

In This Issue

[Next Client Webinar](#)

[New Theme: Enlarged Text](#)

[Spitfire Q&A: Customer on Bid Doc](#)

Feature Spotlight: New NextDocFlow Rules

[Have You Read?](#)

[Your Clients Area](#)

[Training Classes](#)

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!

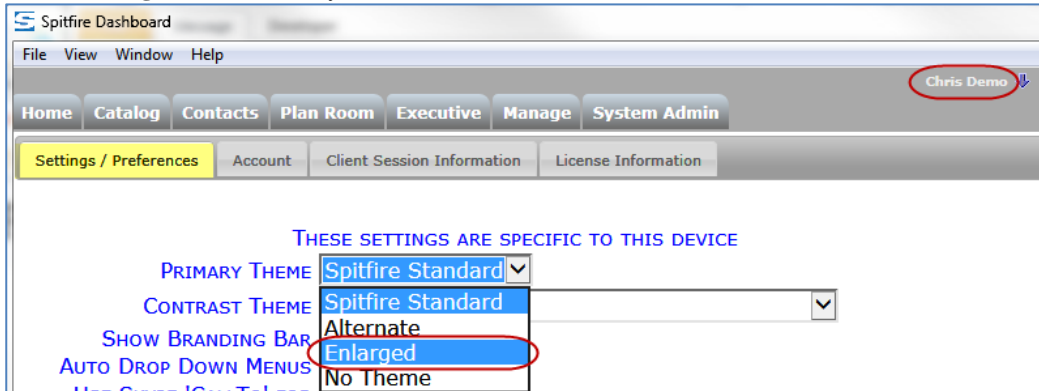
New Theme: Enlarged Text

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:

INBOX							
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:










INBOX							
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

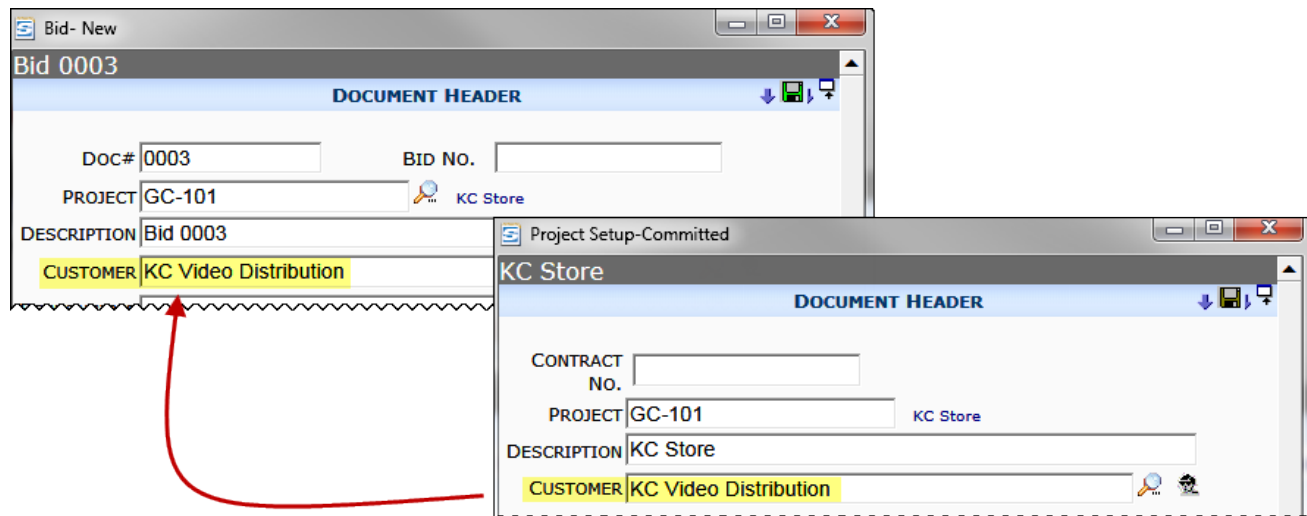
Q: We create Bid documents after we create projects. Is there a way to have the name of the customer, already on the Project Setup document, appear automatically on the associated Bid document?

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  to 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 
12. Click . You'll notice that Trigger When now says On create only;
13. Click  to save the workflow script.

WORKFLOW SCRIPTS						
NAMES LIKE:	<input type="text"/>			<input type="checkbox"/> FOR VENDORS		
	<input type="checkbox"/> FOR COMMITMENTS					
	Workflow Script Name	Script at a Glance	Dist	Active		
 	SetSourceContactToProjct	ATC: SET SourceContact = [DK...	X	<input checked="" type="checkbox"/>		
EVENTS FOR 'SETSOURCECONTACTTOPROJET' WORKFLOWS SCRIPT						
 	Doc Type	Trigger When	Sequence	Stop	Dist	Active
 	Bid	On create only;	10	X	X	<input checked="" type="checkbox"/>
 	<input type="text"/>					

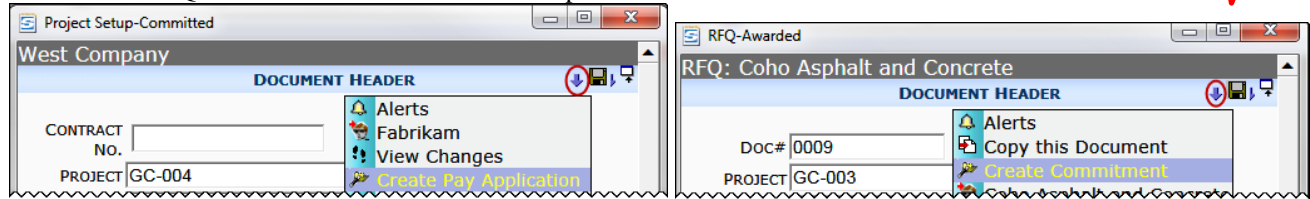
Now when you create a new Bid document, the Customer field will be populated with the company entered on the Project Setup document.



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.

Rule Group	Filter Info	Type	Description
NextDocFlow	DocTypeKey	String	Allows customization of how the 'Create Next' fe

RULE ENTRIES

RULE NAME: DOC TYPE:

WARNINGS ONLY SITE ONLY

AttachmentFilter	Rule	Filter Value	Result Value
	TargetType	Issue	Correspondence
	MenuText	Issue	Create \$\$ Now
	SourceDocStateFlags	Issue	102

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



Contact Us

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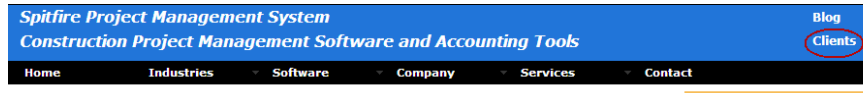
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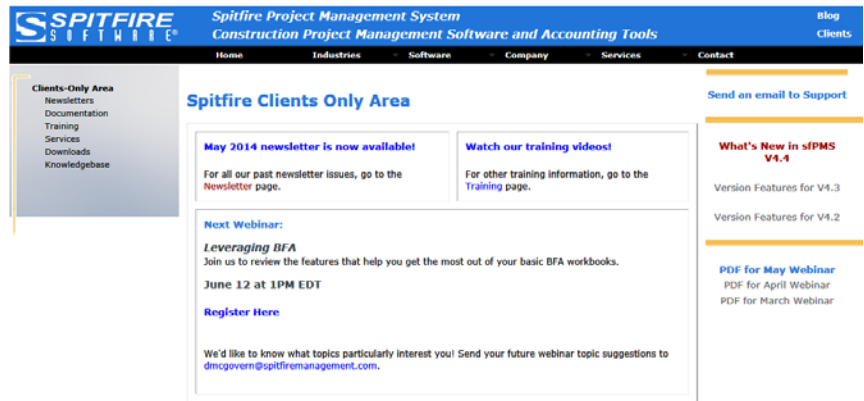
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Your Clients Area



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.

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]