## 

# sfNews

February 2014 Vol. VII, Issue 02

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*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.

			Fol	LDER LIST
±∃ Roles	FOLDER:			
Event Subscriptions		7:	Role Name	Permit (LRIUDS)
* Catalog Folders			Architect	
Report Folders	Bid Pa (all items)	V X	Cataloger	
Account Categories	- Bid Pa Currection	1	Compliance Admin Internal	
Alert Types	Compliance	1	Compliance Admin Vendor	
Company Divisions Compliance Types	Correspondence Customer Contracts	1	Concrete Sub	
CSI Maintenance	D&B Reports	1	Consultant	
B Date Types	Daily Field Reports	1	Contact Admin	
B Doc Types	Drawings Estimates	1	Drywall Sub	
Templates	Filled Templates	1	Electrical Sub	
Workflow Scripts	Foundation	1	Engineering Consultant	
Code Maintenance	🕂 InViaEmail	1	Everyone	
Customization	Invoices	1	GC	
B Mask Maintenance Rule Maintenance	···· Meeting Minutes ···· Miscellaneous	1	Mechanical Sub	
System Information	-Pay Applications	1	Owner	

**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:**

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¢	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	
¢	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,
¢	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,
¢	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,
é	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,
¢	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,
¢	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,
ê	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	
٣	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	
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#### **Executive Dashboard for a Project Manager:**

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¢	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	
¢	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	-
\$	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	-
	GC-500 Northwind Office	\$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	
<b>?</b>	Building																				

	on). sfPMS has over 100 icons in its system. How can when you <b>mouse over</b> an icon, pop-up text tells you w							
ι.	Attachments Route Detail	hat it means of what it does. For example,						
	Name Size	Priority						
	Attach a previously catalogued item	Medium						
2.	New for V4.4: the Help menu includes a quick referer	<b>ice</b> of the most common icons:						
	Chris Dem	o 🎚 Help Home						
	Help Browser	*						
	Make a selection:	~						
	Knowledge Base							
	KB About Project Dashboard							
	Tutorial for Project Dashboard							
	Icon Quick Reference							
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	Icon Quick Reference	er ann a daoine aite a fathachta dath						
	<ul> <li>open a closed document or one with no (or no known) due date</li> <li>open a document with a due date this week (through Sunday)</li> </ul>	<ul> <li>open a document with a future due date</li> <li>open a document with an overdue due date</li> </ul>						
	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)	Interpretation of a stable						
	collapse a Dashboard part	P     expand a Dashboard part that has been collapsed       V     display filters						
	<ul> <li>save</li> <li>add or create a new document/item/row etc.</li> </ul>	▼     display filters       ▶     copy document						
	create a new Project Setup document and related Project Dashboard	open Project Setup document						
	Ref show row/Item details	discard/delete/remove item or row						
	open multi-select window with filters to select one or many choices	$\wp$ select a choice from a lookup						
	open Options drop-down menu	create a file from a template and attach it to the document						
	<ul> <li>attach a doc/file from the Catalog</li> <li>edit the row</li> </ul>	<ul> <li>add a scanned or uploaded file to the Catalog; attach file to document</li> <li>open the Field Zoom window for editing and text formatting</li> </ul>						
	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 Lookup Date	date manually (in formats such as e date in a calendar. Date fields						
	have the $\overline{\mathbf{x}}$ ( $\overline{\mathbf{z}}$ ) icon next to them, for							
	DATE							
	When you click 🛄, a calendar appea							
	Change the month Su Mo Tu We Th Fr Sa	Change the year						
	through the drop- down list	through the drop- down list.						
	6 7 8 9 10 11 12 13 14 15 16 17 18 19							
	Click Today to 20 21 22 23 24 25 22	Click on a day to enter that date into						
	select today's date.	the date field.						

### 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: <u>ATC Scripts and Automatic</u> <u>Workflow</u>

The following articles have been added to the Knowledgebase:

<u>KBA-01561</u>: Cannot approve CCO with negative line amount if line would become overpaid

<u>KBA-01562</u>: Checking the Outbound Route Queue

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

<u>KBA-01564</u>: Overview of the PresetSearch Rule Group and Creating a Custom Tab

<u>KBA-01565</u>: Adding Information to the Login Page

<u>KBA-01566</u>: Customization of Filters

### **Contact Us**

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### Your Clients Area

Spitfire Project Management System Construction Project Management Software and Accounting Tools Home Industries Software Company Services

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<u>The Clients area on our website</u> includes links to our <u>documentation</u>, our <u>Knowledgebase</u>, our <u>forum</u>, our <u>downloads</u>, and a list of what's new in versions <u>4.2, 4.3</u> and <u>4.4</u>.

	Spitfire Project Management System Construction Project Management Software and Accounting Tools	Blog Clients
	Home Industries Software Company Services C	ontact
Clients-Only Area	Spitfire Clients Only Area	Send an email to Support
Documentation Training Services Downloads Khowledgebase	November 2013 newsletter is now availablet         Watch our training videos1           For all our past newsletter issues, go to the Newsletter page.         For other training information, go to the Training page.	What's New in sfPMS V4.4 Version Features for V4.3
Forum	Spitfire Project Management System V4.4 is now available! Spitfire Project Nanagement System Version 4.4 continues to focus on an improved user experience. Among other changes, in ERPS V4.4,	Version Features for V4.2
	There is better functionality on tablets, including iPads, Several icons and tabs have been improved, A pop-up totoful appears for new users, A dop-down menu allows for easier filtering of columns, Password security has been strengthered, Contact info cards can be opened from various locations, whereever a Contact name appears, Items can be edited in giview, Fight view, Figh	
	For a complete list of features, click on the link on the cisht column,	·····

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 <u>website</u>.

We also offer training videos from <u>the client area of our website</u> 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.
- <u>101C Basic Navigation Part 3</u>, [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
- <u>101G Basic Navigation Part 7</u>, [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.