

Challenge

“It is said that the contractor with the best documentation wins. Our file cabinets are full of files, but retrieving specific information and worrying about lost files is taking too much of our time. We need a system that will store not only all files but also all emails and communications pertaining to a project, then provide a way for quick searches, exports and printouts. And, as a bonus, we’d like to get our existing hard-copy files into the system without too much effort.”

Solution

Spitfire Project Management System (sfPMS) provides powerful file management capabilities. Batch processing, bulk import, scanning and upload options all offer a way to catalog all your project and company files and communications in one electronic file library. Once in sfPMS, files can be easily found, printed out or exported to a computer or CD as needed. Files can also be attached to project documents, routed and viewed from within the system, and edited in their native editors, with version control provided by sfPMS.

How It Works

1. Historical documents and paper files are scanned directly into the Spitfire Catalog using a properly provisioned smart copier.
2. Regular stacks of files, such as monthly invoices, are processed through the Batch Upload Tool.
3. Electronic files and emails as well as scanned pages are cataloged through the Add Files tool.
4. Once in the Spitfire Catalog, all files can be found, attached to documents, viewed, and edited.
5. Check-in and Check-out controls prevent simultaneous updating of a file by two or more people.
6. Export options allow you to export just one file or any number of files based on specific filters.

Benefits

- Keeping electronic copies of files in addition to or instead of hard copies means that no file is lost.
- Having all files in one catalog with several search parameters means files are easily found and no time is wasted looking for them.
- Paper memos, letters and emails can all be cataloged providing a “paper trail” if needed.
- Version control eliminates the confusion that occurs when multiple people make changes to the same file.
- Because all version of a file are kept in the catalog, it is easy to see who made changes and when—facts that may be important in conflict resolution or litigation.
- Files need not be kept on different users’ workstations; from sfPMS, files can be printed or exported whenever needed.