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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>

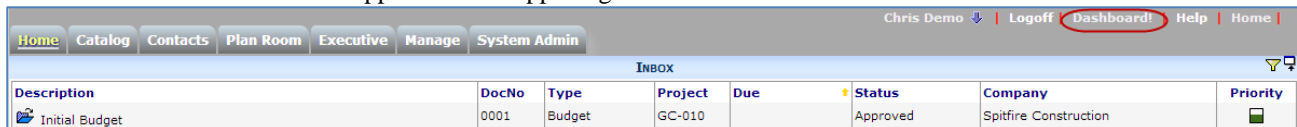
Register soon; tickets are limited!

Spitfire Q & A: Office-Integrated Dashboard

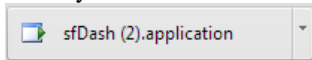
Q: What's the Office-Integrated Dashboard?

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).

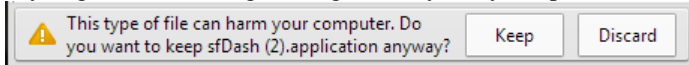
If you are on the Chrome browser on a Microsoft Windows desktop computer and need the Office-Integrated features, look for the Dashboard link that appears on the upper-right side:



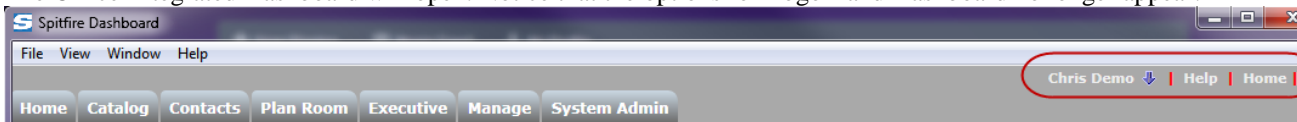
- When you click the Dashboard link, sfDash will download:



- 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?

Details	Scope	Addr	Payees	Dates	Items	Incl/Excl
TYPE		Inclusion				
		Item	Paragraph			
		1				
		10				
		2				

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.

CUSTOMIZATION TOOL	
DOC TYPE:	Commitment
PART:	Doc Inclusion
ITEM:	Item Col
<input type="checkbox"/> SHOW LIVE CONFIGURATION <input checked="" type="checkbox"/> SHOW ADVANCED <input checked="" type="checkbox"/> SHOW GUIDE <input checked="" type="checkbox"/> SHOW VISIBLE ONLY	

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:

Item	Label	Visible	RO	Length	Seq	Lookup	Format	Help	Tip	Rq Flag	Extended
Item Col		<input checked="" type="checkbox"/>	<input type="checkbox"/>	3			000			0	ValidationMode=6

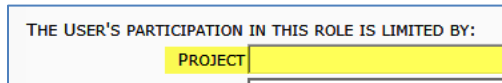
Note: if you want user to be able to change the number, keep **RO** blank; otherwise, if you want the system-generated number to remain read-only, check the **RO** checkbox.

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.

Details	Scope	Addr	Payees	Dates	Items	Incl/Excl
TYPE		Inclusion				
		Item	Paragraph			
		001				
		002				
		010				

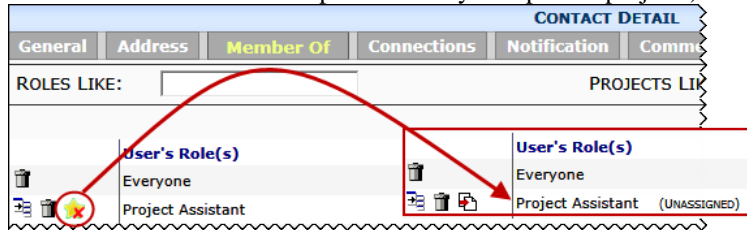
Feature Spotlight: Demoting and Promoting Roles

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:



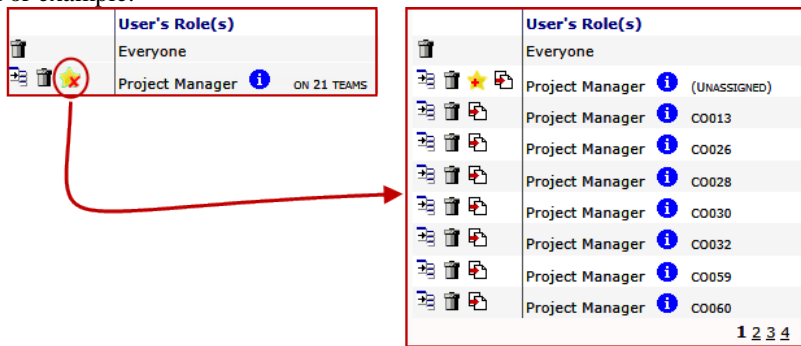
This means that the user will have that role’s capabilities on all projects, even if the user is not part of a project’s team.

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).

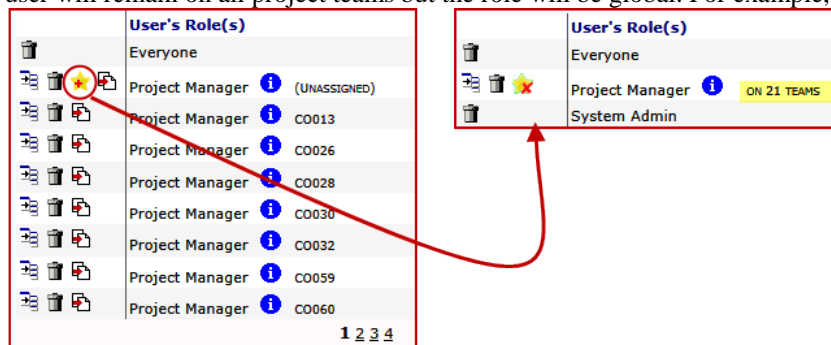


If the user has a global role and is also on specific project teams, the number of teams is noted.

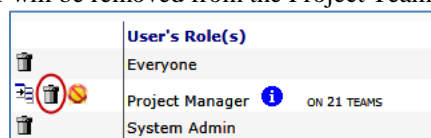
- Click and then to “demote” the role by removing its global attribute and create a project-specific role for each project. For example:



- 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.

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Your Clients Area

Spitfire Project Management System
Construction Project Management Software and Accounting Tools

Blog
Clients

Home Industries Software Company Services Contact

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.

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]