SPITFIRE SOFTWARE®

# sfNews

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***Note**: Features mentioned in this newsletter are available in V4.4 unless V4.5 is indicated.*

## Next Client Webinar!


**September 10 or 11, 1 PM EDT**

***A First Look at V4.5!***

Join us to learn about the new features and functionality of sfPMS V4.5. Registration is free! This webinar will be offered twice. To register for a specific date, go to

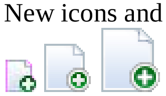
[For Sept. 10] https://www.eventbrite.com/event/12633971549

[For Sept. 11] https://www.eventbrite.com/event/12207487925

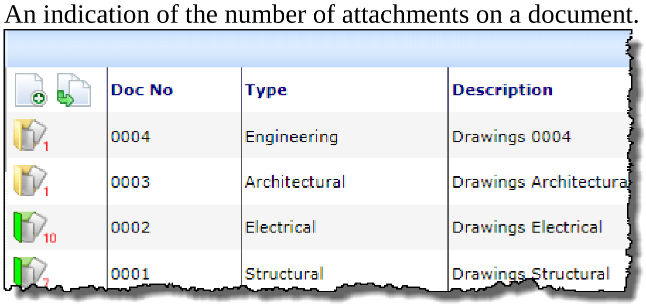
## It's Here: sfPMS V4.5!

Version 4.5 of the Spitfire Project Management System is now available. Remember to register for one of our webinars to learn all about the new features, which include:

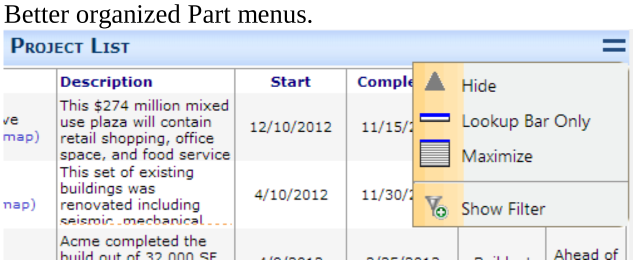

- New icons and a choice of icon size on different devices.



- An indication of the number of attachments on a document.




- Forwarding of email responses on a Spitfire document to your email client.
- Ability to see a document on the Project Dashboard that has been routed to you via email.
- Confidentiality for files on Confidential documents.
- Better organized Part menus.

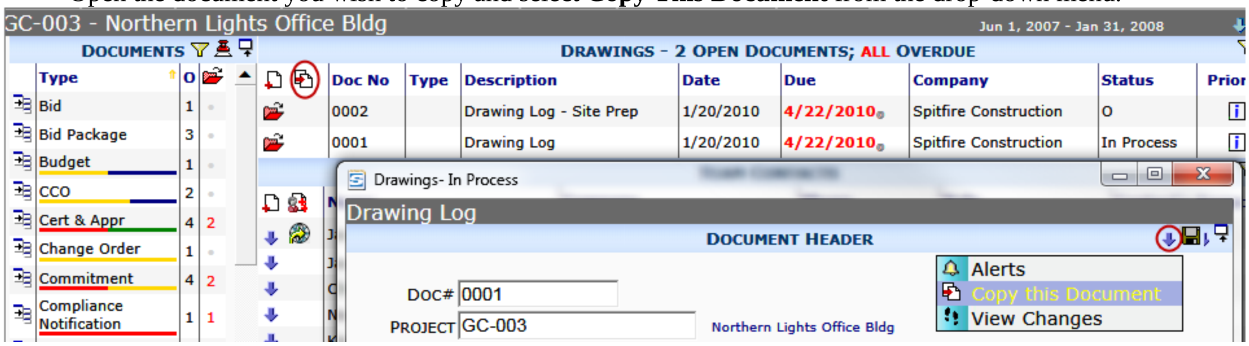



- Ability to expand a part up to 100 lines (that's the Maximize option above).
- More grid editing on the Attachments and Route Detail tabs.
- Easier viewing of the email that will be sent out to Via Email routees.
- More control over new documents created from a document's drop-down options menu.
- And more!

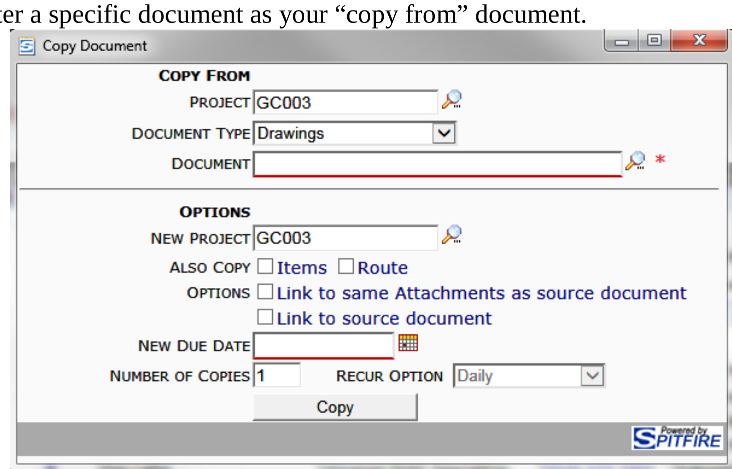
# Feature Spotlight: Copying Documents

Although Spitfire documents can be copied through ATC scripts and workflow, you can also copy documents as needed. To start either:

- Select the desired Doc type on your Project Dashboard, then click on the document part
  -or-
- Open the document you wish to copy and select **Copy This Document** from the drop-down menu.

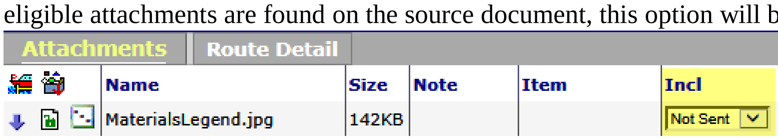



The Copy Document window will appear. The Copy From section will be populated with the current project ID and the Doc type. If you open the window from a specific document, the Document field will also be populated. Otherwise, you will need to look up or enter a specific document as your "copy from" document.




You can indicate several choices in the Options section:

- **New Project**: If you want your new document to belong to a project other than your current project, look up or enter a different Project ID.
- **Also Copy Items / Route**: If you want all the Items on your source document to be copied, click the Items checkbox. Likewise, if you want all the routees on the source document to be copied, click the Route checkbox.
- **Link to same Attachments as source document:** If you want the same Attachments on the source document to appear on the new document, click the checkbox.
  **Note**: This provides another access point to the same files, not to new copies of the files (so changes to a file in the one document will be seen in the file on the other document).
  **Important Note**: Files that are "Not Sent" in the source document cannot be linked to the new document. If no eligible attachments are found on the source document, this option will be disabled.




- **Link to source document:** If you want the source document to appear as an attachment on the new document, click this checkbox.
- **New Due Date:** If you want to indicate a Due date or the new document, select the date.
- **Number or Copies:** If you want to copy the document more than once, change the number.
- **Recur Option:** If you indicated more than 1 copy, indicate the interval to be used for the due date of each copy of the document (i.e., by how many days to advance each Due date).

# Spitfire Q&A: Creating Pay Applications

**Q: Why is the “create new doc” icon disabled for Pay Applications? I need to create a new Pay Application.**

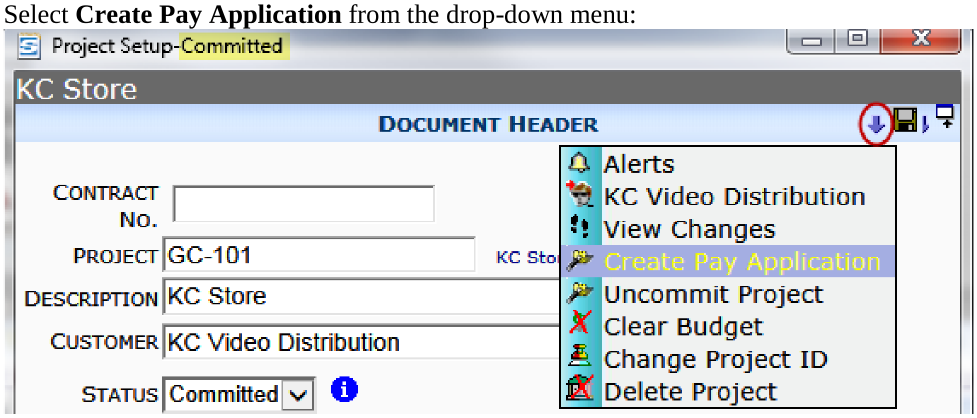
A: When you select Pay Application on your Project Dashboard, indeed the icon normally used to create a new document is disabled.


This is because the first Pay Application document is created directly from the Project Setup document and subsequent Pay Application documents are created from the previous Pay Application document, forming a chain.

**To create the first Pay Application document for a project:**

**[Prerequisite:** The Project Setup document must have a status of **Committed**.]

1. Click to open your Project Setup document.
2. Select **Create Pay Application** from the drop-down menu:

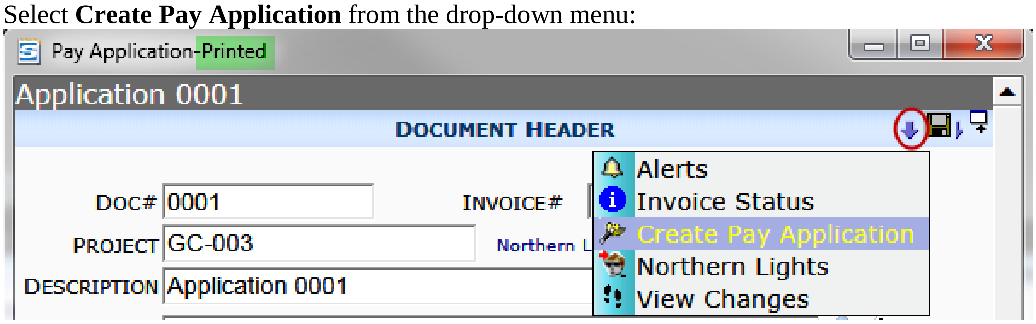



A new Pay Application document, with some information from the Project Setup, will open.

**To create a second, third, fourth, etc. Pay Application document for a project:**

**[Prerequisite:** The current Pay Application document must have a status of **Printed** or **Invoiced**.]

1. Open your current Printed or Invoiced Pay Application.
2. Select **Create Pay Application** from the drop-down menu:




The next Pay Application document, with information from the previous Pay Application and its SOV workbook, will open.

It is also possible to create multiple chains of Pay Applications. See the *Focus on Schedule of Values (SOV) Billing* guide for more information. See also the Pay Application chapter in the *Focus on Doc Types and Project Workflow* guide.

# Have You Read?

The following focus guides and technical white papers have been reviewed and updated, if necessary, for V4.4 since August 1:

*Focus on Schedule of Values (SOV) Billing* [new info]

*Focus on the BFA Workbook* [new info]

TWP: *Hard Copies of Spitfire Documents and Attachments* [same as V4.3]

TWP: *Setup for Spitfire's Plan Room* [same as V4.3]

The following article has been added to the Knowledgebase:

KBA-01578: Changing the message on the new user Welcome Task document

**Remember To Register For Our Next Webinar**

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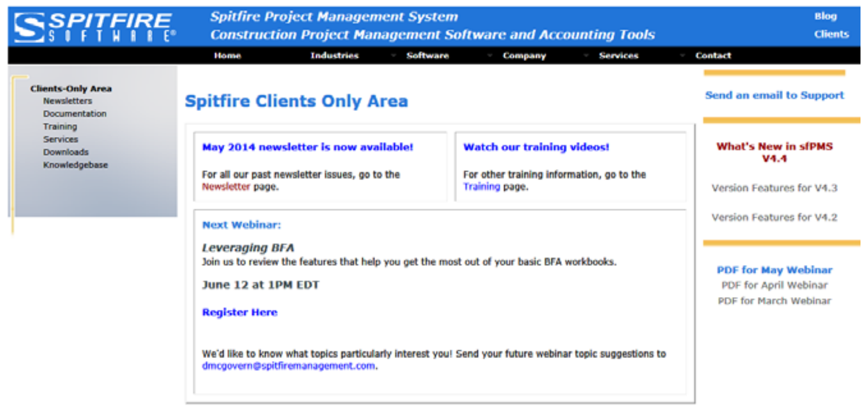
# Your Clients Area


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.