Technical White Paper

Hard Copies of Spitfire Documents and Attachments

This Technical White Paper is designed for Spitfire Project Management users. It describes best practices in dealing with Hard Copy routees (i.e., those people who need to receive printouts of Spitfire documents and related attachments).

Version 4.6

Revision Number: 4.6.03.30.2016

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Introduction

This white paper describes best practices in dealing with your Hard Copy routees (i.e., those people who need to receive printouts of Spitfire documents and related attachments).

This white paper assumes you have a basic understanding of sfPMS in general and Spitfire routing in specific. If not, please read the *Overview Guide* and the *Focus on Routes* guide first. The *Focus on Document and Item Basics* guide also could be helpful.

All documentation referred to within this white paper can be found on the Spitfire Help menu.
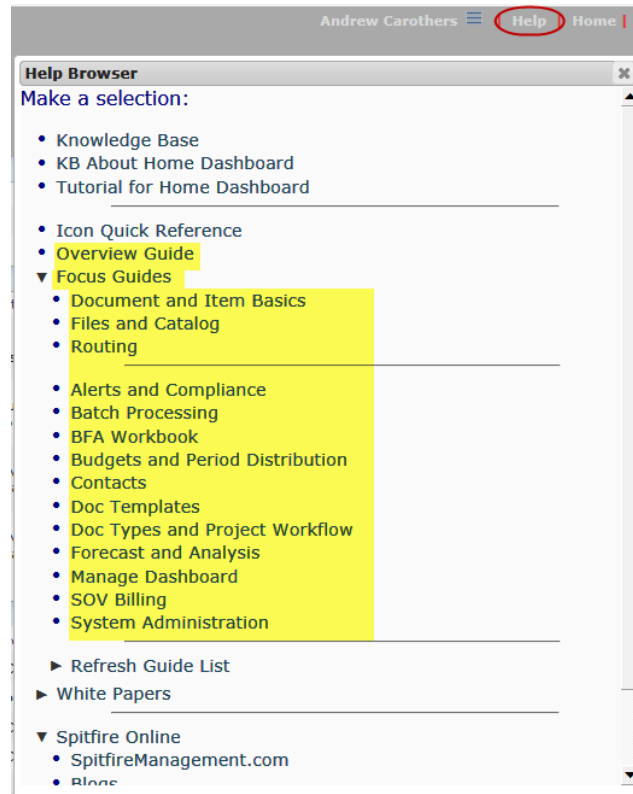
Note: text, sections and chapters that are new or changed from the V4.5 documentation appear with **green headers** and sometimes an *. Also, icons are shown in size 16 only; larger icons are similar but not identical to size 16.

Concepts

Spitfire documents can be seamlessly routed to other people in various ways:

- **Via Web** – Spitfire documents are routed to the routee's Spitfire Inbox. Attached files appear on the document's Attachment tab.

- **Via E-mail** – Spitfire documents are converted into Microsoft Word printout files (through Attachment templates) and attached to the Spitfire document. All designated attachments are then either sent as attachments on emails to the routee's external email application (for example, Microsoft Outlook) or accessible to the routee through a Download Wizard. (For more information, see the *Focus on Routes* guide.)

- **Via Fax** – Spitfire documents are converted into faxable form (through templates) and then sent to the routee's fax machine. Files attached to the Spitfire document are also faxed, if the files are of an appropriate file type (.PDF, .TIF or .DOCX).

However, if you need to route a Spitfire document to someone who is not a Spitfire user, and who cannot be reached via fax or email (i.e., a routee who is **Via Hard Copy**), you or someone else needs to print out the printable version of the routed content before you can "snail mail" or hand over the printed pages.

Templates

All Doc types that may be routed to someone via email, via fax or via hard copy should have at least one Attachment or Transmittal template for sfPMS to use in routing.

Attachment templates are explained in the *Focus on Files, Attachments and the Catalog Dashboard* guide. Transmittal cover sheets are described in the *Focus on Routes* guide.

For information on how to create such templates, see your implementer or support technician. For information on how to upload such templates into sfPMS, see the *Focus on the Manage Dashboard* guide.
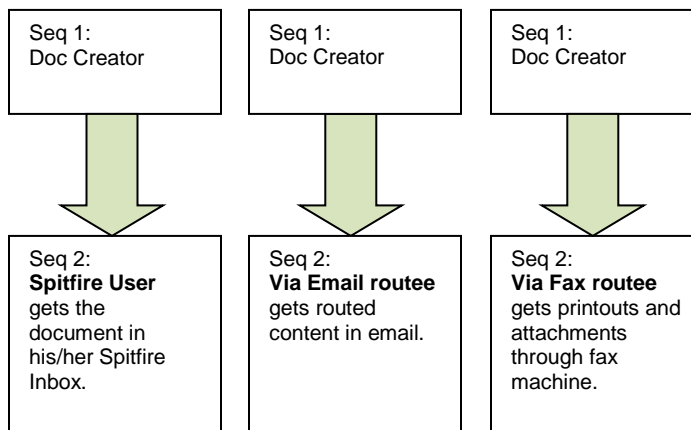
The DocTypeConfig | HardCopyThru Rule

Concept

Sometimes routees are added to documents through predefined routes (established through the Routes tool on the Manage Dashboard). When these routees are Spitfire users, or Via Email/Fax routees, documents are automatically routed to them.

Seq 1: Doc Creator	Seq 1: Doc Creator	Seq 1: Doc Creator
Seq 2: **Spitfire User** gets the document in his/her Spitfire Inbox.	Seq 2: **Via Email routee** gets routed content in email.	Seq 2: **Via Fax routee** gets printouts and attachments through fax machine.

However, when the next routee is a Hard Copy routee, the Spitfire document does not automatically go to that person. sfPMS cannot automatically print, envelope, mail, place in the person's cubby, etc. the printouts associated with the Spitfire document. So some Spitfire User must be the one to print out the routed content and send the hard copies to the Hard Copy routee(s).

The **DocTypeConfig** rule includes the **HardCopyThru** value, which allows you to indicate the person who should be inserted into a route at the same sequence as a Hard Copy routee.

Example

For example, the following predefined route…

…appears as the following routes on Spitfire documents:

Phil is a Via Email routee.

Margie is a Via Hard Copy routee.
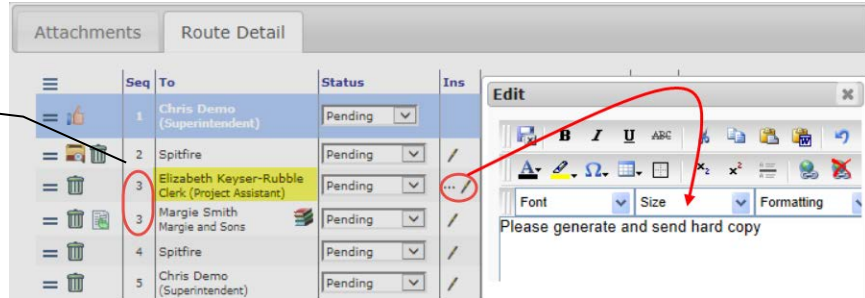
However, if you use the **DocTypeConfig** | **HardCopyThru** rule, the predefined routes could appear as follows:

This route is the same as before.

Elizabeth has been inserted at the same Seq as the Hard Copy routee and an Ins messages has been added automatically.
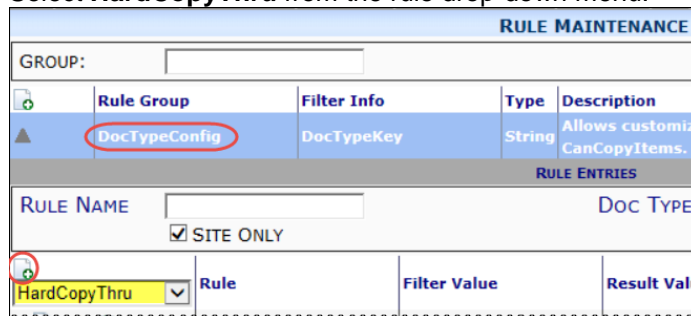
Setting the HardCopyThru Rule

Only Spitfire Users who have access to the Rules Maintenance tool on the System Admin Dashboard can set up rules.

To establish a "Hard Copy Thru" person:

1. Find the **DocTypeConfig** rule group on the **Rules Maintenance** tool (on the System Admin Dashboard).

2. Click ▶ to get to the details.

3. Select **HardCopyThru** from the rule drop-down menu.

4. Click ⊕ to add a new **HardCopyThru** rule.

5. In the Filter Value drop-down, select the Doc type to which this rule will apply. You can add the **HardCopyThru** value multiple times if you want to set this up for various Doc types.

6. In the Result Value, look up or type the name of the Spitfire User who will receive documents that are routed to Hard Copy routees, for example:

7. Click ✔ to accept your values then 💾 to save the rule.

TIP
You can also enter the GUID for the DocEnteredBy role as the result value for HardCopyThru. See KBA-01407 for more information.
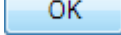
Messages About Hard Copy*

Since it is possible that the document creator or people on the route are not aware that someone is a Hard Copy routee, several messages appear to help ensure that a Hard Copy routee has received the document information.

When the Routee is Added

Whether added through a predefined route or added manually, when a person who is **Via Hard Copy** is added to a document's route, the following message appears:
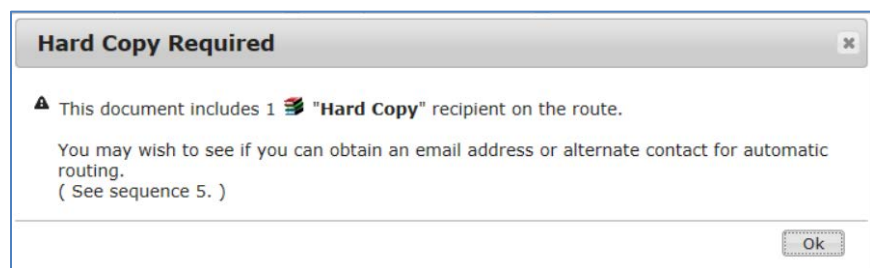
This is an informational message only. When you click , the message will go away and nothing will have been changed.

If you do not want a Hard Copy routee on your route, you will need to add an email address to that person's Contact Details.

To change a Via Hard Copy routee to a Via Email routee:

1. Close the document, go the Contacts Dashboard and find the person.

2. Click to open the Contact Details for that person.

3. In the General tab, enter an email address.

4. Click to save your changes. The **Route Via** field on the Connections tab will change automatically to **E-Mail**.

The next time this person is added to a route, he or she will be a **Via Email** routee.
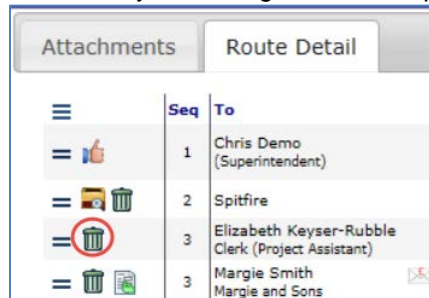
5. Reopen the document and clear the message that reappears.

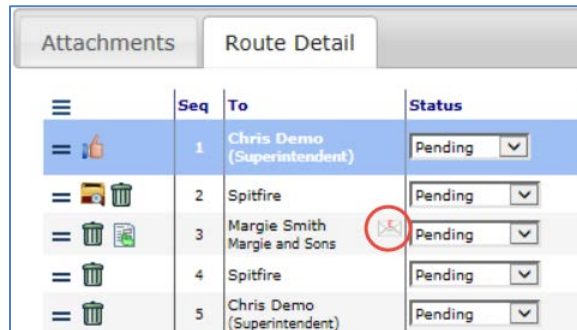6. Click ═ at the route row of the Hard Copy routee and select **Route Via**.
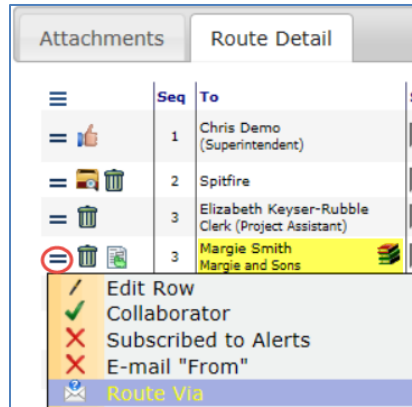
7. Select **Route Via Email** then click [OK].
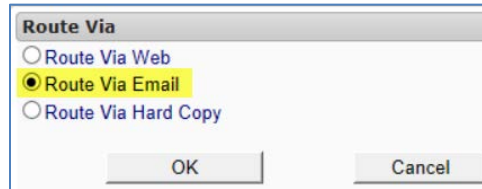
8. (*If a routee was added through the DocTypeConfig | HardCopyThru rule*) Click 🗑 at the routee inserted through the rule, since you no longer need that person on this route.
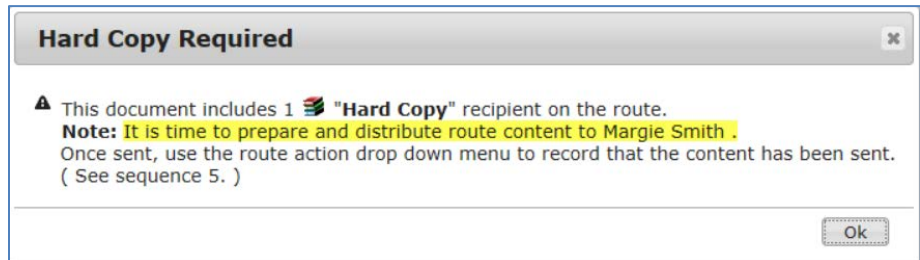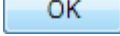

9. Click 💾 to save the document with the new route.

When the Next Routee is Hard Copy

When sfPMS determines that you are the last internal routee before the Hard Copy routee, the following message appears.


This is an informational message only. When you click **OK**, the message will go away and nothing will have been changed.

See page 13 for instructions on how to <u>print out the routed content</u>.

Once information has been given/sent to the Hard Copy routee, you can record that fact.

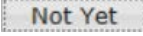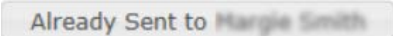**To indicate that information has been given/sent to the Hard Copy routee:**

1. Click = at the Hard Copy routee's row.
2. Select **Send Document**.
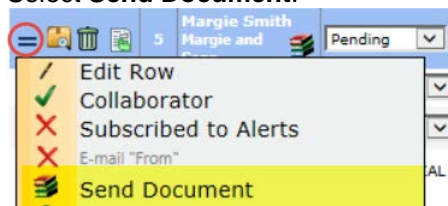
If the Send Document Option is Not Used

If you are in charge of sending information to a Hard Copy routee and you click 👍 to route your document without first selecting the **Send Document** option shown above, the following message will appear each time anyone opens the document—until someone confirms distribution.
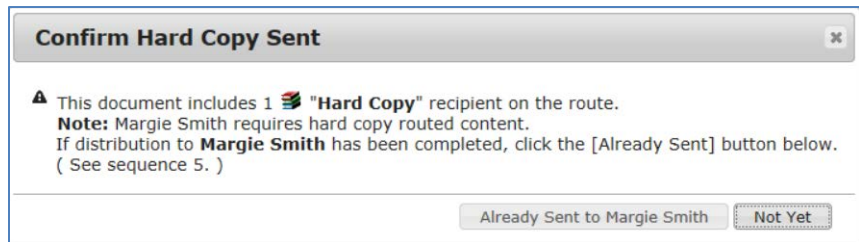
- Click [Not Yet] if routed content has not yet been given/sent to the Hard Copy routee.

- Click [Already Sent to Margie Smith] if you know that routed content was sent to the Hard Copy routee.

Printing the Routed Content

Whoever is printing out the routed content does so through the "view routed content" icon.
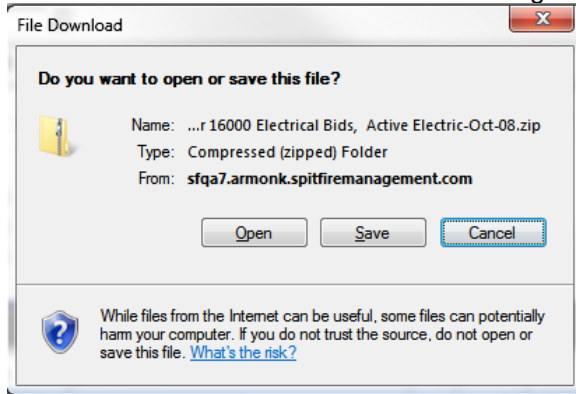
To print out routed content:

1. Once the document has been routed to you, click on on the row for the Hard Copy routee, for example:

sfPMS will gather all route-able files and open a dialog box.

2. Click at the File Download dialog box.

Note: if a second dialog box appears, click again.

All routed files will be listed.

3. Open each file as you would normally and print it out.