In This Issue

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

Free Client Webinar!

CLIENT WEBINAR SERIES

February 13, 1 PM EST

My 5 Favorite 4.4 New Features

Join us for a lively roundtable discussion of our favorite sfPMS 4.4 features. Several of us will share our Favorites lists and explain why we like these new features and how you can use them too! To register, go to

https://www.eventbrite.com/event/10223405481

Register soon; tickets are limited! We had a great turnout last time, and you won't want to miss this one!

Spitfire Q & A: Access to All Catalog Folders

Q: I want a new user role to have access to all the folders in the Catalog, including ones we haven't created yet. Do I need to select each folder in the Catalog Folders tool in order to set this up?

A: No. If you want to limit access to just a few folders, you need to select those folders individually. But if you want to grant access to all folders, just select **(all items)** as your folder. The permissions you give to (all items) will apply to all folders, now and in the future as you add folders.

Note: In order for changes here to take effect, role members must log out and back in. Their folder permissions are rebuilt only upon login. In addition, the system must be recycled in order for cached folder access to expire (or 34 minutes of inactivity by the user). Have users log out before you recycle or republish using ICTool and the **Discard user sessions and stop application pool** option on the Finish tab.

For more information about the Catalog Folders tool, see the *Focus on System Administration* guide.

Spitfire Q&A: Project Access on the Executive Dashboard

Q: How can I set things up so my project managers see their projects and only their projects on the Executive Dashboard?

A: If a person has the **PAGE | Executive Dashboard** and **PART | Executive Project Summary** role capabilities, that person has access to all projects in the system. If that is not the intention, as with project managers, set up the PM role a little differently.

- Do include the **PAGE | Executive Dashboard** capability
- Do include **Project Manager** as the Responsibility
- Do **NOT** include the **PART | Executive Project Summary** capability

When a Project Manager then accesses the Executive Dashboard, the project list will be automatically filtered for only the projects to which the project manager has access. The Project Mgr filter, usually available, will be hidden.

Executive Dashboard All Access:

Project Name	Contract	U.CO	EAC	Com + Act	Orig Commits	CCO	Curr Commits	Appr Pay Req	% Spent	FAC	BTD	O/U Billed	Revenue Budget	Earned Val	Est Profit	Backlog	Net Cash Flow	Cash Conversion	Cash Funding	Net Cash Demand
CO-061 City Power and Light	$15,000	$0	$2,000	$5,790	$0	$0	$0	$0	290 %	$0	$3,300	$11,700	$6,000	$15,000	$13,000	($2,000)	($5,290)	$15,000	$500	$14,500
CO-200 Project Contract 0001	$200,000	$0	$153,345	$0	$0	$0	$0	$0	0 %	$153,345	$0	$0	$200,000	$0	$46,655	$46,655	$0	$0	$0	$0
EN-003 A. Dataum Corporation	$405,250	$0	$152,300	$5,125	$0	$0	$0	$0	3 %	$152,300	$0	$13,637	$405,250	$13,637	$252,950	$239,313	($5,125)	$13,637	$0	$13,637
EN-004 City Power and Light	$37,500	$0	$20,625	$3,800	$0	$0	$0	$0	18 %	$0	$5,075	$1,834	$37,500	$6,909	$16,875	$9,966	($3,800)	$6,909	$0	$6,909
EN-005 Adventure Works	$15,000	$0	$5,000	$2,783	$0	$0	$0	$0	56 %	$0	$6,283	$2,066	$15,000	$8,349	$10,000	$1,651	($2,783)	$8,349	$0	$8,349
GC-003 Northern Lights Office Bldg	$750,000	$2,925	$575,000	$74,800	$46,354	$8,419	$54,773	$5,350	13 %	$575,000	$15,500	$36,846	$750,000	$52,346	$175,000	$122,654	($26,539)	$52,196	$13,443	$38,753
GC-004 West Company	$103,750	$0	$39,000	$13,897	$0	$0	$0	$0	36 %	$33,500	$0	$36,970	$113,000	$36,970	$64,750	$27,780	($13,897)	$36,970	$0	$36,970
GC-005 Fabrikam, Inc.	$75,000	$0	$40,225	$18,085	$46,354	$0	$46,354	$21,399	45 %	$40,225	$5,000	$28,719	$75,000	$33,719	$34,775	$1,056	($18,057)	$33,719	$28	$33,691
GC-010 Le Restaurant de la Lune	$750,000	$0	$600,000	$0	$21,000	$0	$21,000	$0	0 %	$600,000	$0	$0	$0	$0	$150,000	$150,000	$0	$0	$0	$0
GC-101 KC Store	$700,000	$0	$575,000	$0	$0	$0	$0	$0	0 %	$575,000	$0	$0	$700,000	$0	$125,000	$125,000	$0	$0	$0	$0
GC-201 KC Store	$700,000	$0	$541,250	$0	$0	$0	$0	$0	0 %	$575,000	$0	$0	$700,000	$0	$158,750	$158,750	$0	$0	$0	$0
GC-202 KC Store	$700,000	$0	$575,000	$0	$14,425	$0	$14,425	$0	0 %	$575,000	$0	$0	$700,000	$0	$125,000	$125,000	$0	$0	$0	$0

Executive Dashboard for a Project Manager:

Project Manager Mode

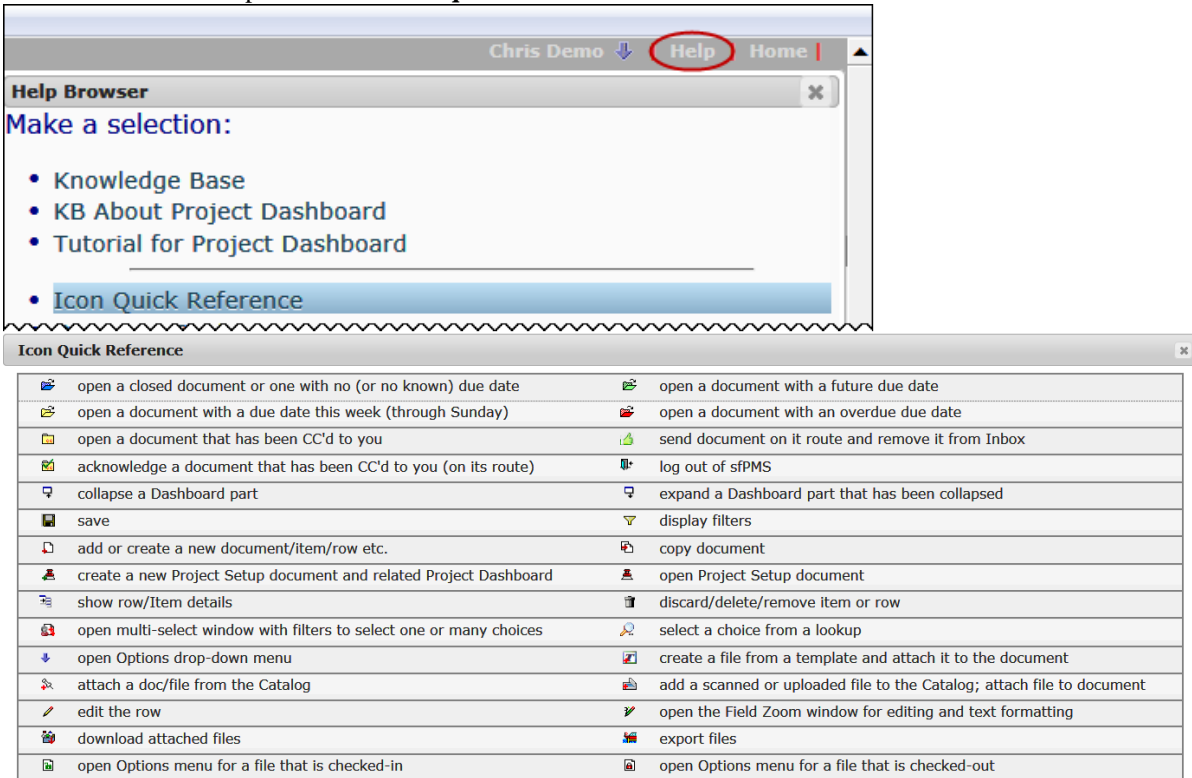| Project Name	Contract	U.CO	EAC	Com + Act	Orig Commits	CCO	Curr Commits	Appr Pay Req	% Spent	FAC	BTD	O/U Billed	Revenue Budget	Earned Val	Est Profit	Backlog	Net Cash Flow	Cash Conversion	Cash Funding	Net Cash Demand
GC-003 Northern Lights Office Bldg	$750,000	$2,925	$575,000	$74,800	$46,354	$8,419	$54,773	$5,350	13 %	$575,000	$15,500	$36,846	$750,000	$52,346	$175,000	$122,654	($26,539)	$52,196	$13,443	$38,753
GC-101 KC Store	$700,000	$0	$575,000	$0	$0	$0	$0	$0	0 %	$575,000	$0	$0	$700,000	$0	$125,000	$125,000	$0	$0	$0	$0
GC-201 KC Store	$700,000	$0	$541,250	$0	$0	$0	$0	$0	0 %	$575,000	$0	$0	$700,000	$0	$158,750	$158,750	$0	$0	$0	$0
GC-202 KC Store	$700,000	$0	$575,000	$0	$14,425	$0	$14,425	$0	0 %	$575,000	$0	$0	$700,000	$0	$125,000	$125,000	$0	$0	$0	$0
GC-500 Northwind Office Building	$700,000	$0	$541,250	$0	$0	$0	$0	$0	0 %	$541,250	$0	$0	$700,000	$0	$158,750	$158,750	$0	$0	$0	$0
	$3,550,000	$2,925	$2,807,500	$74,800	$60,779	$8,419	$69,198	$5,350		$2,841,250	$15,500	$36,846	$3,550,000	$52,346	$742,500	$690,154	($26,539)	$52,196	$13,443	$38,753

Feature Spotlight: Icons

In sfPMS, we call "icons" those little pictures that you click on to do something (or sometimes you just mouse over for information). sfPMS has over 100 icons in its system. How can you know what they mean? There are a few ways.
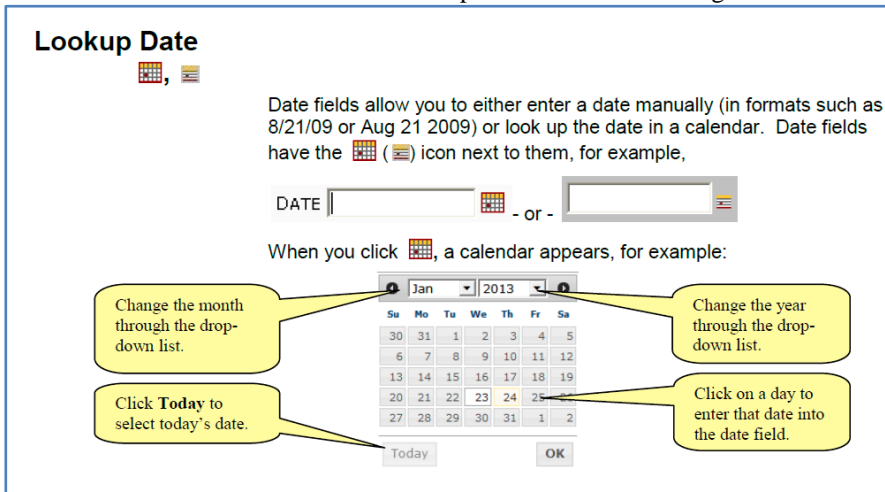
1. When you **mouse over** an icon, pop-up text tells you what it means or what it does. For example,
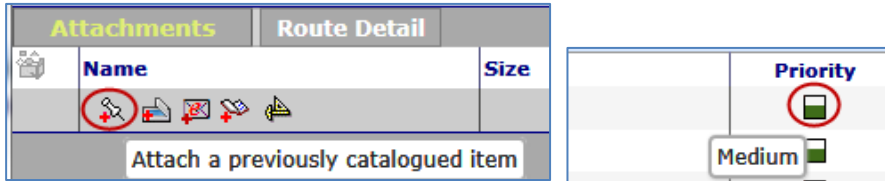
2. **New for V4.4**: the Help menu includes a **quick reference** of the most common icons:

Icon Quick Reference

	open a closed document or one with no (or no known) due date		open a document with a future due date
	open a document with a due date this week (through Sunday)		open a document with an overdue due date
	open a document that has been CC'd to you		send document on it route and remove it from Inbox
	acknowledge a document that has been CC'd to you (on its route)		log out of sfPMS
	collapse a Dashboard part		expand a Dashboard part that has been collapsed
	save		display filters
	add or create a new document/item/row etc.		copy document
	create a new Project Setup document and related Project Dashboard		open Project Setup document
	show row/Item details		discard/delete/remove item or row
	open multi-select window with filters to select one or many choices		select a choice from a lookup
	open Options drop-down menu		create a file from a template and attach it to the document
	attach a doc/file from the Catalog		add a scanned or uploaded file to the Catalog; attach file to document
	edit the row		open the Field Zoom window for editing and text formatting
	download attached files		export files
	open Options menu for a file that is checked-in		open Options menu for a file that is checked-out

3. The **Overview Guide** lists all icons and explains a few of them in greater detail.

Have You Read?

The following focus guides and technical white papers have been written for V4.4 since January 1:

Focus on Doc Templates

TWP: *ATC Scripts and Automatic Workflow*

The following articles have been added to the Knowledgebase:

KBA-01561: Cannot approve CCO with negative line amount if line would become overpaid

KBA-01562: Checking the Outbound Route Queue

KBA-01563: Routee doesn't respond, but the document needs to move on

KBA-01564: Overview of the PresetSearch Rule Group and Creating a Custom Tab

KBA-01565: Adding Information to the Login Page

KBA-01566: Customization of Filters

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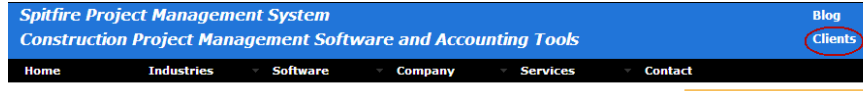
Your Clients Area

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 4.2, 4.3 and 4.4.
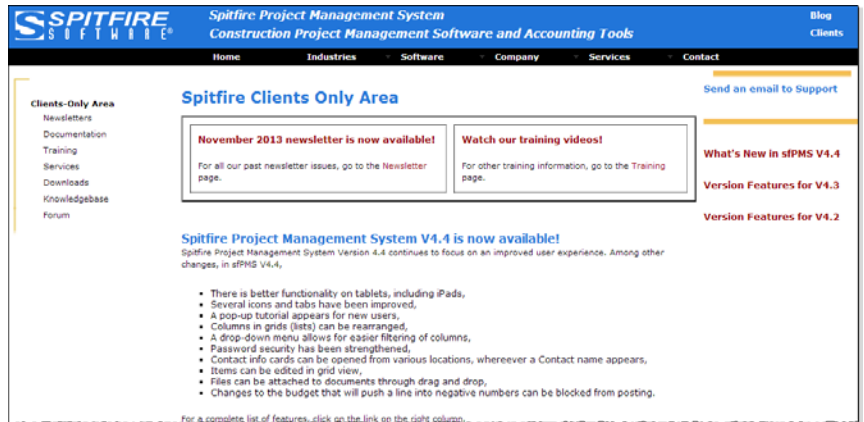
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Training Classes and Videos

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.