Focus Guide

Routes

This Focus Guide is designed for Spitfire Project Management System users. This guide focuses on the Route Detail tab found on documents and all its options and explains how to route documents internally within Spitfire and also via email (fax or hard copy).

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Spitfire Management, LLC.
www.spitfiremanagement.com

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About Our Documentation

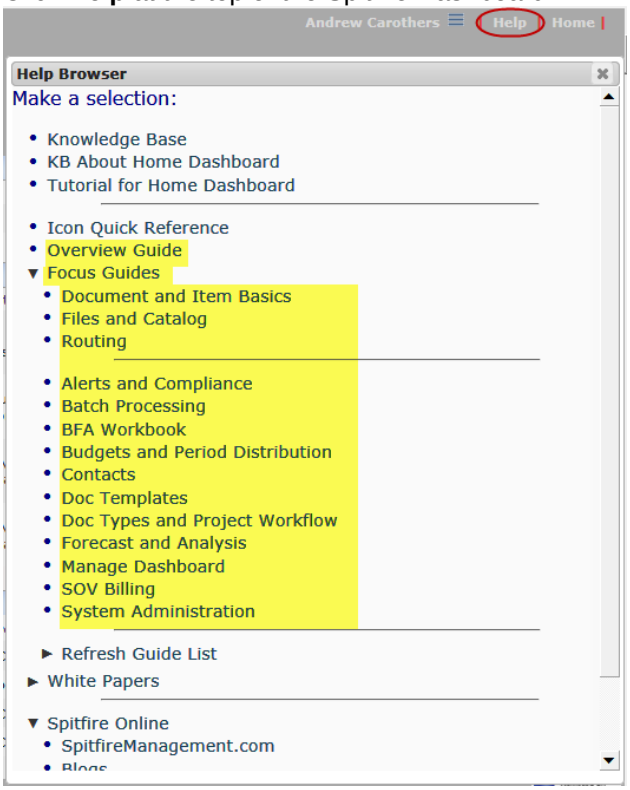
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

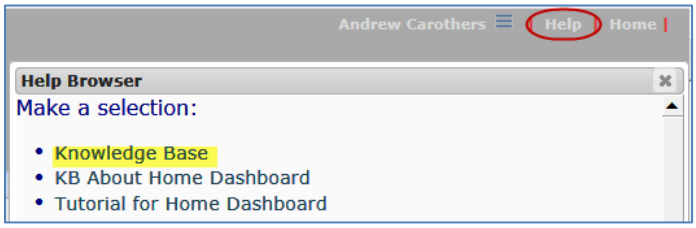


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

   The guide will appear as a PDF file.

The Knowledge Base

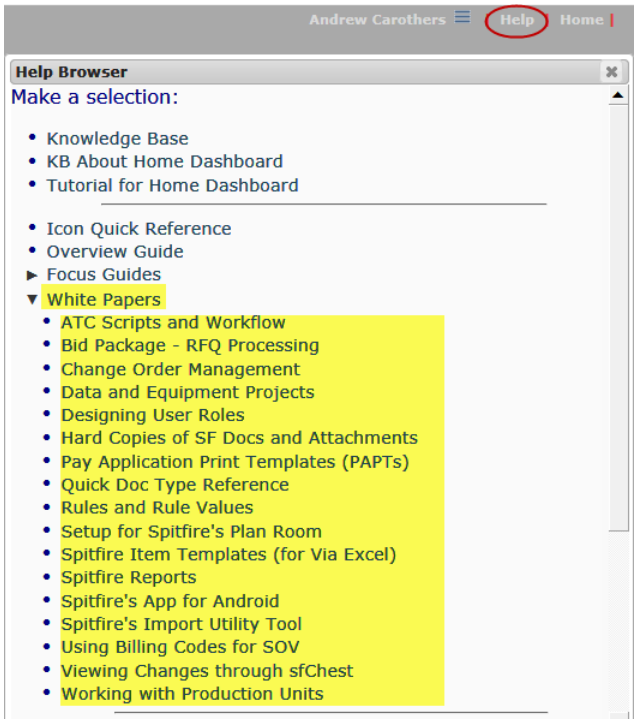
The Knowledgebase contains articles, in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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

White Papers

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



Introduction to This Guide

Routing documents allows you to have your co-workers and managers review them. It also allows you to delegate action items to co-workers, subcontractors or other project contacts. You can assign due dates, which can be tied into Alerts. There's even a Build Route function that will build a route on-the-fly for all Responsible Parties and/or Attendees on the document.

Note: it is also possible to set up sfPMS to integrate with a Cloud storage provider so that project participants who are not Spitfire users may access documents and files in the cloud. For more information, contact your implementer and see the *Setup for Cloud Drive Integration* technical white paper.

This guide focuses on the document Route Detail tab and all its options and explains how to route documents internally within Spitfire and also via email (fax or hard copy).

This guide assumes some familiarity with sfPMS and its dashboards as described in the *Overview Guide*.

Note: Because sfPMS is configurable and because different users have different levels of access rights and permissions, the screens shown and the fields described in this guide may not be the same as those in your system.

Note: section, chapters and text that are new or changed from the V4.4 documentation appear with **green text** and sometimes an *

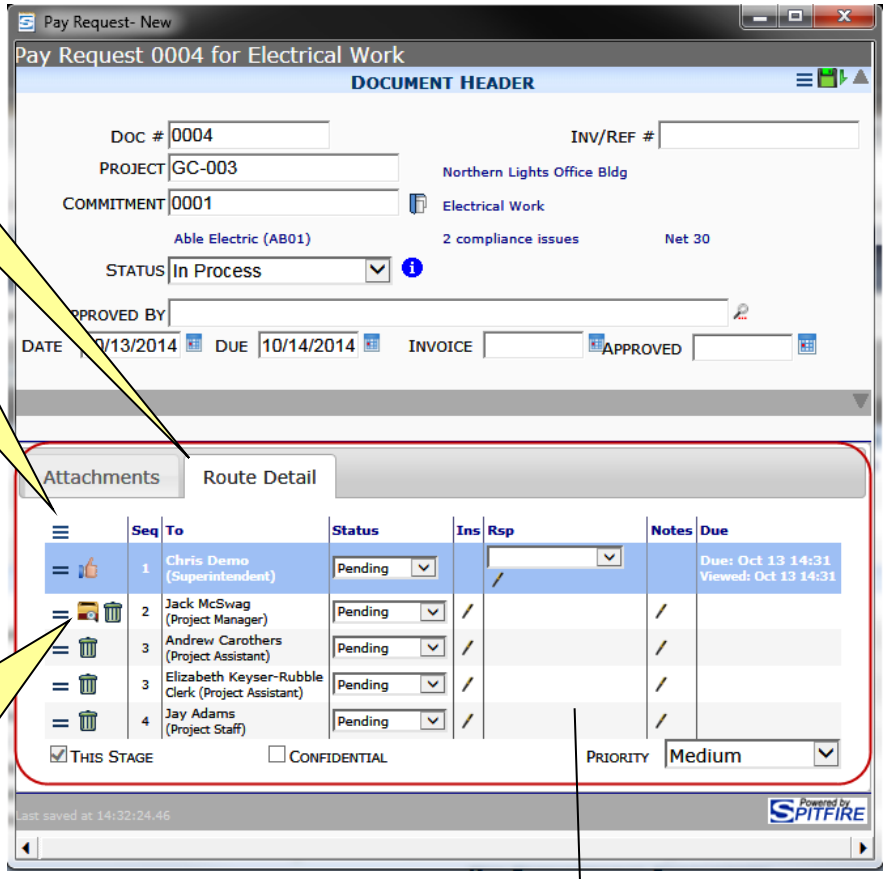
Route Detail Tab

Routing is added and accessed through the Route Detail tab that appears on Spitfire documents.

Click on the **Route Detail** tab to see routing info or to add a routee.

Click ≡ to open the Route Options menu in order to add routees or build a route.

Click ≡ on a routee line to open the Routee Options menu for that routee; click to preview the routed content.



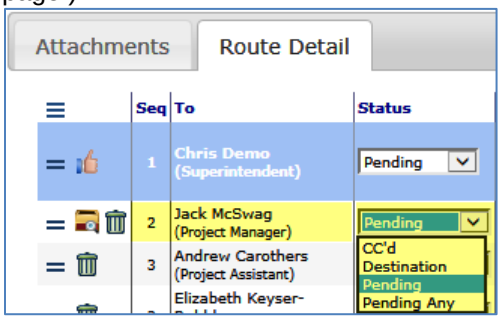
Instructions, Responses and Notes in the Route Detail grid allow for communication among routees.

- Routing is available on all Doc types.
- When you create a document of any type, by default, you are automatically listed as the first routee for that document (as Seq. 1).

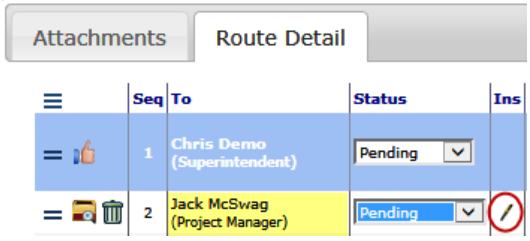
The Route Detail Grid

The Route Detail grid consists of the following information:

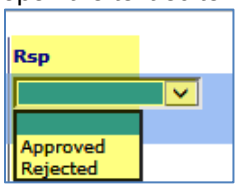
- **Seq** – the sequence number for the routee. (See also the section on Sequential vs. Parallel Routing on page 10.)
- **To** – the name and role (if available) of the routee. The **To** routee can be an individual or a company.
- **Status** – the route status. This status should not be confused with the document status. When adding a routee, you can change the Status by selecting another option from the drop-down menu. (See also the section on Route Status on the next page.)



- **Ins** – an instructional or other type of note to be read by the routee. You can click to open the text editor to add the note, or to read an existing note.



- **Rsp** – both a Response from a drop-down and a response note. You can select an option from the drop-down and click to open the text editor.



- **Notes** – another possible note. You can click to open the text editor to add the note, or to read an existing note
- **Due** – the date by which the routee should take action on the document, sending it to the next routee. (See "taking action on your documents" on page 32.) Also, when the document was viewed.

Route Status

TIP

Documents do not "stop and wait" in the Inboxes of routees with a status of CC'd. The document is also routed to the next person on the Seq without a CC'd status.

The Route Detail includes the status of the route for each routee. When adding routees, possible statuses are

- **CC'd**: the document is a courtesy copy only; no action is required from this person. Once the courtesy copy is opened, the CC acknowledged icon appears. When the routee clicks , the status changes to **CC'd: Ack** and the document leaves the person's Inbox (see page 36).
- **Destination**: Routee is the final recipient. The document cannot be routed after arriving at its destination.
  Note: Routes do not require a destination routee and, in fact, the status of Destination makes the routing more inflexible. For example, if you mark a routee as "Destination" and someone else wants to add routees to the end of your route, the added routees would be inserted before the Destination routee, not after as may have been expected.
- **Pending**: the document is pending action from this routee. The document appears in this person's Inbox until he or she takes action by changing the status to one of the following:
  - **Responded**: send the document to the next routee's Inbox.
  - **Held**: hold the document in this routee's Inbox. This status allows others to see that the document is being intentionally held and will eventually be accepted.
  - **Restarted**: return the document to the originator's Inbox (i.e., to the person who created the document). The originator can then resend the document on its route.
  - **Sent Back**: return the document to the previous routee's Inbox. This routee can then resend the document forward to the next routee.
- **Pending Any**: the document is pending action (as described above) from this routee or another routee with the Pending Any status (see the next section on the next page for an example of the use of Pending Any).

Sequential vs. Parallel Routing

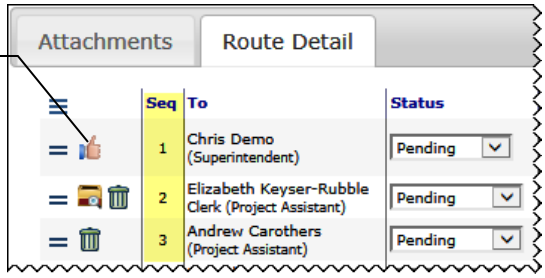
You can choose to route your documents with any combination of

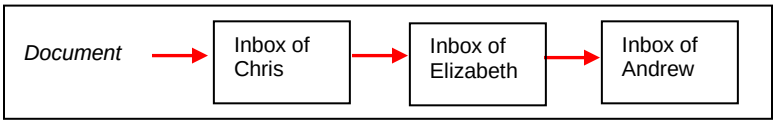
- **Sequential Routing:** Routed to routee A and then to routee B, and then routee C, etc. or
- **Parallel Routing:** Routed to all routees at the same time. What happens when these routees take action on the document depends on whether they have a Pending or Pending Any status (explained on the next page).

Documents are routed to the Inbox of each routee.

Example of Sequential Routing:

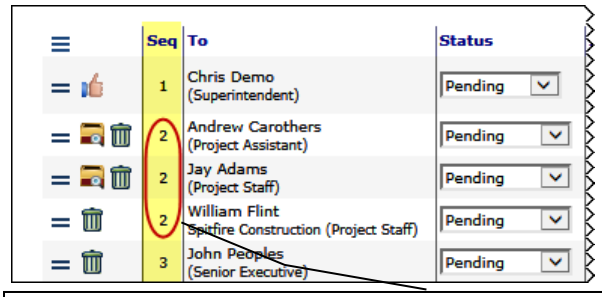
When person #1 accepts the route, the document will go to person #2 and so on.



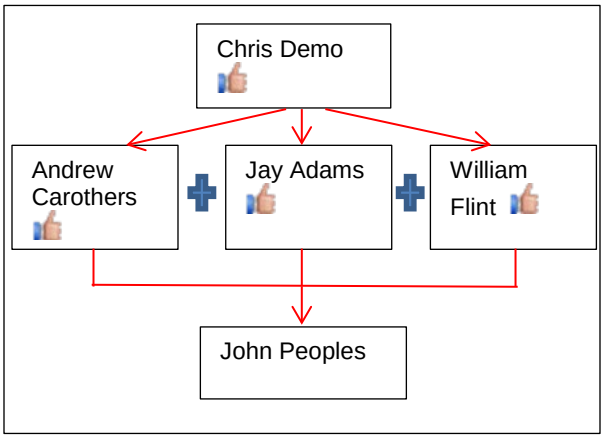


Pending vs. Pending Any

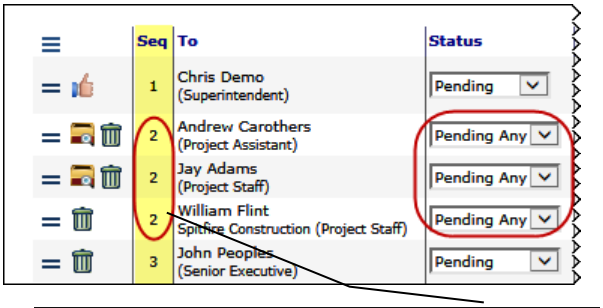
Example of Parallel Routing with Pending:



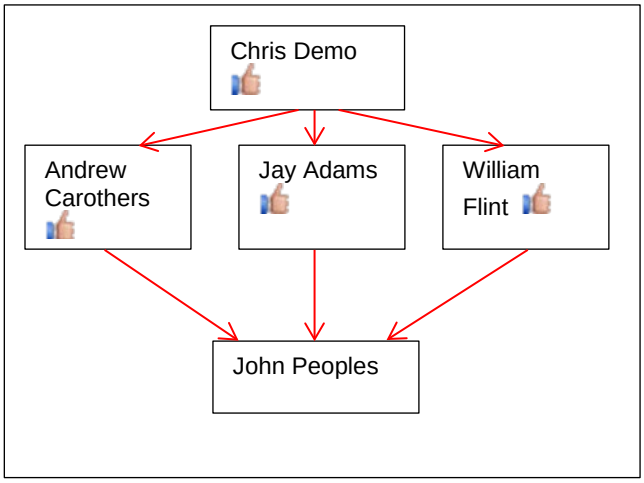
This document will be simultaneously routed to the Inbox of these three people. Because they all have a status of **Pending**, all three need to accept the route before the document goes to Seq. 3.



Example of Parallel Routing with Pending Any:



This document will be simultaneously routed to the Inbox of these three people. Because they all have a status of **Pending Any**, any one of the three needs to accept the route before the document goes to Seq. 3 (John Peoples)



Note: in the above example, if Jay had a status of Pending (instead of Pending Any), the document would be routed to John Peoples only when Jay **and** either Andrew or William have accepted their routes.

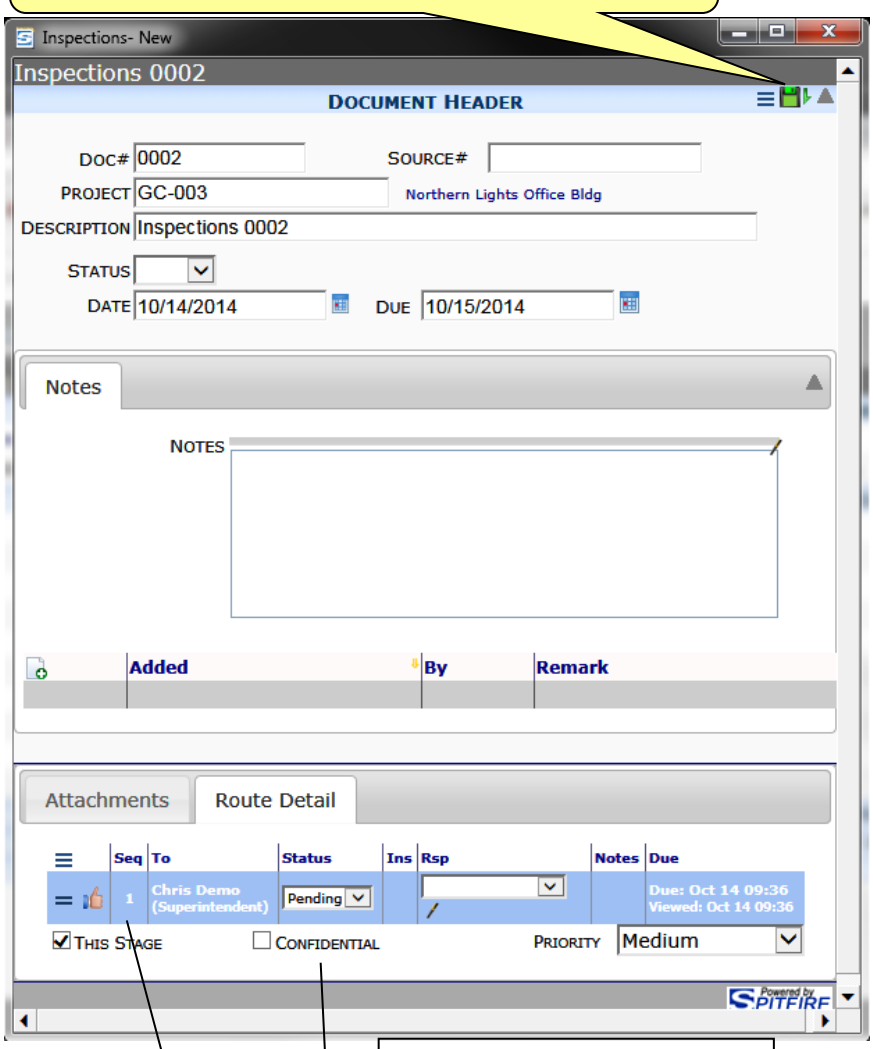
Individual Document Routes

Route Creation

TIP
Information about documents can be found in the *Focus on Document and Item Basics* guide.

Routes are automatically created when you first create a document.

Fill in the information for this document then click to save it. The document will appear in your Inbox.

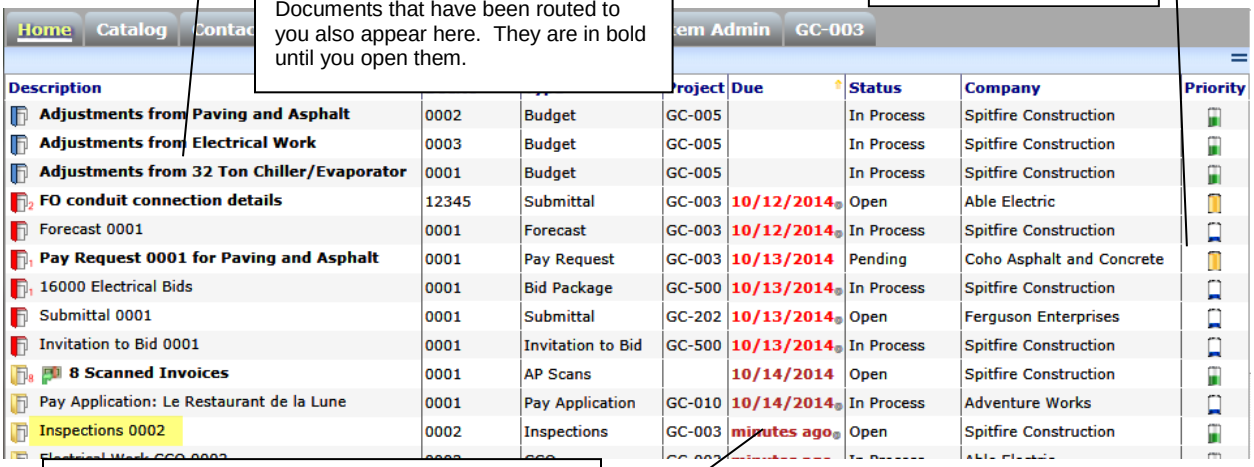


Confidential and **Priority** are routing options that apply to the document, not each routee (see page 30).

You are automatically the first routee when you create a document. The status is set to Pending by default. If predefined routes have been set up, then two or more routees may automatically appear. (For more information about predefined routes, see the *Focus on the Manage Dashboard* guide.)

Once saved, the document appears in regular text in your Inbox on your Home Dashboard. (See page 31.) Documents that have been routed to you also appear here. They are in bold until you open them.

Each document has its own level of priority.



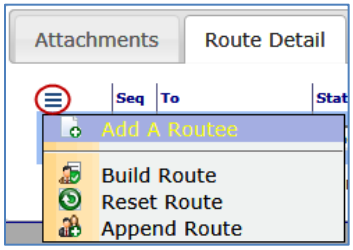
The Due date is the route due date. If none, it is the document due date. Red means it is past; brown means it is today; black means it is in the future. Bold means it is the past (determined by time if today).

Routees

You can add routees manually and you can add routees through the Build Route option.

To add a routee to your route manually:

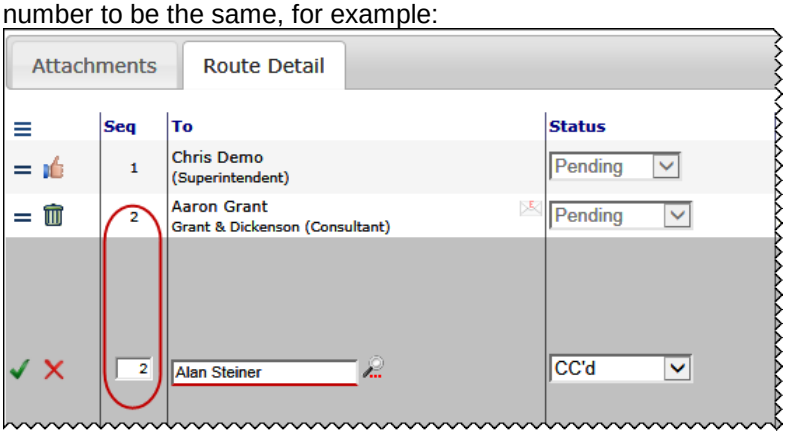
1. After creating or opening a document, click on the Route Detail tab.
2. Click ≡ to open the Route Options menu and select **Add a Routee**:



   A new row will appear in edit mode:

3. (*optional*) At the **Seq** field, change the number if it is not what you want it to be.
4. In the **To** field, either **type a name until autocomplete gives you choices, then select one** or click to look up the routee.
5. (*optional*) At the **Status** drop-down, select the status for this routee. At this point your status choices are CC'd, Destination, Pending, and Pending Any (described on page 10). Most commonly, you will leave the status as **Pending**, which is the default.

6. (*optional*) At the **Ins** column, enter a short note or click to open the text editor. This is where you can add instruction or other specific notes for the routee.
7. (*optional*) At the **Notes** column, click to open the text editor. This is where you can add other specific notes for the routee.
8. (*optional*) At the **Due** field, either enter a date in the format mm/dd/yy (e.g. 9/7/16) or click to select a date from the calendar. The Due field indicates the date by which the routee should act on the document; however, this date is not required.
9. Click to accept the information for this routee (or to cancel changes).
   Note: You can create more routees in this same manner. To make any of your routees parallel (so that they get the document at the same time) instead of sequential, change their **Seq** number to be the same, for example:



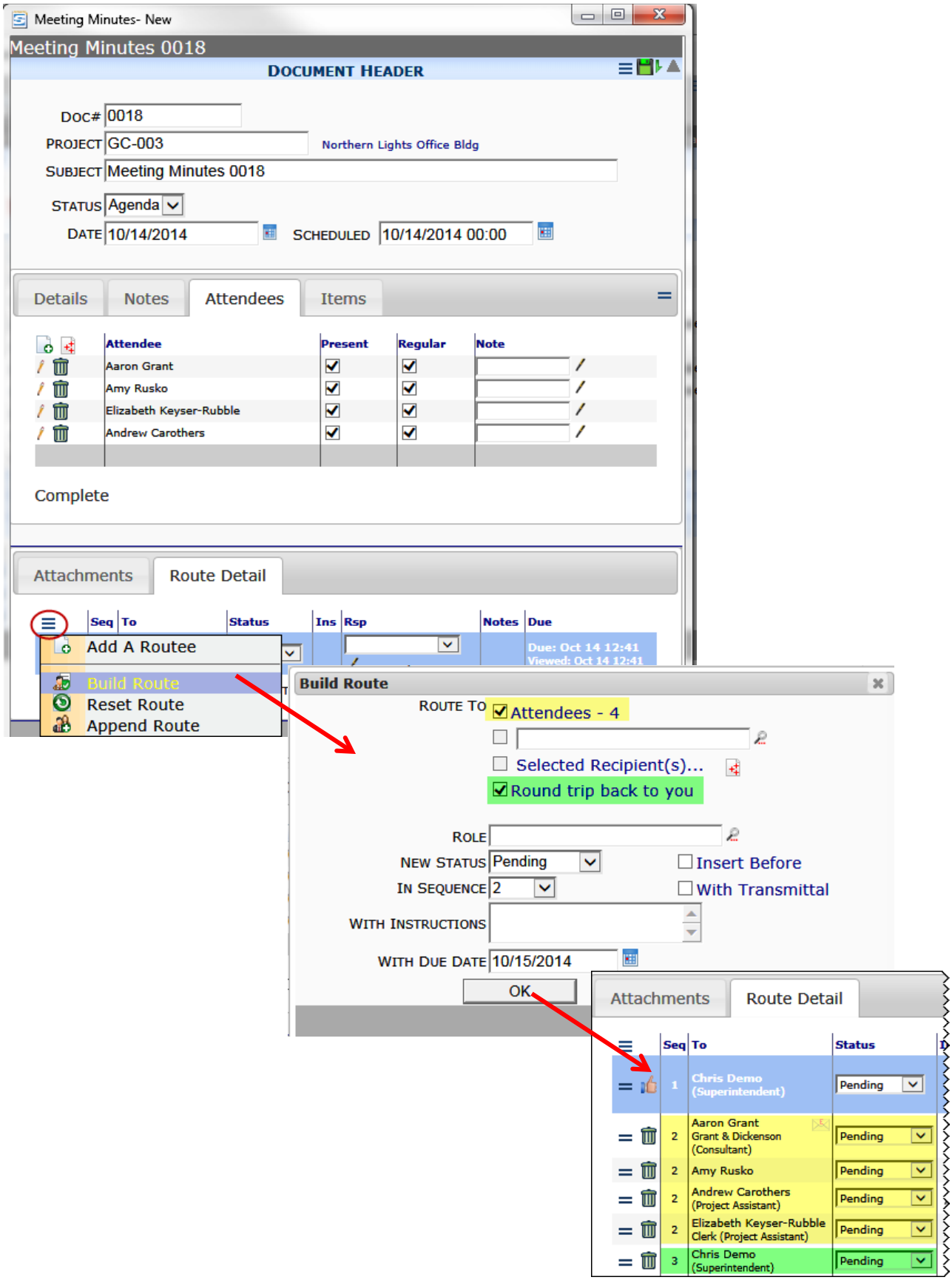
10. When you have finished adding routees, click to save your routing information.

TIP
Seq numbers need not be consecutive. For example, you can add routees with Seq numbers of 2, 3 and 6. If there is no Seq # 4 or 5, Spitfire will jump from Seq #3 to Seq # 6.

Build Route

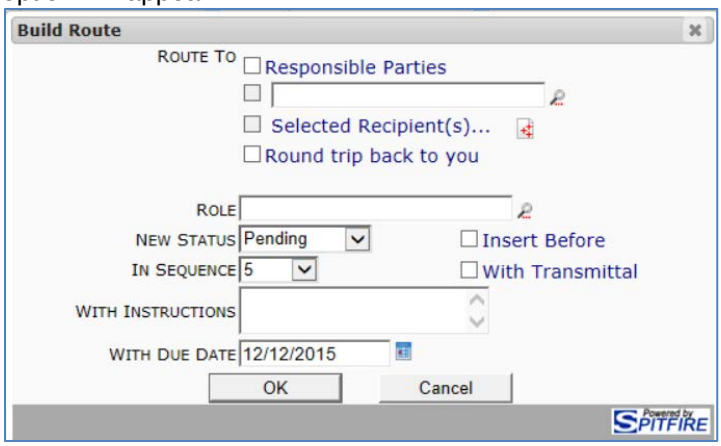
The Build Route option can help you build your route. It provides an easy way to add several routees at a time, especially if they are Attendees (on a Meeting Minutes document, for example), Addressees, Primary Contact, or Responsible Parties. It also allows you to indicate that you want the document routed back to you. For example:

TIP
If you do not have permission to use Build Route, Reset Route and/or Append Route, these options will appear grayed out or not appear at all.


Meeting Minutes- New
Meeting Minutes 0018
DOCUMENT HEADER
DOC# 0018
PROJECT GC-003
Northern Lights Office Bldg
SUBJECT Meeting Minutes 0018
STATUS Agenda
DATE 10/14/2014
SCHEDULED 10/14/2014 00:00
Details
Notes
Attendees
Items
Attendee
Present
Regular
Note
Aaron Grant
Amy Rusko
Elizabeth Keyser-Rubble
Andrew Carothers
Complete
Attachments
Route Detail
Seq
To
Status
Ins
Rsp
Notes
Due
Add A Routee
Build Route
Reset Route
Append Route
Due: Oct 14 12:41
Viewed: Oct 14 12:41
Build Route
ROUTE TO
Attendees - 4
Selected Recipient(s)...
Round trip back to you
ROLE
NEW STATUS Pending
Insert Before
IN SEQUENCE 2
With Transmittal
WITH INSTRUCTIONS
WITH DUE DATE 10/15/2014
OK
Attachments
Route Detail
Seq
To
Status
1 Chris Demo (Superintendent) Pending
2 Aaron Grant Grant & Dickenson (Consultant) Pending
2 Amy Rusko Pending
2 Andrew Carothers (Project Assistant) Pending
2 Elizabeth Keyser-Rubble Clerk (Project Assistant) Pending
3 Chris Demo (Superintendent) Pending

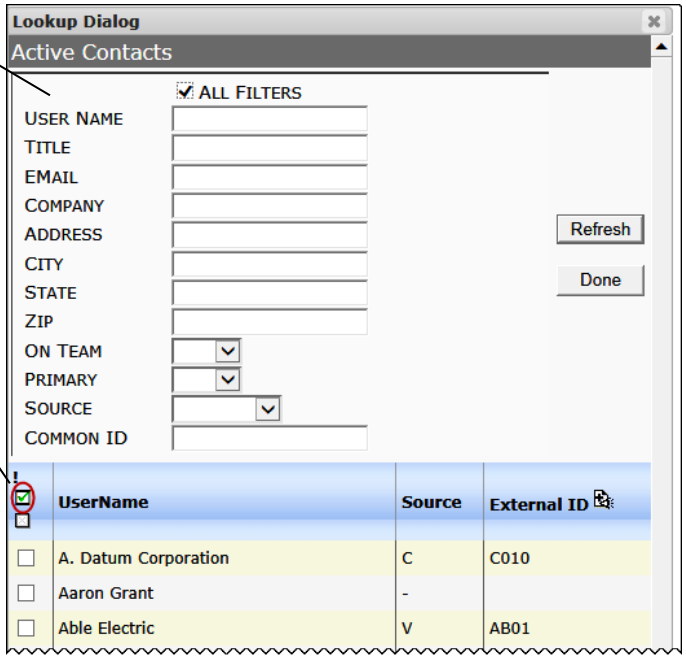
To use the Build Route option:

1. Click ≡ to open the Route Options menu and select **Build Route.** A Build Route dialog box will appear. Exactly which checkboxes will appear depends on the Doc type and the contents of the document. Depending on the Doc type, checkboxes for Addressees, Primary Contact, Attendees and Responsible Parties will be included. In all cases checkboxes for a lookup field, a Selected Recipients icon and the "round trip" option will appear.



TIP
The Attendees option on a Commitment document is used for Lien holders.

2. Check (click on) the **Route To** checkboxes to indicate whom you want to include in your route.
   - Click 🔍 to look up a specific routee.
   - Click ⊞ to open the multi-select window and select several routees:



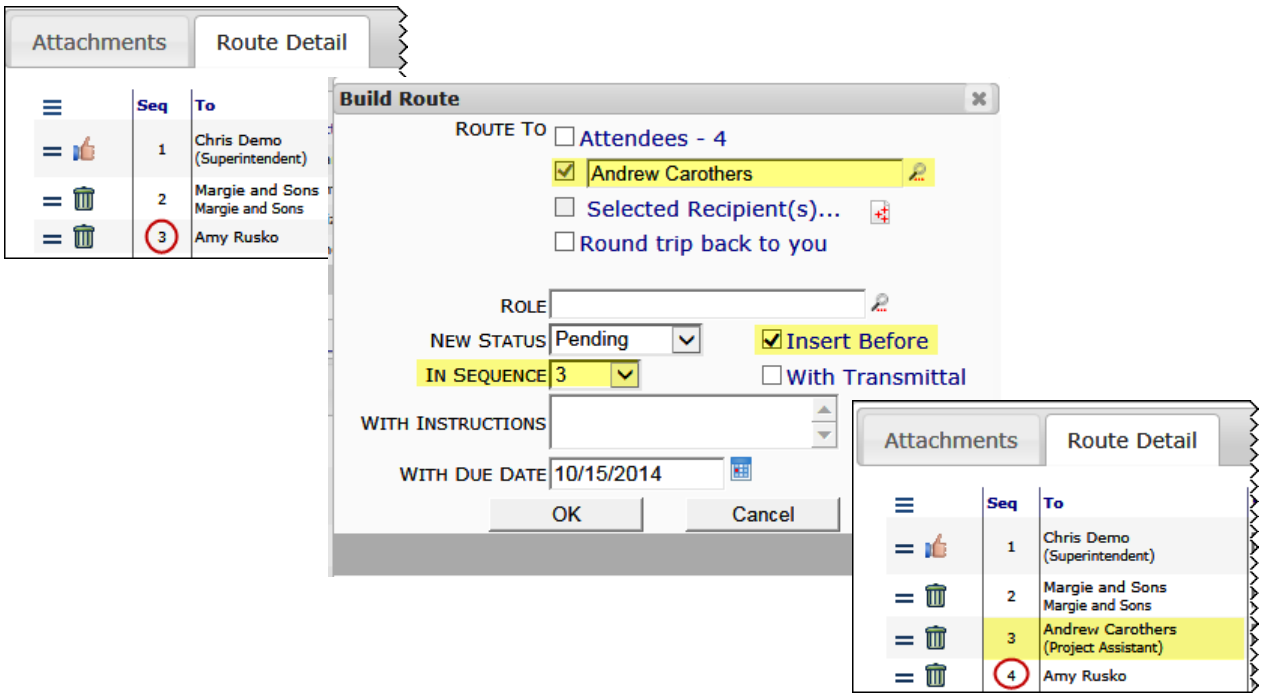
Filters help you find routees.

Click individual checkboxes or click ☑ to select all listed contacts.

   - Click Done to return to the Build Route window.

TIP
You can use the Build Route option any number of times when building your route. By using the option more than once you can assign different Sequences and Status to different sets of routees.

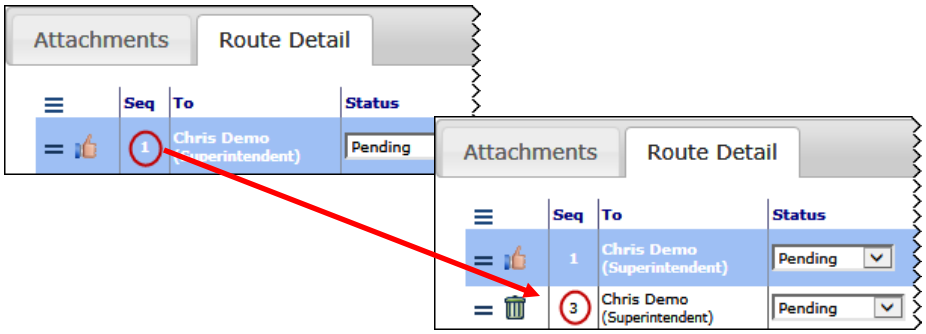
3. Click **Round trip back to you** to add yourself to the end of the routing list (see the section on the next page).
4. (*optional*) Click to look up a **Role** if you want to limit the routees indicated in the Route To selections to just those with the selected role.
5. (*optional*) Use the drop-down to select a **New Status** for your routees if you don't want the default of "Pending". These routees will all have the selected status.
6. (*optional*) If you already have routees in your route, you can use the drop-down to select the **In Sequence** placement for your routees. All new routees will have the same Seq number (although you will be able to manually change any individual Seq number once you are back on the Route Detail tab).
7. (*optional*) If you want to add routees before other routees, click the **Insert Before** checkbox. The new routees will be inserted before the routees currently in the Seq indicated in the In Sequence field. For example:

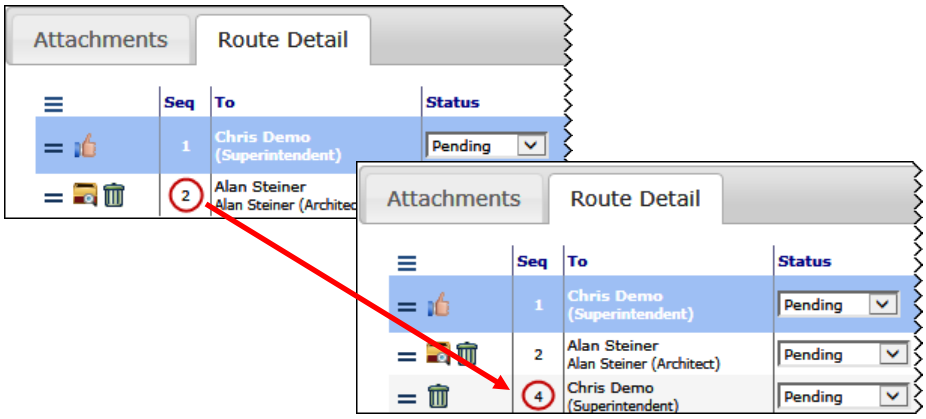


8. (*optional*) Click **With transmittal** if you want to send a transmittal cover sheet to these routees.
9. (*optional*) Type in the **With Instructions** field if you want to add a note in the routee's Ins field.
10. Verify the default Due Date. If it is inappropriate, enter a new Due Date or clear the **With Due Date** field.
11. Click OK. You can now review the route in case you want to change any individual routee's information.
12. Click to save the route and the document.

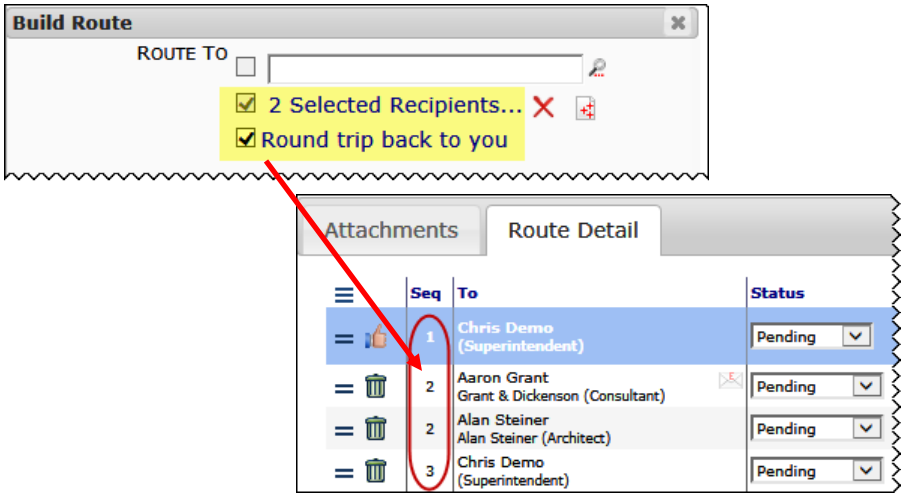
Round Trips

The “round trip” choice is meant for times when you want to route a document to one or more people and then have it come back to you. For this reason, the default round trip sequence number is determined by the rest of the route. If you choose only **Round trip back to you** in the Build Route option, you will be given a Seq number two higher than the last Seq in the route, for example:

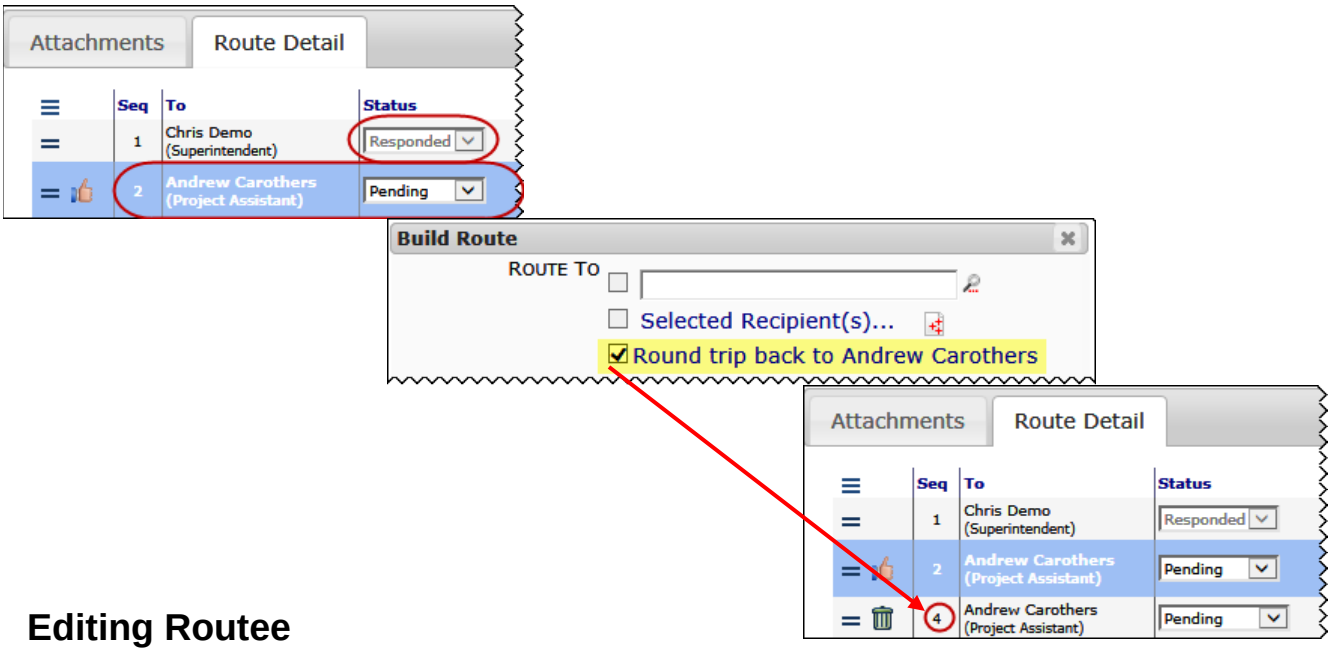




If, however, you choose other routees through the Build Route option, by default you will be given a Seq number one higher than the other Build Route routees. For example, if you include several routees, the route might look like this:



If you choose the Build Route option after you have taken action on the document (i.e., after you have Responded and routed the document to the next routee), the round trip choice will not be available for you, but rather for the next routee who has the document. For example:



Editing Routee Rows

Reordering Rows

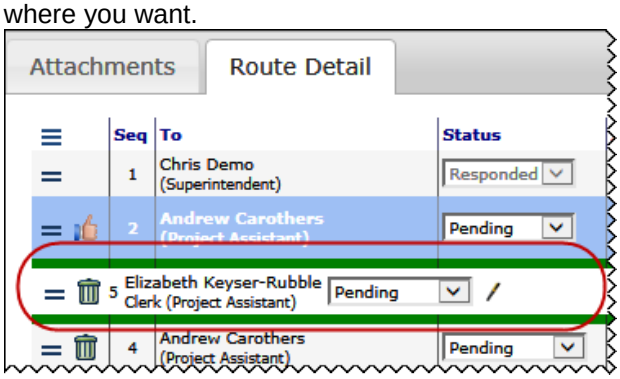
Sometimes the names of the people on the Route Detail tab are not in the order you want them to be. You can reorder the rows through drag-and-drop and by changing the Seq number. sfPMS uses logic to renumber the rows when you use drag-and-drop but you might need to change the Seq manually if the number is not right.

TIP

If you have more than one page of routees and want to drag and drop to reorder, first click the number for page 2, then click the icon that appears [1 2].

To use drag-and-drop to reorder a row:

1. Mouse over the first column of the row you want to move until the curser changes to ↕.
2. Left-click your mouse and hold it while you drag the column to where you want.



3. Release the mouse when the row is where you want it. If it seems logical to do so, sfPMS will change the sequence number. (If the number is not correct, you can change it as described in the next set of instructions.)
4. Click to save the document and keep the new sequence. **Note**: you will not be able to make other kinds of changes to the document until you save.

Editing Routee Rows

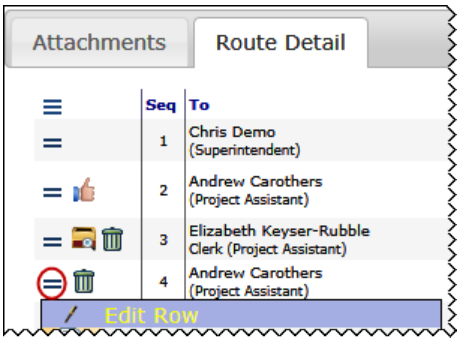
TIP

If you have proper permission, you can also add to and edit routees in documents that you did not create. For more information, see the technical white paper *Designing User Roles*.

You can change the **Status**, **Ins**, **Rsp** and **Note** for a routee row directly in grid view. The following instructions are needed for changing the **Seq** number and/or **Due** date.
Note: You cannot change the Seq number of a routee who has the document already in his or her Inbox.

To edit a routee row:

1. At the row, click to open the Routee Options menu and select **Edit Row**.

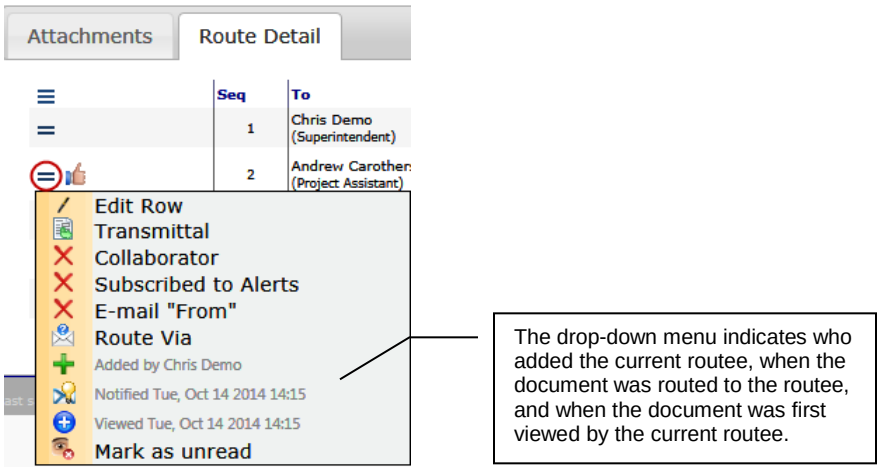


The row will appear in edit mode.

2. Make changes to the **Seq**, **To**, **Status**, **Ins, Notes** and/or **Due** fields.
3. Click to accept these changes.
4. Click at the document header to save the document.

Routee Options

There are additional options that you can add or change for each routee. These options are available on the drop-down menu for each routee:



Transmittal

Transmittal is "off" by default. If you want the user to get a transmittal cover sheet for the document and if you want to include the routing of the document on a transmittal log, you need to switch transmittal to "on."

TIP
For more information about creating the transmittal template, see the *Focus on Bookmark Templates* guide.

Note: Cover sheets are created through a transmittal template.

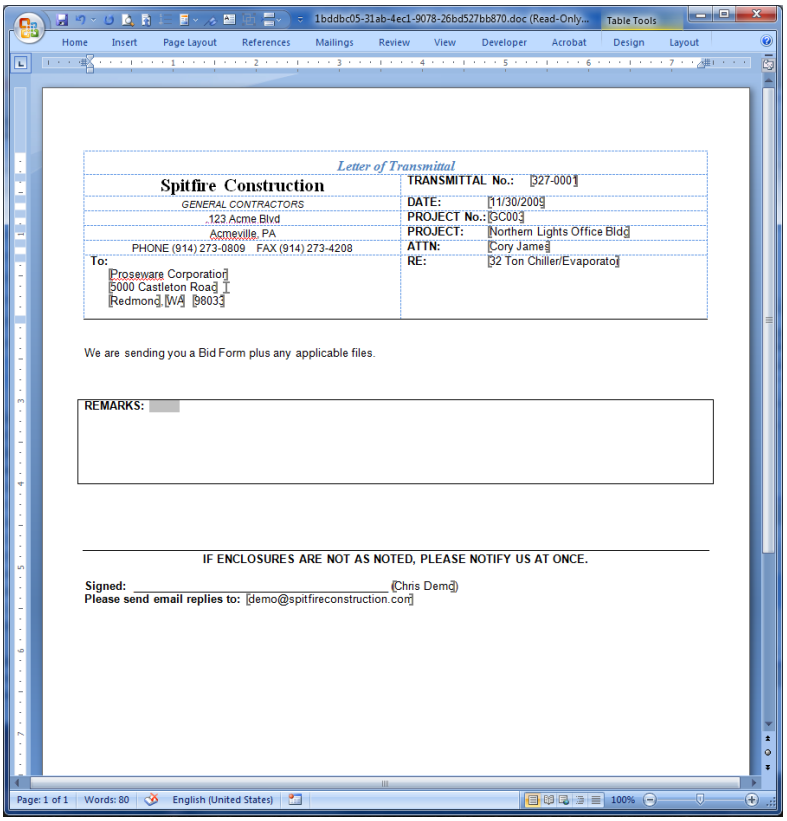
- Click **Transmittal** on the Options menu for the routee you desire. The icon will then appear on that row to indicate that the user can open a transmittal cover sheet for the document and that the routing of the document to this routee will be included in a transmittal log.

To open the transmittal cover sheet:

1. If appears on your routee row, you can click it to open the transmittal cover sheet for the document:

Microsoft Word will open with a copy of the transmittal cover sheet, for example:

TIP
You can print the transmittal cover sheet as you would any Microsoft Word file. In addition, the transmittal cover sheet will be included as a PDF in routed content. See page 45.



Note: If your organization has multiple transmittal cover sheet templates, a dialog box will open so that you can choose which transmittal cover sheet to use on this transmittal before Microsoft Word opens.

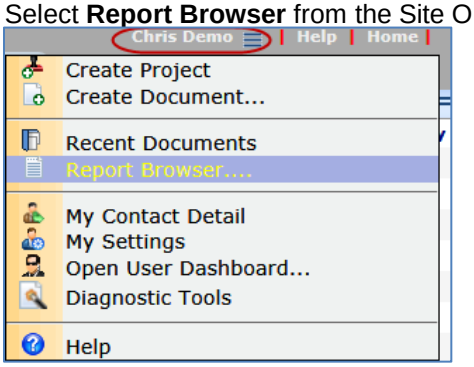
2. (*optional*) In Microsoft Word, edit your cover sheet if necessary. Information from your document will already be included. Remember to save your changes.
3. Close your transmittal cover sheet in Microsoft Word.

Transmittal Log Report

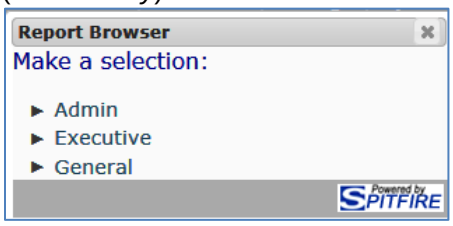
Only users with the proper permission level can access reports.

To access the Transmittal Log Report:

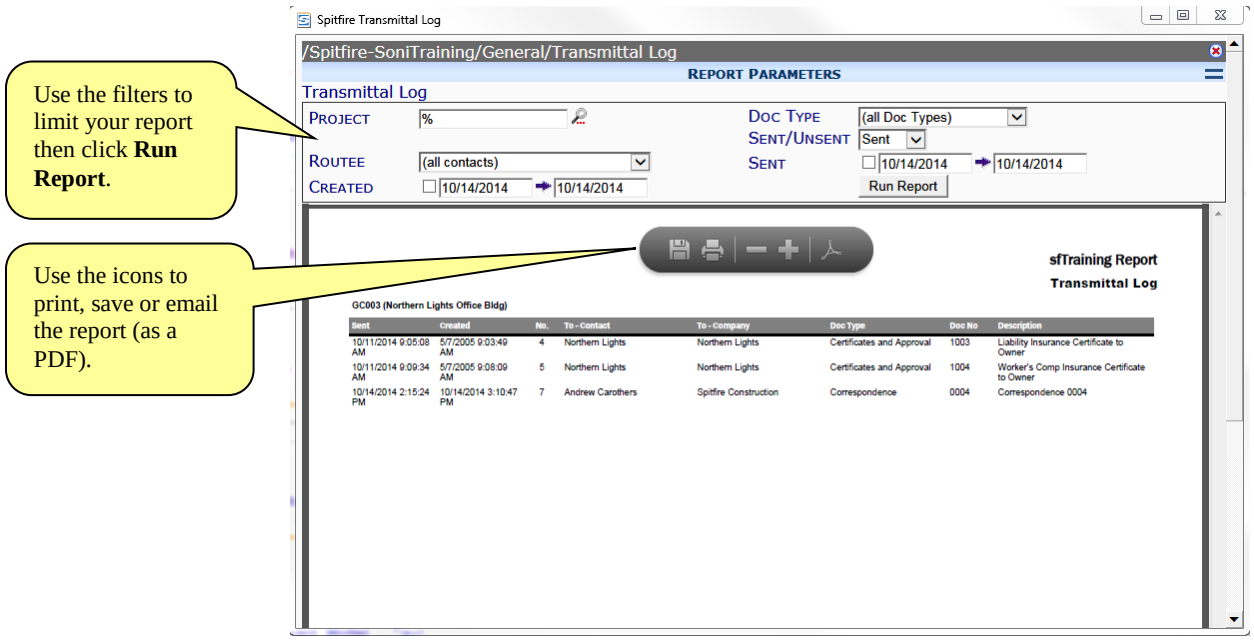
1. Select **Report Browser** from the Site Options menu:



2. (*If necessary*) Click **General.**



3. Click **Transmittal Log**. The report will open, for example:



4. Click to close the report.

Collaborator

Collaborator is "off" by default (except for the document's originator), indicated by the ✗ icon.

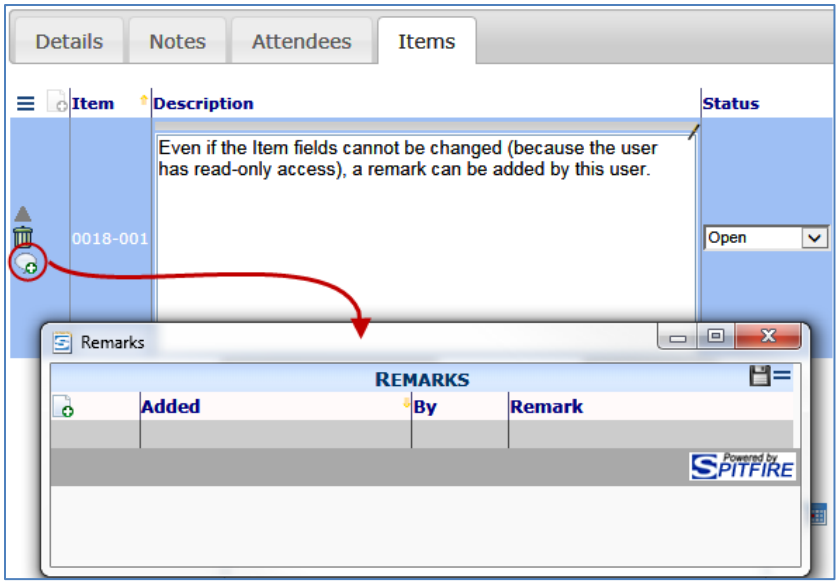
- Click ✗ **Collaborator** if you want a routee with read-only permission to be able to edit this particular document. The icon will change to ✓.

- Click ✓ **Collaborator** to revoke permission to edit for the routee. The icon will change to ✗.

TIP

Collaborators can edit the document, add and edit Items and add files through the Add Files tool, but cannot attach files from the Catalog.

Note: Routees who normally have read-only access to documents, and who are NOT made Collaborators may nevertheless include remarks in the Route Detail's **Rsp** and **Notes** text boxes and the remarks field in Item Detail view (assuming they can view Items).



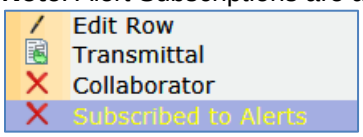
Subscribed to Alerts

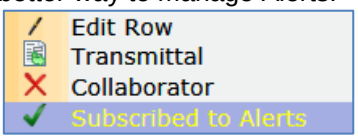
TIP

More information on Alerts and Alert Subscriptions can be found in the *Focus on Alerts and Compliance* guide.

Subscribed to Alerts is "off" by default (except for the document's originator), indicated by the ✕ icon.

- Click ✕ **Subscribed to Alerts** if you want this routee to receive an alert about this document. The icon will change to ✓.
  Note: Alert Subscriptions are a better way to manage Alerts.



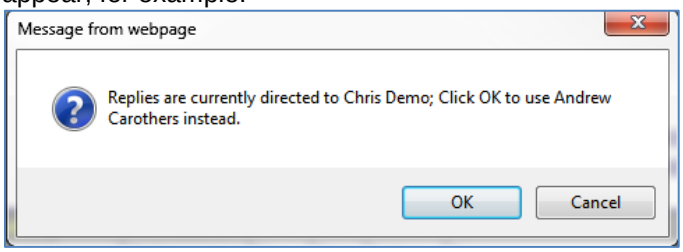


- Click ✓ **Subscribed to Alerts** to unsubscribe this routee. The icon will change to ✕.

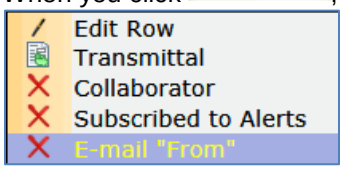
E-Mail "From"

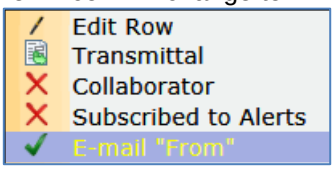
E-Mail "From" defaults to the creator of the document, indicated by the ✕ icon on all other routee rows. The E-Mail From option indicates who reply e-mails should be sent to. This option makes sense only if there are via email routees (see page 39) for the document and your site has been set up for inbound e-mail processing.

- Click ✕ **E-Mail "From"** if you want this routee to receive the reply email sent by a via email routee. A confirmation box will appear, for example:



When you click OK, the ✗ icon will change to ✓.





- Click ✓ **E-mail "From"** to revert back to the default. The icon will change to ✗.

Send / Resend Document

See page 49.

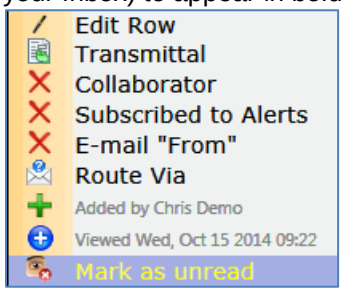
Route Via

See page 41.

Mark as Unread

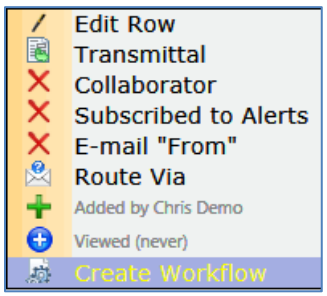
A document that has been opened from the Inbox (and therefore considered "read" by the Inbox) can be marked as "unread" again so that it will return to boldface on the Inbox. Normally, once you open a document from your Inbox, it will appear in regular text.

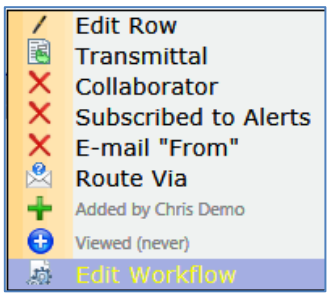
- Click **Mark as unread** if you want the document (which is in your Inbox) to appear in boldface text once you save it.



Create/Edit Workflow

Users with proper permission can create workflow scripts using ATC commands. For more information, see *ATC Scripts and Automatic Workflow* in the Spitfire Client Services site.
Note: the **Create Workflow** option appears only for the routee named "Spitfire".



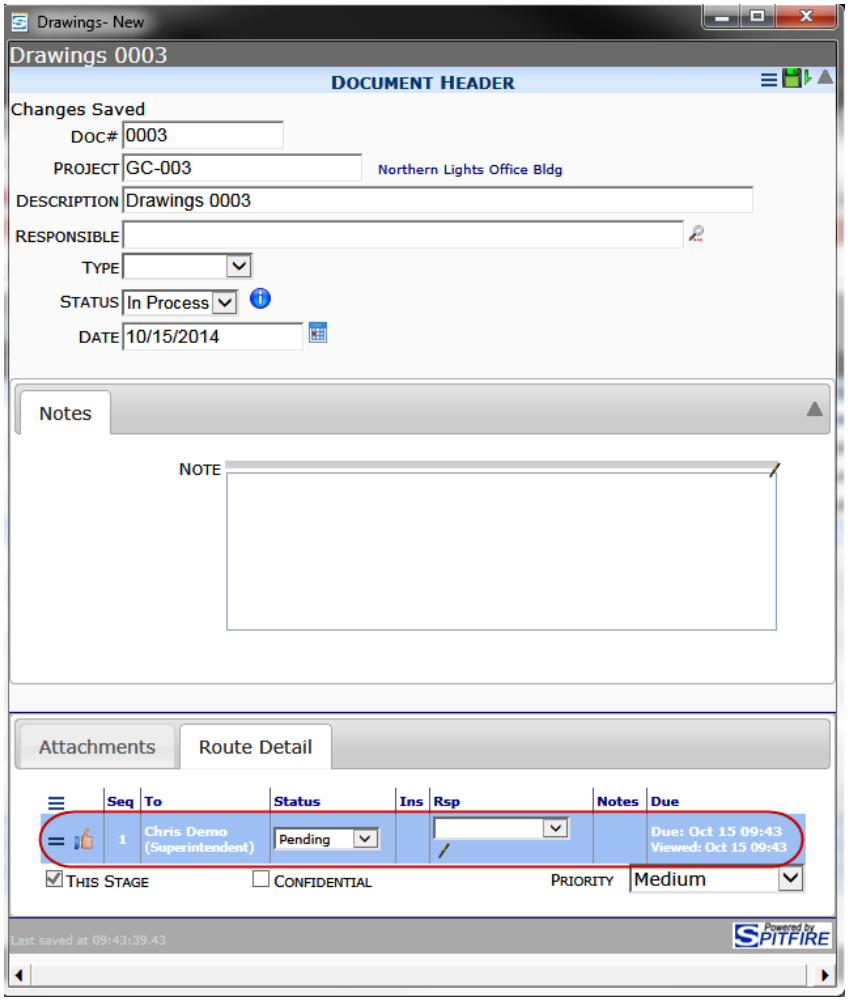


Initial Route

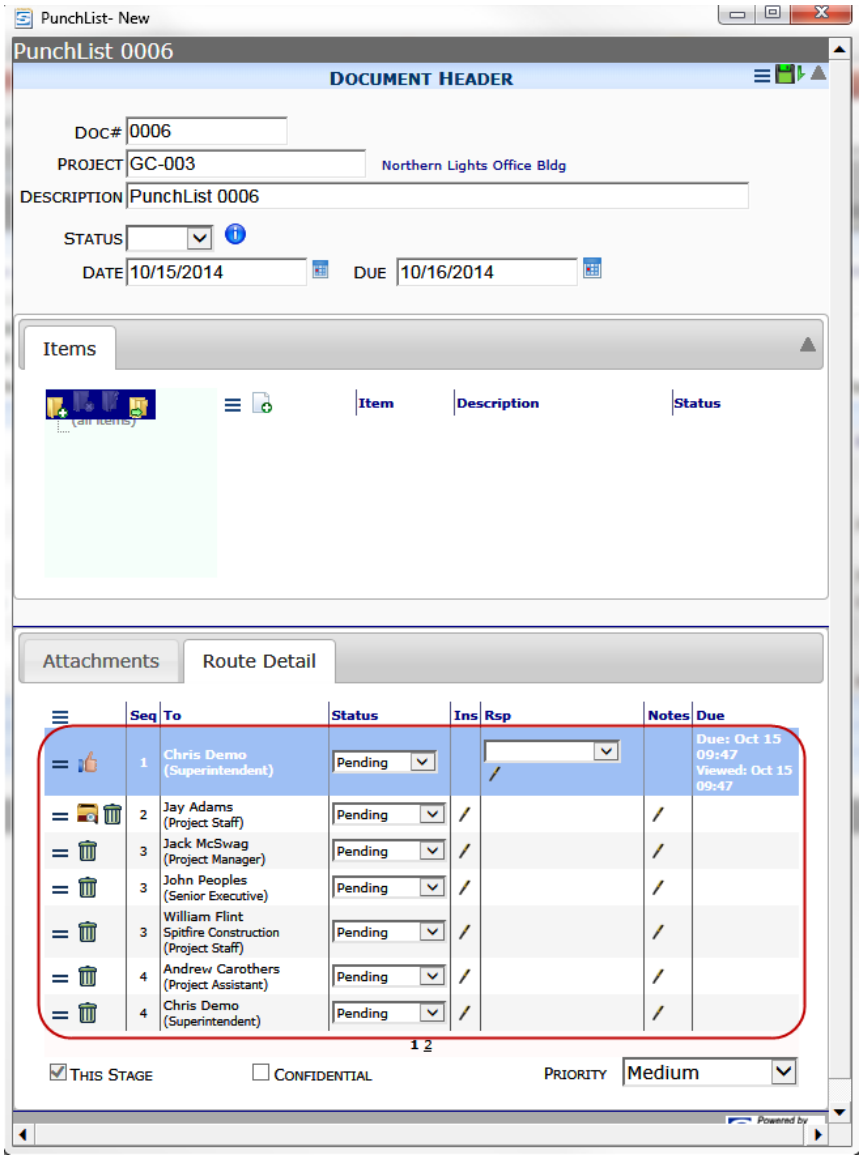
TIP
For more information about predefined routes, see the Routes chapter in the *Focus on the Manage Dashboard* guide.

TIP
For information about the PAGE | Manager Dashboard and PART | Route List role capabilities, see the technical white paper *Designing User Roles.*

Users with proper permission can create predefined routes based on Doc types and other conditions. If you create a document that has no applicable predefined route, the route that first appears under the Route Detail tab lists only you. (By default, sfPMS routes every document to the document originator. This allows you, as the document originator, to add the routees you want, finalize the document before you send it on its way to these routees, or just archive it in the system.) An initial route would look like this:



On the other hand, if an applicable predefined route exists for the Doc type, when you save the document, the Route Detail will list you as Seq 1, followed by the routees from the predefined route. (When a new document is first saved, sfPMS analyzes all the predefined routes that might apply to your new document. The route with the most complex set of conditions is evaluated first, and then the next and next until sfPMS finds a match.) For example, your initial route might look like the following:


PunchList- New
PunchList 0006
DOCUMENT HEADER
DOC# 0006
PROJECT GC-003
Northern Lights Office Bldg
DESCRIPTION PunchList 0006
STATUS
DATE 10/15/2014
DUE 10/16/2014
Items
Item
Description
Status
Attachments
Route Detail
Seq
To
Status
Ins
Rsp
Notes
Due
1 Chris Demo (Superintendent) Pending Due: Oct 15 09:47 Viewed: Oct 15 09:47
2 Jay Adams (Project Staff) Pending
3 Jack McSwag (Project Manager) Pending
3 John Peoples (Senior Executive) Pending
3 William Flint Spitfire Construction (Project Staff) Pending
4 Andrew Carothers (Project Assistant) Pending
4 Chris Demo (Superintendent) Pending
1 2
THIS STAGE
CONFIDENTIAL
PRIORITY Medium

Route Options for Predefined Routes

Replace a Default Route

TIP

Predefined routes are defined and named on the Manage Dashboard (see the *Focus on the Manage Dashboard* guide). To use the Reset and Append Route options, you must know the names of the predefined routes you want.

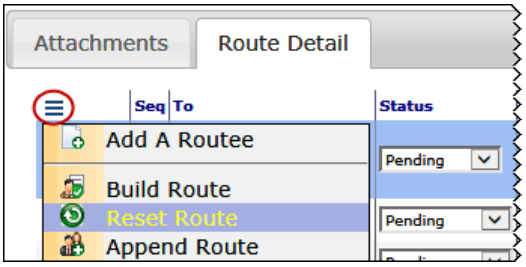
If your company has multiple predefined routes for a specific Doc type and you don't want the one that sfPMS has chosen as your initial route, you can select another route to apply to your document.

Prerequisites:

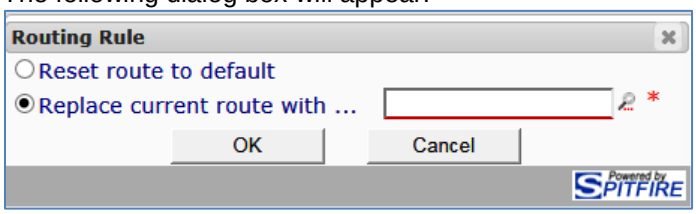
- There must be available multiple predefined routes that apply to your Doc type.
- The document must still be in the Inbox of the person who created it. Once the document has started on its route, the route cannot be reset.

To replace the default predefined route:

1. Click to open the Route Options menu, then select **Reset Route**:



The following dialog box will appear:



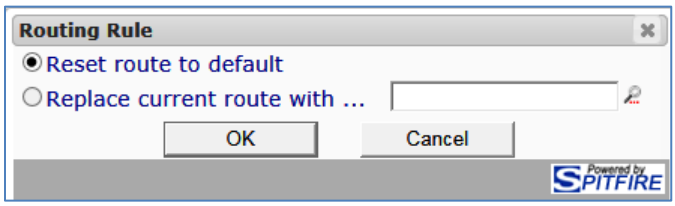
2. Click to select the route you want, then click OK.

Reset a Route to the Default

Since all conditions for a route might not be in place when a new document is first saved, you can have Spitfire reselect the appropriate route after adding information to the document. You do this by resetting the route to the default.

To reset the route to the default:

- On the dialog box that appears when you select Reset Route, make sure that **Reset route to default** is selected then click OK.



Note: the **DocTypeConfig | AutoReroute** rule can indicate that a document should automatically attempt to resolve a default route each time it is saved, until an appropriate predefined route is found. For more information see your System Administrator or KBA-01154.

Append Route

TIP

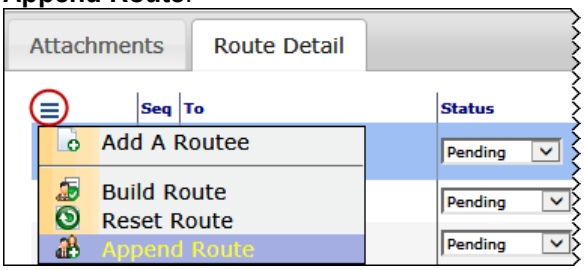
It is possible to have routes available for your selection that are never automatically used by sfPMS. For example, you may set up several predefined routes for a particular Doc type so that a Project Manager can append the route appropriately, but you might not want sfPMS to ever apply one of those routes to the Doc type automatically. See the *Focus on the Manage Dashboard* guide for more information.

If you want a second predefined route appended to your initial route, you can choose to **Append Route**. This option is also available any time after the document has started on its route (i.e., left your Inbox). It comes in handy particularly when conditions of the document have changed and predefined routes that didn't apply before, apply now. This option is also useful when, after a document has been routed for approval, you want to send the final copy to a group of people. You can Append Route whenever predefined routes exist for that Doc type. The appended route will be added to the end of the route list.

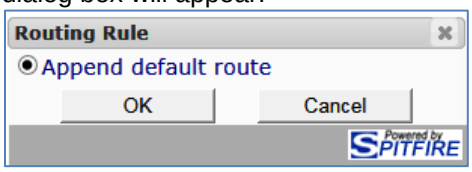
Note: If your last routee has a status of **Destination**, the appended route will be inserted directly before your last routee.

To append the route:

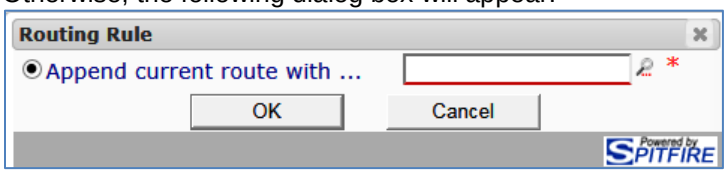
1. Click to open the Route Options menu, then select **Append Route**:



If there is one predefined routes for your Doc type, the following dialog box will appear.



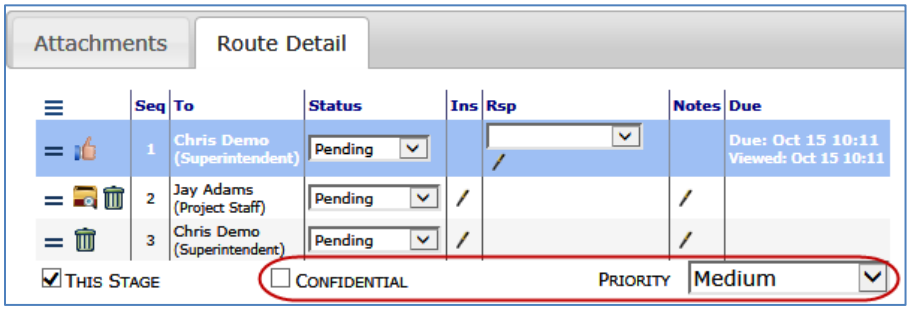
Otherwise, the following dialog box will appear:



2. Click to select the route you want to append to your Route Detail then click OK.

Additional Document Routing Options

There are two checkbox options at the bottom of each document (below the Route Detail information) that affect routing. These options apply to the document and not to individual routees. If desired, choose these options before you close the document.



Confidential

If you click the **Confidential** checkbox on a document, you make the document confidential to those on the Route Detail tab (the route list). This means the following:

- No one else can add routees to the document,
- Only the listed routees can open the document.
- Attached files on the document will be confidential also, meaning only listed routees can view them.

The Confidential option overrides any blanket permissions, restricting access to the document.

Priority

TIP
Information about Notifications can be found in the *Focus on Contacts* guide.

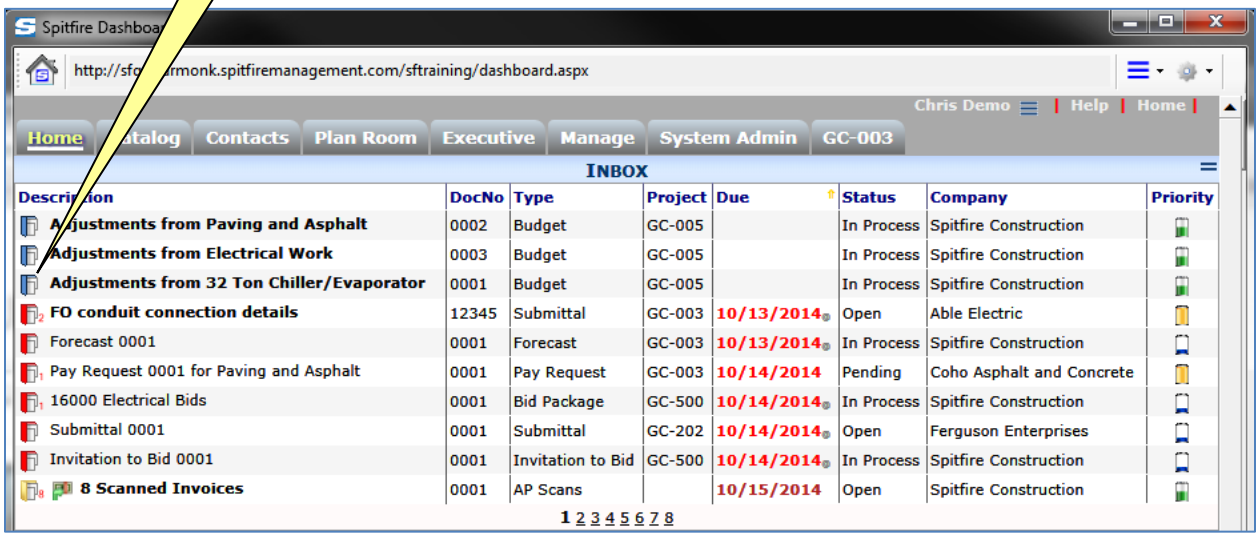
A **Priority** level is given to all documents. This priority level appears in the user's Inbox (on the Home Dashboard). It is also the priority used to evaluate if Notifications are emailed to users. Low priority is the default. You can change the priority for this document by selecting your choice from the drop-down list:

Key:
= Urgent, = High, = Medium, = Low, = FYI

Documents in Your Inbox

Whether you create a document, or a document has been routed to you by the person who created the document, by the person before you on the routing sequence, or through a predefined route for the Doc type, the end result is the same: the document appears in your Inbox on your Home Dashboard:

Click to open a document.



Columns

TIP

You can sort the columns in the Inbox and use filters to find particular documents. See the "Column Options" section in the *Overview Guide* for more information.

- **Description** – the name of the document. Documents that you have not yet opened (read) appear in boldface; those that you have opened appear in regular text. You can make a regular text description appear in boldface again through the **Mark as unread** routee option (see page 25).

  Note: the colors of the "open document" icon indicate the following:

  - - the document is closed or has no due date.
  - - the document is overdue.
  - - the document is due this week (through the next Sunday).
  - - the document is open and due in the future.
- **DocNo** – the document number of the document.
- **Type** – the Doc type of the document.
- **Project** – the project ID of the project to which the document belongs.

TIP
For more information on document status of different Doc types, see the *Focus on Doc Types and Project Workflow* guide.

- **Due** – the date by which you need to take action on the document. The Due date is taken from the route's due date, or the document's due date if there is no route due date. Red indicates a past due date, brown indicates today's date and black indicates a future date. In addition, boldface indicates a past time.
- **Status** – the current document status. This document status should not be confused with the status on the route that appears on the Route Detail tab.
- **Company** – the company associated with the document.
- **Priority** – the document's level of priority.

Actions on a Routed Document

You can open and review any document that appears in your Inbox. However, you might not be allowed to see all the routees in a document's route. If you were designated a Collaborator by the creator of the document (see page 23), you can edit the document. Otherwise, you probably cannot edit the document, unless you have been given a role with permission to edit documents of the particular Doc type. In all cases, you can add information to the **Rsp** text box in the Route Detail section or the remarks field where configured.

While the document is in your Inbox, you can open it, view it (possibly edit it) and close it any number of times. It will remain in your Inbox. Only when you change its route status will it leave your Inbox and go to the next routee (or to nobody's Inbox if you are the last routee).

If you do not need to open the document, you can change its route status through the Inbox action bar (see pg 34).

Note: The Inbox represents an access point to the document. Even while the document is in your Inbox, it appears in, and can be opened from, the Project Dashboard.

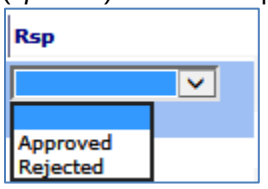
Opening and Editing the Document

To open the document and read/write route messages:

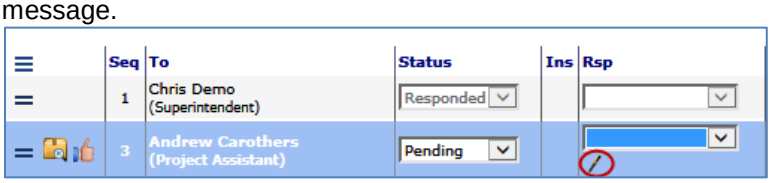
1. At your Inbox on the Home Dashboard, click (of whatever color) to open the document.
2. (*optional*) If you have permission to do so, make changes on the document header and mid-section tabs as needed.
3. If necessary, click the Route Detail tab.
4. (*optional*) Click and/or in your **Rsp** or **Notes** column if there are messages for you.

TIP
Messages up to four characters long will appear directly in the Rsp column. Longer messages will be indicated by the icon.

5. (*optional*) Select a response from the Rsp drop-down:



6. (*optional*) Click to open the text editor. Other routees on your route with proper permission will be able to read this Rsp message.



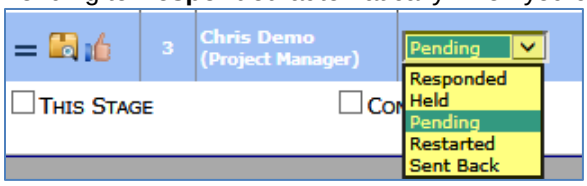
Removing the Document from your Inbox

In order to have the document leave your Inbox, you need to take action on it by changing the route's status. There is a way to do this without opening the document (see the Inbox Action Bar on page 34) and a way to do this from within the document.

To route a document after opening it:

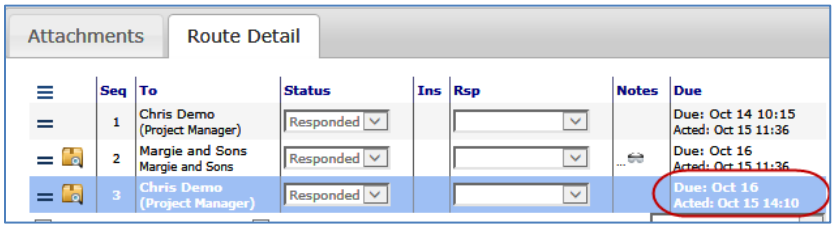
TIP
In order to select the Restarted and Send Back options, you need the role capabilities DOC | Can route a document back to originator and DOC | Can route a document back to prior sequence. See the technical white paper *Designing User Roles* for more info.

1. At your Inbox, click (of whatever color) to open the document.
2. If necessary, click the Route Detail tab.
3. If you want to change your route **Status,** select a different status depending on what you want to do with the document.
   Note: if you do not select any status, the status will change from Pending to **Responded** automatically when you click .

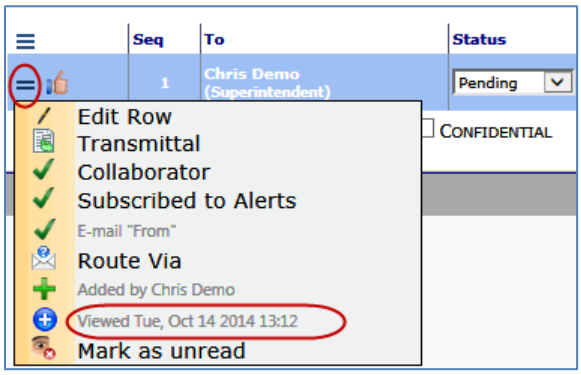


   - If you need more time with the document, click on **Held**; the document will remain in your Inbox until you change the status again. (The document would remain in your Inbox with its status of Pending also; **Held** lets others know that you are intentionally holding on to it.)
   - If you reject the document and want to send it all the way back to its originator, select **Restarted**.
   - If you want to send the document back to the person who routed it to you, click on **Send Back**.
4. (*optional*) Select a **Rsp** from the drop-down and/or click to add a note in the **Rsp** field.

5. Click . The document will be saved and will leave your Inbox (unless you changed the status to **Held**). The date and time at which you took action on the document will appear in the Route Detail.



Note: if you keep your route status as **Pending**, sfPMS will not record that any action has taken place and the document will remain in your Inbox. However, the day and time you viewed the document will be recorded in the routee drop-down, for example:



Inbox Action Bar*

The Inbox action bar provides an easy way to remove documents from your Inbox if you know that you do not need to open them, view them or make changes to them.

Click (of whatever color) to open the document, if you realize you should do so after all.

Click on the word "docs" to get a list of the documents to be released.

Click to get more information, such as who routed the document to you and who is next on the route.

Click to close the action bar.

To Route One Document

You can route one document at a time from the Inbox action bar.

TIP
Remember to eventually take action on all documents that you create (even if you are not routing them to anyone else) in order to remove them from your Inbox.

To send a document on its route from the action bar:

1. Click in the white space on the document row (next to the document's Description, for example). The action bar will appear.
2. (*optional*) Select a route status from the drop-down (which says **Pending** in the image above). For a description of possible route statuses see page 33.
3. (*optional*) Select a **Rsp** status from the next drop-down (which appears blank in the image above).
4. (*optional*) Write a note.
5. Click . If you did not select a route status, the route status will change to Responded automatically. If you did select a route status, the route status will remain as selected. In addition, the document will be saved and will leave your Inbox.

To Route Matching Documents

You can remove several matching documents from your Inbox all at once. Documents are considered matching if:

- They are of the same Doc type and at the same Seq. as the selected document (for example, all Commitment documents that are at Seq. 1) AND
- They have no further routing OR are not overdue OR you received them in your Inbox within the last 5 days AND
- They do not have a route status of **Held**.

For example, if you received many Pay Requests on which you are Seq. 2 and you have either dealt with all the exceptions or changed the route status of the exception documents to Held, you can clear all the remaining Pay Requests from your Inbox all at once.

To route matching documents from your Inbox:

1. Click in the white space on the document row of a document that serves as your model. sfPMS will match other documents to that selected document.
2. In the Inbox action bar, click to route all matching documents. A number indicates how many document will be removed from the Inbox in addition to your currently selected document. For example: means 5 documents will be released in addition to the selected document.

To Route All Eligible Documents

You can remove an even larger number of eligible documents from your Inbox all at once. Documents are considered eligible if:

- They are at Seq. 1 (of any stage) OR
- They are at the Destination route status OR
- You are the last Seq. on the route

For example, if you realize that over the course of time you have created a number of documents that do not need to be routed to anyone and do not need to be in your Inbox, you can remove them all at once.

To route all eligible documents from your Inbox:

1. Click in the white space on the document row of a document that you want to remove from your Inbox.
2. Click to route the selected document plus other eligible documents . A number indicates how many documents will be removed from the Inbox in addition to your currently selected document. For example: means 78 documents will be released in addition to your selected document.

CC'd Documents

Documents that have been routed to you with a CC'd status appear in your Inbox marked by .

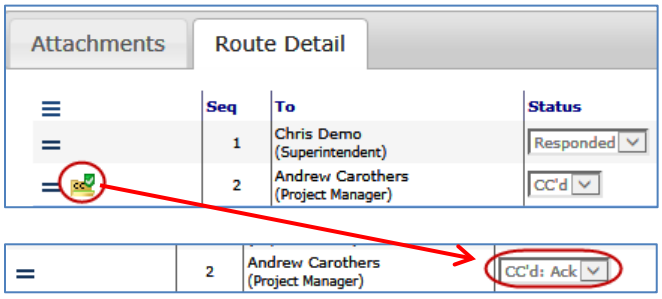
INBOX			
Description	DocNo	Type	Project
Submittal 0001	0001	Submittal	GC-202
Review American Supply Purchases	0002	Task	
Pay Request 0003 for Electrical Work	0003	Pay Request	GC-003
Correspondence 0004	0004	Correspondence	GC-003

To acknowledge a CC'd document without opening it:

1. Click on the white space next to the Description of the document. The Inbox Action bar will appear.
2. Click . Your status will change to **CC'd: Ack** and the document will be automatically saved. It will leave your Inbox although you may not see this until you next refresh the dashboard.

To acknowledge a CC'd document after opening it:

1. At your Inbox, click to open the document.
2. If necessary, click the Route Detail tab.
3. Click at your routee row. Your status will change to **CC'd: Ack** and the document will be automatically saved. It will leave your Inbox although you may not see this until you next refresh the dashboard.

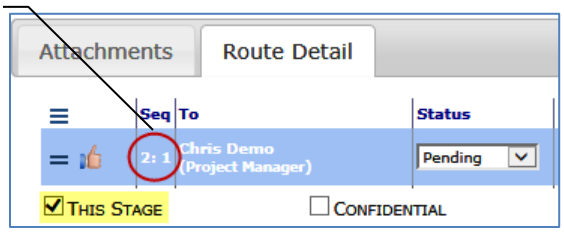


4. Click to close the document window.

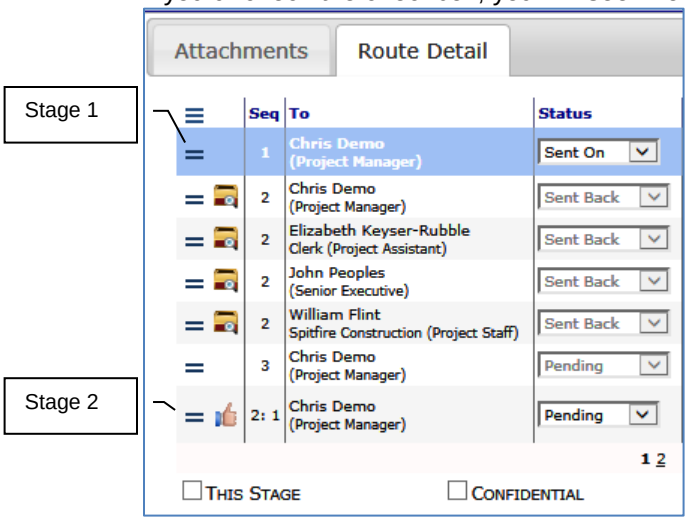
Stages in a Route

Whenever a document is restarted or sent back, the route needs to partially or completely repeat itself. The first time the document is routed, the route is considered to be in "stage 1." Subsequent routes are called stage 2, stage 3, etc. When other stages are created, a checkbox at the bottom (normally disabled) lets you know that you are seeing only the current or active stage and that other stages exist.

The Seq number is now preceded by the Stage number. For example 2:1 means first routee in stage 2 route.



If you uncheck the checkbox, you will see information for all stages.



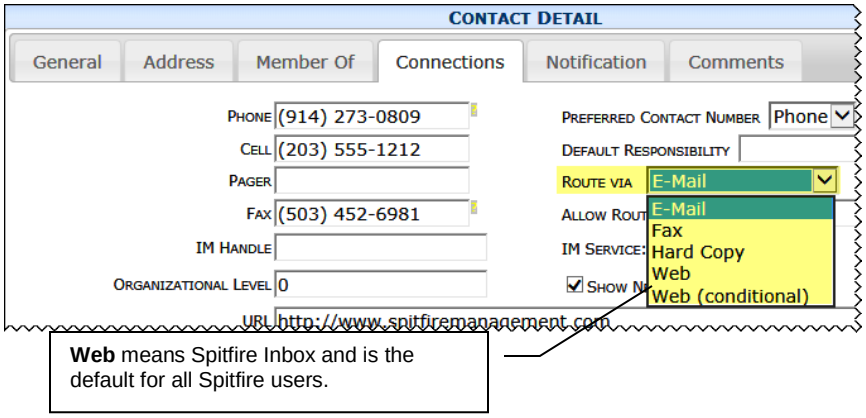
Note: by default, you can see only the current stage and up to two prior stages.

Email, Fax and Hard Copy

TIP
For more information about Contact options, see the *Focus on Contacts* guide.

TIP
People who receive a document via email, but who are also Spitfire users (i.e., can log in) can access that document on the Project Dashboard, even though the document won't appear in their Inbox.

Documents are often routed to a routee's Inbox (i.e., via the Web) as described previously. However, some routees (for example, your subcontractors) might not log into sfPMS very often or at all and therefore require an output format of documents via email, fax or hard copy. When the Contact records for such people are created, an option on the Connections tab is used to indicate that they should receive email, fax or hard copy output—or that they should receive certain documents by Web and others by email or fax (called Web conditional)—by default:



Web means Spitfire Inbox and is the default for all Spitfire users.

Note: it is also possible to set up sfPMS to integrate with a Cloud storage provider so that project participants who are not Spitfire users may access documents and files in the cloud. For more information, contact your implementer and see the *Setup for Cloud Drive Integration* technical white paper.

Web (conditional)

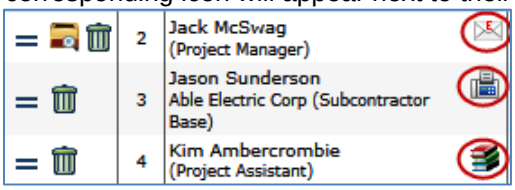
TIP
For more information about the DocTypeConfig rule, see KBA-01154 or your System Administrator

When a routee is marked as a **Web (conditional)** routee, he or she will receive most documents by either email (if there is an email address in the Contact details) or fax (if there is no email address but there is a fax number in the Contact details). However, documents of certain Doc types will go to that person's Spitfire Inbox if the Doc types have been set up through the **DocTypeConfig** | **LimitWebRouting** rule. This rule controls which documents a Spitfire user can see within sfPMS and which documents the user will receive via email/fax. For example, you (or your company) might want subcontractors to log into Spitfire and edit Submittal documents directly in Spitfire, but to receive other documents such as Commitments as template printouts only.

Current Routing Method

You can tell a routee's current Route Via method right on the routee list. Routees with an icon next to their names are email, fax or hard copy routees; those with no icons are web routees (i.e., those who get Spitfire documents routed to their Inboxes).

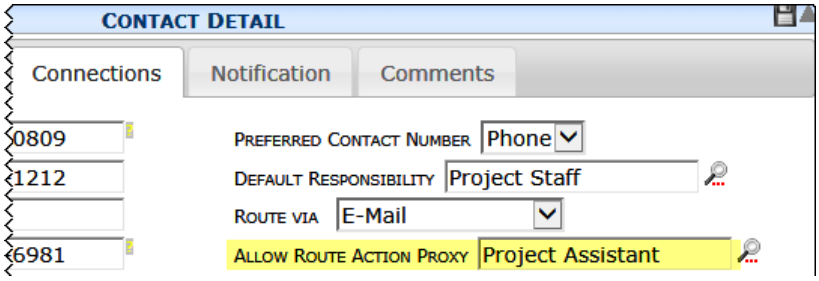
Note: Web (conditional) routees are not identified as such on the routee list. However, if the document will be routed to them by email or fax, the corresponding icon will appear next to their names.



Route Via Icons

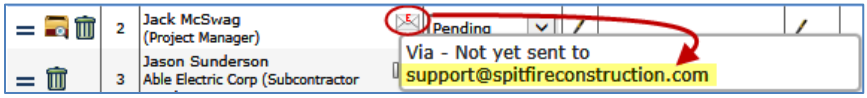
- indicates that an email will be sent to this routee. What exactly gets sent depends on criteria explained on page 44.
- indicates that a fax will be sent to this routee. What exactly gets sent depends on criteria explained on page 44.
- indicates that this routee should get a hard copy of the document. What exactly gets sent depends on the person sending or delivering it (for example, printouts, hand drawings, receipts, photos, Post-Its, blueprints, letters, etc.). A Spitfire user needs to print out all document output (including valid attachments). When routed content is previewed (see page 42), all output is prepared and can be printed.

Note: "Hard copy" routees generally need a Proxy to accept their routes and move the document to the next routee. Proxies are indicated on the Connections tab on the Contact record.



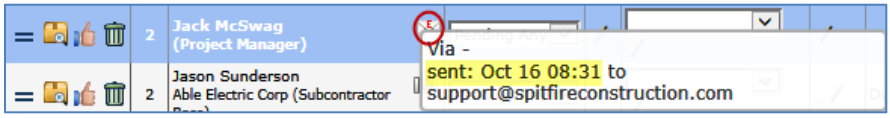
Email Address

Before a document is routed via email, the icon indicates the email address of the routee. Mouse over the icon to see this information.



Document Sent

Once a document has been routed (emailed, faxed, printed), the Route Via icon will indicate the date and time sent. Mouse over the icon to see this information.



To see the email that was sent to a Via Email routee:

- Click to view the email.

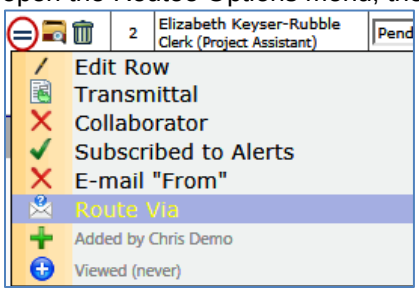
Route Via Option

Although a default Route Via method is set up in a routee's Contact record, you can change it through the Routee Options menu.

TIP
The Route Via method for a particular Seq number can also be set through the ATC script command *SEQ n VIA*.

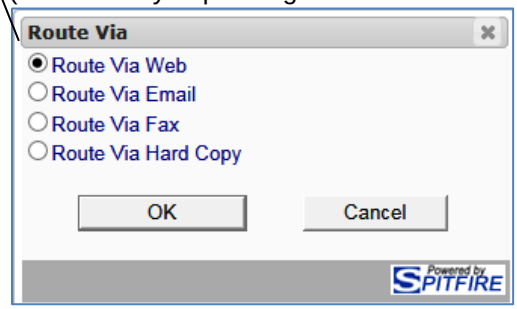
To change the Route Via method for a routee:

1. On the Route Detail tab, click next to the desired routee to open the Routee Options menu, then select **Route Via:**



Route Via Web means send to the Spitfire Inbox.

A dialog box will appear showing possible choices for the routee (choices vary depending on information available for the routee):



TIP
If the Route Via Fax option does not appear even for routees with fax information, it may be because the RouteConfig | FaxingEnabled rule = OFF.

2. Click on the designation you want for this routee.
3. Click OK. The appropriate icon (if any) will appear next to the routee's name. What exactly will get routed is explained in the next section.

Routed Content

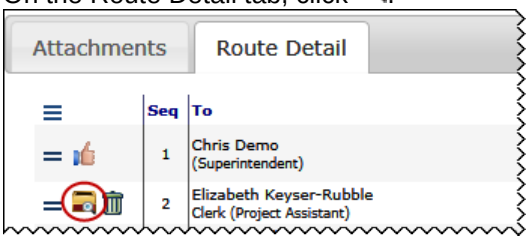
Preview

Once a routee has been added to the document and the document has been saved, an icon allows you to preview the routed content that will be emailed or possibly faxed. You can preview only the next routee's content before you actually send the document on its route.

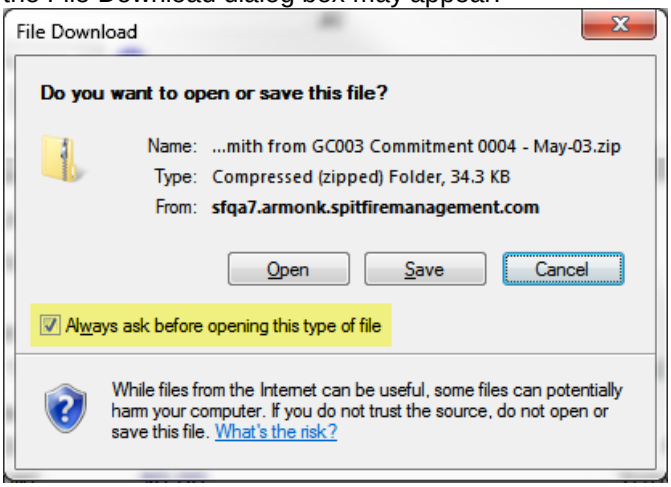
TIP
See also the section on What Gets Routed, starting on page 44.

To preview what will be routed to the routee:

1. On the Route Detail tab, click .

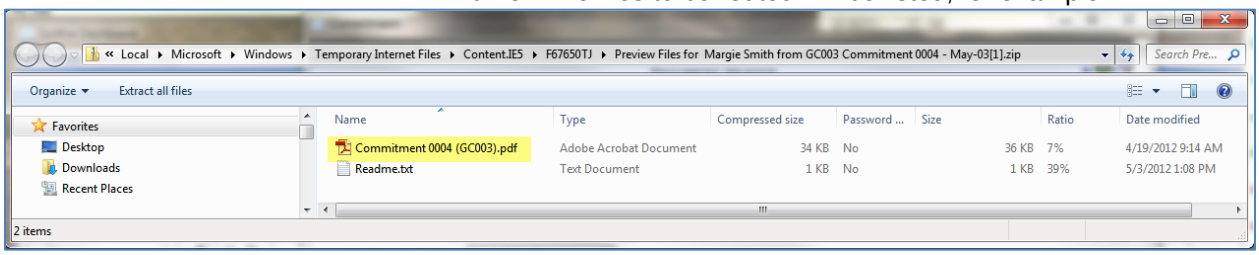


A message will indicate that files are being collected and then the File Download dialog box may appear:



Note: if you uncheck the **Always ask before opening this type of file** checkbox, the dialog box will not appear in the future.

2. Click Open. You may need to click the button a second time. The files to be routed will be listed, for example:



3. Double-click any file to open and view it. You can also print the file if you need a hard copy.

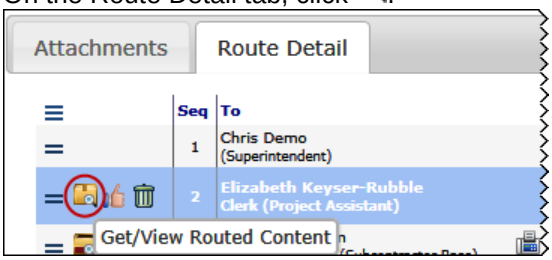
Post-view

Once the document has been routed to someone, the icon on the routee's row changes to indicate that content was already sent to that person. (**Note**: the document may need to be refreshed first.) You can view content that was routed at any time after the fact. Even if new versions of the files are uploaded to the Catalog, the post-view of the routed content for a particular routee always remains the same – a snapshot of what was actually sent.

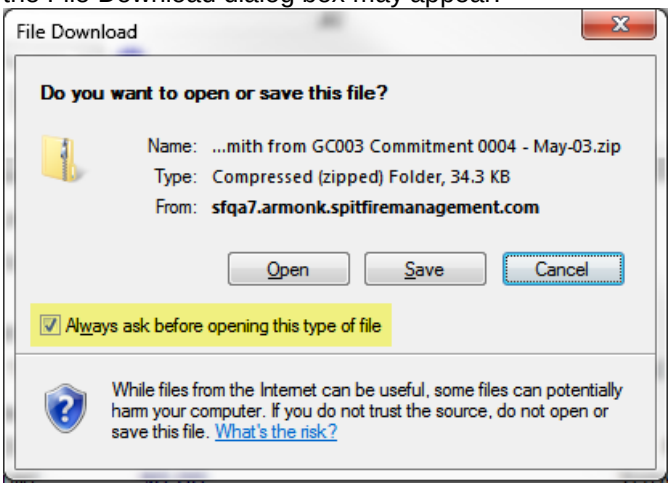
TIP
See also the section on What Gets Routed, starting on page 44.

To view what was routed to a routee:

1. On the Route Detail tab, click .

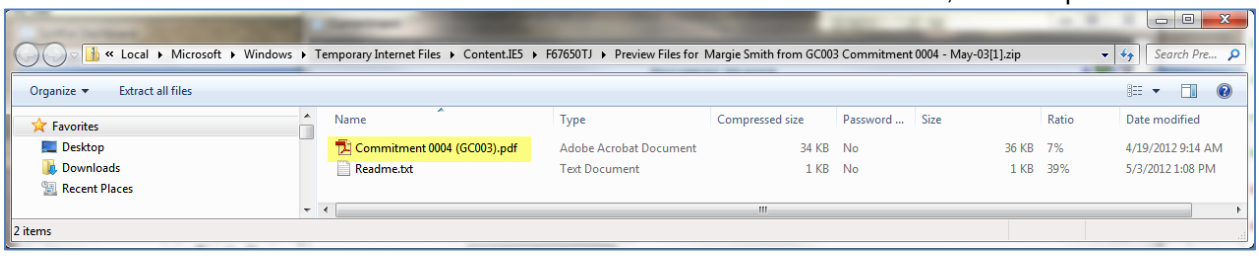


2. A message will indicate that files are being collected and then the File Download dialog box may appear:



Note: if you uncheck the **Always ask before opening this type of file** checkbox, the dialog box will not appear in the future.

3. Click Open. You may need to click the button a second time. The files to be routed will be listed, for example:



4. Double-click any file to open and view it.

What Gets Routed

No Output Version of a Spitfire Document

Preview / Post-view Content

If there is no output version of the document (i.e., nothing created from a template) nor any attached files, the preview and post-view content will include only a ReadMe.txt file and a SendInProcess.txt file (that indicates whether the document has been routed or not.)

Email

If there is no output version of the document (i.e., nothing created from a template) nor any attached files, the email or fax that gets sent to the routee will include only one of the following:

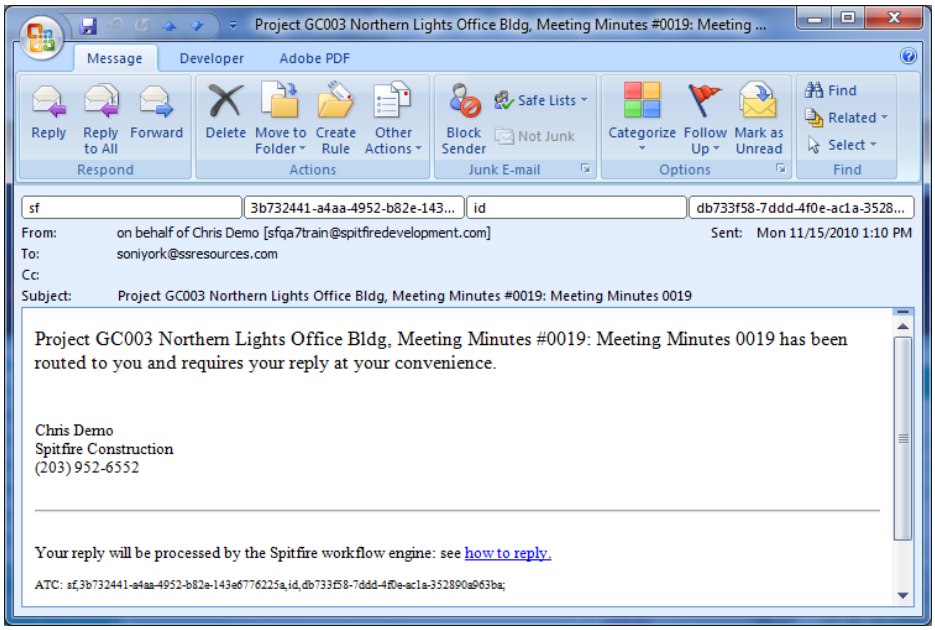
- whatever message and information was configured through an **EMailText** rule
  -or-
- the output from an Email Body template

Note: If no EMailText rule nor Email Body template has been configured for the document, the default email or fax will likely be confusing to the Via Email/Fax routee. For this reason, if you add a Via Email routee to your document's Route Detail tab, you should make sure that the routee will be getting something useful, such as a configured email (that possibly pulls in some information from the document), an output version of the document or attached files.

TIP

For more information about the EMailText rules, see KBA-01394 or your System Administrator.

Email Body templates can include document data through bookmarks. Email Body templates are added to the system through the Templates tool. See the *Focus on the Manage Dashboard* guide.



Document Attachments and Template Printouts

TIP
If the attachment is associated with an Item (as opposed to the whole document), the attachment will not be included if the routee does not have access to the corresponding Item.

All files that are listed on a document's Attachments tab can be included in the routed content of a document. Files become part of a document through:

- Drag-and-drop
- The Add Files and DocAttach tools
- Attachment templates.

Whether or not each file is actually included in the routed content, and in what format, is determined by the **Incl** option on the document's Attachments tab. (For more information, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.)

If Incl option =	***File***
Assemble	Will be merged with other Assembled files into one PDF file and that one PDF file will be included in the routed content. File types that can be assembled are .JPG, TIF, .PNG, .GIF, .PDF, .DOC, .DOCX, .XLS, .XLSX
Native	Will be included in routed content in its original format (e.g., as a .DOCX, .XLSX, etc.file), if possible.
Not Sent	Will not be included in the routed content.
PDF	Will be converted into a PDF file (if possible; see list above) and included individually in the routed content.

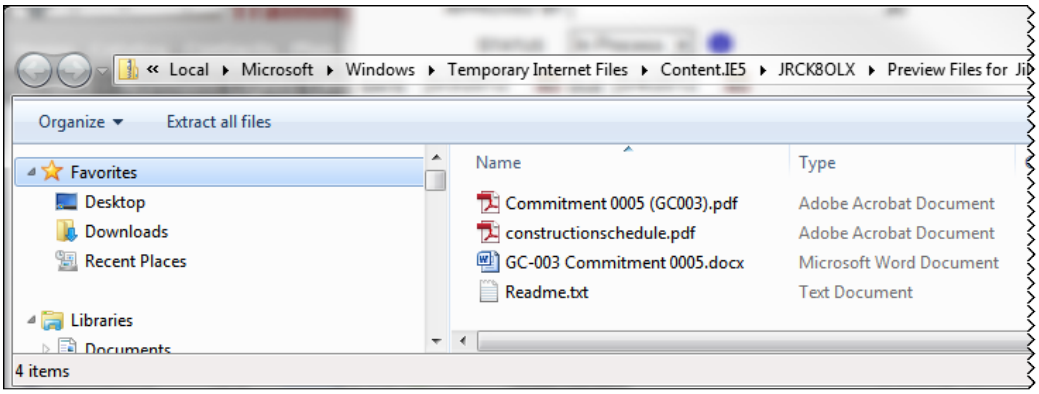
TIP
More information about the Rule Maintenance tool can be found in the *Focus on System Administration* guide.

Notes:

- The **Incl** option can be set by default for specific file types through the **FileCatalogConfig | AttachMode:*ext*** rule.
- When a document (A) has another document (B) in its Attachments, and document (A) is routed, the assembled output of the attached document (B) is included, excluding any document (C) that may be attached to it (B).
- Files that are created through the Transmittal and Item Cover templates (which do not appear on the Attachments tab) are also included in routed content, as stand-alone PDF files.

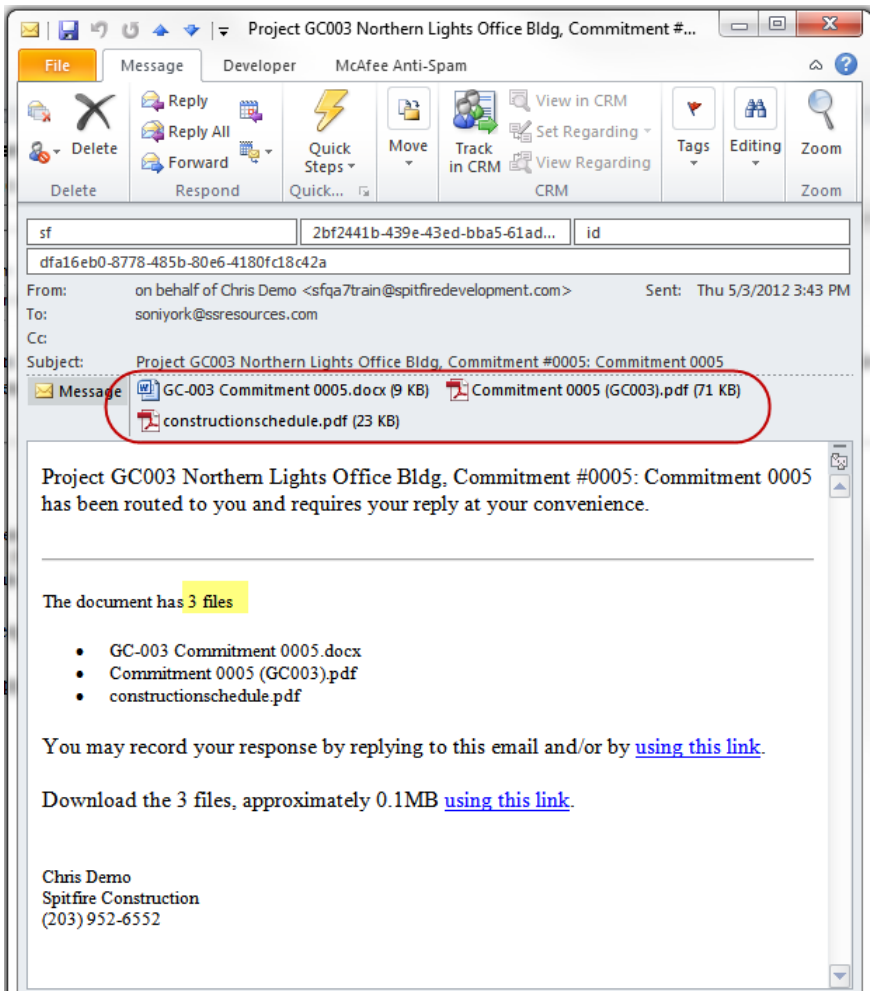
Preview / Post-view Content

The routed content for the document includes all files that are not marked as Not Sent, as well as a ReadMe.txt file for example:



Email

When a document with attachments and/or template printouts is routed via email, those files appear as attachments on the email, if size permits, for example:



Note: if an **EmailText** rule (see KBA-01394) or Email Body template has been set up for the email, it will show up in the body of the email whether or not files are attached.

TIP
The link for downloadable content can be configured through EmailText rules.

Download Wizard

Since attached files may prove too large for the email, by default the email includes a download link. Clicking on this link is the same as previewing and post-viewing routed content.

> Download the 3 files, approximately 0.1MB using this link.

Replies to Emails

If you receive an email from Spitfire, you can reply in two different ways. Either way processes your reply as having taken action in the route and sends the document to next routee's Inbox.

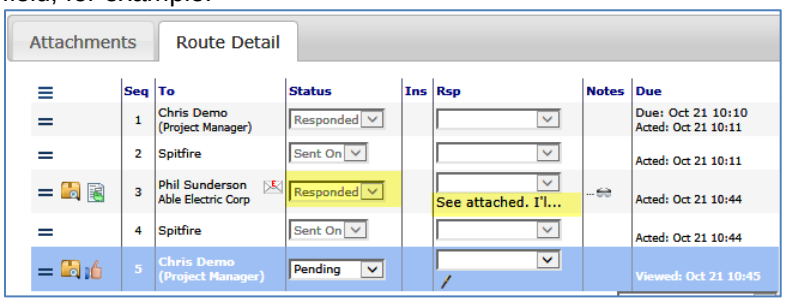
Reply in the Usual Way

You can use the Reply option in your email application, as you would normally.

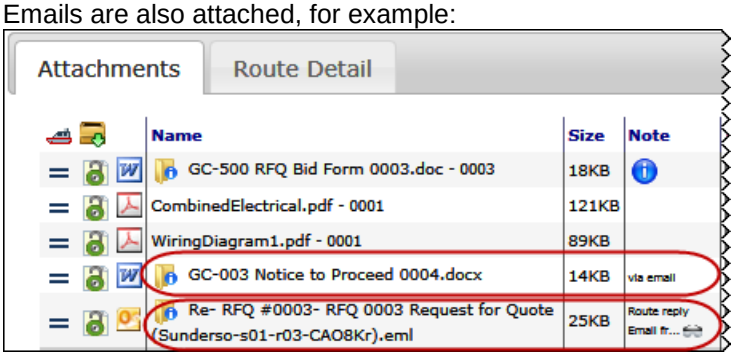
Your reply will be processed by the Spitfire workflow engine. As long as the system is still waiting for your response, the inbound email updates the original document according to the following guidelines:

TIP
If you are the Email From person on the route (see page 24) and if the Doc type has the Forward Inbound Emails option checked on your Contact Detail's Notification tab (see the *Focus on Contacts* guide), replies processed by sfPMS are also forwarded to your email address.

- Plain text at the top of your reply is added to your route's **Rsp** field, for example:



- Files attached to your email either are attached to the Spitfire document or update previous attachments with the same name. Emails are also attached, for example:

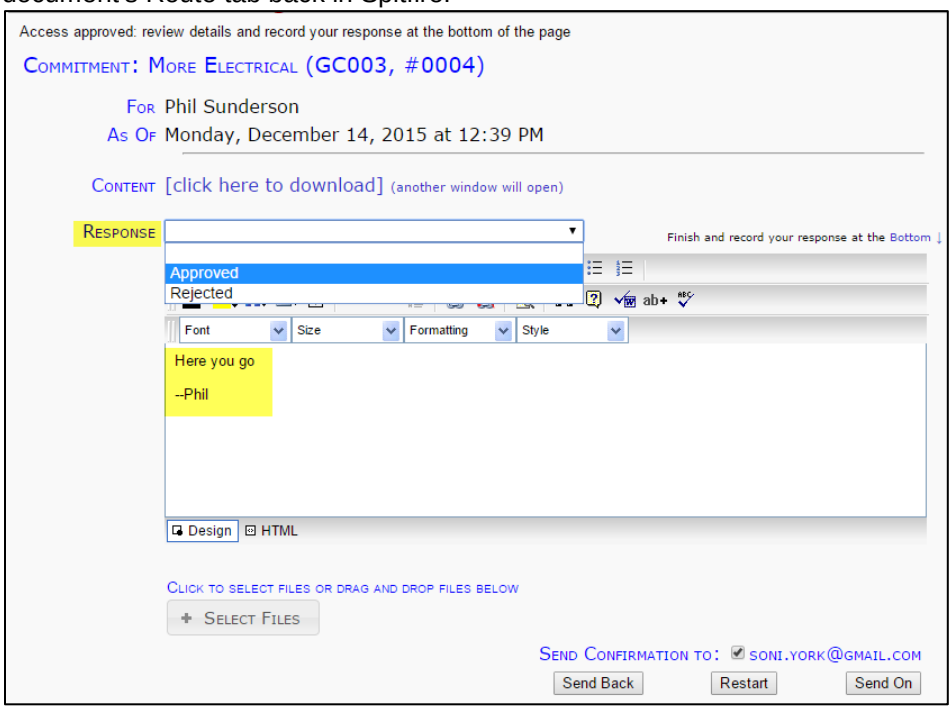


Response Wizard

Another way to respond to the email is to click on the link that opens the Response Wizard.

> You may record your response by replying to this email and/or by using this link.

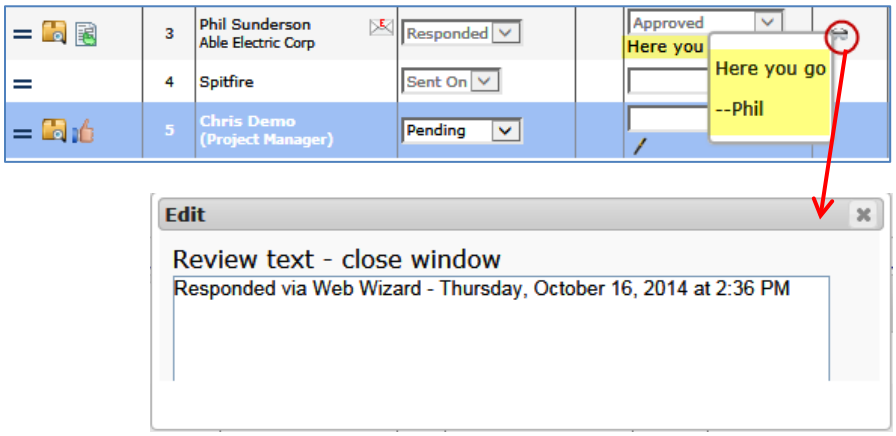
The Response Wizard allows you to both select a Response from the drop-down and enter a response note. Both of these will be added to the document's Route tab back in Spitfire.



TIP

Routees who have been given the DOC | Can route a document back to prior sequence and/or DOC | Can route a document back to originator role capabilities will see buttons for Send Back and/or Restart on the Response Wizard. These buttons work the same as the Sent Back and Restarted options on a route (see page 37). For more information about role capabilities, see the *Designing User Roles* technical white paper.

- Click SELECT FILES or drag and drop files to the area by the button if you want to include files in your response. These files will be attached to the Spitfire document automatically once the system processes the reply email.
- Click Send On to send your reply to Spitfire.



Re-Transmissions

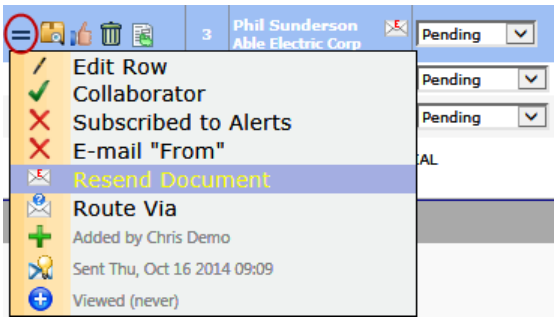
TIP

Resending an email sends the same routed content that was sent the first time. In other words, the same routed content is resent every time. If your intent is to update what is being sent, you need to create a new routing sequence or stage.

There may be times when a person who received (or was supposed to receive) an email or fax needs to have that email or fax transmitted again. If that person is the next routee in the sequence, you can send or resend the email or fax again. In such situations the Send/Resend Document option will appear in the Routee Options menu. (The option will say **Send Document** if sfPMS couldn't send the email or fax automatically or **Resend Document** if sfPMS sent the email or fax but it was not received properly.)

To retransmit an email or fax to a routee:

- Click ≡ next to the appropriate routee to open the Routee Options menu, then select **Send/Resend Document.**. **Note**: the routee must be next in the routing sequence and a "route via" email or fax routee.

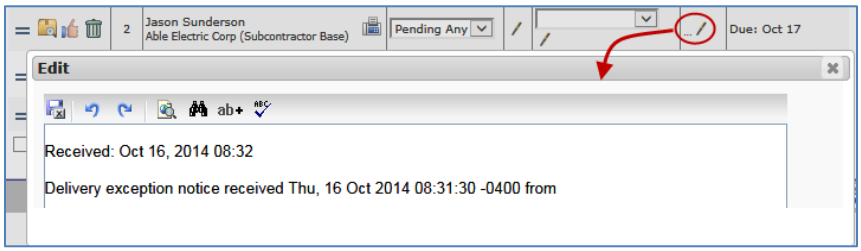


The routed content will be transmitted.

Bounced Emails

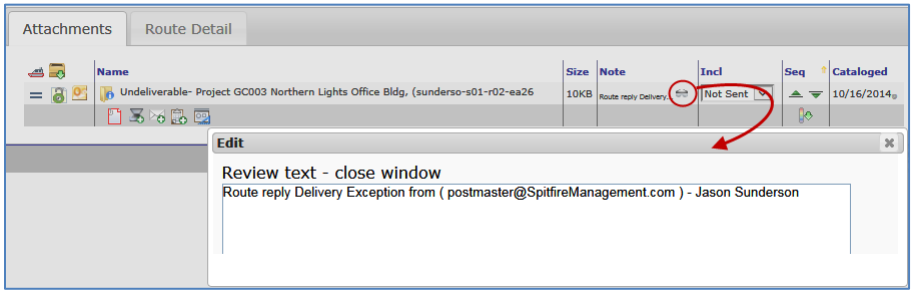
If a Spitfire document that has been routed via email cannot be delivered and is bounced back, a note to this effect is added to the routee's row on the Route Detail grid.

- Click … to read the note.

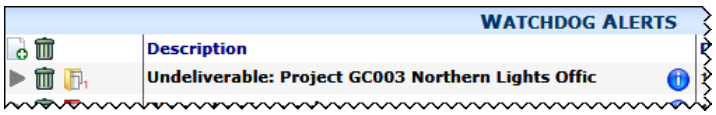


The Attachment tab will reflect the undeliverable email.

- Click to view the Note.



In addition, a Spitfire Alert is sent to the "email from" person (see page 24) and this person receives an email informing him or her of the delivery exception.

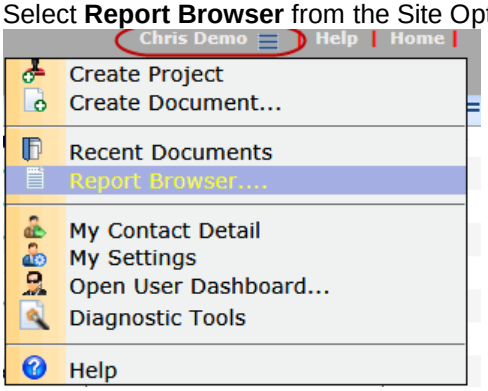


Open Routing Report

The Open Routing Report lists documents being routed. You can filter the report.

To open the Open Routing Report:

1. Select **Report Browser** from the Site Options menu:



2. Select **General | Open Routing.**
3. Click ✕ to close the report.

TIP

For more information about reports, see the *Spitfire Reports* technical white paper.