SPITFIRE SOFTWARE® **sfNews** May 2014
Vol. VII, Issue 05

In This Issue

***Note**: Features mentioned in this newsletter are available in V4.4 of sfPMS.*

Next Client Webinar!

May 8, 1 PM EDT

All About Contacts

Join us to explore the Contacts Dashboard and the role capabilities that affect who can view, add and maintain Contact data.
Registration is free! To register, go to

https://www.eventbrite.com/event/11226561949

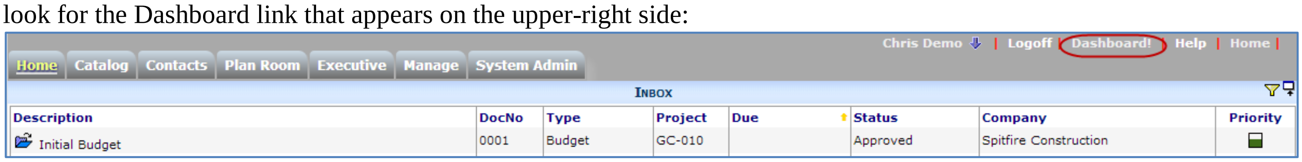
Register soon; tickets are limited!

Spitfire Q & A: Office-Integrated Dashboard

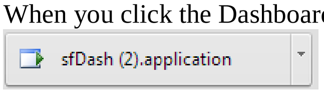
Q: What's the Office-Integrated Dashboard?

A: Now that people are using Spitfire on tablets or on their desktops using the Chrome browser, they can encounter the message that certain features require the "Office-Integrated Dashboard". Spitfire's Office-Integrated Dashboard is a proprietary browser that includes Microsoft Windows and Microsoft Office integration. Specifically, it includes the ability to automatically check out files from the Catalog and wait while they are being edited, then check those files back in. This functionality is not available for the Chrome browser. This means that if you are on a tablet, this Office-Integrated functionality is not available (and that is why we have made it easier to email files into the full system, as we described in our recent March issue).

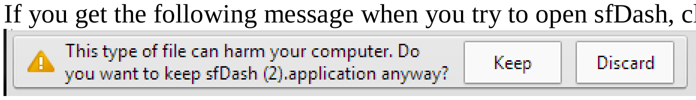
If you are on the Chrome browser on a Microsoft Windows desktop computer and need the Office-Integrated features, look for the Dashboard link that appears on the upper-right side:



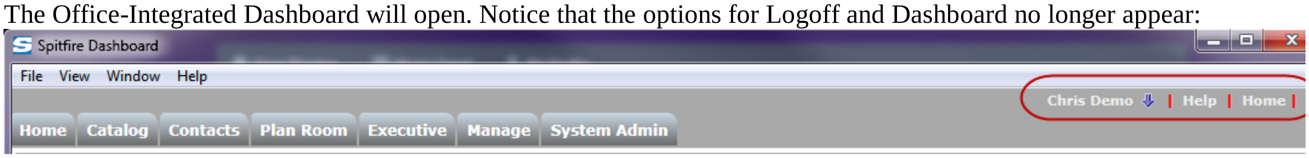
- When you click the Dashboard link, sfDash will download:



- If you get the following message when you try to open sfDash, click **Keep**.



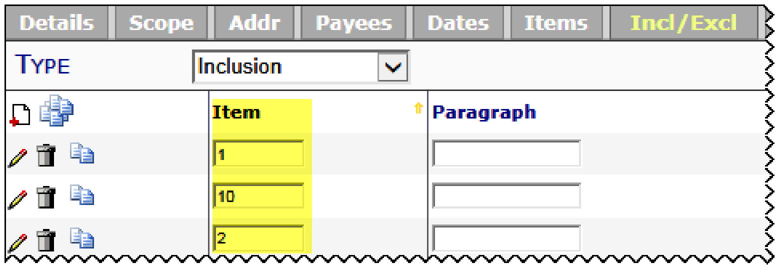
The Office-Integrated Dashboard will open. Notice that the options for Logoff and Dashboard no longer appear:



sfPMS provides a role capability **SYS | Require Spitfire Dashboard** that can be given to all users who should be transferred to the Office-Integrated Dashboard automatically upon login, provided that Microsoft Internet Explorer is the default browser on their desktops.

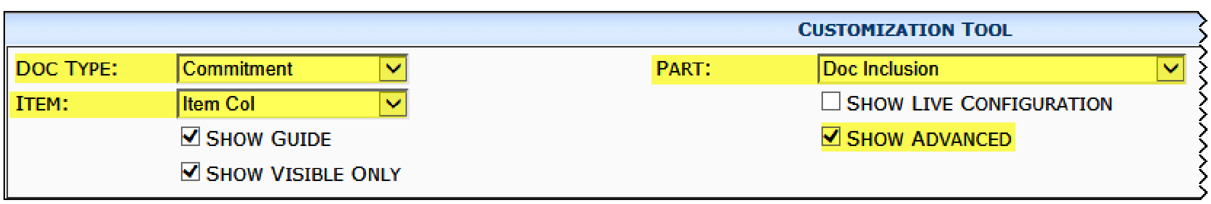
You Asked For It, You Got It: Better Numbers on Incl/Excl Tab

Q: Currently, the Item field on the Incl/Excl tab does not allow leading zeroes, so sorting on that column does not give us the results we want. Is there a way to configure that field?

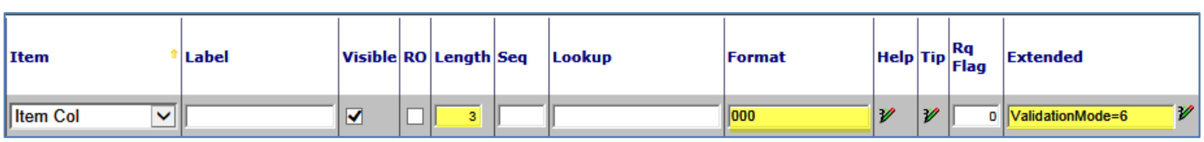


A: Yes, starting in V4.4.5203, you can configure this field as follows.

1. Go to the Customization tool on the System Admin Dashboard.
2. Select a **Doc Type** from the drop-down.
3. Select **Doc Inclusion** as the Part.
4. Select **Item Col** as the Item.
5. Make sure that **Show Advanced** is checked.

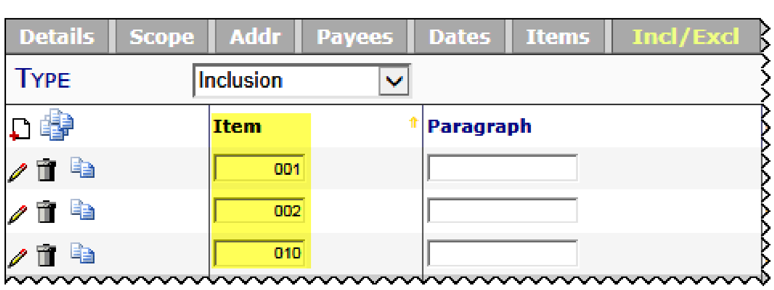


6. Click to add a new customization row.
7. Specify a **Length** for the Item Col.
8. Type an equal number of zeroes in the **Format** field.
9. In the Extended field, enter either **ValidationMode=5** (which allows for a decimal point) or **ValidationMode=6** (which allows whole numbers only). For example:



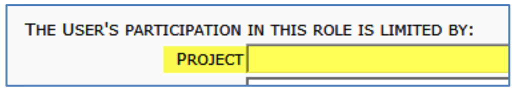
Note: if you want user to be able to change the number, keep **RO** blank; otherwise, if you want the system-generated number to remain read-only, check the **RO** checkbox.

10. Click ✓ to accept your customization, then to save. The next time you open the Incl/Excl tab on a document of the Doc type you just customized, you'll see that the Item field allows numbers with leading zeroes.



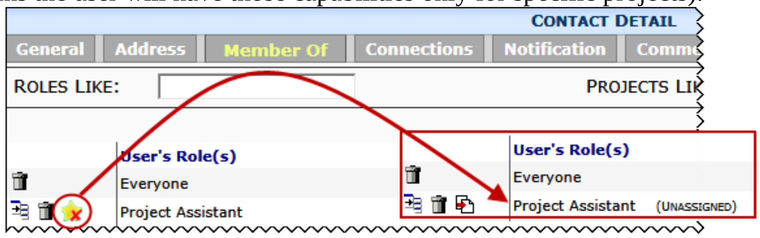
Feature Spotlight: Demoting and Promoting Roles

As you may know, roles that are limited by the project condition can be set to "global" by blanking out the Project field on a Contact's Member Of tab:



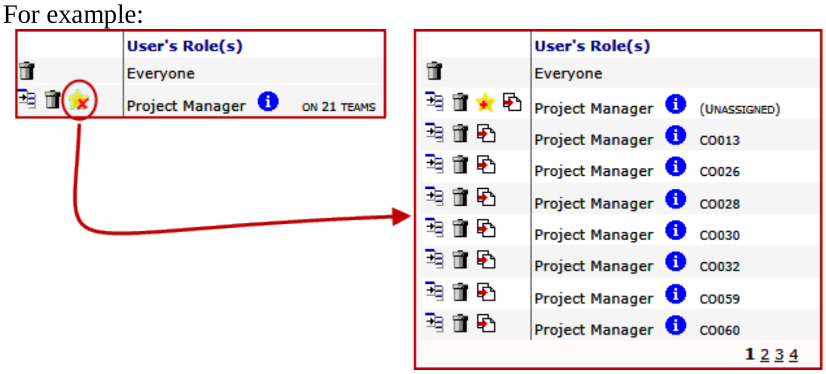
This means that the user will have that role's capabilities on all projects, even if the user is not part of a project's team.

A new icon on the Members Of tab on the Contact Detail now allows you to easily change a global role back to "unassigned" (which means the user will have those capabilities only for specific projects).

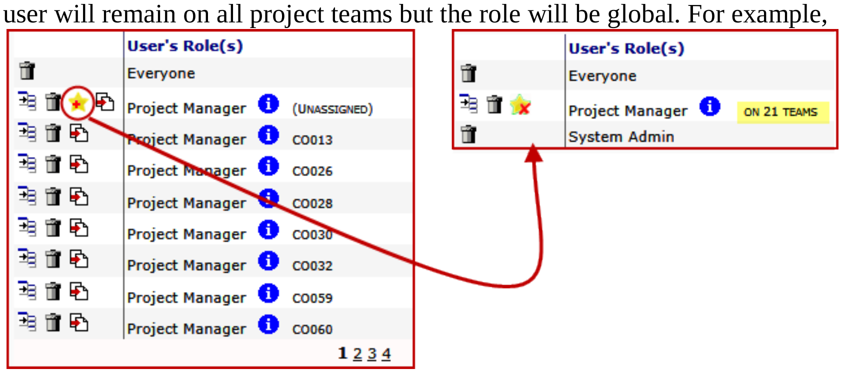


If the user has a global role and is also on specific project teams, the number of teams is noted.

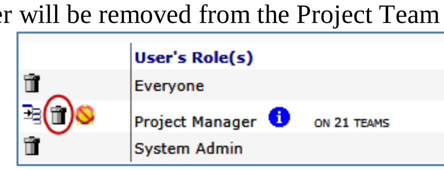
- Click and then to "demote" the role by removing its global attribute and create a project-specific role for each project. For example:



- Click and then to "promote" a project-specific role and make it global. If the user has this role on specific projects, the user will remain on all project teams but the role will be global. For example,



- If you want to actually remove a role from a user, click then . The role will be removed from the Member Of tab and the role for that user will be removed from the Project Team Contacts list.



Note: Project Managers that are synced from an integrated accounting system should be removed from the accounting system first.

Have You Read?

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

Focus on Alerts and Compliance

Focus on System Administration

Focus on the Manage Dashboard

The following articles have been added to the Knowledgebase:

KBA-01573: ATC Remote Tool

Reminder

All Spitfire offices will be closed on May 26 in observance of ***Memorial Day.***

Contact Us

7 Skyline Drive, Suite 350
Hawthorne, NY 10532

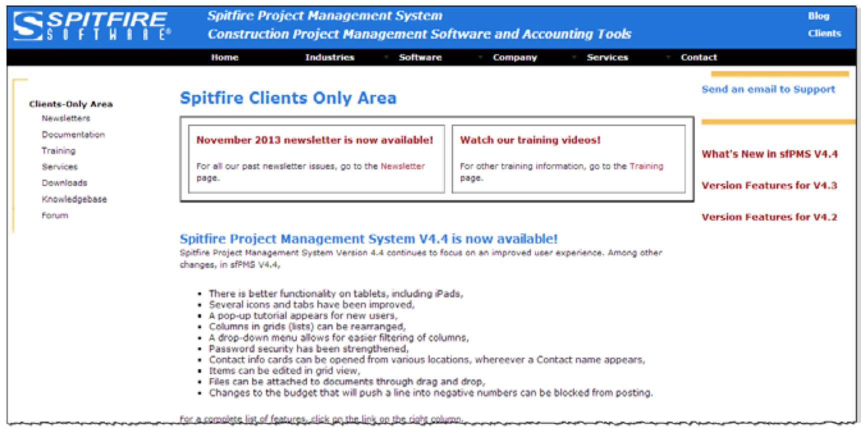
Phone:888-287-4603
Fax: 888-287-4603

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 4.2, 4.3 and 4.4.



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.