SPITFIRE SOFTWARE® **sfNews** June 2014
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***Note**: Features mentioned in this newsletter are available in V4.4 of sfPMS.*

Next Client Webinar!

June 12, 1 PM EDT

Leveraging BFA

Join us to review the features that help you get the most out of your basic BFA workbooks.
Registration is free! To register, go to

https://www.eventbrite.com/event/11539724627

Register soon; tickets are limited!

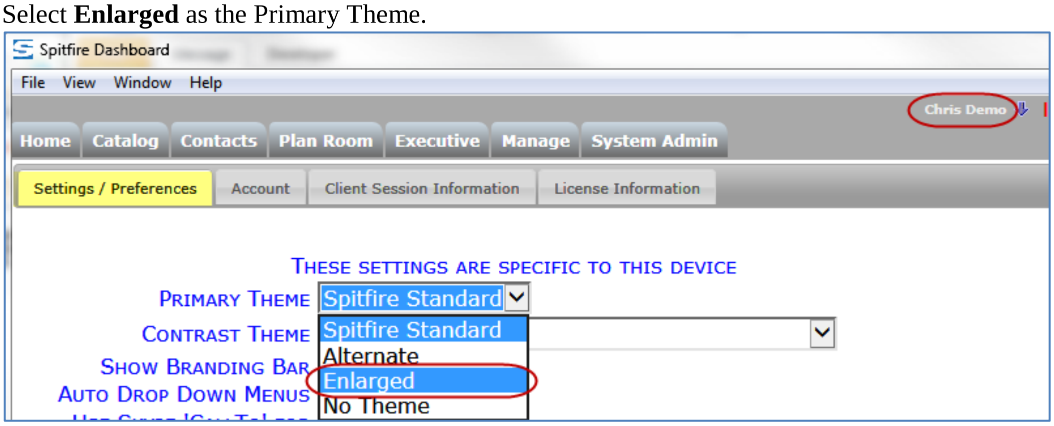
New Theme: Enlarged Text

NEW

Now (in V4.4) you can select a theme that will make most text bigger by 15%.

To select the new theme:

- Click on your name.
- Select **Enlarged** as the Primary Theme.



Standard Theme:

Description	DocNo	Type	Project	Due	Status	Company	Priority
Initial Budget	0001	Budget	GC-010		Approved	Spitfire Construction	
Adjustments from Paving and Asphalt	0002	Budget	GC-005		In Process	Spitfire Construction	
Adjustments from Electrical Work	0003	Budget	GC-005		In Process	Spitfire Construction	

Enlarged Theme:

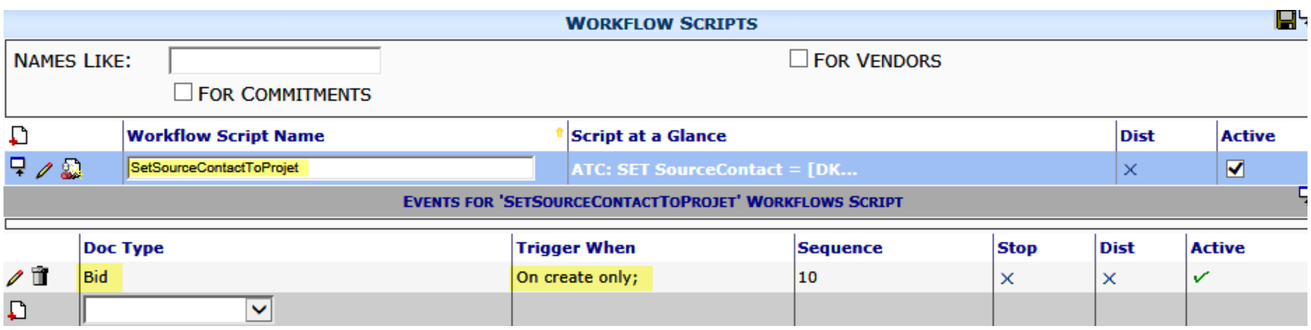
Description	DocNo	Type	Project	Due	Status	Company	Priority
Initial Budget	0001	Budget	GC-010		Approved	Spitfire Construction	
Adjustments from Paving and Asphalt	0002	Budget	GC-005		In Process	Spitfire Construction	
Adjustments from Electrical Work	0003	Budget	GC-005		In Process	Spitfire Construction	

Spitfire Q&A: Customer on Bid Document

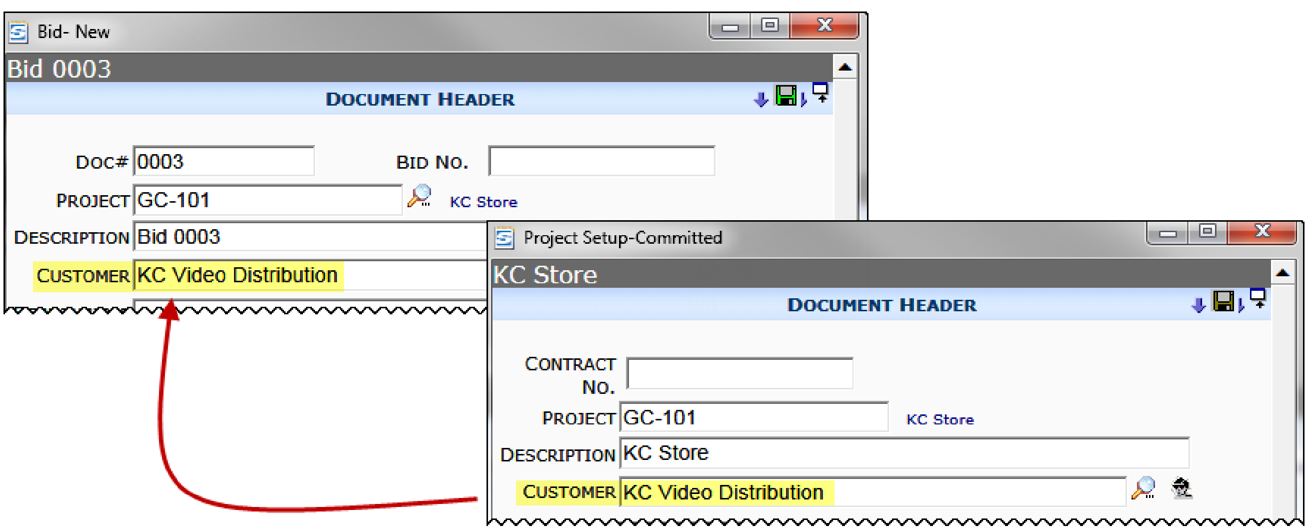
Q: We create Bid documents after we create projects. Is there a way to have the name of the customer, already on the Project Setup document, appear automatically on the associated Bid document?

A: Yes, you can set up a workflow script to do this.

1. Open the Workflow Scripts tool on the System Admin Dashboard.
2. Click to create a new workflow script.
3. Name your script with a descriptive name such as **SetSourceContactToProjectOwner** then click **.**
4. Click on the row to type in your script.
5. Type **ATC: SET SourceContact = [DKEY_DocHeader_ProjectSourceContact]**
6. Click to save and close the text editor window.
7. Click **t**o set the trigger event for this script.
8. Select the **Bid** Doc type (or whatever you call it) from the drop-down.
9. Click to create a new row.
10. Click in the **Trigger When** field then select **On Create**.
11. Click Ok
12. Click . You'll notice that Trigger When now says On create only;
13. Click to save the workflow script.

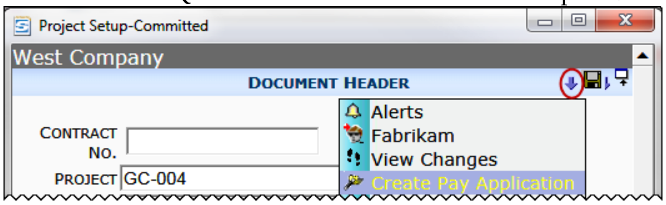


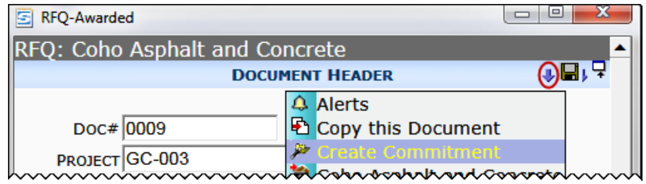
Now when you create a new Bid document, the Customer field will be populated with the company entered on the Project Setup document.



Feature Spotlight: New NextDocFlow Rules

Certain documents allow you to create a new document (of a different Doc type) from their drop-down options menu. For example, a committed Project Setup offers the **Create Pay Application** option and an awarded RFQ offers the **Create Commitment** option.

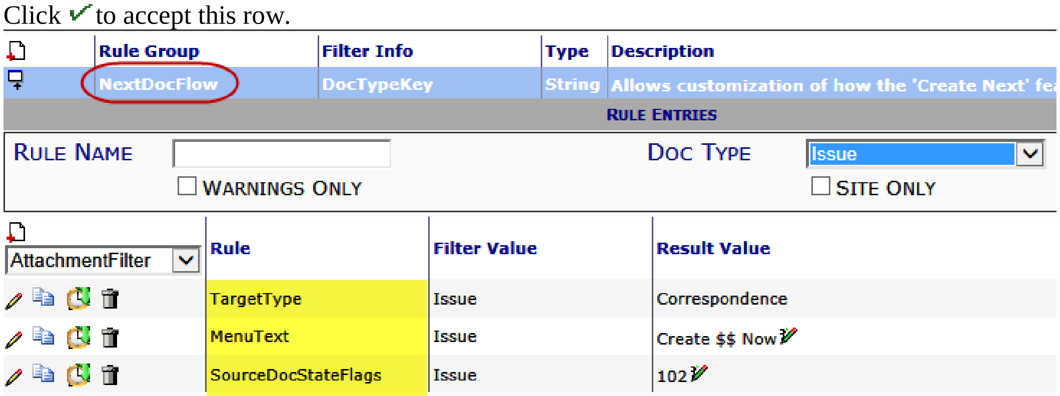




You can add the option to create a new document of a specific Doc type to the drop-down options menu of a source Doc types through some new NextDocFlow rules added to sfPMS V4.4.

To add a "Create New Doc Type" option:

1. Go to the Rules Maintenance tool on the System Admin Dashboard and expand the **NextDocFlow** rule group. You need to know the source Doc type (e.g., Project Setup or RFQ shown above) and target Doc type (e.g., Pay Application or Commitment shown above) that you want to set up.
2. Select the **TargetType** rule from the Rule Entries drop-down then click to add a new rule row.
3. In **Filter Value**, select your source Doc type. This is the Doc type that will offer the "Create New Doc Type" option.
4. In **Result Value**, select your target Doc type. This is the Doc type that will be created through the "Create New Doc Type" option.
5. Click to accept this row.
6. (*optional*) Select the **MenuText** rule from the drop-down then click to add a new rule row.
   a. In the Filter Value, select the same source Doc Type.
   b. In the Result Value, type the text that you want to appear as the menu option. By default (if you don't add this rule), the text will be **Create** ***$$*** where *$$* is replaced by your specified target Doc type in the **TargetType** rule.
   c. Click to accept this row.
7. (*optional*) Select the **SourceDocStateFlags** rule from the drop-down then click to add a new rule row.
   a. In the Filter Value, select the same source Doc Type.
   b. In the Result Value, enter a value that represents the document state during which the "Create New Doc Type" option will be enabled. Possible values (which can be combined) are
      002 = In Process
      004 = Pending
      032 = Closed
      064 = Approved (Awarded) – This is the default for most Doc types.
      102 = Any of the above – This is the default for all Submittal types, RFI and Commitments
   c. Click to accept this row.



8. Click to save your rules.

There are other optional rules in the **NextDocFlow** rule group. See KBA-01517 for more information.

Have You Read?

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

Focus on Contacts

Focus on Routes

TWP: *Spitfire Item Templates (for Via Excel)*

TWP: Data and Equipment Projects

The following articles have been added to the Knowledgebase:

KBA-01575: Reports open in Adobe Reader instead of Spitfire Report Browser

KBA-01576: System Availability Notification

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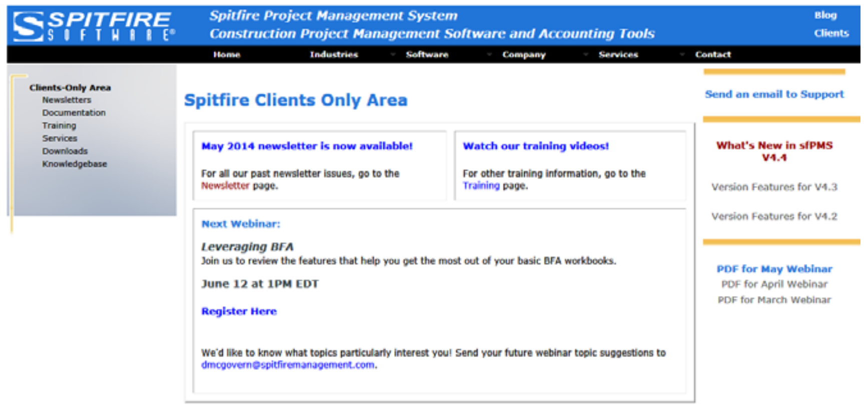
Your Clients Area

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.



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.