SPITFIRE SOFTWARE®

sfNews

November 2014
Vol. VII, Issue 11

In This Issue

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

Next Client Webinar!

November 13 at 1 PM EST

Secrets to Creating a Great PAPT

Join us to learn all how you can best create a Pay Application Print Template to use with your SOV workbook.

[Register at Eventbrite](#).

Register soon—it's free and tickets are limited!

You Asked For It, You Got It: Capability Filter for Roles

Request: Can there be an easy way to see what role has a particular capability when you are in the Role tool?

A: Yes! Although this information has long been available through the **Admin | User Capability Detail** report, there is now (in sfPMS V4.5) an easier way to find which role or roles include a particular capability.

NEW

1. Open the Roles tool on the System Admin Dashboard.
2. If necessary, click = to open the part menu, then select **Show Filter**.
3. Select a capability from the **Has** filter drop-down menu.

Example:

ROLE LIST

ROLE LIKE: [ ] TYPE: Primary
HAS: Attach existin

Role Name	Description	Conditions	Conditions Optional	Active	Member Count
Accounting	Accounting	✗ ✓ ✗ ✗ ✗	✓	✓	2
Cataloger	Cataloger	✗ ✗ ✗ ✗ ✗	✓	✓	1
Project Manager	Project Manager	✓ ✗ ✗ ✗ ✗	✓	✓	6
Project Staff	Project Staff	✓ ✗ ✗ ✗ ✗	✓	✓	7
Subcontractor	Subcontractor	✓ ✗ ✗ ✗ ✗	×	✓	1

Displaying 5 of 7 roles that include PAGE:Attach existing Files and sfDocs to Documents

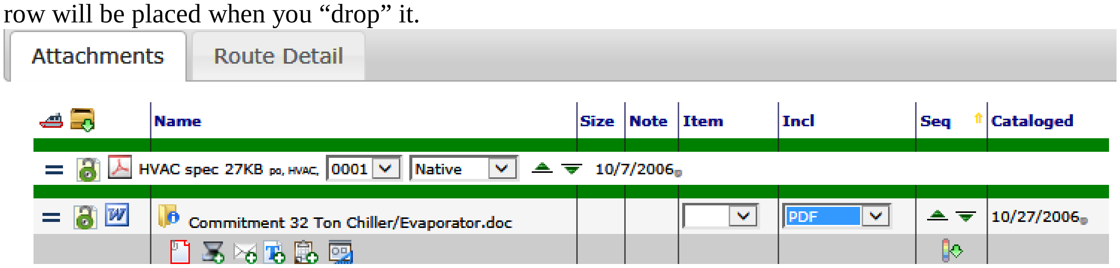
Note: 5 of the 7 roles are shown above; the other 2 roles are Subordinate and would appear if the Type filter = "Subordinate" instead of "Primary".

Feature Spotlight: Reordering Routes and Attachments

sfPMS V4.5 offers an easier way to reorder the rows on the Route Detail tab and the Attachments tab. In both cases, you can use the mouse to select, drag and drop.

To re-sequence rows in the Attachments tab:

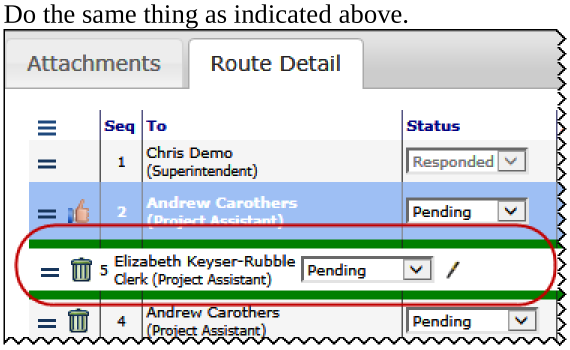
1. Move your mouse to the first column in the Attachments tab. You'll see the cursor change to a double-headed arrow such as .
2. Left-click the mouse on the row you want to move and keep pressing the mouse button.
3. Drag the row to where you want it. While you are moving the row, a green background will indicate where the row will be placed when you "drop" it.

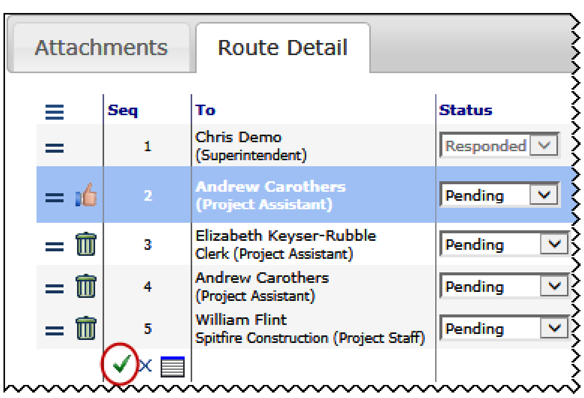


4. Release the mouse button when the row is positioned correctly.
5. After you move all the rows you want to move, click at the bottom of the Attachments tab.
6. Click to save the document and keep the new sequence.

To re-sequence rows in the Route Detail tab:

- Do the same thing as indicated above.





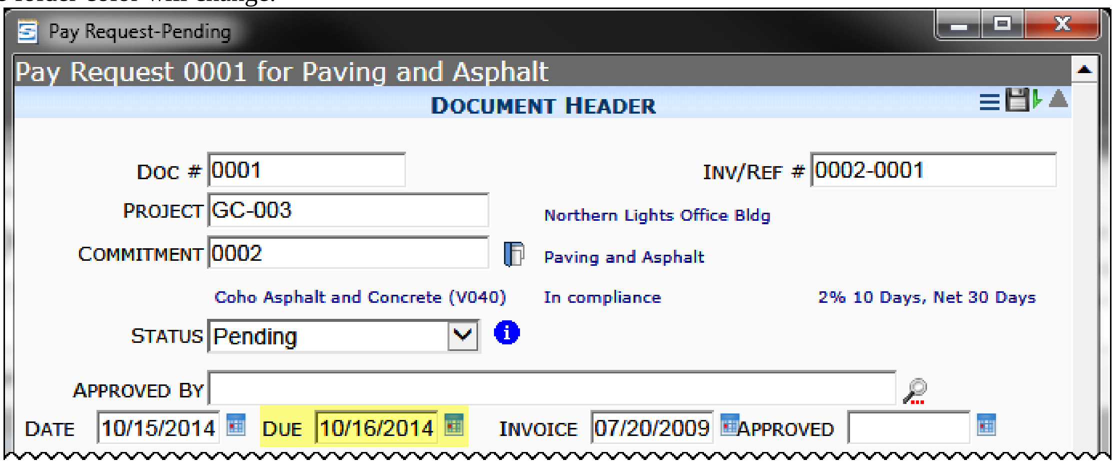
- **Note**: If it seems logical to do so, sfPMS will change the sequence number of the row. If the number is not what you want, you can change it by editing the row. (Click = on the row to get to the Edit option.)

Note: the curser will change to whenever you mouse over the first column, even if you do not intend to move the row. Use the curser as you would normally to click on icons.

Spitfire Q&A: Why Do Folders Turn Red?

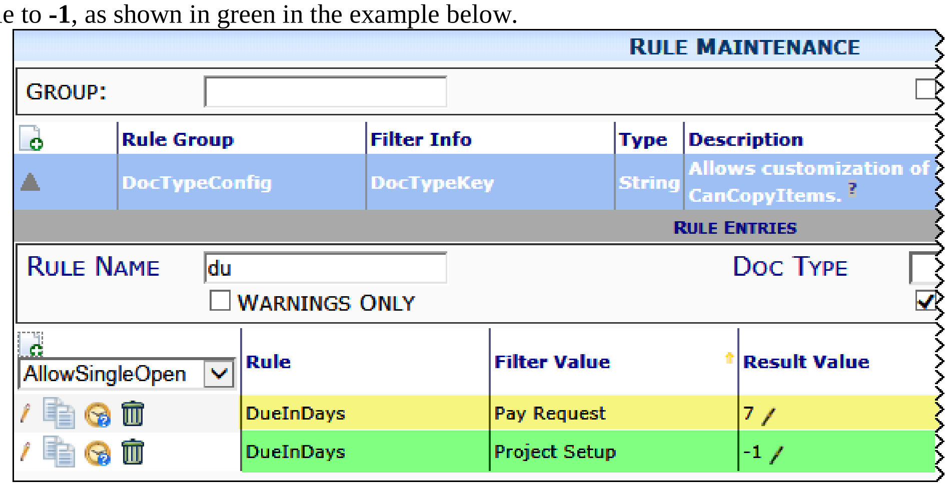
Q: I know that the folder icon used to open a document turns red when the document is overdue, but what determines when it is overdue? Can I prevent it from turning red?

A: The  icon is totally controlled by the Due date on the document. Once the current date passes the Due date, the folder turns red. If you change the Due date to some day in the future, or close/approve the document (to make it read-only), the folder color will change.



Often, the Due date on a new document is populated with “the next day”. You can, and should, change this Due date if a different date is more appropriate. You can also set up default due dates for different Doc types through the **DocTypeConfig | DueInDays** rule, as shown in yellow in the example below.

If the Doc type does not require a Due date, and you don’t want that Doc type to ever be overdue, set the **DocTypeConfig | DueInDays** rule to **-1**, as shown in green in the example below.



Some Doc types, by default, do not show the Due date field. If a Doc type is showing up with  and does not show the Due date field, you have two choices. Either

- Make the Due date visible through the Customization tool (Part = **Doc Header – Standard**, Item = **Due Date**) so that you can change the Due date as needed, or
- Set the **DocTypeConfig | DueInDays** rule to **-1** as explained above.

Note: You can use the **ATC: CLOSE** script command in an automatic workflow to close documents after a period of time. Closed documents show up with the  icon and never go back to .

For more information about ATC scripts, see the *ATC Scripts and Automatic Workflow* technical white paper. For more information about the Rule Maintenance and Customization tools, see the *Focus on System Administration* guide.

Have You Read?

The following focus guides and technical white papers have been reviewed and updated, if necessary, for V4.5 since October 1:

Focus on Alerts and Compliance [new info]

Focus on Contacts [new info]

Focus on Routes [new info]

The following article has been added to the Knowledgebase:

KBA-01583: Numeric Subtotal ID Causes PAPT Error

Happy Thanksgiving to All!

As a reminder, our offices will be closed on November 27 and 28.

Contact Us

7 Skyline Drive, Suite 350
Hawthorne, NY 10532

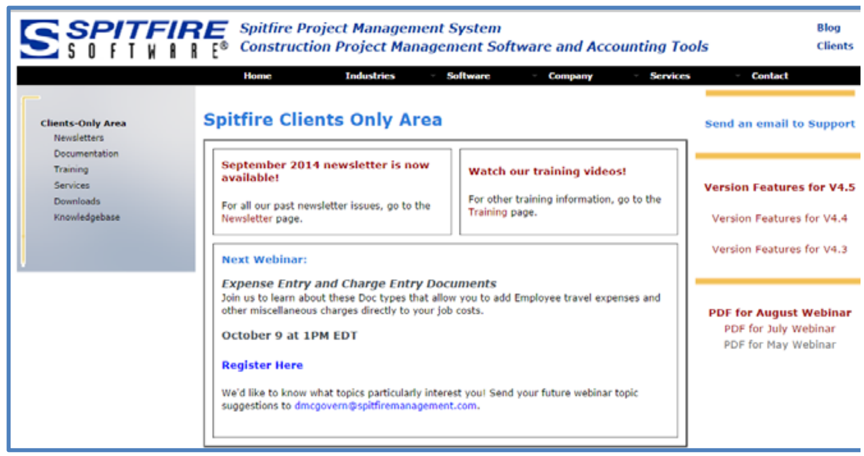
Phone: 888-287-4603
Fax: 888-287-4603

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 4.3, 4.4 and 4.5.



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.