

Batch Processing



This Focus Guide is designed for Spitfire Project Management System users. In this guide you will learn how to view, upload, and process batches of scanned TIF files.

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Spitfire Management, LLC.

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About Our Documentation

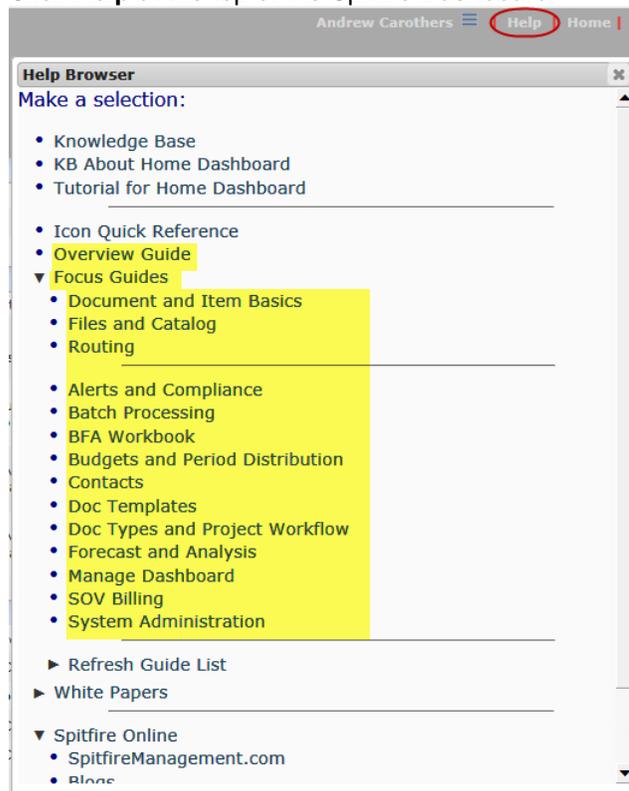
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller units of documentation—guides, knowledge base articles, and technical white papers.

Guides

Our guides, which include an [Overview Guide](#) and various other guides, focus on specific areas or tasks in sfPMS. Often, one Focus Guide will refer you to a second Focus Guide when an overlapping section is described in more detail in the second guide. By reading the guides, you will get a good understanding of the system in general and you will learn procedures for how to do many of the things that sfPMS allows you to do. We suggest you read the [Overview Guide](#) first, followed by other Focus Guides as needed.

To access the guides:

1. Log in to sfPMS.
2. Click **Help** at the top of the Spitfire Dashboard:

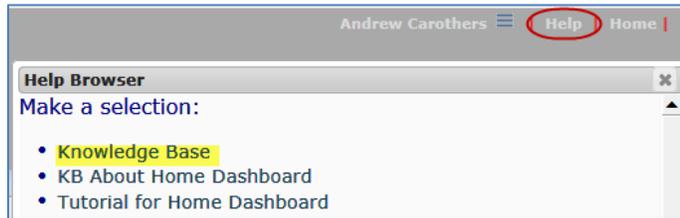


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

The guide will appear as a PDF file.

The Knowledge Base

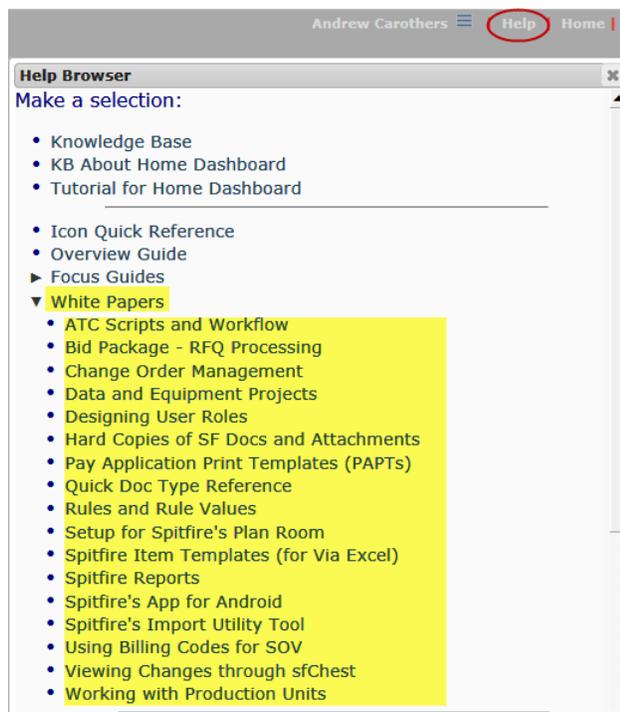
The Knowledgebase contains articles, often in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



Articles in the Knowledgebase are numbered, for example, KBA-01044.

White Papers

White papers (also known as technical white papers and TWP) are documents that delve into some of the more technical or specific aspects of sfPMS. White papers are accessed through the same Help menu:



Introduction

The Spitfire Project Management System (sfPMS) allows you to scan files into its Catalog. It also allows you to upload any number of (often PDF) files to the Catalog. When you need to scan many files (vendor invoices, purchase orders, receipts, timecards, etc.) at a time or process uploaded files, sfPMS enables you to view, upload, and process batches of scanned TIF files.

This guide assumes a basic understanding of sfPMS and Spitfire documents, as described in the [Overview Guide](#) and the [Focus on Document and Item Basics](#) guide.

Note: Aside from updated pictures and icons, the information herein is the same as the information in the V4.4 and 4.5 documentation. Also, icons are shown in size 16 only; larger sized icons are similar but not exactly the same.

Overview

TIP

If you click on a link to get to another page in this guide, you can use the **Alt + ←** (left arrow) keys to return to the previous view.

If Batch Scanning

Spitfire's Batch Scanning processing can use two tools that are outside the Spitfire dashboards:

- **Batch Upload Tool**
- **Image Stapler**

Both of these tools need to be installed before the first time you want to use them. See page 11 for [installation instructions](#).

The Batch Scanning process is a series of steps that could be performed by one person or multiple people depending upon your organization's division of tasks. Instructions in this technical white paper refer to "you" as the person doing those steps. See page 20 for a [diagram of the process](#).

Step 1 is your prep work. In this stage, you separate your invoices and other such documents into two piles: one-page and multi-page.

Step 2 is [creating a separator sheet](#) for the one-page invoices (see page 21) then adding that separator sheet to the top of the one-page pile.

Step 3 is scanning your one-page batch and creating a TIF file that is ready for the Batch Upload Tool.

Step 4 is scanning your multi-page batch and creating another TIF file that is ready for the Image Stapler.



Step 5 is using the Image Stapler to convert your one multi-page TIF file into the appropriate number of "sifted" TIF files (one for each multi-page invoice/document). These sifted TIF files are then ready for the Batch Upload Tool.

Step 6 is using the Batch Upload Tool to upload your TIF files to Spitfire where they will be attached to a Spitfire File Batch document (or optionally, some other Doc type such as Scanned Timecards) that is routed automatically to the person designated in [a predefined route](#) (see page 16).

 **8 Scanned Invoices**

Step 7 is viewing and processing the images attached to the File Batch document. As you process each scanned image, you will have the opportunity to:

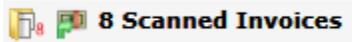
- Create an AP Voucher and automatically attach the image to that Voucher, then route the Voucher.
- Create a new Spitfire document, for example a Pay Request, and automatically attach the scanned image to that new document, then route the document.
- Route the image to someone else for additional information.
- Attach the image to an existing Spitfire document.
- Discard the image.

If Attaching Existing Files

Step 1 is collecting all the files (often PDFs) that you will want to attach to a batch. These files can be on your computer, perhaps in a folder meant to organize the files by “batches.”

Step 2 is creating a File Batch document.

Step 3 is attaching all the appropriate files to that File Batch document and (if necessary) routing that document to the appropriate person.



Step 4 is viewing and processing the images attached to the File Batch document. As you process each scanned image, you will have the opportunity to:

- Create an AP Voucher and automatically attach the image to that Voucher, then route the Voucher.
- Create a new Spitfire document, for example a Pay Request, and automatically attach the scanned image to that new document, then route the document.
- Route the image to someone else for additional information.
- Attach the image to an existing Spitfire document.
- Discard the image.

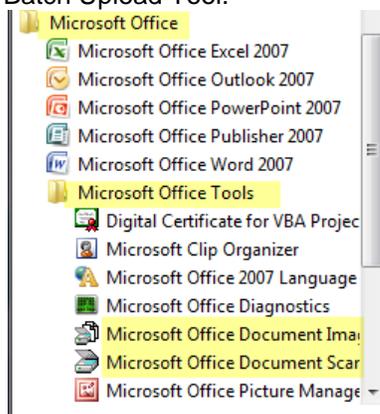
Batch Scanning Requirements

To add full Batch Processing to sfPMS, your system must meet the following requirements:

- **Spitfire Batch Scanning License**
- **Microsoft Office 2007 with Imaging Tools:** Microsoft Office Document Scanning and Microsoft Office Document Imaging (configured for OCR) need to be installed and ready to use on the workstation used to run the Spitfire Batch Upload Tool.

TIP

If you are using Microsoft Office 2010 or later, you still need Microsoft Office Document Imaging from Office 2007. See [KBA-01522](#) or contact support for help.



An easy way to verify that the workstation is ready,

- Open Microsoft Office Document Imaging
- Open the TIF file with ODI
- Use the **Tools | Send Text to Word** command.

The Batch Upload Tool requires that your multi-page TIF file be compatible with Microsoft Office 2007 ODI. Using Microsoft Office 2007 Document Scanning to create your TIF files is the easiest way to accomplish this, but any scanning process that produces a multi-page, CCIT Group 4, B&W (1 bpp), 300 x 300 DPI, with skew corrected TIF file can be used.

Microsoft Office 2007 Document Imaging can be used to view your TIF file before uploading.

- **Scanner**
TWAIN or an ISIS Level 1 compatible scanner with an automatic document feeder (ADF) is required.
- **Monitor**
The workstation used to process scanned images requires a large screen monitor with very good resolution. We strongly recommend dual monitors (one for viewing the images in the Batch Viewer and one for processing the images in Microsoft Dynamics SL or Spitfire).

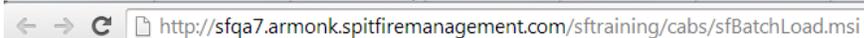
Installation of Tools

Batch Upload Tool

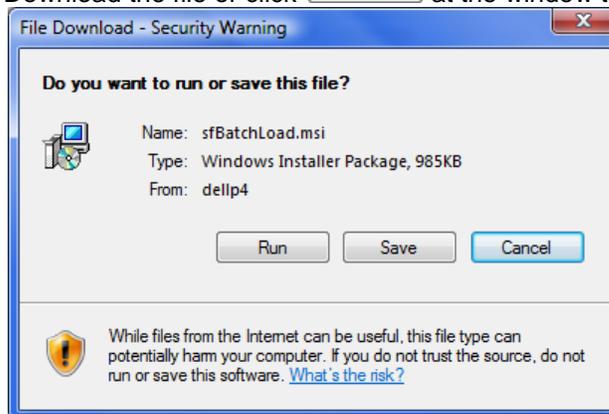
The Batch Upload Tool may have been installed for you already during implementation. If it has not yet been installed, follow these instructions.

To install the Batch Upload Tool:

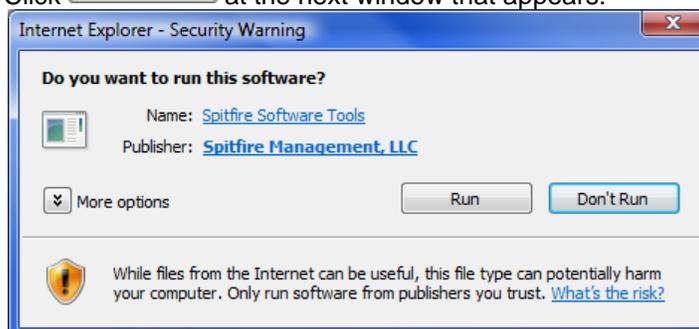
1. In your Web browser, enter the URL for your site followed by **/cabs/sfBatchLoad.msi**, for example:



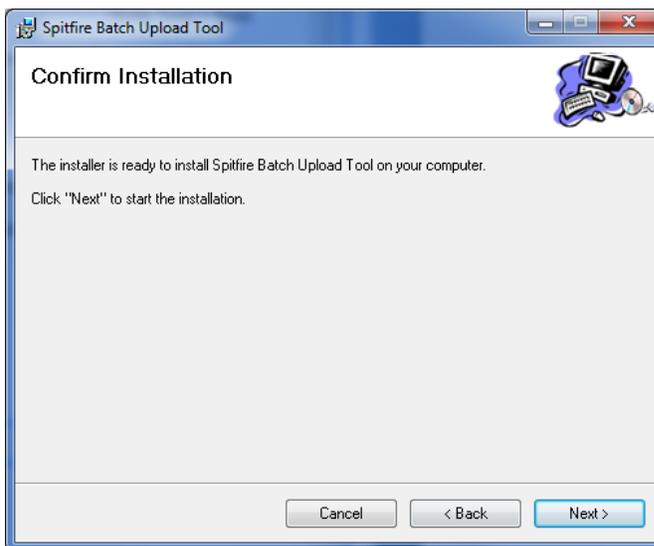
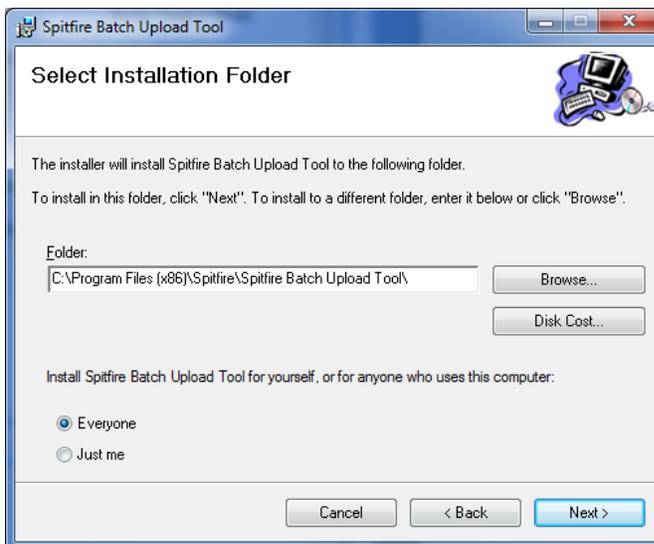
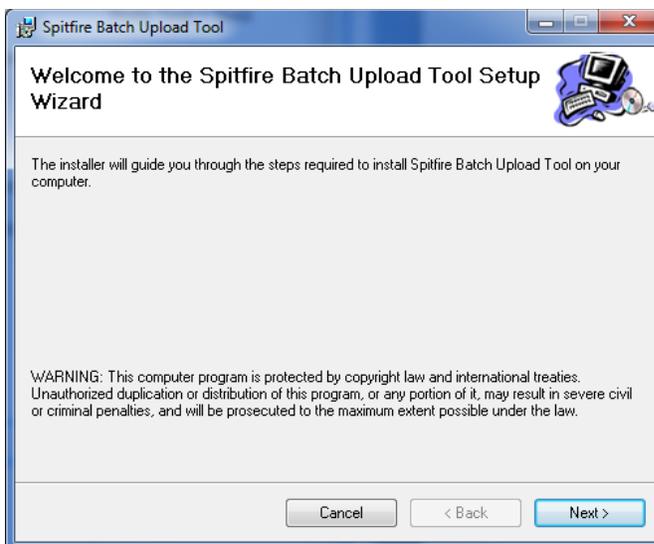
2. Download the file or click  at the window that appears:



3. Click  at the next window that appears:



4. Proceed through the Setup Wizard to install the Batch Upload Tool. Usually, all you have to do is click . (See next page.)



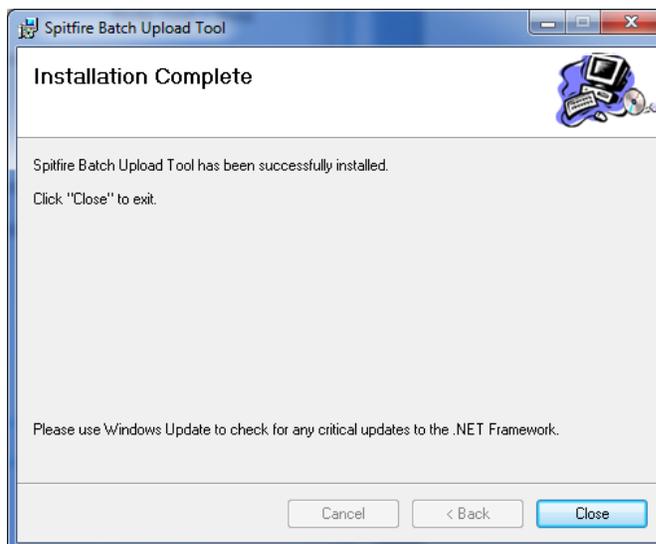
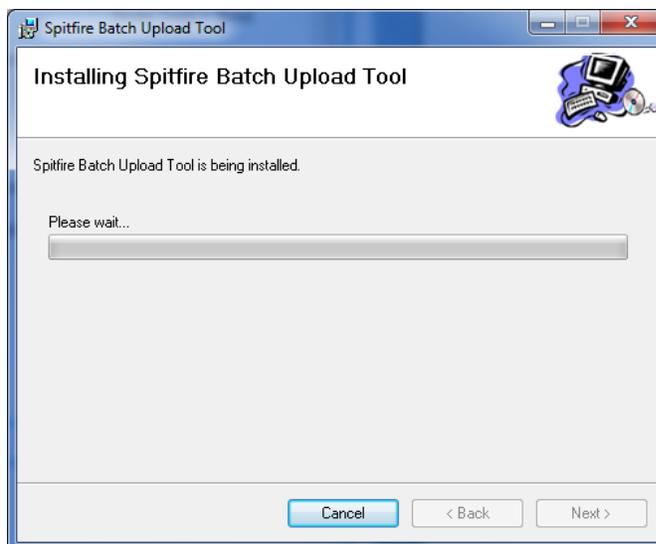
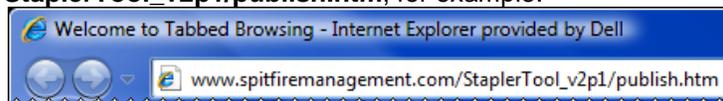


Image Stapler

The Image Stapler may have been installed for you already during implementation. If it has not yet been installed, follow these instructions.

To install the Image Stapler:

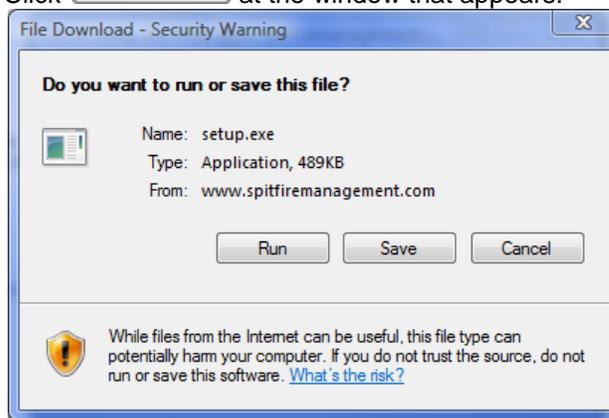
1. In your Web browser, enter the URL **www.spitfiremanagement.com/StaplerTool_v2p1/publish.htm**, for example:



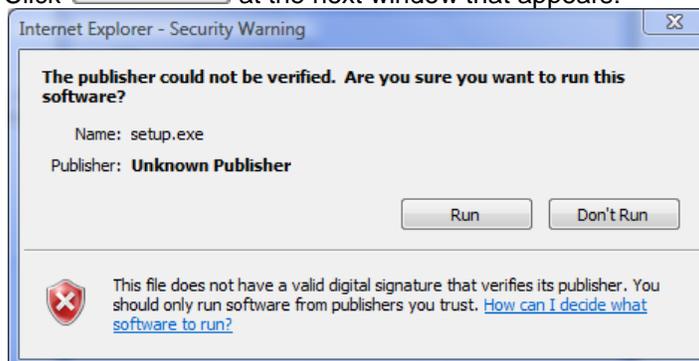


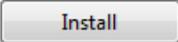
2. Click .

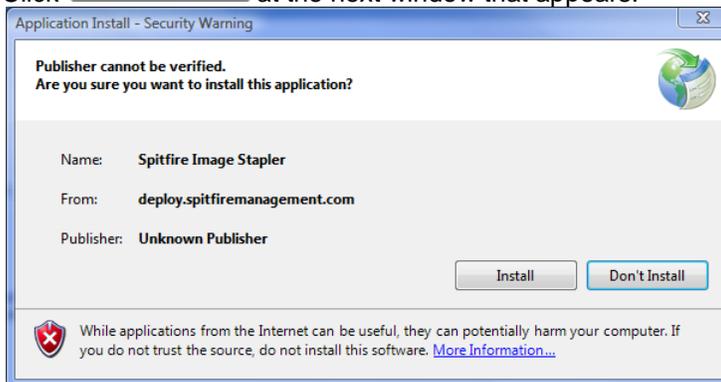
3. Click at the window that appears:

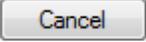


4. Click at the next window that appears:



5. Click  at the next window that appears:



6. The Image Stapler will open and ask you to indicate a filename and location for the TIF file. If you are not ready to do this (because you will go back to the Image Stapler after you have batch scanned), just click  then click  to close the Image Stapler.

Setup of Predefined Routes

Note: See the [Focus on the Manage Dashboard](#) guide for full information on predefined routes.

For AP Scans Documents

TIP
Your File Batch Doc type may have been renamed to something like AP Scans.

You should set up a predefined route for the File Batch Doc type. This automated route will set up, by name or more often by role (such as **Doc Entered By** or a site-specific, non-project role such as **Batch Processor**), the routing list of who gets the File Batch documents that are created either manually or by the Batch Upload Tool. The only rule condition for this predefined route is by **Doc Type** (e.g., File Batch).

The screenshot shows the 'Manage' dashboard for predefined routes. The 'Route Name' is 'File Batch / AP Scans'. Below it, a table lists the roles and their associated details:

Seq. No.	User/Role	Description	Access Level	Default Status	Default N
2	Doc Entered By		Collaborate	Pending	
3	Chris Demo		Collaborate	CC'd	
3	Elizabeth Keyser-Rubble		Collaborate	Pending	

At the bottom, there is a table for 'Doc Type' with columns for 'Source Contact', 'Project', 'Priority', and 'Status'. The 'Doc Type' is 'File Batch'.

Note: if the Batch Upload Tool will create documents of another Doc type, such as Scanned Timecards, you should set up a predefined route for that Doc type also.

For File Inquiries (Route Option)

If the person who deals with the File Batch document will want to use the [Inquiry option](#) to send individual images to other people (see page 42), one or more additional predefined routes need to be created. These predefined routes for inquiries must use Doc Type, Responsible and Status as rule conditions. Source Contact, Project, Low and High can also be indicated. Use these conditions as follows:

Doc Type (<i>required</i>)	File Batch (or other Doc type)
Source Contact (<i>optional</i>)	Vendor name
Responsible (<i>required</i>)	The name of the person who will be indicated on the Route for Inquiry Route To field.
Project (<i>optional</i>)	Project ID
Status (<i>required</i>)	Q Note: Q=Inquiry. The Inquiry option changes the status of the File Batch document to Inquiry .
Low (<i>optional</i>)	A minimum Invoice amount
High (<i>optional</i>)	A maximum Invoice amount

TIP

Leave room in the Seq. No. between the first and last routee so that others may more easily add routees when the document gets to their Inbox.

There are two ways you can choose to set up the Rules and Details for your predefined route: individually or shared.

If you want to create a predefined route for each Responsible person,

- Add the person to the Responsible field on the Rules section.
- Add the person as Seq. No. 2 on the Details section.
- Add the sender of the File Batch document (i.e., the person choosing to route the image) or **Doc Entered By** to the Details.
- Add any additional parties to the Details as needed.

Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	Due In	w/ T
2	Elizabeth Keyser-Rubble		View	Pending			x
3	Doc Entered By		View	Pending			x

Doc Type	Source Contact	Responsible	Project	Priority	Status	Su
File Batch		Elizabeth Keyser-Rubble			Q	

If you want to create one shared predefined route for inquiries,

- Add rows with each possible person in the Responsible field on the Rules section.
- Add **Doc Responsible Contact** as Seq. No. 2 on the Details section. Doc Responsible Contact is a special purpose Role that means “whoever is the Responsible Contact on this document.”
- Add **Doc Entered By** as a higher Seq. No. on the Details section. Doc Entered By is a special purpose Role that means “whoever created this document.”

Route Name							Active
Batch File Inquiries							✓
DETAILS FOR SELECTED ROUTE							
STATUS: <input type="text"/>							
Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	Due In	w/ Trans
2	Doc Responsible Contact		View	Pending			X
3	Doc Entered By		View	Pending			X
Note: Role alias 'Doc Responsible Contact' will disqualify this route from automatic selection until the corresponding document fields are use							
RULES FOR SELECTED ROUTE							
CONTACT <input type="text"/>				<input checked="" type="checkbox"/> SHOW RESPONSIBLE <input type="checkbox"/> SHOW DOC REFERENCE <input type="checkbox"/> SHOW DIVISION			
<input type="checkbox"/> SHOW GLOBAL REFERENCE							
Doc Type	Source Contact	Responsible	Project	Priority	Status	Sub T	
File Batch		Elizabeth Keyser-Rubble			Q		
File Batch		Jay Adams			Q		
File Batch		Phil Sunderson			Q		

When you enter a Responsible person as the **Route To** person on the [Route for Inquiry](#) dialog box (see page 42), sfPMS will check route rules and use the corresponding predefined route.

For AP Voucher Documents

If the person who is dealing with the scanned or attached files through the Batch Viewer will create AP Voucher documents as part of the [AP Invoice processing](#) workflow (as described on page 45), you should create one or more predefined routes for the AP Voucher Doc type, for example:

Route Name	Active	UseCount
AP Voucher	✓	2

DETAILS FOR SELECTED ROUTE

STATUS:

Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	Due In	w/ Transmittal	At Source Contact	No Repeats	Emails From	Alerts
2	Project Manager		Collaborate	Pending			×	×	0	×	×
3	Project Assistant		View	Destination			×	×	0	×	×

RULES FOR SELECTED ROUTE

CONTACT: S S

SHOW GLOBAL REFERENCE SHOW DIVISION

Doc Type	Source Contact	Project	Priority	Status	Sub Type	Project Type	Low	High	Auto	Active
AP Vouchers									×	✓

Do not check the Auto checkbox on your predefined route for Voucher documents.

For Pay Request Documents

If the person who is dealing with the scanned or attached files through the Batch Viewer will create Pay Request documents as part of the [Pay Request processing workflow](#) (as described on page 47), you should create one or more predefined routes for the Pay Request Doc type, for example:

Route Name	Active	UseCount
Pay Request	✓	1

DETAILS FOR SELECTED ROUTE

STATUS:

Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	Due In	w/ Transmittal	At Source Contact	No Repeats	Emails From	Alerts
2	Project Manager	Project Manager	Collaborate	Pending			×	×	0	×	×
3	Project Assistant	Project Assistant	Collaborate	Pending			×	×	0	×	×
4	Accounting	Accounting	Collaborate	Pending			×	×	0	×	×

RULES FOR SELECTED ROUTE

CONTACT: S S

SHOW GLOBAL REFERENCE SHOW DIVISION

Doc Type	Source Contact	Project	Priority	Status	Sub Type	Project Type	Low	High	Auto	Active
Pay Request									×	✓

Do not check the Auto checkbox on your predefined route for Pay Request documents.

Prep Work for Batch Scanning

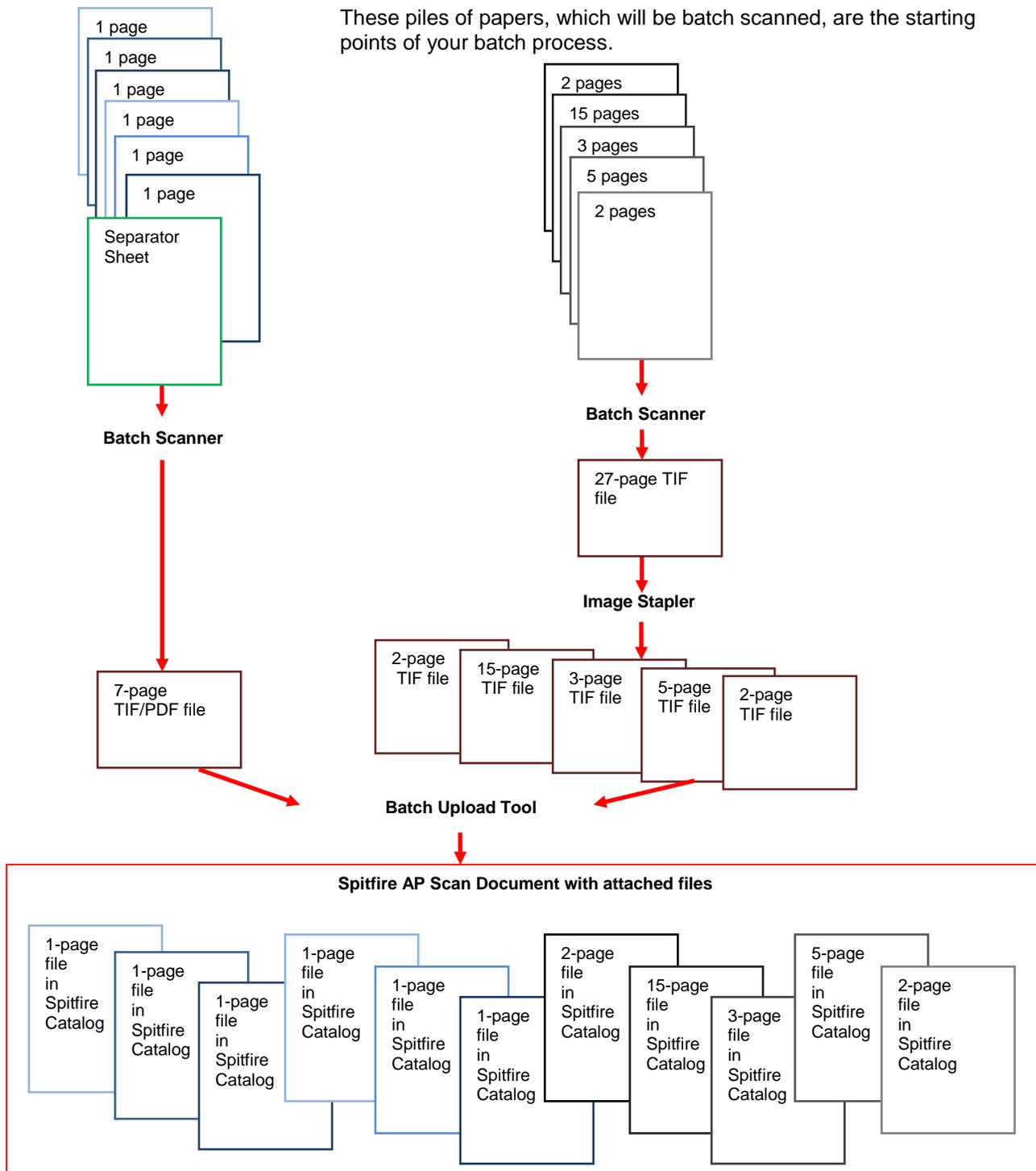
Note: if you are dealing with invoices or paperwork already in electronic form, skip this and the next chapters and continue on page 32.

As you open your invoices and other paperwork, go through them and place them into two piles.

All the one-page invoices/papers go in one pile.

All the other invoices/paperwork, whether they are two pages long, five pages long or ten pages long, etc., go in the other pile.

These piles of papers, which will be batch scanned, are the starting points of your batch process.



Separator Sheets

<hr/> <hr/>	
<< Spitfire Scan Separator >>	
<hr/> <hr/>	
Vendor:	Varies
Content:	Invoice
Pages Per:	one
 Note: Vendor IDs that are a combination of Letters and Numbers need to include a # to separate Letters from Numbers. For example, VT#001	

Separator sheets indicate that what follow are similar length invoices (or other papers), for example, that all following invoices/papers are one-page in length. When you place your batch into your scanner's document feeder, the separator sheet precedes the invoices.

Separator sheets can also indicate that the following invoices are from a particular vendor.

Separator sheets must use **OCR A Extended** font. You can create your own separator sheet to look identical or similar to the one shown above.

To create and use a separator sheet:

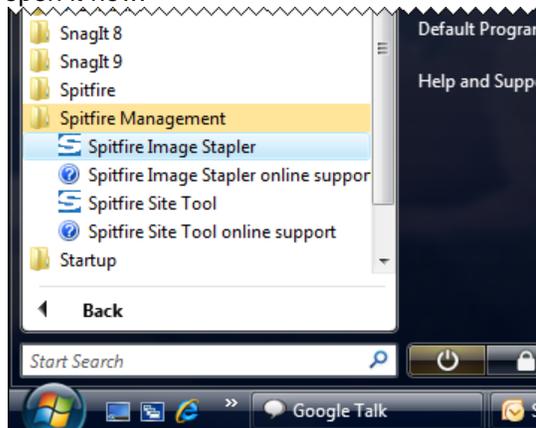
1. Create a new file in Microsoft Word.
2. Select the OCR A Extended font.
3. Type two lines, as shown in the example above.
4. Type << **Spitfire Scan Separator** >> as shown in the example above.
5. Type two more lines, as shown in the example above.
6. Type **Vendor:** then the following:
 - Type **Varies** if the invoices/papers that will follow the Separator Sheet come from a variety of vendors.
 - Type a specific Vendor ID, if all pages that follow come from one vendor. However, if the Vendor ID is made up of both alpha and numeric characters (as most are) you must use the symbol # between the alpha and the numeric characters, for example, WH#23.
7. Type **Content: Invoice.**
8. Type **Pages Per:** then the following
 - Type **one** if all the invoices/papers that will follow the Separator Sheet are one-page in length.
Note: You can also indicate a different “pages per” number, but the Image Stapler is a better way to deal with two-page and multi-page invoices/papers.
9. Save your separator sheet on your computer so that you can use it as often as necessary.
10. *(optional)* Copy your separator sheet if you need another for different Vendor or Pages Per.
11. Print your separator sheet and place it in front of the pages that are ready to be batch scanned, for example, all your one-page invoices.
12. Feed your separator sheet then your invoices/papers through your batch scanner. The TIF or PDF file that is created is now ready for Spitfire's [Batch Upload Tool](#) (see page 26).

Image Stapler

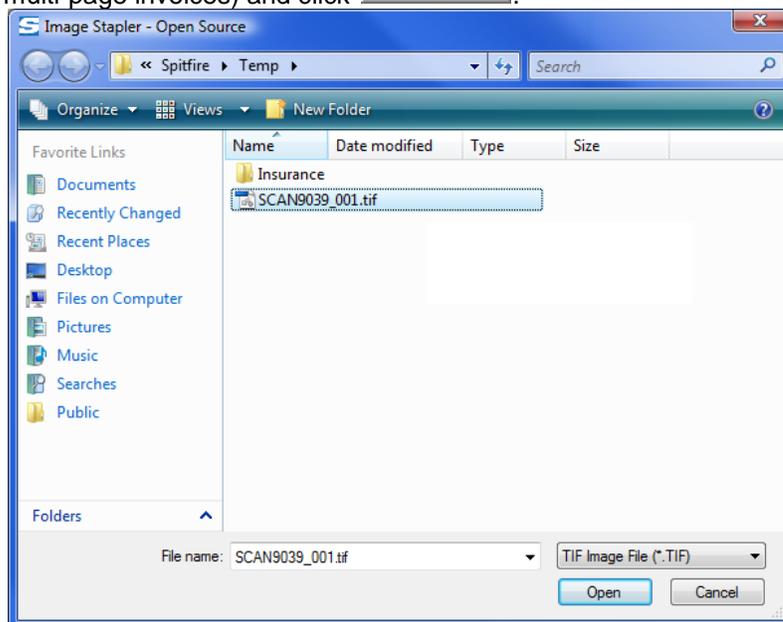
The Image Stapler starts with the TIF file that was created when you fed multi-page invoices/papers into the batch scanner. You use the Image Stapler to separate the one TIF file into several “sifted” TIF files. All the sifted TIF files will then be ready for the Batch Upload Tool.

To open the Image Stapler:

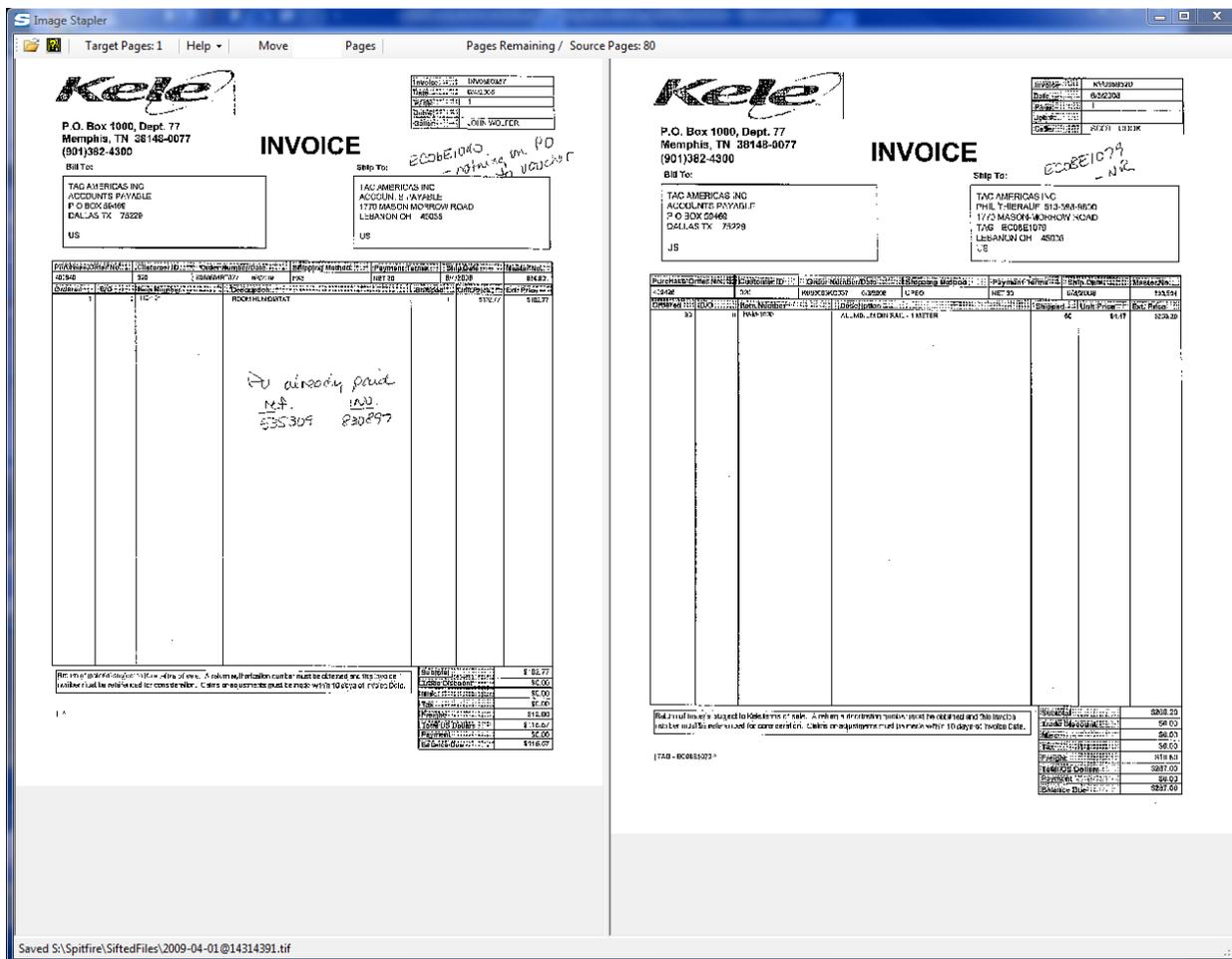
1. Assuming you [installed the Image Stapler](#) earlier (see page 13), open it now.



2. In the Open Source window that appears, select the TIF file that you want to process (e.g., the TIF file created from a number of multi-page invoices) and click .

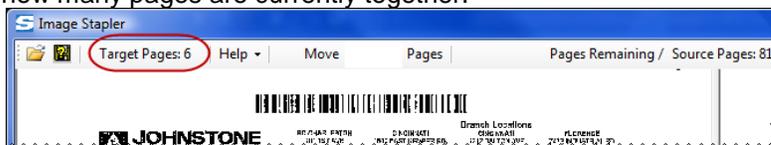


The Image Stapler will open showing the first two pages in the TIF file (as shown on the next page):



To use the Image Stapler:

1. Click  to indicate the folder where you want to save your “stapled” TIF files. This target folder will likely be a [folder that is later read by the Batch Upload Tool](#) (see page 27).
2. The image on the left side of the Image Stapler will be saved in the first TIF file. Use the + key on your numeric keyboard (or the Page Down or Insert key) to move as many pages as desired to the left to add them to that first TIF file. For example, if you want the TIF file to hold the first six pages (because the original invoice consisted of six pages), press the + key 5 times to move pages 2, 3, 4, 5 and 6 to the left. The **Target Pages** will indicate how many pages are currently together.



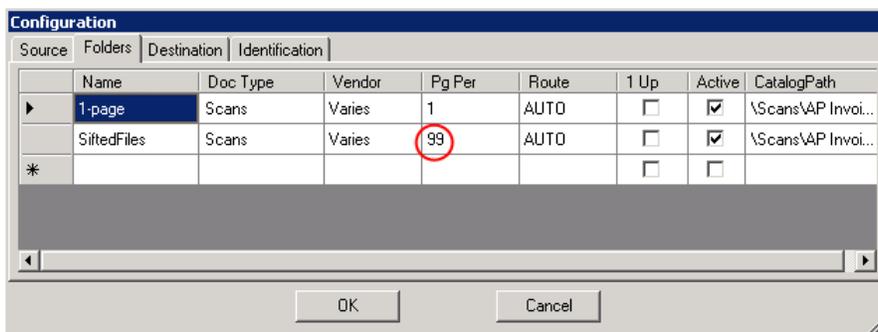
3. If you added too many pages, use the – key on the numeric keypad (or the Page Up key) to move a page back to the right and remove it from the Target Pages.

4. If you need to swap the pages on the left and the right, use the / key on the numeric keypad.
5. Press the **ENTER** key to save all the target pages as one sifted TIF file. This file will be saved in your indicated folder.

The image on the right will move to the left and begin the next set of target pages.

6. Repeat this process until you have gone through all your pages.

Important Note: Be sure to add a folder for your sifted TIF files on the [Configuration Folder tab](#), and enter **99** as the Pg Per (see page 27). If the Pg Per for your target folder is not set properly, the Batch Upload Tool will process your sifted TIF file and could divide them into multiple smaller files.



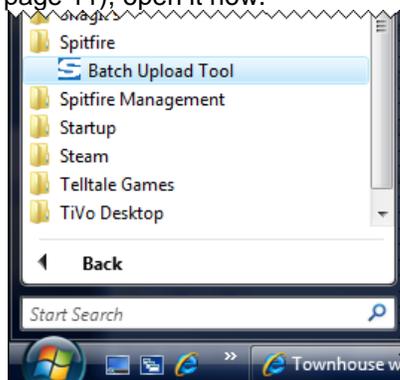
Batch Upload Tool

Once you have all your scanned images/invoices as TIF or image-based PDF files, you use the Batch Upload Tool to process your these files and load the information into sfPMS.

- This process will create a Spitfire File Batch document with each of the scanned files attached to the document.
- The File Batch document will then be routed according to the [predefined route](#) for the Doc type (see page 16).
- The person who gets the File Batch document in his or her Inbox will be able to process the images through the [Spitfire Batch Viewer](#) (as described on page 33).

To open the Batch Upload Tool:

1. *(optional)* We recommend you log in to Spitfire before starting the Batch Upload Tool. If you do, the Batch Upload Tool will self update and use the dashboard to determine the destination site.
2. Assuming the [Batch Upload Tool was installed](#) previously (see page 11), open it now.



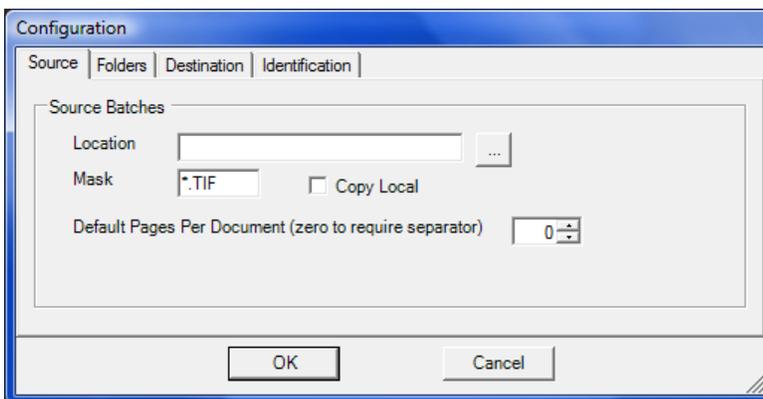
If it is the first time you are using the Batch Upload Tool, the Configuration window will open (see the next section). On subsequent times, the Batch Upload Tool will open directly.

Batch Upload Tool Configuration

The first time you open the Batch Upload Tool, the Configuration window will automatically appear. You need to configure the Batch Upload Tool before you can use it. (You'll be able to reconfigure the Batch Upload Tool as needed in the future.)

Once you fill out the Configuration tabs and click , the Batch Upload Tool will open.

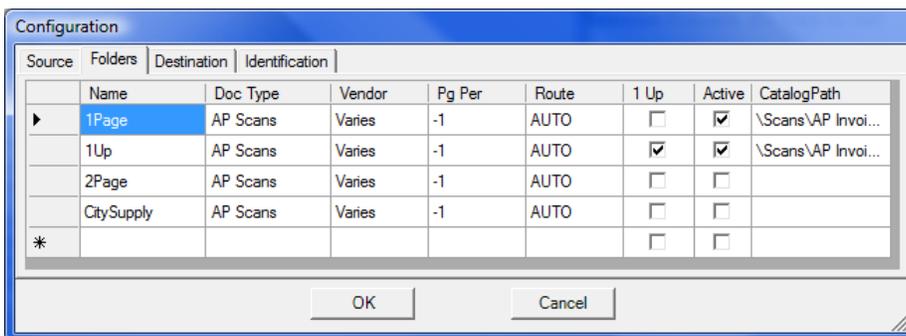
Source Tab



The Source tab points to the location of your TIF image files on your computer/network.

Location	Enter the path to your images (top level folder) on your C: drive. Click <input type="button" value="..."/> to browse for your folder.
Mask	(<i>optional</i>) Enter a mask for your scanned image files. TIF is the only supported file format. Wildcards are allowed: * for multiple characters, % for a single character, for example, *.tif = all .TIFfiles and G%.tif = all .TIF files that begin with G.
Copy Local	Check to indicate that your image files are on the network and you'd like to copy the files to your local drive before processing
Default Pages Per Document	Enter or select 0 if you are using separator sheets (see page 21), 1 if scanning files with all 1-page invoices, 2 if 2-page invoices, etc. (See also page 25.)

Folders Tab



The Folders tab provides the functionality that allows you to

- Upload files from multiple folders.
- Route the created File Batch document through a predefined route.

Note: Projects are not known by the Batch Upload Tool; therefore, the selected route cannot resolve roles from a Project Dashboard. The predefined route created for File Batch documents should contain specific Contacts or non-project-specific roles, such as Doc Entered By. (See page 16 and the [Focus on the Manage Dashboard](#) guide for more information.)

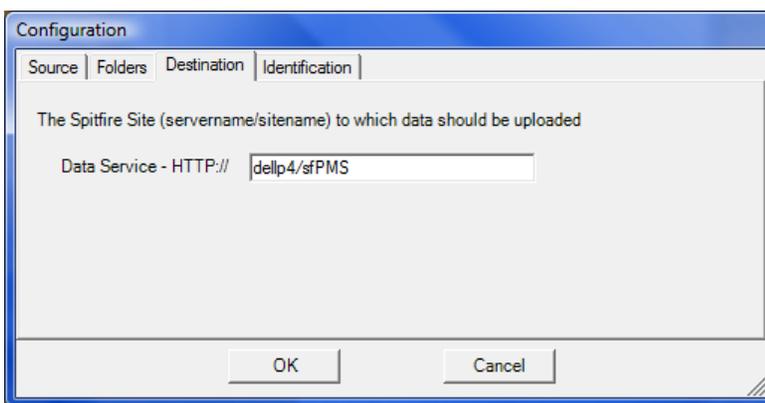
- Upload the scanned image files to a specific Spitfire Catalog folder.
- Create one Spitfire document per scanned file or create one Spitfire document with all the scanned files attached.
- Upload PDF files instead of TIF files. (You need a folder with Pg Per = **99**).

When you indicate the **Location** of your top-level folder on the Source tab, any folders nested in your top-level folder will automatically populate the rows in the Folders tab. Edit the default information in these rows to match your needs.

Name	(<i>optional</i>) Enter or edit the name of the folder where your .TIF image files are located on your computer.
Doc Type	Defaults to File Batch , the most commonly used Spitfire Doc type in Batch Scanning. Select a different Doc type (such as Scanned Timecards) if appropriate.
Vendor	The default, Varies , does not pass Vendor ID to Microsoft Dynamics SL. Enter the Vendor ID if your folder is for a specific Vendor.
PgPer	Defaults to -1 , which refers to the setting entered on the Source tab. Enter 1 to indicate that each page in the image file should be loaded to Spitfire as a separate file, 2 to indicate that every 2 pages should be loaded into Spitfire as a separate file, etc. For example: a 50-page scan file could create 50 1-page files or 25 2-page files in Spitfire. Enter 99 for the folder that holds your sifted TIF files.
Route	The default, AUTO , allows the system to use the standard route determination process to find automated routes that you have set up for File Batch (or other) documents. Enter the name of a specific predefined route here to override the standard process and select the specific route.
1 Up	Check this option if you'd like to create a new Spitfire document for each scanned image in the uploaded file. For example: an uploaded file may contain 50 1-page invoices. With 1 Up selected, 50 Spitfire documents each with one image file attachment will be created. If 1 Up is not selected (clear), then one Spitfire document with 50 image file attachments will be created.

Active	Check this option if you want this row to be considered in the next Batch Upload Tool process. If not selected (clear), this row will be skipped.
CatalogPath	Enter the Spitfire Catalog folder (including path from the Catalog root) to which the image files processed from this row will be uploaded, for example, \\Scans\\AP Invoices . The \ is required to designate a folder below the root (all items) folder. Note: Be sure the user has access rights to the designated folder.

Destination Tab

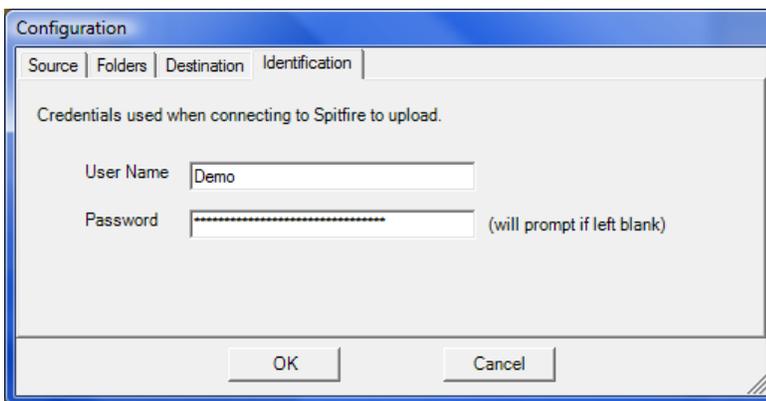


The Destination tab points to the location of your Spitfire software on your IIS server.

Data Service – HTTP://	Enter your IIS Servers' HTTP HostName followed by the Application Root configured within IIS for sfPMS, for example, spitfire/sfPMS spitfire/test
-------------------------------	--

Note: if you open the Batch Upload Tool while you are logged into a Spitfire Dashboard, that dashboard will be used as the destination, overriding whatever is in this tab.

Identification Tab

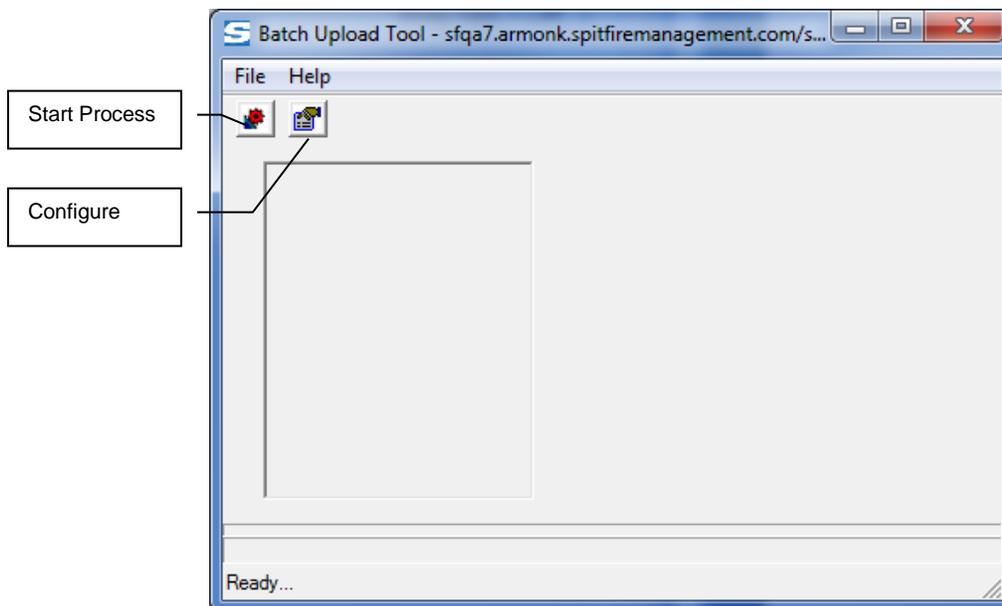


The Identification tab identifies the Spitfire user who uploads the batches.

User Name	Enter the username of the Spitfire user who will upload the batch image files. This is a required field.
Password	Enter the user's password. Note: If the password is not entered, the user will be prompted to enter the password before processing.

Using the Batch Upload Tool

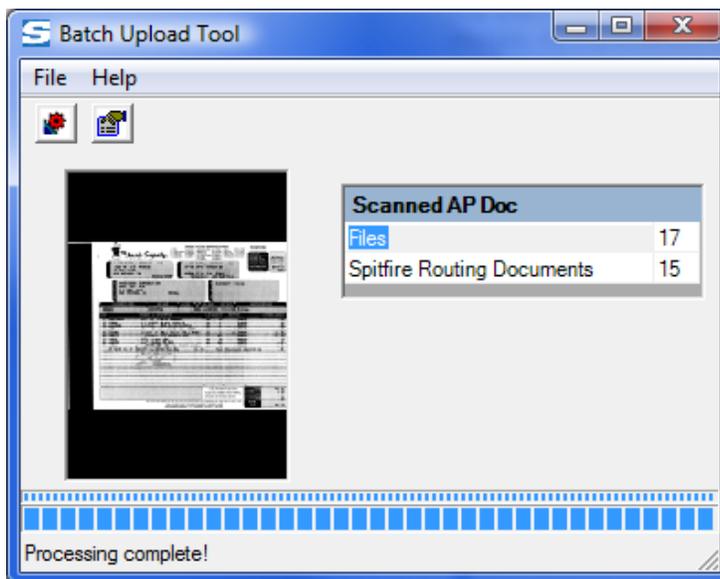
The Batch Upload Tool is configured to locate TIF or image-based PDF files of scanned images. As it processes files, it recognizes the Vendor ID and number of pages per invoice that you entered on your separator sheets and applies that information to the image.



To process the scanned images:

- Click .

When the Batch Upload Tool has finished processing, it will look something like the following, indicating the number of scanned image files and Spitfire documents that have been created:



To reconfigure the Batch Upload Tool:

- Click  and change information on any of the tabs.

To leave the Batch Upload Tool:

- Click .

The person established by the automated route for AP Scan uploads will receive the images in the Spitfire Inbox and will be able to process them through the Batch Viewer. (See page 16 for [more on predefined routes.](#))

File Batch Document

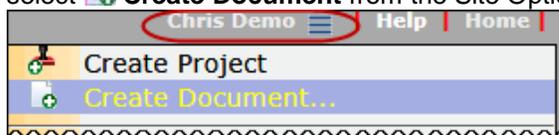
If the files (invoices, etc.) that you want to process through the Batch Viewer are already in electronic form (often, as PDF files), you need not use the Batch Upload Tool. You can create the File Batch document directly and attach files to that document yourself.

Creating the File Batch

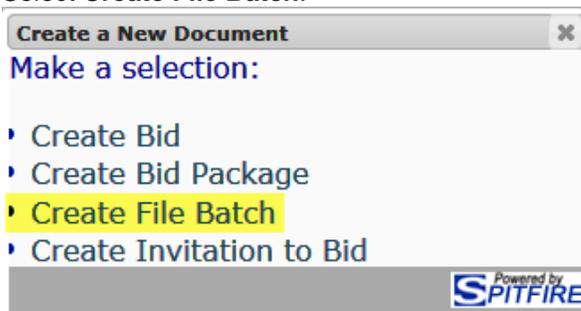
File Batch documents need not be part of any project. You can create File Batch documents as needed.

To create a File Batch document:

1. Click  or your name to open the Site Options menu, then select  **Create Document** from the Site Options menu:



2. Select **Create File Batch**.



The File Batch document window will open.

3. Click  to save the document.
4. On the Attachments tab, attach any number of files to the document, either through the Add Files tool or by dragging files onto the Attachments tab.

Note: the Batch Viewer supports PDF, DOC*, DOT*, RTF, HTM* and TXT files, so any of these file types can be attached to the File Batch document.
5. (*optional*) Unless a predefined route for the File Batch document has been established, or you are the person who will use the Batch Viewer, establish the routing for the File Batch document on the Route Detail tab.
6. Route or save the document, then close the document window.

TIP

For more information about the Add Files tool, see the [Focus on Files, Attachments and the Catalog Dashboard](#) guide.

For more information about routing, see the [Focus on Routes](#) guide.

Scanned or Attached Files

Whether the File Batch document was created through the Batch Upload Tool, or created manually, it ends up in someone's Inbox.

- Click to review the File Batch document (optional) or to open the Batch Viewer and process the images.

INBOX				
Description	DocNo	Type	Project	Due
8 Scanned Invoices	0001	File Batch		10/

Batch Viewer

The Batch Viewer displays your scanned TIF images as well as any [valid files](#) that are attached to the File Batch document (see page 32). It also connects to Microsoft Dynamics SL Accounts Payable Voucher and Adjustment Entry (on integrated sites).

The screenshot shows the Batch Viewer interface with the following callouts:

- Open Batch**: Points to the Batch Viewer icon in the top navigation bar.
- Attach to Pay Request; see page 47.**: Points to the AP icon in the top navigation bar.
- Attach image**: Points to the image icon in the top navigation bar.
- View data about the image**: Points to the information icon in the top navigation bar.
- Route mode (see 39)**: Points to the route icon in the top navigation bar.
- First scan, Prior scan, Next scan, Last scan**: Points to the navigation arrows in the top navigation bar.
- Page 1 of 1 File 2 of 8**: Points to the page and file indicators in the top navigation bar.
- Attach to Voucher; see page 45.**: Points to the AP icon in the top navigation bar.
- Route for inquiry; see page 42.**: Points to the route icon in the top navigation bar.
- Invoice Inquiry; see page 41.**: Points to the inquiry icon in the top navigation bar.
- Discard image**: Points to the trash icon in the top navigation bar.
- Set configuration options; see page 38.**: Points to the gear icon in the top navigation bar.
- Current page in current scan**: Points to the page indicator in the top navigation bar.
- Current file displayed**: Points to the file indicator in the top navigation bar.
- View Options: Normal / Zoom / Fit All / Fit Width**: Points to the view options dropdown in the top navigation bar.

The main content area displays an invoice from **SUPPLY CORP** with the following details:

2326 BELL AVENUE
P.O. BOX 1799
DES MOINES, IA 50306
(515) 288-3211 (800) 400-2377

Invoice Date: 5/10/2005
Invoice Number: S1186068.1
Page No.: 1

REMY TO: City Supply Corp.
PO Box 1799
Des Moines, IA 50306

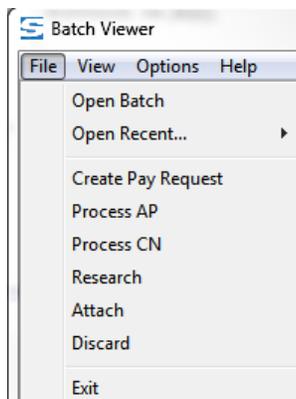
BILL TO: Acme Construction
80 Industry Drive
Armonk, NY 10504

SHIP TO: OUR TRUCK

CUSTOMER NUMBER	CUSTOMER ORDER NUMBER	CUSTOMER JOB NUMBER	WHSE	SALESMAN	TERMS TO TO, NET 30 DUE DATE AND CASH DISCOUNT IF APPLICABLE ARE LISTED BELOW
890	PO 000027	GC-003	1	BOBP	
SALES TICKET NUMBER	SHIP VIA	DATE SHIPPED	ORDER DATE	% FINANCE CHARGE ADDED ON PAST DUE AMOUNTS	
S1186068.1	OUR TRUCK	5/10/2005	5/9/2005		
DESCRIPTION	QTY	UNIT PRICE	NET AMOUNT		

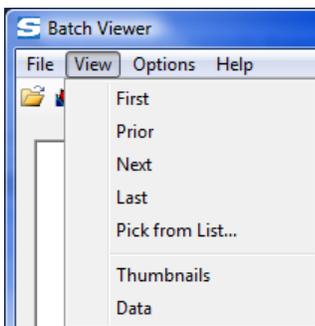
Batch Viewer Menus

File Menu



Open Batch	Select and open a batch . Same as  . See page 40.
Open Recent	Open a recent Spitfire document to which an image was attached. For example, if you used the Inquiry option or attached an image to a Pay Request, you could open the AP Scan or Pay Request document from the Open Recent option. The Batch Viewer remembers up to eight recent documents. The list is cleared when the Batch Viewer is closed.
Create Pay Request	Open the Attach to Document dialog box . Same as  Pay Req . See page 47.
Process AP	Process the displayed image in Microsoft Dynamics SL AP Voucher and Adjustment Entry. Same as  AP . See page 45.
Process CN	Process the displayed image in Microsoft Dynamics SL Contract Management Payment Request Entry. Same as  CN .
Research	Open the Invoice Inquiry dialog box. Same as  . See page 41.
Attach	Same as  . See page 47.
Discard	Same as  .
Exit	Close the Batch Viewer.

View Menu



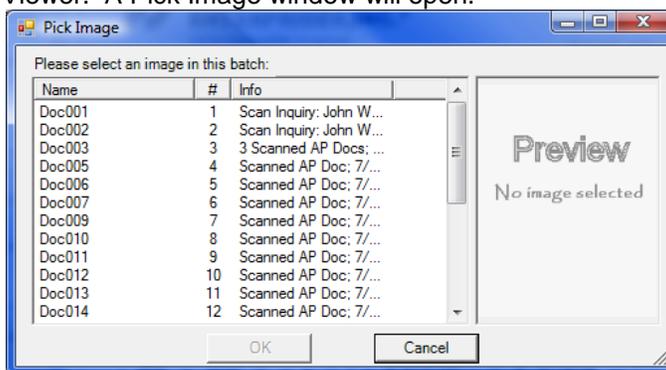
First, Prior, Next, Last	Go to the first, prior, next or last image file in the batch.
Pick from List	Select an image file from the batch. See the “Pick from List” section below.
Thumbnails	Show thumbnails of the previous and next two image files on the side of the Batch Viewer. This option is a toggle. See the “Thumbnails” section on the next page.
Data	Display information about the image. Same as 

Pick From List

When the image file that you want is neither the first, prior, next or last file, it could be tedious to find, especially if your batch has many files. The Pick from List option allows you to quickly find any image file in the batch.

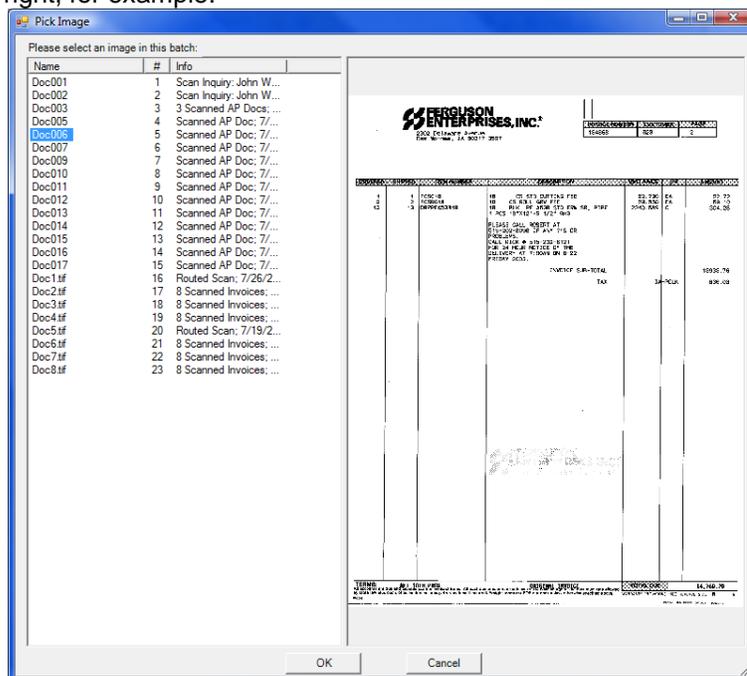
To find an image file from the batch:

1. Select **Pick from List...** from the View menu on the Batch Viewer. A Pick Image window will open.



2. Click  on the lower right corner of the window then drag to expand the size of the window. The bigger the window, the bigger the preview image will appear.
3. If necessary, scroll down the list to find the image file you want.

- When you click on the file Name, its image will appear on the right, for example:



- Click . That image file will now appear on the main Batch Viewer window.

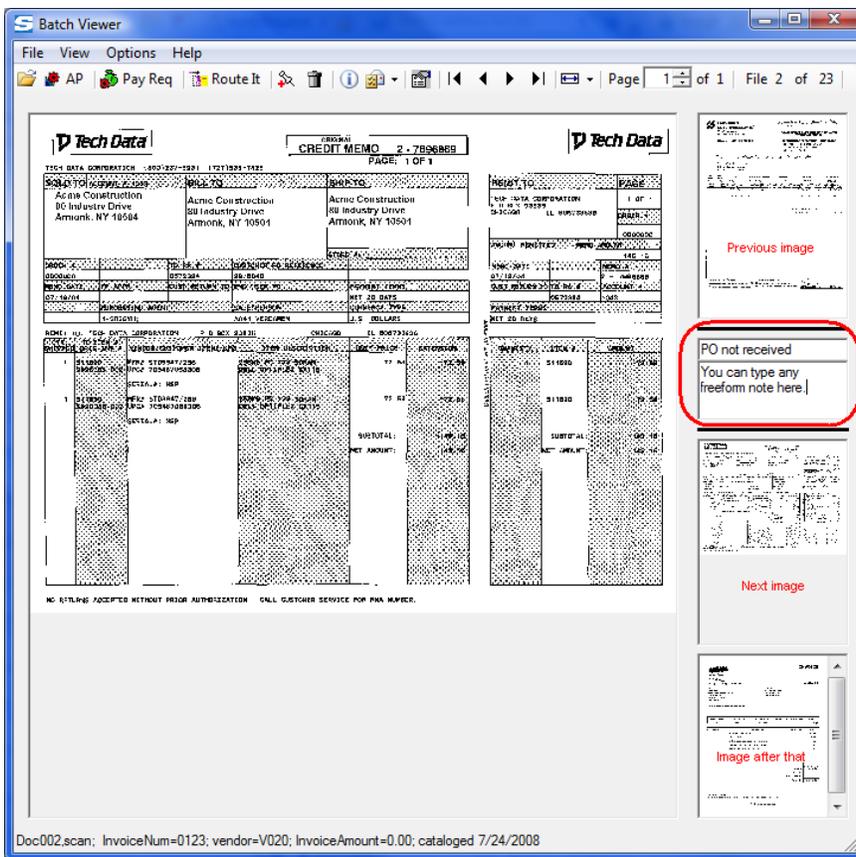
Thumbnails

When you choose to show thumbnails (from the View menu), a side panel on the Batch Viewer displays thumbnail pictures of the previous image and the next two images. It also provides Inquiry/Note fields similar to those on the [Route for Inquiry](#) dialog box (shown on page 44).

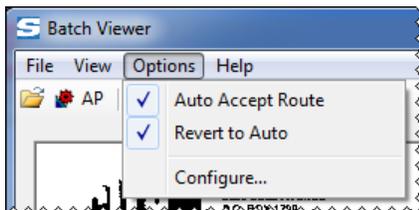
The top Inquiry field is meant for a short one-line note. If you start to type a default note, the field will auto-complete. For example, you can type just "po n" to get "PO not received".

The bottom note field allows you to type a longer, freeform note. Together, these fields will populate the Remarks field on a Spitfire document if you attach this image to a document.

However, the Inquiry/Note fields will not store information in the Batch Viewer itself. Once you move on to another image, the fields will clear.



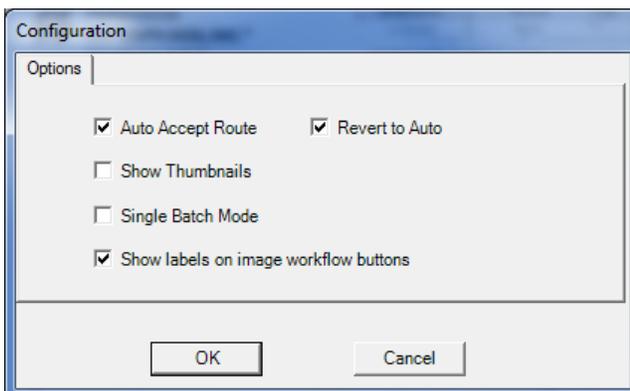
Options Menu (Configuration)



<p>Auto Accept Route</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Set the route mode to Auto Accept. See page 39. <input type="checkbox"/> Set the route mode to Manual.
<p>Revert to Auto</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> If Auto Accept Route mode is selected (checked), and the user changes the route mode to manual for one document, this option will automatically revert the route mode to Auto Accept Route for the next image. <input type="checkbox"/> Does not automatically reset the mode to Auto Accept Route, once Manual route mode is selected.
<p>Configure...</p>	<p>Open the Configuration dialog box for the Batch Viewer. See next page.</p>

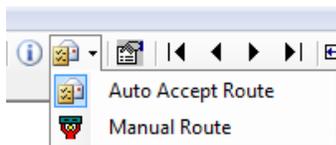
Configuration

The Configuration dialog box stores the Batch Viewer settings.



Auto Accept Route	<input checked="" type="checkbox"/> Set the document route mode to Auto Accept. This will default the Auto Accept Route choice on the Options menu  and the toolbar  <input type="checkbox"/> Set the document route mode to Manual  .
Revert to Auto	<input checked="" type="checkbox"/> Set the default Revert to Auto status on the Options menu to  . See previous page. <input type="checkbox"/> Turn off the Revert to Auto status.
Show Thumbnails	<input checked="" type="checkbox"/> Open a panel on the right edge of the viewer with thumbnails of the images. <input type="checkbox"/> Hide the thumbnail panel.
Single Batch Mode	<input checked="" type="checkbox"/> Limit the contents of the Batch Viewer to the files attached to the Spitfire document in your Inbox where you clicked the yellow processing arrow. <input type="checkbox"/> By default, load all of the images from all of the AP Scan documents in your Inbox. Note: Changes to this option require you to close the Batch Viewer and reopen it.
Show labels on image workflow buttons	<input checked="" type="checkbox"/> Add label to some toolbar buttons. <input type="checkbox"/> Hide all label on toolbar buttons. For example: with label  Pay Req and without label 

Auto Accept vs. Manual Route Mode



You can set and quickly change the route mode for Spitfire documents created during your Batch Viewer workflow. The route mode determines how the Spitfire documents will start their routes. In all cases, sfPMS will expect to use a [predefined route](#) (as established on the Manage Dashboard; see page 19).

While **Auto Accept Route** mode is on, documents will start their routes with the Seq 2 routees defined on the automated route. These documents will not be included in your Inbox.

While **Manual Route** mode is on, documents will remain at Seq 1 and therefore appear on your Inbox until you manually send the document on to the next routee. Also, the document will open when it is created during the workflow.

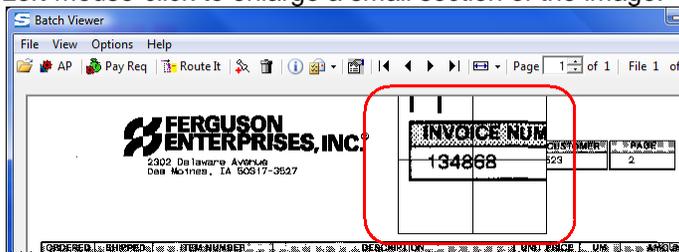
The icon that appears on the toolbar tells you which mode is currently active.

- To change the route mode, click the icon. It is a toggle.
- You can also open the drop-down menu and select the mode you want.

Using the Batch Viewer

To use the Batch Viewer:

1. (optional) Use the  buttons or the **View | Pick from List** option ([see page 35](#)) to get to another image.
2. (optional) Click  to check [if the invoice is already in Spitfire](#) or has an existing Voucher (see page 41).
3. Left-mouse-click to enlarge a small section of the image.

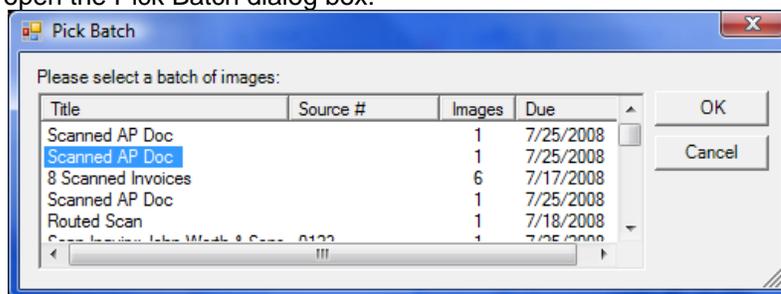


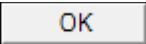
4. Review the scanned image to be processed.
Note: If required, change the route mode by clicking  (to switch to Auto-Accept route mode) or  (to switch to Manual routing mode).

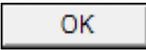
- Decide which of the following options apply to your scanned image:

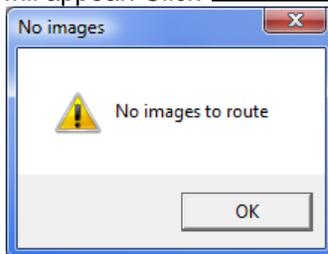
New AP Invoice	Click  AP and follow directions in the section " AP Invoice Processing Steps " on page 45.
Existing Spitfire Document	Be sure that the corresponding Spitfire document exists within the system then click the  button and follow the directions in the section " Spitfire Documents Processing Steps " on page 47.
Pay Request	Click the  Pay Request button and follow the directions in the section " Spitfire Documents Processing Steps " on page 47.
Route It (Inquiry)	Click the  Route It button and follow the directions to route the image on page 42.
Duplicate Scanned Image	Click  to discard the file from the Batch Viewer and from the Spitfire Catalog.

- (optional) Click  to display information about the image at the bottom of the Batch Viewer and bring the linked Microsoft Dynamics window to the foreground.
- (optional) If you want to open another batch (instead of going back to your Spitfire Inbox, finding another File Batch document and opening the Batch Viewer from there again), click  to open the Pick Batch dialog box:



- Select your next batch and click .

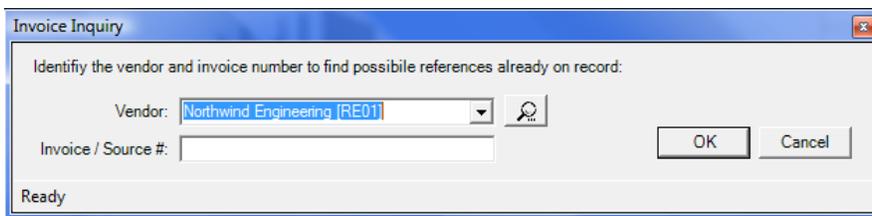
- When you have processed all your images, a confirmation box will appear. Click  then close the Batch Viewer.



Note: Once all the scanned images attached to the File Batch (or other) document in your Inbox are handled appropriately, the document will be automatically closed and removed from your Inbox (although you may have to refresh your page in order to see it removed.)

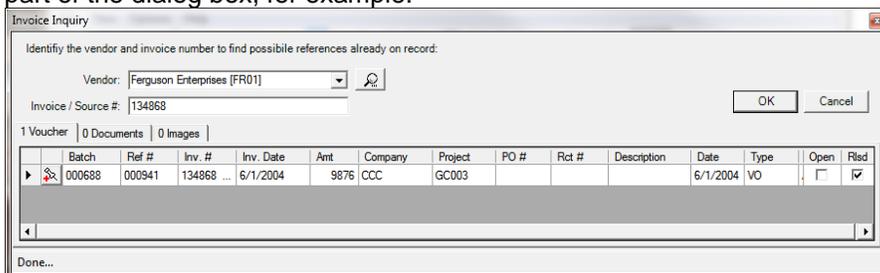
Invoice Inquiry

There may be times when you want to check if an image/invoice has already been processed or if a Voucher document already exists for a particular invoice. The Invoice Inquiry dialog box allows you to search by Vendor and Invoice number.



To use the Invoice Inquiry dialog box:

- Click . The dialog box will open.
- Use the lookup or drop-down to select a **Vendor**.
- Enter the **Invoice** or **Source** number. You can also enter a PO number.
- Click . Any results found will be listed in the lower part of the dialog box, for example:



- (optional) If a Voucher is listed and you want to attach the current image to that Voucher, click the  button.
- Click  to close the Invoice Inquiry dialog box.

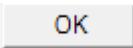
Inquiry (Route It Option)

When you need to route a specific image in a batch to someone else, who will in turn route it back to you so you can complete processing, you can do so through the Inquiry option. The Inquiry option first opens a Route for Inquiry dialog box. Information you enter in this dialog box gets copied to a new File Batch document (which you can choose to, but need not, open). The current image is removed from the batch and attached to the document.

To route an image:

1. Click  Inquiry. The [Route for Inquiry window](#) (shown on page 44) will appear.
2. Type in the appropriate fields (see the section that follows). If necessary, you can also use the lookups. Tab to get from one field to another.

Notes:

- Drop-downs offer previously used entries to auto-complete your current fields.
 - The **Route To** and **Vendor** fields will first auto-populate with the most recently used names.
 - The **Route To**, **Vendor**, **Invoice #** and **Inquiry/Note** fields are required.
 - Type **p** in the Inquiry field to choose a default one-line note.
3. (*optional*) To include a date, use the keyboard side arrow keys (← and →) to move among date, month and year and the up/down arrow keys (↑ and ↓) to change the numbers or choose a date from the drop-down calendar.
 4. (*optional*) If you want to look at the newly created AP Scan document that will be routed, click the **Show inquiry document** checkbox. Tab until the checkbox is selected, then press the spacebar.
 5. Press  to create and route the new AP Scan document. If you had chosen to open it, it will open. In either case, the image will be removed from the batch.

TIP

Although you can use the mouse on it, the Route It dialog box was designed for quick entry by keyboard. The Enter key finishes and closes the dialog box.

Inquiry Fields

Route To <i>(required)</i>	The Spitfire user who will receive this image attached to a new File Batch (or other) document. You can type an Employee ID or full name, select a previously selected name from the drop-down, or use the lookup. This person must also be designated as the Responsible person on a predefined route (see page 17).
Vendor <i>(required)</i>	The Vendor associated with the image. You can type a Vendor ID or full name, select a previously selected name from the drop-down, or use the lookup.
Description <i>(recommended)</i>	A description for the new File Batch (or other) document. A default description with the Vendor's name appears once you enter a Vendor.
Project <i>(optional)</i>	The Spitfire project ID associated with this image.
Invoice / Source # <i>(required)</i>	The number for the invoice or other image.
Invoice Date <i>(optional)</i>	The date on the invoice or other image. By default, no date will appear. To enter a date, use the arrow keys to change the month, day, year; or click the drop-down arrow to select a date from a calendar.
Invoice Amount <i>(optional)</i>	The amount on the invoice. Type a number or use the spinners.
Inquiry <i>(required if Note is blank)</i>	A quick one-line note. Four options are available for auto-completion if you type P . Either this field or the Note field must be filled out.
Note <i>(required if Inquiry is blank)</i>	A note of any length. Either this field or the Inquiry field must be filled out.
Show inquiry document <i>(optional)</i>	When checked, opens the newly created document that will be routed.

Route for Inquiry Window

Route for Inquiry

Complete this dialog to separate this image from the current batch and route it for additional information:

Route To: Elizabeth Keyser-Rubble [RUBBLE]

Regarding...

Vendor: Northwind Engineering [RE01]

Description: Scan Inquiry: Northwind Engineering

Project: GC003

Invoice / Source #: 1095

Date: 10/27/2014

Amount: 2,100.00

Inquiry/Note: PO not received
Please send by Wed.

Show inquiry document

OK Cancel

Click OK to create and route the inquiry

File Batch-Inquiry

Scan Inquiry: Northwind Engineering

DOCUMENT HEADER

DOC# 0002 INVOICE/SOURCE# 1095

PROJECT GC-003 Northern Lights Office Bldg

DESCRIPTION Scan Inquiry: Northwind Engineering

VENDOR Northwind Engineering

STATUS Inquiry

DATE 10/27/2014 DUE 10/28/2014

Notes Details

NOTES

Added	By	Remark
seconds ago	Chris Demo	PO not received Please send by Wed. af...

Attachments Route Detail

Name	Size	Note	Incl	Seq	Cataloged
Doc1 - 1095	108KB	Manually attached sc...	Native		12/18/2006

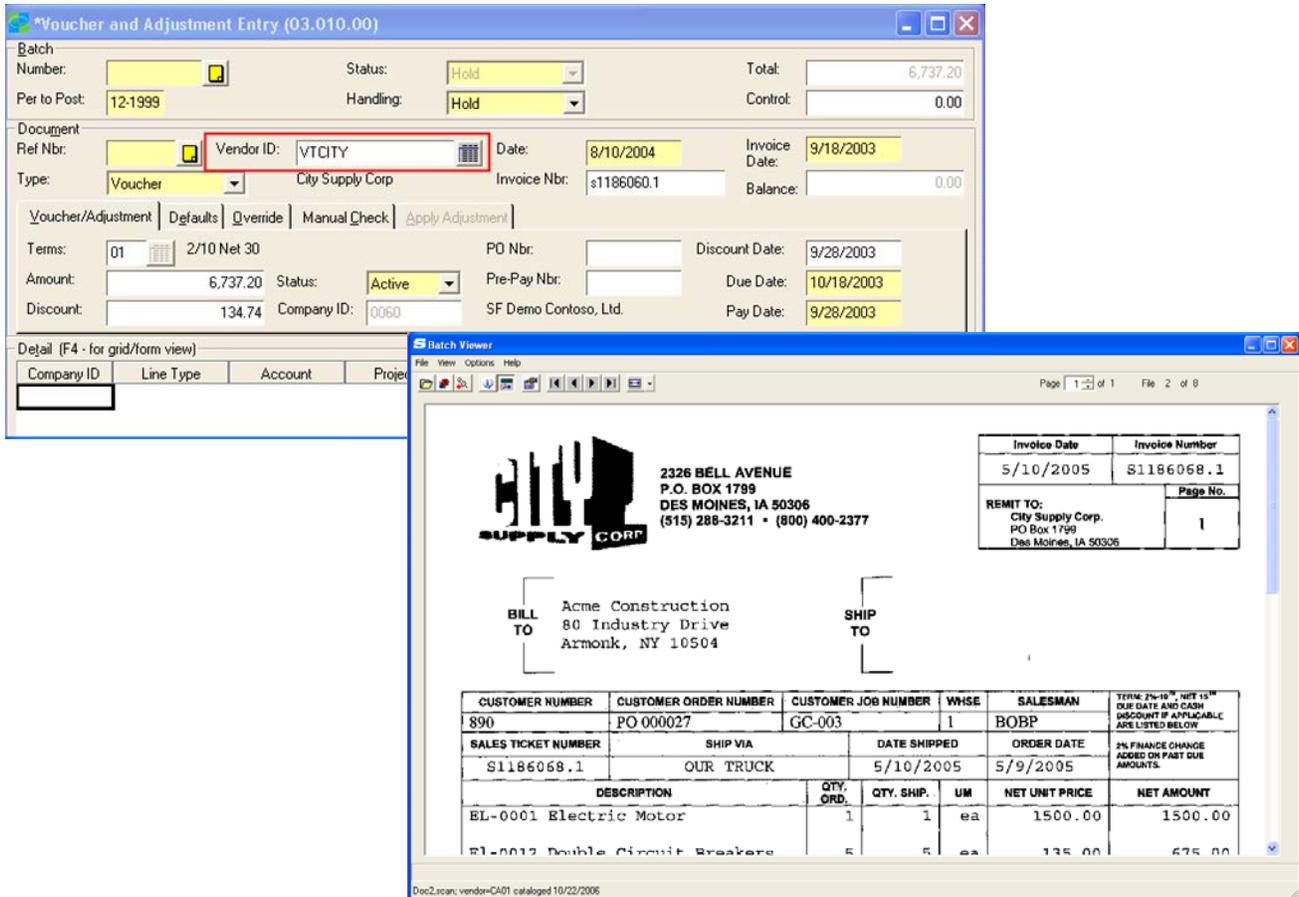
Powered by SPITFIRE

AP Invoice Processing Steps

Note: The AP Invoice Processing workflow requires sfPMS to be integrated with Microsoft Dynamics SL.

1. Click  to open Microsoft Dynamics SL AP Voucher and Adjustment Entry.

Note: If Microsoft Dynamics SL is not open, you will be prompted to log into it.



The screenshot shows two overlapping windows from Microsoft Dynamics SL. The top window is titled "Voucher and Adjustment Entry (03.010.00)". It contains various fields for document information, including Vendor ID (VT01TY), Date (8/10/2004), Invoice Date (9/18/2003), and Invoice Nbr (s1186060.1). The bottom window is titled "Batch Viewer" and displays a scanned AP invoice from City Supply Corp. The invoice includes the company logo, address (2326 BELL AVENUE, P.O. BOX 1799, DES MOINES, IA 50306), and contact information. It also shows the bill-to address (Acme Construction, 80 Industry Drive, Armonk, NY 10504) and a table of invoice items.

CUSTOMER NUMBER	CUSTOMER ORDER NUMBER	CUSTOMER JOB NUMBER	WHSE	SALESMAN	TRM 2% 10% NET 15% DUE DATE AND CASH DISCOUNT IF APPLICABLE ARE LISTED BELOW
890	PO 000027	GC-003	1	BOBP	
SALES TICKET NUMBER	SHIP VIA	DATE SHIPPED	ORDER DATE	2% FINANCE CHARGE ADDED ON PAST DUE AMOUNTS.	
S1186068.1	OUR TRUCK	5/10/2005	5/9/2005		
DESCRIPTION	QTY. ORD.	QTY. SHIP.	UM	NET UNIT PRICE	NET AMOUNT
EL-0001 Electric Motor	1	1	ea	1500.00	1500.00
EL-0012 Double Circuit Breakers	5	5	ea	135.00	675.00

2. Enter your AP Invoice in Microsoft Dynamics SL per your company's standard operating procedure and save your voucher.

Note: If the VendorID was associated with a scanned image by using either a separator sheet with the Vendor ID, or a VendorID for the Folder, or during a route inquiry, the Vendor ID will auto populate the Vendor ID field in AP Voucher and Adjustment Entry.

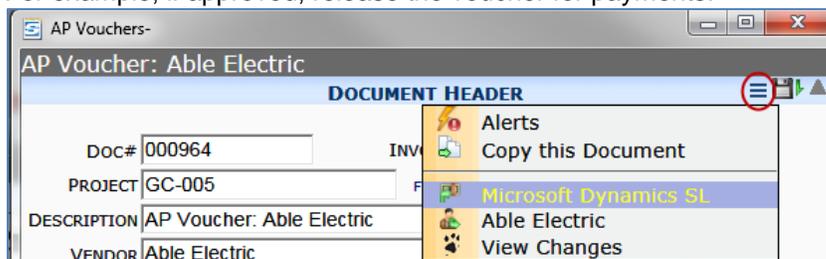
3. Click the **Attach** button to attach the scanned image in the Batch Viewer to the displayed AP Voucher.

Note: The AP Voucher must be saved and have a Reference Number in order for the Attach button to be active.

TIP

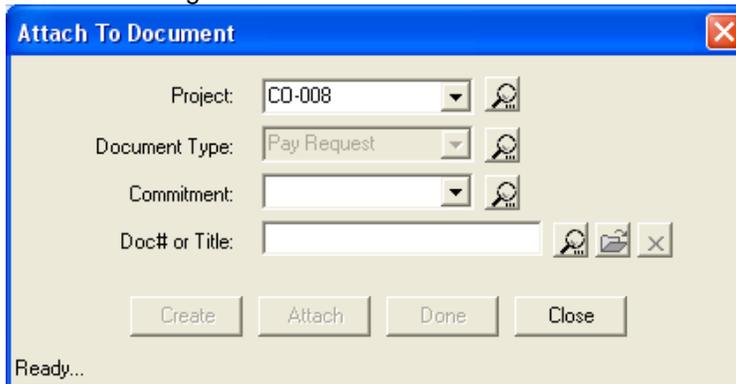
If you need to open one of the Spitfire documents created during the invoice processing workflow (for example, to add a note), use the [Open Recent option](#) on the Batch Viewer's File menu. (See page 34.)

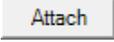
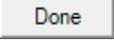
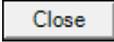
4. Notice that a Spitfire AP Voucher document is created and routed according to your default [predefined route](#) (see page 19).
5. Notice too that the Batch Viewer now has one less scanned file and is ready for you to process the next file.
6. In Microsoft Dynamics SL, click **Finish** and select either Document or Batch per your normal AP Voucher protocols.
7. Repeat steps 2 through 6 for each scanned AP Invoice file in the Batch Viewer.
Note: The Attach button in the Microsoft Dynamics SL AP Voucher and Adjustment Entry screen attaches the displayed scanned image to the AP Voucher, removes the Scanned Image from the Batch Viewer, and moves to the next scanned image. You may skip some scanned files to find the next scanned file to be entered in AP Voucher and Adjustment Entry.
8. Close the Batch Viewer when finished. You may close the Batch Viewer even if you have not finished processing all the scanned images. The next time you click , the Batch Viewer will open with the remaining scanned images.
9. (If you routed the Spitfire AP Voucher document to others for approval) When that Spitfire AP Voucher document is returned to you, save the document then select **Microsoft Dynamics SL** from the Document Options menu to open the voucher in Microsoft Dynamics SL, where you can take appropriate action. For example, if approved, release the voucher for payments.



Spitfire Document Processing Steps

1. Click  or  Pay Request to open the Spitfire Attach To Document dialog box.



2. (optional) In **Project**, select a Project ID from the drop-down or lookup (.
 3. In **Document Type**, select a Doc type from the drop-down or lookup (.
- Note:** If you clicked  Pay Request, the Document Type is Pay Request and you cannot change it.
4. (If you clicked ) In **Commitment**, select a Commitment document from the drop-down or lookup ( for this Pay Request. This is a required field for Pay Requests.
 5. (optional) Click the  button to create a new Spitfire document for the Project. It will be of the Doc type entered above. The scanned image will be automatically attached to this new document. If you do not create a new document, you will need to select one.
 6. (if a new document was not created) In **Doc# or Title**, click  to select an existing Spitfire document.
 - o (optional) Click  to open the document so you can add notes and routing.
 - o Click the  button to attach the scanned image to the selected document.
 7. Either click the  button to close the dialog box and remove the scanned image from the Batch Viewer
-or-
Click the  button to close the dialog box but leave the scanned image in the Batch Viewer so that you can attach it to additional documents.

8. Proceed through the images in the Batch Viewer until you have finished processing.
9. Click  to close the Batch Viewer. Any scanned images that you have not processed will be available when you reopen the Batch Viewer.

Working with AP Vouchers/ Pay Request in sfPMS

Access

From Inbox

If the [routing mode during batch processing](#) was Manual (see page 39), you may find an AP Voucher or Pay Request document in your Inbox.

Note: Spitfire document names can be customized; therefore AP Vouchers may have been renamed by your System Administrator.

INBOX								
Description	DocNo	Type	Project	Due	Status	Company	Priority	
AP Voucher: Able Electric	000964	AP Vouchers	GC-005	10/26/2014		Able Electric		
AP Voucher: Ferguson Enterprises	000941	AP Vouchers	GC-003	10/27/2014	Open	Ferguson Enterprises		
AP Voucher: Humongous Insurance	000894	AP Vouchers	GC-003	11/18/2014	Open	Humongous Insurance		

- Click to open the document so that you can review it and route it to the next routee.

From Catalog

The Spitfire Catalog also provides access.

Home **Catalog** Contacts Plan Room Executive Manage System Admin GC-003

SEARCH

INCLUDE DOCUMENTS

TYPE: AP Vouchers

REFERENCE:

COMPANY:

DOC #:

DATE: 10/26/2013 → 10/27/2014

INCLUDE CLOSED

HAS ATTRIBUTE:

PROJECT ID:

PER PAGE: 24

AUTO REFRESH

INCLUDE FILES

SUBTYPE:

RESPONSIBLE:

CONTACT:

SOURCE #:

DUE: 10/27/2014 → 10/27/2014

STATUS:

HAS FILES: Either

MAX ITEMS: 200

TEXT:

	Date	Title	Type	DocNo	Project	Project Name	Source Contact	Status
	10/26/2014	AP Voucher: Able Electric	AP Vouchers	000964	GC-005	Fabrikam, Inc.	Able Electric	
	10/26/2014	AP Voucher: Able Electric	AP Vouchers	000950	GC-006	City Hall Renovation	Jason Sunderson	Open
	10/26/2014	AP Voucher: Able Electric	AP Vouchers	000951	GC-006	City Hall Renovation	Jason Sunderson	Open
	10/13/2014	AP Voucher: Margie and Sons	AP Vouchers	000934	SC-100	Weyerhaeuser Waferboard Plant	Margie and Sons	Closed

- Search for documents of the desired Doc type (e.g., **Vouchers**). In the Search Results locate your voucher and click to open the document.

From Document List on Project Dashboard

Documents (such as Vouchers) appear on the Project Dashboard's document list.

Type	Doc No	Invoice #	Description	Amount	Date	Due	Company	Status	Priority
AP Vouchers	000958		AB01 for \$140	\$140.00	2/4/2010		Able Electric	I	
Bid	000957		AB01 for \$1960	\$1,960.00	2/4/2010		Able Electric	I	
Bid Package	000941	134868	AP Voucher: Ferguson Enterprises	\$9,876.00	10/5/2014	10/27/2014	Ferguson Enterprises	Open	

- Click at the desired Doc type (e.g., **Vouchers**) to open the Vouchers list, then to open the document.

From Drill-Down

The Voucher document can also be accessed from the drill-down in the Cost Analysis Detail (on the Project Dashboard) or a BFA spreadsheet:

Account	EAC	U.CO	=Sum	Actual	Com Cost	=A+C	Spent	FAC	Variance
_EQ RENTAL	\$5,125	\$0	\$5,125	\$1,550	\$0	\$1,550	30.24 %	\$5,125	\$0
_LABOR	\$169,000	\$0	\$169,000	\$875	\$0	\$875	0.52 %	\$169,000	\$0
_MTRL PERM	\$253,500	\$0	\$253,500	\$31,939	\$13,618	\$45,557	17.97 %	\$253,500	\$0

Transaction Date	Module	Type	Name	Amount	Account	Cost Code
4/25/2004	AP	VO		\$215.00	_MTRL PERM	01700-
6/1/2004	AP	VO		\$9,876.00	_MTRL PERM	02000-

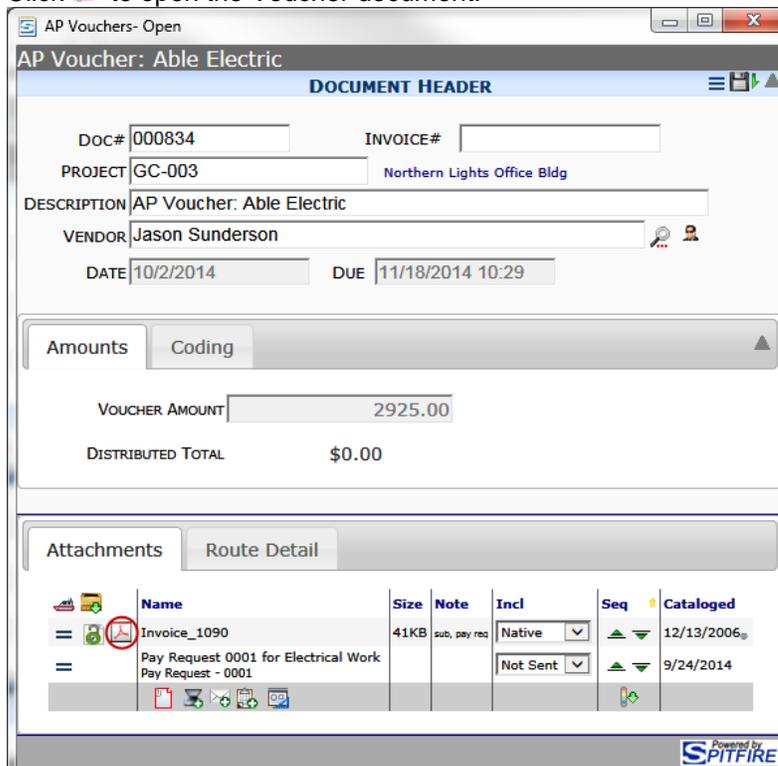
Cost Codes	Description	Work Order Open	Actual Cost to Date	Work Order Closed	Committed Cost to Date	Work Order Open Units
00000	Project	\$0.00	\$0.00	\$0.00	\$0.00	0.00
01000	General Conditions	\$0.00	\$11,618.20	\$0.00	\$11,618.20	0.00
01700	Contract Closeout	\$0.00	\$215.00	\$0.00	\$0.00	0.00
02000	Site Work	\$0.00	\$12,693.70	\$0.00	\$425.00	0.00
02050	Demolition	\$0.00	\$6,180.00	\$0.00	\$0.00	0.00

Transaction Date	Module	Type	Name	Amount	Account	Cost Code
4/9/2004	TM	EQ		\$825.00	_EQ RENTAL	02000-
4/9/2004	TM	EQ		\$375.00	_EQ RENTAL	02000-
4/9/2004	TM	EQ		\$350.00	_EQ RENTAL	02000-
6/1/2004	AP	VO		\$9,876.00	_MTRL PERM	02000-

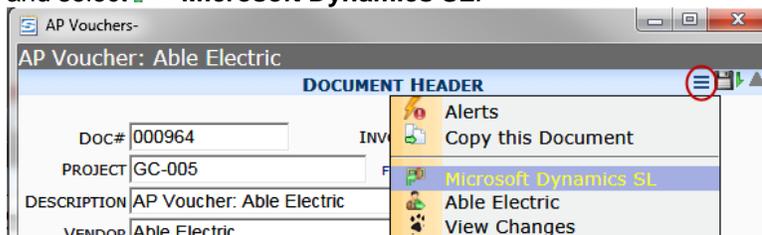
- Right-click to drill-down to the Transaction History window, and then click to open the document.

Spitfire AP Voucher Document

1. Click  to open the Voucher document:



2. Notice that the scanned image of the vendor invoice is attached to the document. Click the view icon (e.g., ) to view it.
3. To link to the AP Voucher or SL Pay Request, save the document then click  to open the Document Options menu and select  **Microsoft Dynamics SL**.



4. To edit the route on the Spitfire Voucher document, click on the Route Detail tab.

Note: detailed information about routing can be found in the [Focus on Routes](#) guide.

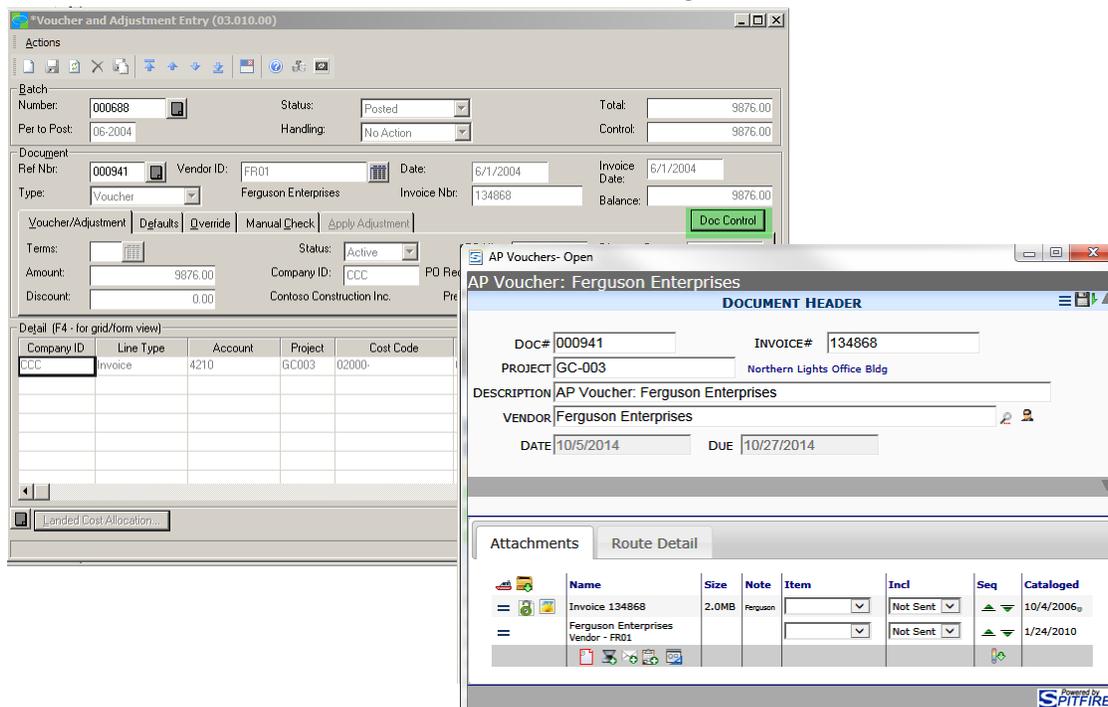
5. Click  to save your document and route it.

Access from Microsoft Dynamics SL

Access to the scanned image is also available in Microsoft Dynamics SL.

To access the scanned image from Microsoft Dynamics SL:

1. In Accounts Payable, open Voucher and Adjustment Entry or Document Maintenance and locate your voucher.
-or-
In Contract Management, open Subcontractor Payment Request Entry screen and locate your voucher.
2. Click the DocControl button to open the corresponding Spitfire document. **Note:** your Spitfire Dashboard must be open before you click the button.
3. Click  to view the scanned image.



Access to scanned images is also available from other Microsoft Dynamics SL screens. Any screen with a Spitfire DocControl button can access a Spitfire document with a scanned image. For example, the Vendor Maintenance screen has a DocControl button that links to the Vendor Doc type where Vendor Compliance information can be stored along with various scanned images of insurance certificates, etc.

In addition, on the Documents tab of the Vendor Maintenance screen, you can select one of the Vendor's documents and open the Microsoft Dynamics SL Document Transaction button to drill-down to the transaction. The Spitfire DocControl button is available there and links the appropriate Spitfire Voucher document with the scanned image.

***Vendor Maintenance (03.270.00)**

Vendor ID: Ferguson Enterprises Class ID: Status:

Vendor | Address Info | Defaults | 1099 Info | Purchasing Info | Documents

Select Company:
 Specific Company ID: Contoso Construction Inc.
 All

Last Voucher Date:
 Last Check Date:
 Current Balance:
 Future Balance:

Detail Viewing Option:

Detail (F4 for grid/form view)

Type	Reference Nbr	Company ID	Date	Status	Original Amount	Doc Ba
Voucher	000941	CCC	6/1/2004	Active	9876.00	

Page 1 of 1 Document Transactions...

CCC DEMO 9/11/2006

***Document Maintenance (03.250.00)**

Document Ref Nbr: Status: Vendor Status:
 Type: Vendor: Batch Nbr:
 Date: Ferguson Enterprises Doc Total:

Document Details | | |

Company ID: Contoso Construction Inc. Terms:

Invoice Nbr: Period Entered: Pay Date: Doc Balance:
 Invoice Date: Period to Post: Disc. Date: Disc. Balance:
 PO Nbr: Period Closed: Due Date:
 Pre-Pay Nbr: Released Selected

Details (F4 - for grid/form view)

Company ID	Account	Project	Cost Code	Subacct	Invoice Qty	UOM
CCC	4210	GC003	02000-	00	0	

Doc Control

AP Vouchers - Open

AP Voucher: Ferguson Enterprises

DOCUMENT HEADER

DOC# INVOICE#
 PROJECT Northern Lights Office Bldg
 DESCRIPTION
 VENDOR
 DATE DUE

Amounts Coding

VOUCHER AMOUNT
 DISTRIBUTED TOTAL

Attachments Route Detail

Name	Size	Note	Item	Incl	Seq	Cataloged
Invoice 134868	2.0MB	Ferguson	<input type="text" value=""/>	<input type="text" value="Not Sent"/>	<input type="text" value=""/>	10/4/2006
Ferguson Enterprises Vendor - FR01			<input type="text" value=""/>	<input type="text" value="Not Sent"/>	<input type="text" value=""/>	1/24/2010

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