the **RecurIncrement** rule group.
2. Click to add a new row, then type the newly created code in the Rule field.
3. In the Result Value field, define the interval as three numbers separated by semicolons to indicate recurring days, recurring months and recurring years. So, for example, every three days would be 3;0;0 and every four months would be 0;4;0.



4. Click to accept your changes, then to save.

Your new recurrence interval will now appear on the Recur drop-down menu on the Compliance Type, Alert Types, and Alert Subscriptions tools.

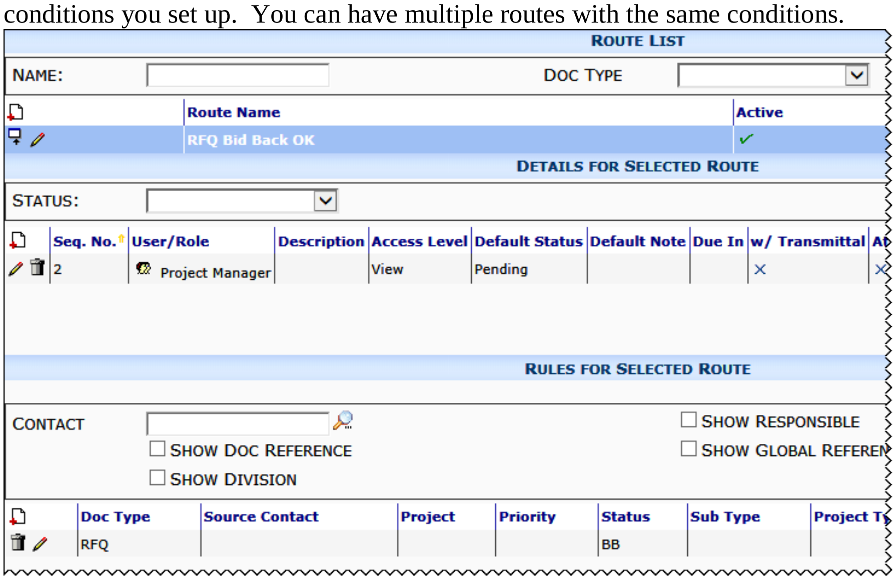


Routing Tip: Appending Routes

Since V2, sfPMS has offered a way to add a predefined route to the end of an existing document route as needed. In order to do this, the routes must exist in the Routes tool first.

To create predefined routes:

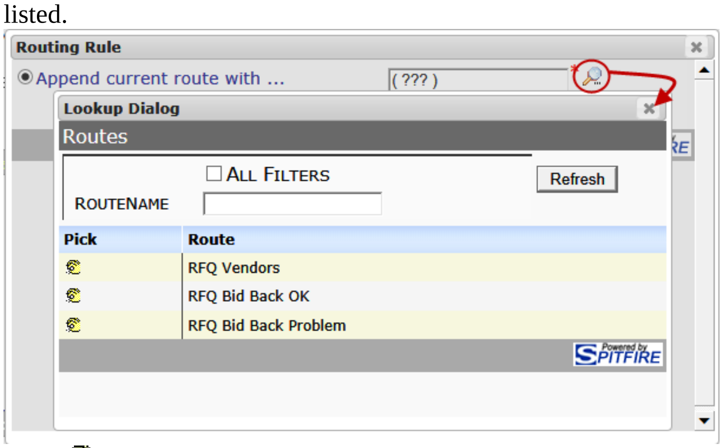
1. Select the **Routes** tool on the Manage Dashboard.
2. Add and name each new route, keeping in mind that you intend for it to be a route that gets appended (added) to the end of an existing route (as opposed to a route that gets added to a document when the document is first created).
3. Click to accept the route name, then to expand its details.
4. In the Details for Selected Route section, add the people who should be added to the route, using roles for greater flexibility.
5. In the Rules for Selected Route section, indicate the conditions for this route, for example, Doc Type and Status. This predefined route will be offered only when you are appending a route from a document that meets the conditions you set up. You can have multiple routes with the same conditions.



6. Remember to save your route!

To append a route to an existing route on a document:

1. At the Route Details tab, click the topmost to open the Route Options menu and select **Append Route**. A Routing Rule dialog box will appear.
2. Click to select your route. Only predefined routes that are currently applicable to your document will be listed.



3. Click to select the specific route you want. People from that predefined route will be added to the end of your route list on the Route Details tab.

For more information about predefined routes, see the *Focus on the Manage Dashboard* guide.

Have You Read?

The following articles have been added to the Knowledgebase:

KBA-01556: Internet Explorer does not open EML and/or MSG files

KBA-01557: Google Chrome Extensions

KBA-01558: Workflow Script Library

KBA-01559: Symptoms of Server Time Sync Failure

KBA-01560: Approved Pay Request are waiting; cannot approve this deductive change at this time

Reminder: the Spitfire offices will be closed on **Nov. 28** and **29**.

Contact Us

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Your Clients Area

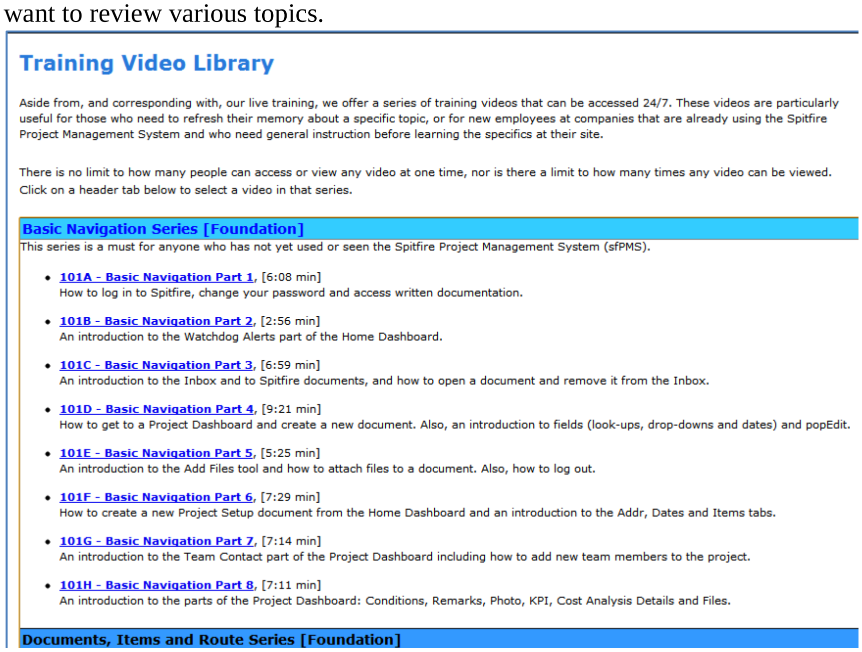
The Clients area on our website includes links to our documentation, our Knowledgebase, our forum, our downloads, and a list of what's new in versions 4.1, 4.2 and 4.3.

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]