SPITFIRE SOFTWARE®

sfNews

December 2014
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In This Issue

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

Next Client Webinar!

December 11 at 1 PM EST

Via Excel Basics & Creative Uses

Join us to review the basics of how to create templates for the Via Excel option for Items and to see examples of more advanced templates used in creative ways.

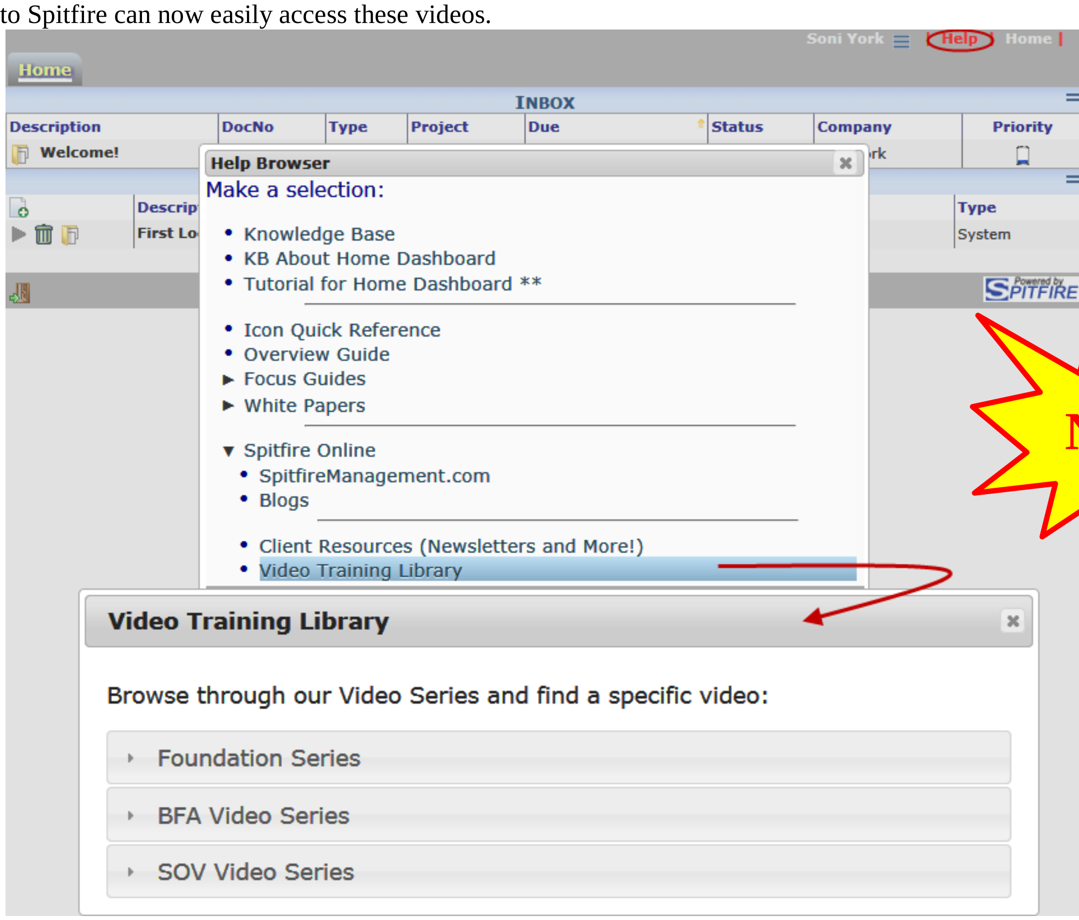
[Register at Eventbrite].

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

You Asked For It, You Got It: Better Access to Training Videos

Request: Can the training videos be available to people who don't have or who don't remember their login and password to the Clients-only section of the website?

A: Yes! We have made all our training videos available right from the Spitfire Help menu in sfPMS V4.5. Anyone who can log into Spitfire can now easily access these videos.



Feature Spotlight: Configuring Your KPI

In sfPMS V4.5, the Customization tool includes items for all the rows and columns in the Key Performance Indicator (KPI) part of the Project Dashboard. In addition, there are two rows in each of the three default columns (and two more columns) that can be made visible, relabeled and used for information not currently in the KPI.

KEY PERFORMANCE INDICATORS

Contracts & Budgets		AR Summary		Project Cash Flow		Column 4	Column 5
Original Contract	$750,000	KPI Space 21	$0	Billed to Date	$15,500		
Posted CO	$0	**AGED AR**		Less Open AR	$13,800		
Current Contract	$750,000	Under 30	$0	Less Retention	$1,550		
Unposted CO	$0	30 - 60 Days	$0	**CASH IN**	$150		
Original Commitment	$46,354	60 - 90 Days	$0	KPI Space 31	$0		
Approved CCO	$8,419	Over 90	$13,800	AP Cost to Date	$13,759		
Current Commitment	$54,773	**TOTAL**	$13,800	Less Open AP	$5,350		
Pending Commitment	$1,200	KPI Space 22	$0	Less Retention	$325		
Approved Pay Request	$5,350	**UNBILLED**		AP Cash Out	$316		
Commitment Remaining	$36,153	Under 30	$0	Other Cash Out	$26,373		
Original EAC	$575,000	30 - 60 Days	$0	**NET CASH FLOW**	($26,539)		
Current EAC	$575,000	60 - 90 Days	$0	KPI Space 32	$0		
Actual + Committed Cost	$74,800	Over 90	$3,053	Cash Conversion	$52,196		
Current FAC	$575,000	**TOTAL**	$3,053	Cash Funding	$13,443		
Variance	$0			**NET CASH DEMAND**	$38,753		
Percent Spent	13 %						
Earned Income	$52,346						
Over/Under Billed	$36,846						
Backlog	$162,786						
KPI Space 11	$0						
KPI Space 12	$0						

By using the Customization options (especially **Visible**, **Label**, **Seq**, **Format** and **Extended**) on each item, you can change the look of your KPI. For example :

CUSTOMIZATION TOOL

PART: Project KPI ITEM:

☐ SHOW LIVE CONFIGURATION ☑ SHOW VISIBLE ONLY

Part Name	Doc Type	Context	Capability	Item	Label	Visible	RO	Length	Seq	Lookup	Format	Help	Tip	Rq Flag	Extended
Project KPI				Actual + Committed	Actual + Committed Cost	✓	✓		65		C0			0	Col=4
Project KPI				Contract Col	Contracts	✓	✓		1		hide			0	Col=1;CSS=clsKPIHeader
Project KPI				Current EAC	Current EAC	✓	✓		60		C0			0	Col=4;CSS=clsKPILabelBold
Project KPI				Forecast at Completion	Current FAC	✓	✓		70		C0			0	Col=4
Project KPI				KPI Column 4	Budgets	✓	✓		4		hide			0	Col=4;CSS=clsKPIHeader
Project KPI				Original EAC Budget	Original EAC	✓	✓		55		C0			0	Col=4
Project KPI				Percent Spent	Percent Spent	✓	✓		80		P0			0	Col=4
Project KPI				Variance		✓	✓		75		C0			0	Col=4

shows up as:

KEY PERFORMANCE INDICATORS

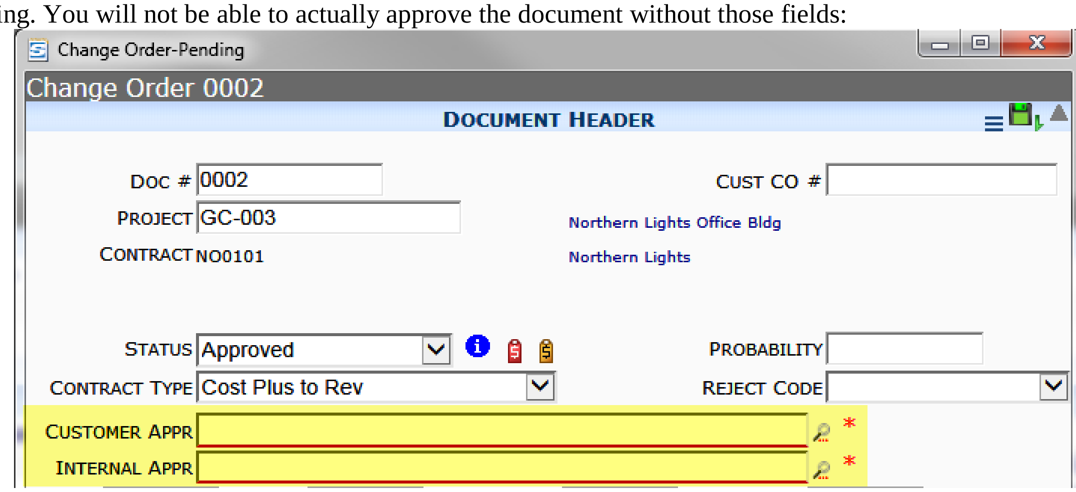
Contracts		AR Summary		Project Cash Flow		Budgets	
Original Contract	$750,000			Billed to Date	$15,500	Original EAC	$575,000
Posted CO	$0	**AGED AR**		Less Open AR	$13,800	**CURRENT EAC**	$575,000
Current Contract	$750,000	Under 30	$0	Less Retention	$1,550	Actual + Committed Cost	$74,800
Unposted CO	$0	30 - 60 Days	$0	**CASH IN**	$150	Current FAC	$575,000
Original Commitment	$46,354	60 - 90 Days	$0			Variance	$0
Approved CCO	$8,419	Over 90	$13,800	AP Cost to Date	$13,759	Percent Spent	13 %
Current Commitment	$54,773	**TOTAL**	$13,800	Less Open AP	$5,350		
Pending Commitment	$1,200			Less Retention	$325		
Approved Pay Request	$5,350	**UNBILLED**		AP Cash Out	$316		
Commitment Remaining	$36,153	Under 30	$0	Other Cash Out	$26,373		
Earned Income	$52,346	30 - 60 Days	$0	**NET CASH FLOW**	($26,539)		
Over/Under Billed	$36,846	60 - 90 Days	$0				
Backlog	$162,786	Over 90	$3,053	Cash Conversion	$52,196		
		TOTAL	$3,053	Cash Funding	$13,443		
				NET CASH DEMAND	$38,753		

For more specific information, see [KBA-01585](KBA-01585).

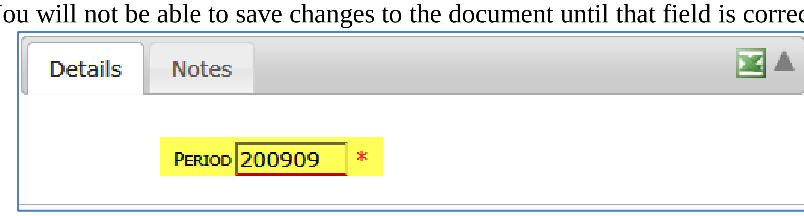
Spitfire Q&A: The Red Asterisk

Q: Why do red asterisks sometimes appear on my documents?

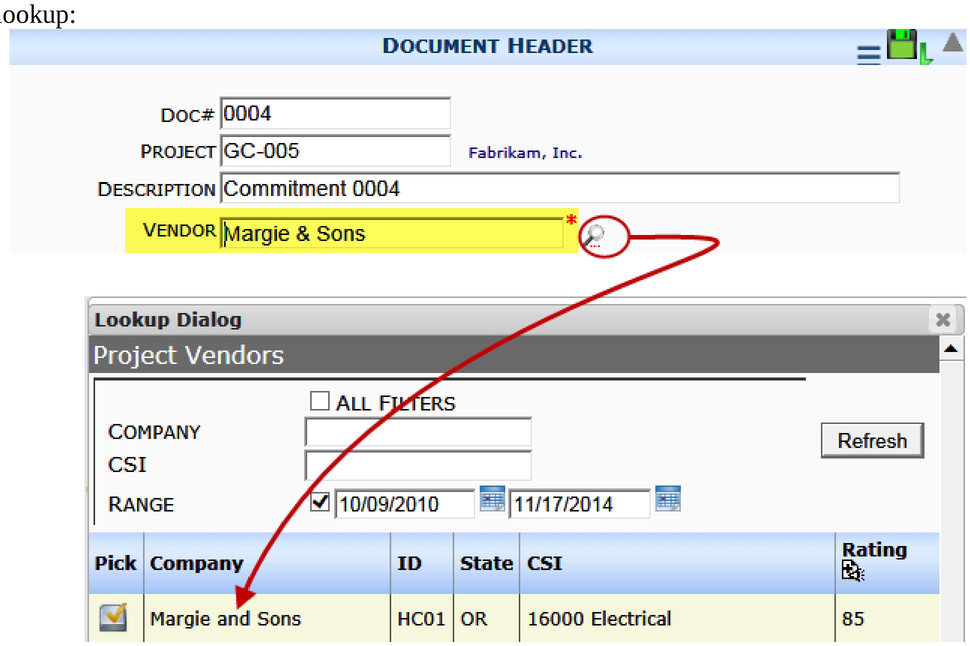
A: A red asterisk means that the field is invalid as is, so you need to fill in or correct that field. For example, when it is time to approve a Change Order, the Customer Approver and Internal Approver fields must contain names of a person or company. If you change to an **Approved** status on the document without filling in those fields, red asterisks will appear as a warning. You will not be able to actually approve the document without those fields:



Another example is the red asterisk appearing next to the **Period** field on a document's Details tab when the date in the field is out of range. You will not be able to save changes to the document until that field is corrected:



As a third example, a red asterisk will appear if a name that you type into a field does not match any name in the corresponding lookup:



Have You Read?

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

Focus on the BFA Workbook
[updated pics only]

Focus on Batch Processing
[updated pics only]

Focus on Document and Item Basics
[updated pics only]

The following articles have been added to the Knowledgebase:

KBA-01584: What are the default filters on the Contacts Dashboard?

KBA-01585: Configuring the Project Key Performance Indicator Part

To All Our Clients:

As a reminder, our offices will be closed on December 25 and January 1.

Contact Us

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Support:
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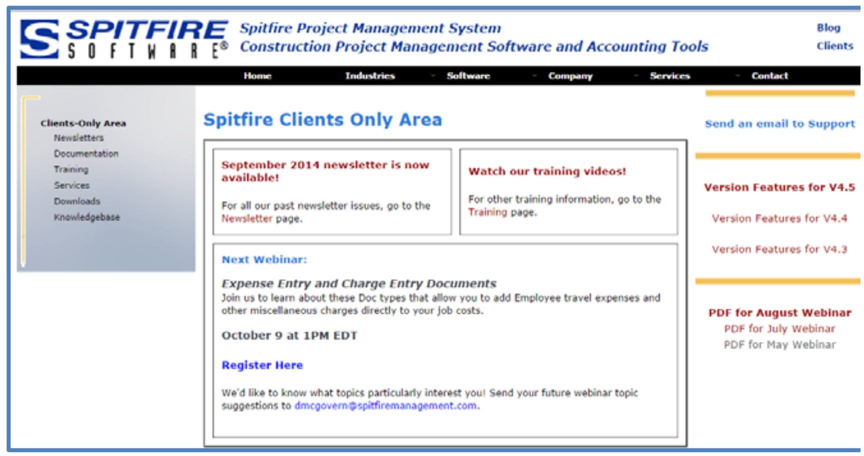
Your Clients Area

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 4.3, 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.