Focus Guide

Document and Item Basics

This Focus Guide is designed for Spitfire Project Management System users. In this guide you will learn about documents and the Items tab, found on several Doc types.

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Table of Contents

About Our Documentation

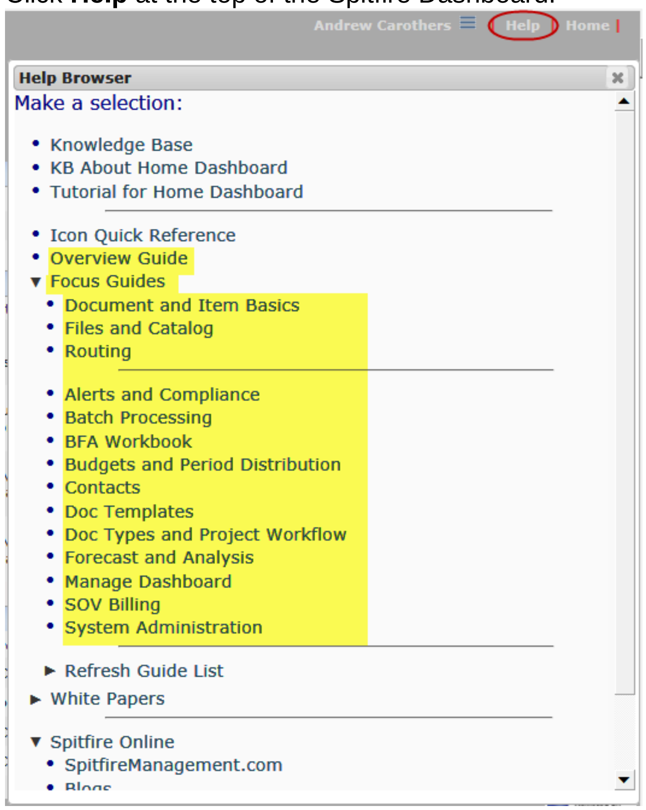
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

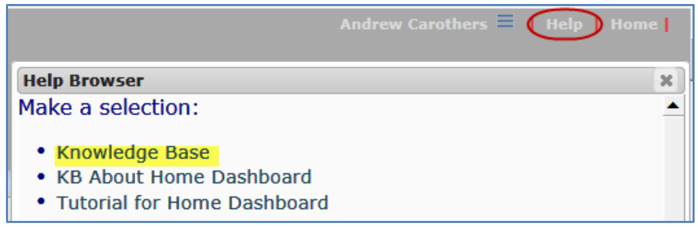


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

   The guide will appear as a PDF file.

The Knowledge Base

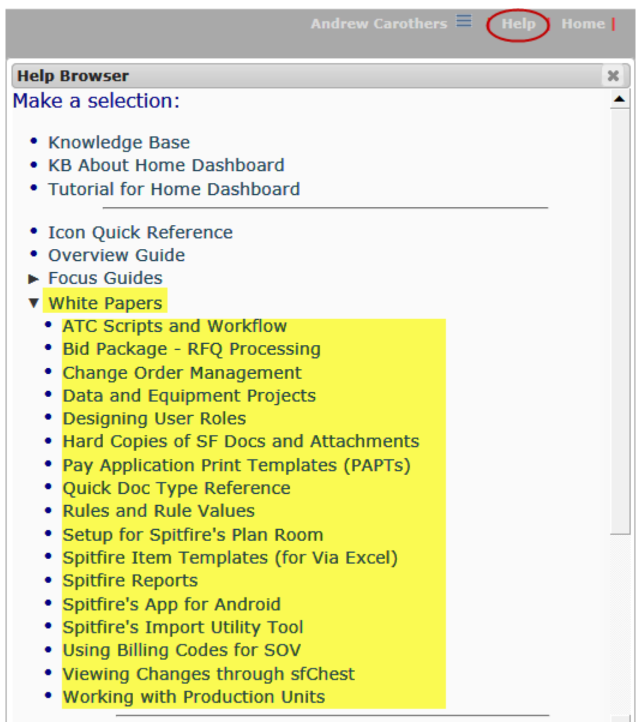
The Knowledgebase contains articles, in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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

White Papers

White Papers (also known as Technical White Papers or TWPs) 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

In Spitfire, the term “document” is used to describe a specific entity created in sfPMS from a document type (Doc type). There are many Doc types in the system, each with its own specific purpose.

Documents are different from files in that files are created outside of sfPMS and then uploaded, scanned or copied into the system. (Detailed information about files can be found in *Focus on Files, Attachments and the Catalog Dashboard*.)

This guide focuses on general information about documents and also a thorough explanation of the Items tab, found on several Doc types.

A quick summary of the Doc types can be found in the *Quick Doc Type Reference* technical white paper and more detailed information about each Doc type can be found in the *Focus on Doc Types and Project Workflow* guide.

Note: Because Doc types are configured during implementation, the Doc types and specific documents shown as examples in this guide might not be the same as the ones used in your own system.

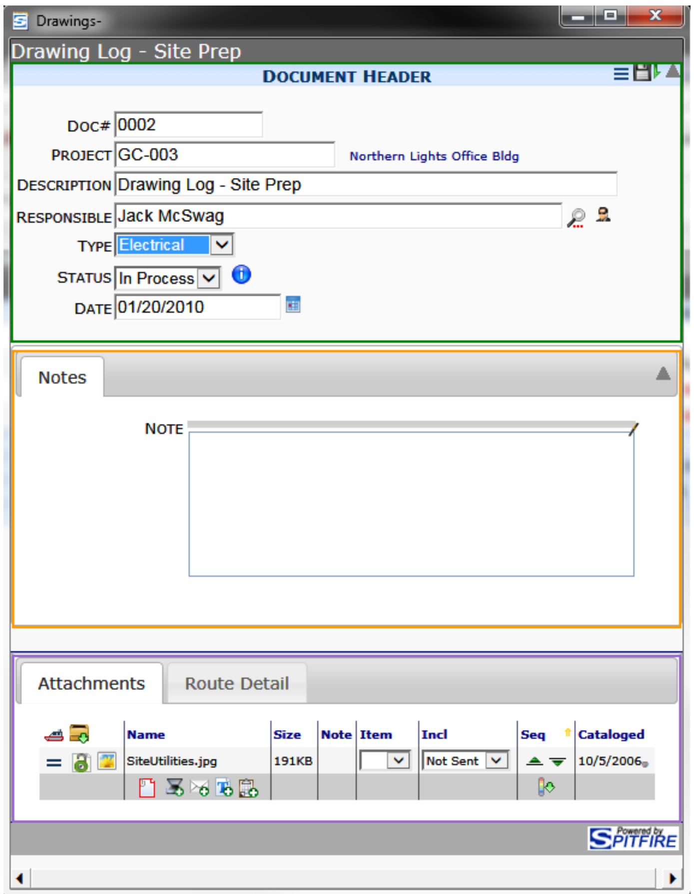
This guide assumes some familiarity with sfPMS and its dashboards as described in the *Overview Guide.*

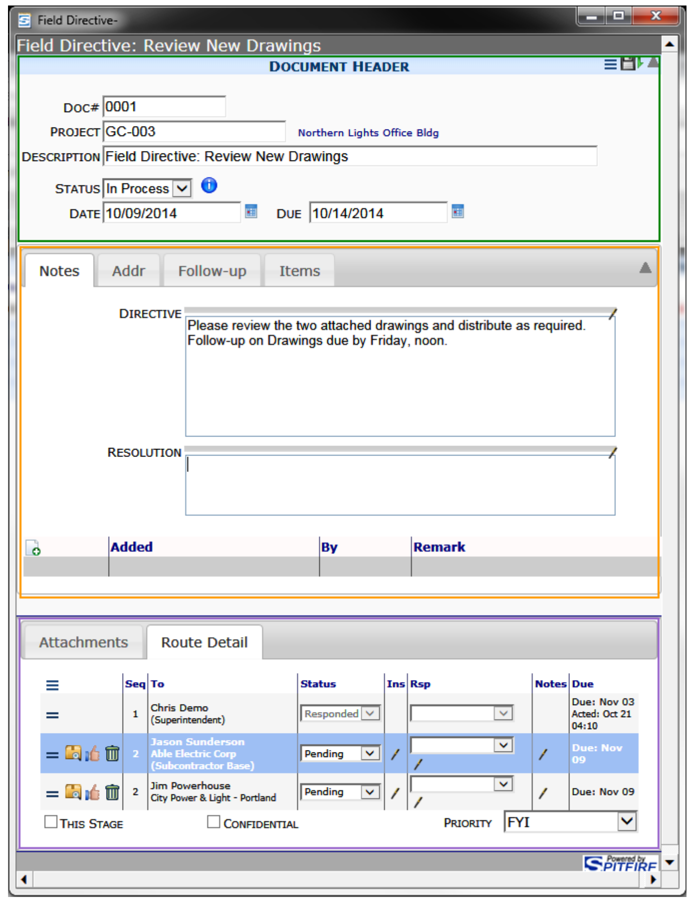
Note: Aside from updated pictures and icons, the information herein is the same as the information in the V4.4 documentation. Also, icons are shown in size 16 only; larger sized icons are similar but not exactly the same.

Standard Document Features

A document in Spitfire is a defined set of specific, related information. And since there are many types of activities on a project, there are many different Doc types. Each Doc type is designed for a specific requirement. For example, a Meeting Minutes document allows you to enter Attendees, Agendas, and Meeting Items with Notes, and to schedule a new meeting, whereas a Change Order document has a very different structure to store information about your change order. But even though documents vary depending upon their Doc type, there are still some common elements shared by all documents.

- Documents open in a browser window, for example:





TIP

For more information on routing, see the *Focus on Routes* guide. For more information on Alerts, see the *Focus on Alerts and Compliance* guide.

- The browser window has three sections: Document Header (shown above outlined in green), Mid-section tabs (outlined in orange), and the Attachment/Routing section (outlined in purple). **Note:** Available tabs vary by Doc type.
- Documents appear in your Home Dashboard Inbox when they are routed to you (e.g., when you are responsible to review, track or complete the action required by the document) or when you create them. Documents also appear on Project Dashboards. (See page 28.)
- Documents send Alerts when specific conditions are overdue or closed.

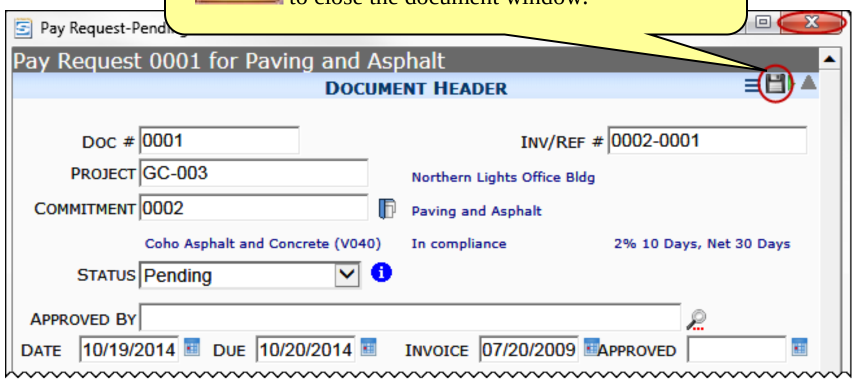
Sections on a Document Window

Document Header

The Document Header contains information such as the document's number, project number and description. Fields vary depending on Doc type. Some fields are filled in automatically when you first create a document; others are filled in by you. Some fields end with the lookup icon ( ) indicating that you can click the icon in order to fill in the field (or type three or more characters for an autocomplete list); some fields end with the calendar icon ( ) indicating that you can click the icon to fill in dates; and some fields include the info icon ( ) indicating that you can mouse over the icon for information. The following are some examples of Document Headers:

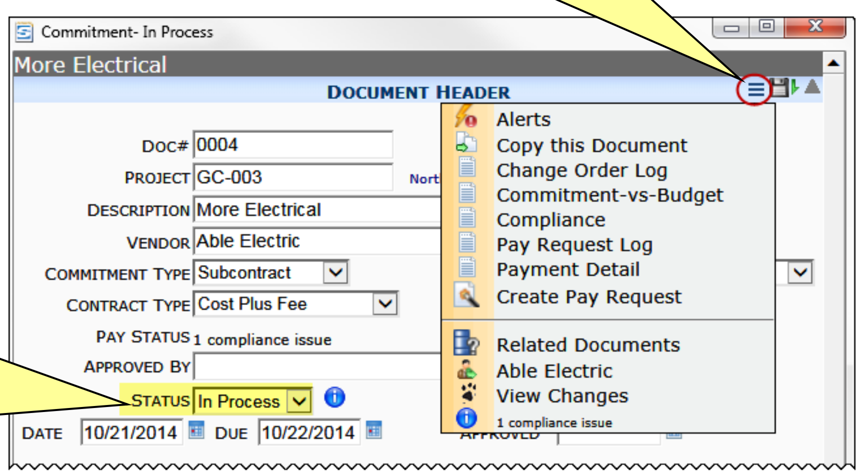
TIP
Lookup fields require valid entry from the lookup. However, if you know the beginning of your entry, you can start typing it and auto-complete choices will appear. You can then select one.

Click to save information for the document and to close the document window.

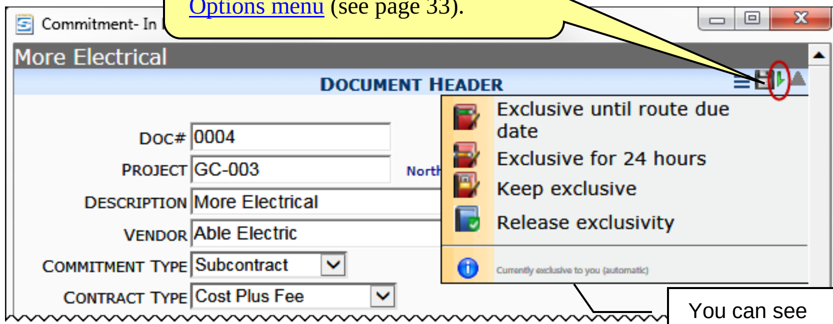


Click to access the Document Options menu (see next page).

Click the drop-down to change the status of a document. When you set the status to certain statuses, such as **Closed** or **Approved**, the document becomes "read-only" and you can no longer make changes to it.



Click to access the Exclusivity Options menu (see page 33).



You can see who has update rights to the document.

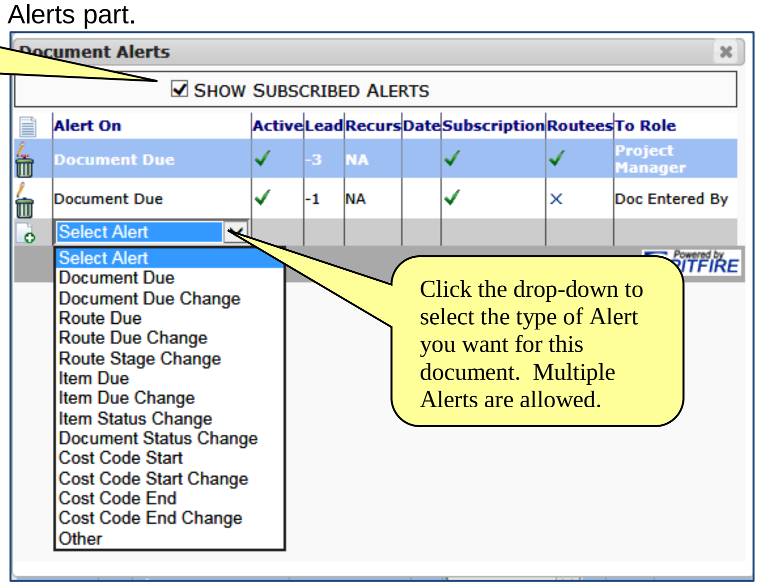
Document Options Menu

Choices on the Options menu (found on the Document Header of a document) vary depending on Doc type and your level of permission. Possible options include the following.

Alerts

- Select this option to open the Document Alerts window in order to set up or view Alerts for this document. When conditions are met, Alerts appear on the Home Dashboard in the Watchdog Alerts part.

Click the checkbox to see subscribed Alerts.



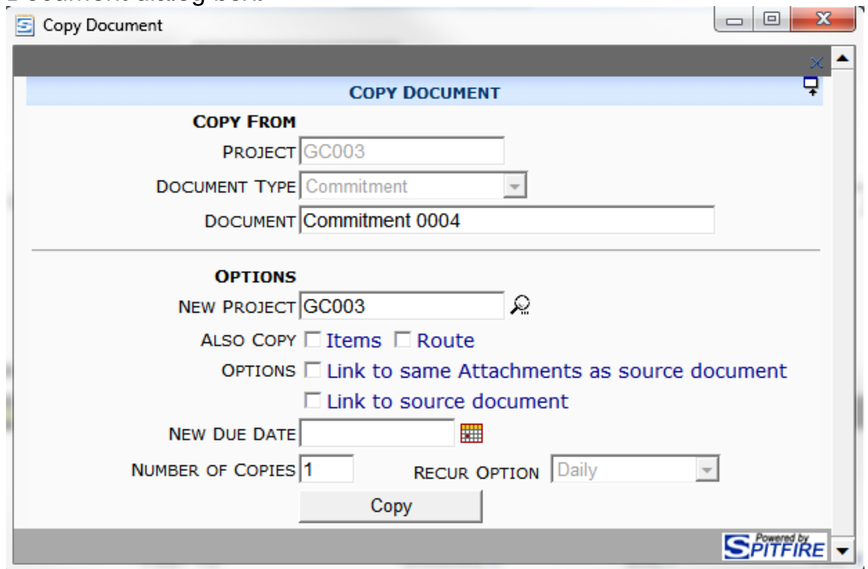
Click the drop-down to select the type of Alert you want for this document. Multiple Alerts are allowed.

TIP

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

Copy this Document

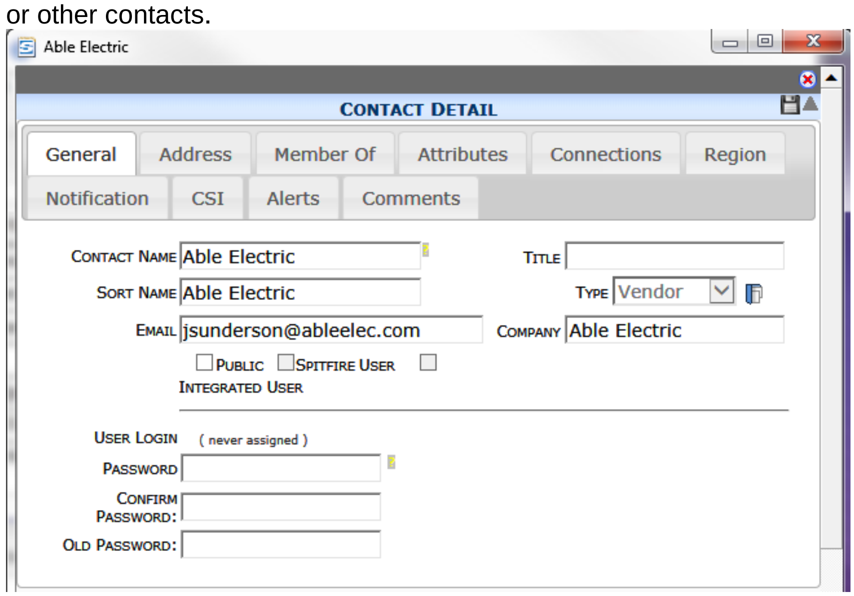
- Select this option to copy the document through the Copy Document dialog box.



See page 31 for more information.

person or company

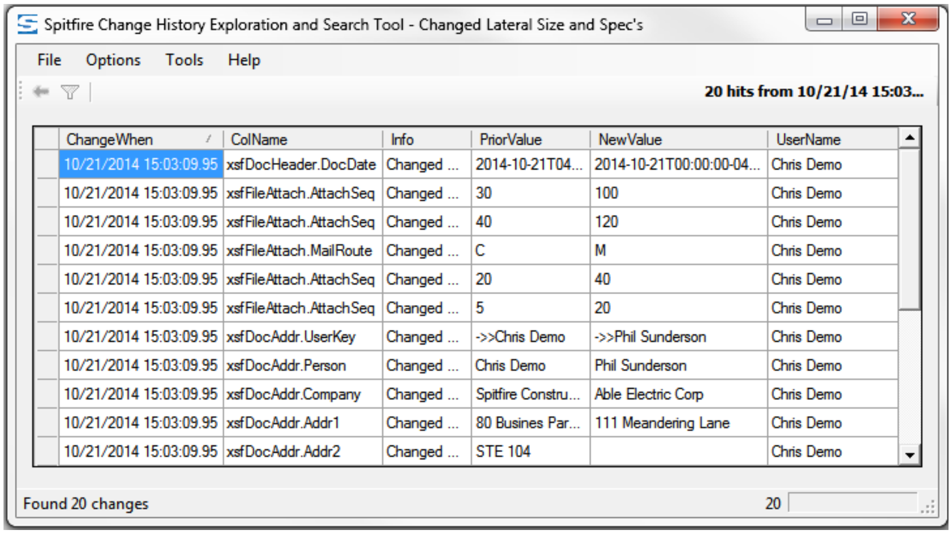
- Select this option to open the detail window for this person or company. What appears next to the icon changes from document to document and can include vendors, subcontractors, or other contacts.



TIP
More information on Contact details can be found in the *Focus on Contacts* guide.

View Changes

- Select this option to open the Spitfire Change History Exploration and Search Tool (sfCHEST). sfCHEST provides a detailed history of changes to every data field in the document:



ChangeWhen	ColName	Info	PriorValue	NewValue	UserName
10/21/2014 15:03:09.95	xsfDocHeader.DocDate	Changed ...	2014-10-21T04...	2014-10-21T00:00:00-04...	Chris Demo
10/21/2014 15:03:09.95	xsfFileAttach.AttachSeq	Changed ...	30	100	Chris Demo
10/21/2014 15:03:09.95	xsfFileAttach.AttachSeq	Changed ...	40	120	Chris Demo
10/21/2014 15:03:09.95	xsfFileAttach.MailRoute	Changed ...	C	M	Chris Demo
10/21/2014 15:03:09.95	xsfFileAttach.AttachSeq	Changed ...	20	40	Chris Demo
10/21/2014 15:03:09.95	xsfFileAttach.AttachSeq	Changed ...	5	20	Chris Demo
10/21/2014 15:03:09.95	xsfDocAddr.UserKey	Changed ...	->>Chris Demo	->>Phil Sunderson	Chris Demo
10/21/2014 15:03:09.95	xsfDocAddr.Person	Changed ...	Chris Demo	Phil Sunderson	Chris Demo
10/21/2014 15:03:09.95	xsfDocAddr.Company	Changed ...	Spitfire Constru...	Able Electric Corp	Chris Demo
10/21/2014 15:03:09.95	xsfDocAddr.Addr1	Changed ...	80 Busines Par...	111 Meandering Lane	Chris Demo
10/21/2014 15:03:09.95	xsfDocAddr.Addr2	Changed ...	STE 104		Chris Demo

- Click to close sfCHEST.

TIP

You can add a **Create Next *doctype*** option to the Document Options menu. See the NextDocFlow rule group in the *Rules and Rule Values* technical white paper for more information.

Create *DocType*

- Select this option to create the indicated document (for example, Project Setup, Pay Application, Submittal, etc.)
  Note: unlike documents created through the icon, documents created through this option exist in the system right away even before being saved.
  (See also page 26 for other ways to create documents.)

Change Order Log

- Select this option to open the CCO Log report.

TIP

Reports are described in the *Spitfire Reports* technical white paper.

CI Payment Log

- Select this option to open the Change Item Payment Log report.

Commitment-vs-Budget

- Select this option to open the Commitment Budget Comparison report.

TIP

You can add custom reports to the Document Options menu. See the **ReportConfig | MenuList** rule in the *Rules and Rule Values* technical white paper for more information.

Compliance

- Select this option to open the Compliance Log report.

Link to External System

- Select this option to access the screen associated with the document in an integrated accounting system.

Pay Request Log

- Select this option to open the Pay Request Log report.

Payment History

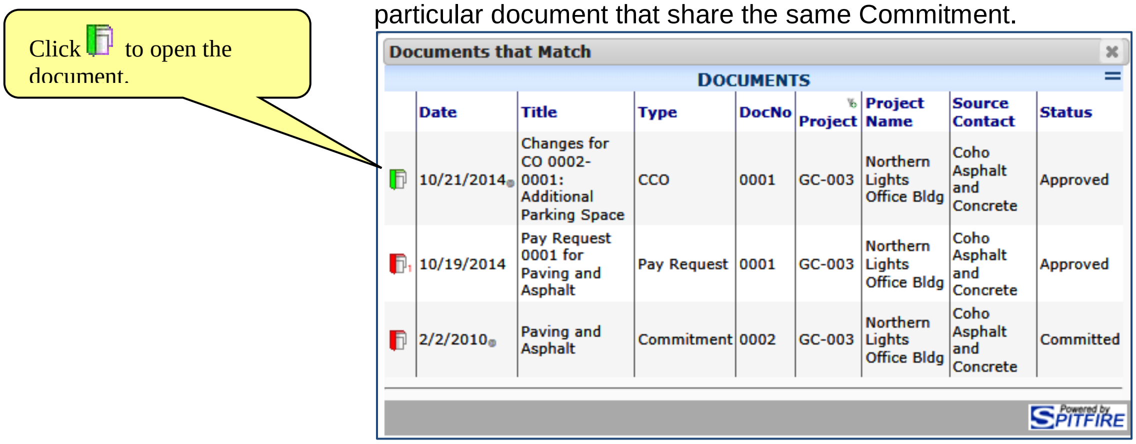
- Select this option to open the Payment Detail report.

Report

- Select this option to open the Production Analysis report (from the Production Units document.)

Related Documents

- Select this option to view a list of documents related to the particular document that share the same Commitment.



	Date	Title	Type	DocNo	Project	Project Name	Source Contact	Status
	10/21/2014	Changes for CO 0002-0001: Additional Parking Space	CCO	0001	GC-003	Northern Lights Office Bldg	Coho Asphalt and Concrete	Approved
	10/19/2014	Pay Request 0001 for Paving and Asphalt	Pay Request	0001	GC-003	Northern Lights Office Bldg	Coho Asphalt and Concrete	Approved
	2/2/2010	Paving and Asphalt	Commitment	0002	GC-003	Northern Lights Office Bldg	Coho Asphalt and Concrete	Committed

TIP
More information on Pay Applications can be found in the *Focus on Schedule of Values (SOV) Billing* guide.

Reverse

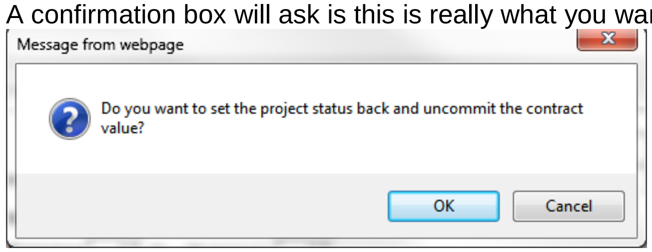
- Select this option to reverse an invoiced Pay Application that has been posted in an external accounting system. This option is only available for integrated sites.

TIP
[*Spitfire-Enterprise*] For more information about role capabilities, see the technical white paper *Designing User Roles*. For information on how to assign capabilities to a role, see the *Focus on the System Admin* guide.

Uncommit Project

- Select this option to set the document status of the Project Setup document back to **In Process** and uncommit the contract value. **Note**: only users with the **DOC | Can set document status to committed/pending (RS)** capability can use this option.

  A confirmation box will ask is this is really what you want to do.

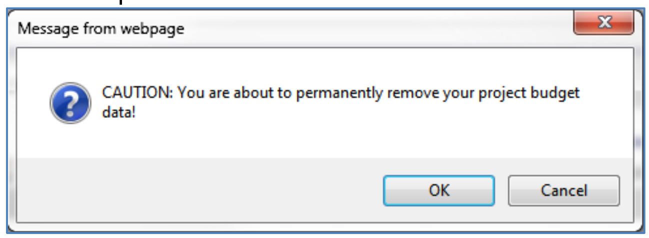


  If you click OK, the following happens:

  - A budget revision with the contract value (and revenue, if applicable) netted out is created and posted.
  - A revision is added to the Project Setup document.
  - The document status is set back to **In Process**.
  - The project metrics cache (KPI, Cost Analysis etc.) is flushed.

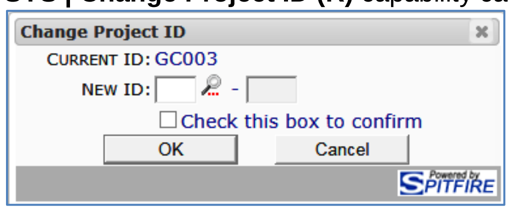
Clear Budget

- Select this option to remove all data from your approved BFA workbook (budget) and clear all your cost codes. A confirmation box will ask if this is really what you want to do. **Note**: only users with the **SYS | Clear Budget/Delete Project (RS)** capability can use this option.



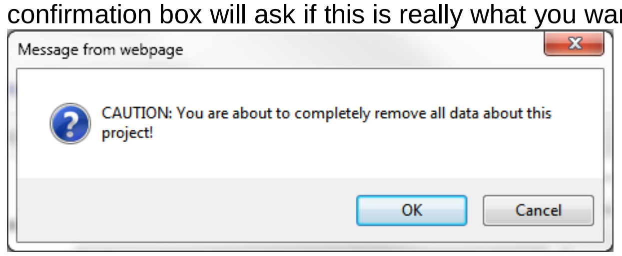
Change Project ID

- Select this option to change the Project ID on the Project Setup document (and corresponding project). **Note**: only users with the **SYS | Change Project ID (R)** capability can use this option.



Delete Project

- Select this option to remove the Project Setup document and its corresponding Project Dashboard from your system. A confirmation box will ask if this is really what you want to do.



Notes:

- Before you can use this option, you must remove all other documents from the project through the Catalog.
- Only users with the **SYS | Clear Budget/Delete Project (RDS)** capability can use this option.

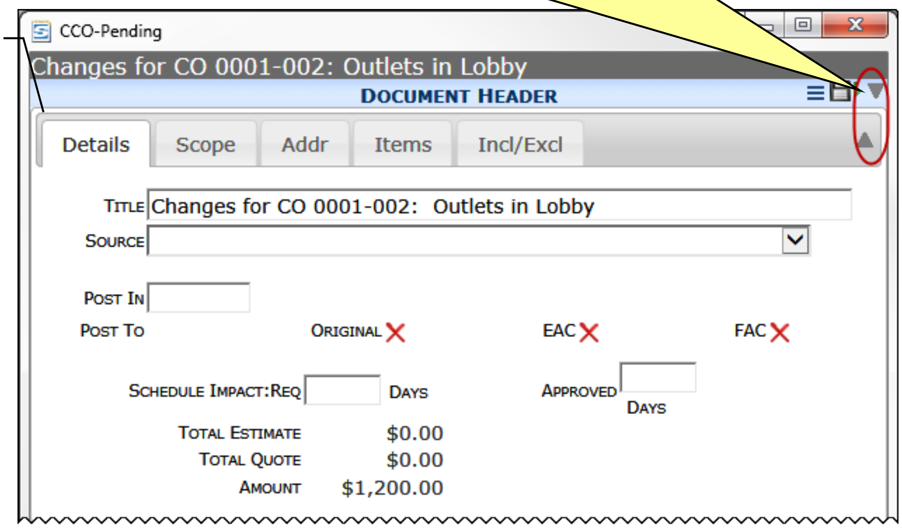
- Information about the document (for example, about Compliance for the related Vendor or Commitment document).

Mid-Section Tabs

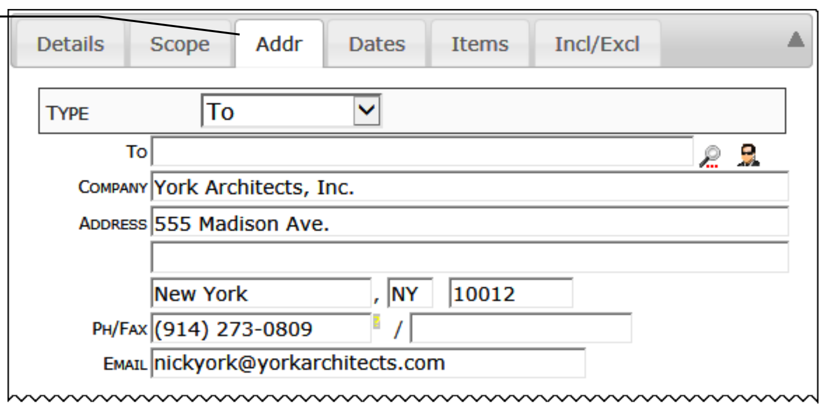
The tabs that appear in the mid-section of a document window and the number of tabs in each document vary from Doc type to Doc type, as shown in the following examples. Keep in mind that the number and contents of tabs are customizable and may be different at your site:

Notice that the Document Header section is hidden. Click ▼ to show these fields. Click ▲ at the tab line to hide the mid-section tab section.

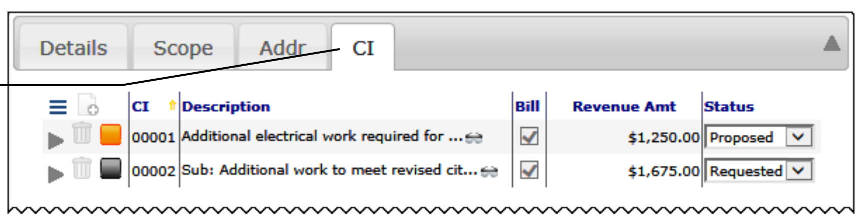
Default Mid-section tabs for a CCO; Details tab selected



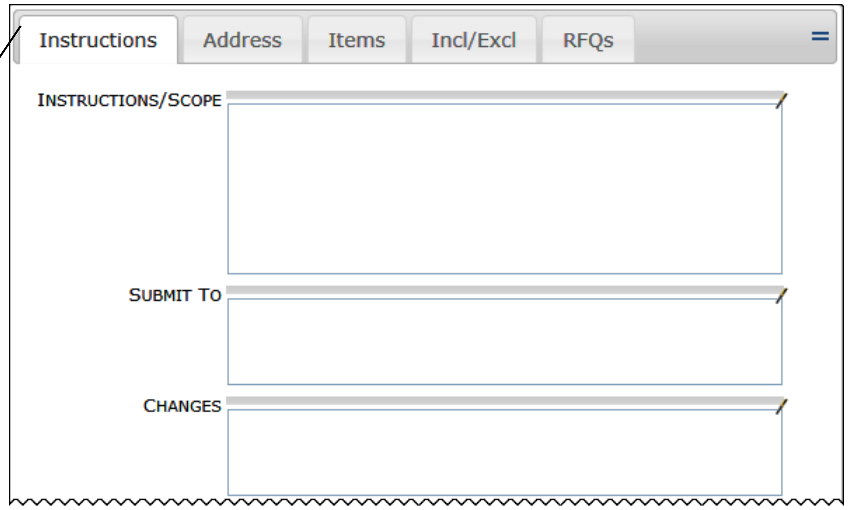
Default Mid-section tabs for a Bid; Addr tab selected



Default Mid-section tabs for a Change Order; CI tab selected



Mid-section tabs for a Bid Package; Notes tab (renamed Instructions) selected



Documents can have one or more of the following tabs in their mid-sections:

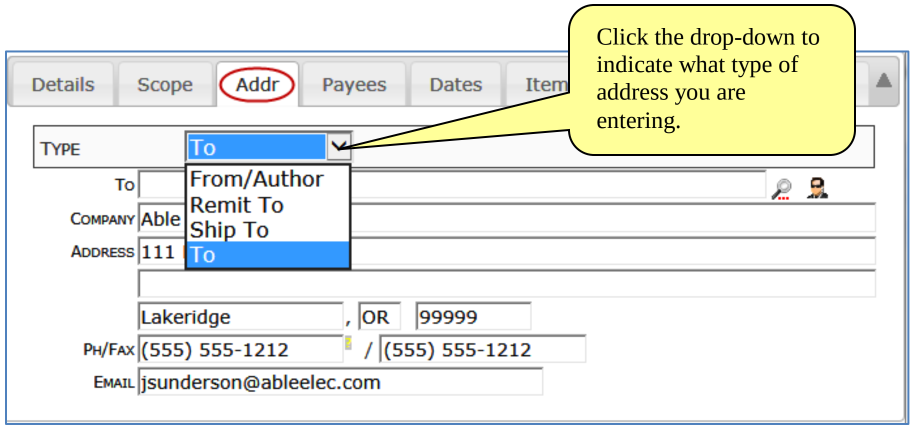
- **Addr** (a.k.a. **Address**),
- **Attendees** (a.k.a. **Contacts**, **Liens**, **Resources**),
- **Attributes** (a.k.a. **Info**, **Instructions, Follow-Up, Equipment**)
- **Compliance**,
- **Dates**,
- **Details** (a.k.a. **Amounts, Notify, Summary**),
- **Incl/Excl**,
- **Items** (a.k.a. **CI**, **Coding**, **Cost Codes, CSI, Materials**),
- **Links** (often renamed, e.g., Subordinate Docs, Suppliers, etc.**)**
- **Message** (a.k.a. **Email, Job Safety, Plan Room Access**)
- **Notes** (a.k.a. **Comments**, **Info**, **Instructions**, **Scope**, **Work**)
- **Project Setup** (a.k.a. **Project**)
- **RFQs**
- **To**

TIP

For more information about customizing your documents, see the *Focus on System Administration* guide.

During installation, tabs may be customized with other labels, but the tab details will be the same or similar to the following tabs described. (For example, you might label an Items tab **Change Items** or notice a tab labeled **CI** but they would still function as the Items tab.)

Addr



- Use this tab to enter and view address information.

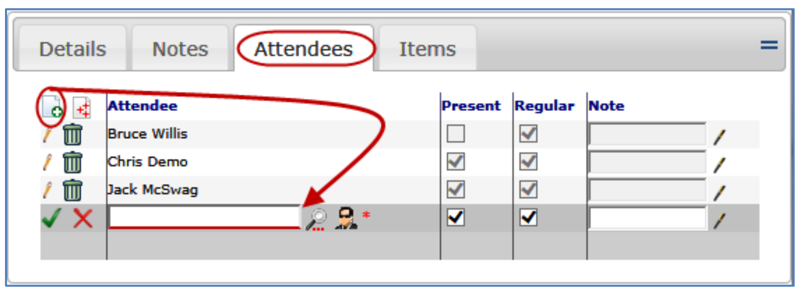
Attendees

TIP

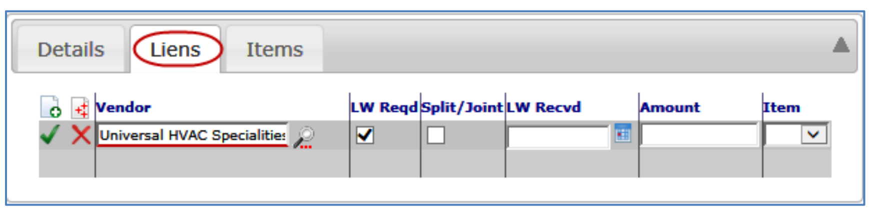
Here and elsewhere, click to add a new line item then to accept your information. Or click for the multi-select window. Click to view and edit a line item and to delete a line item.

TIP

Click to toggle between freeform and lookup entry. allows freeform; restricts you to the lookup.



First example (Meeting Minutes)

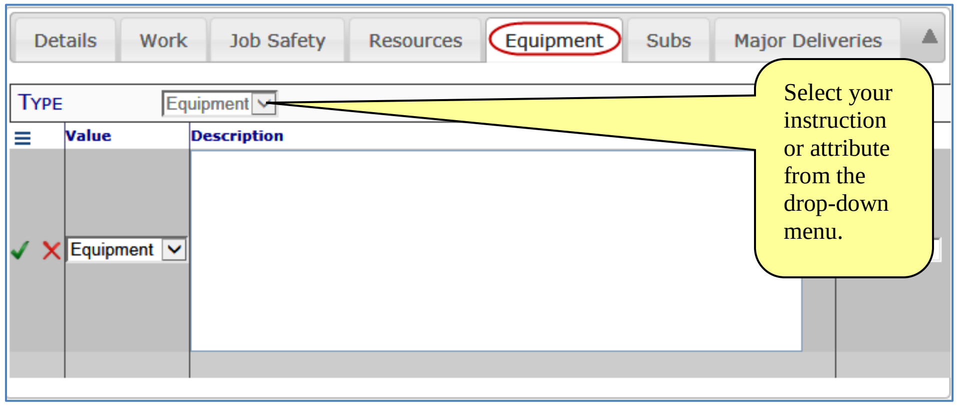


Second example (Pay Request)

- Use this tab to enter and edit information about attendees, workers, or other groups of people such as Vendors.

Attributes

TIP
Here and elsewhere, click ☰ for an options menu.

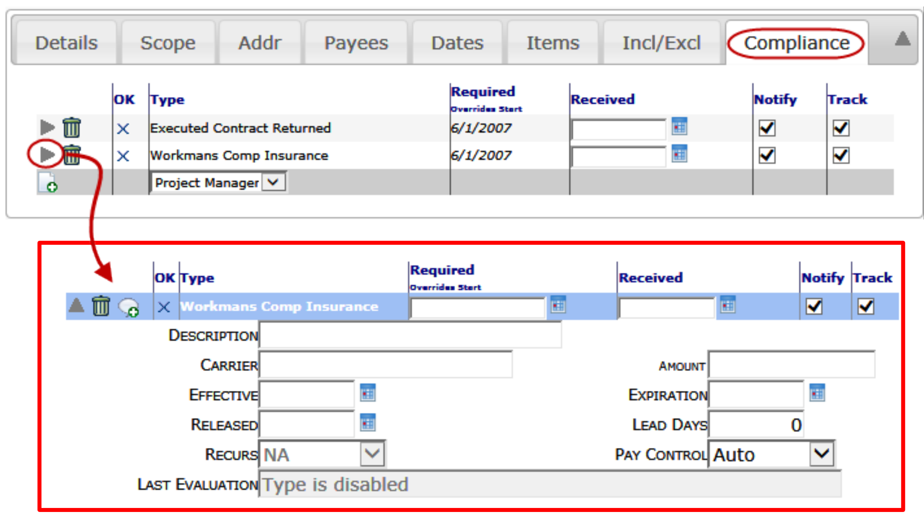


- Use this tab to list attributes or instructions pertaining to this document. If the document has more than one Attributes type, a **Type** filter becomes available, as shown above.

Compliance

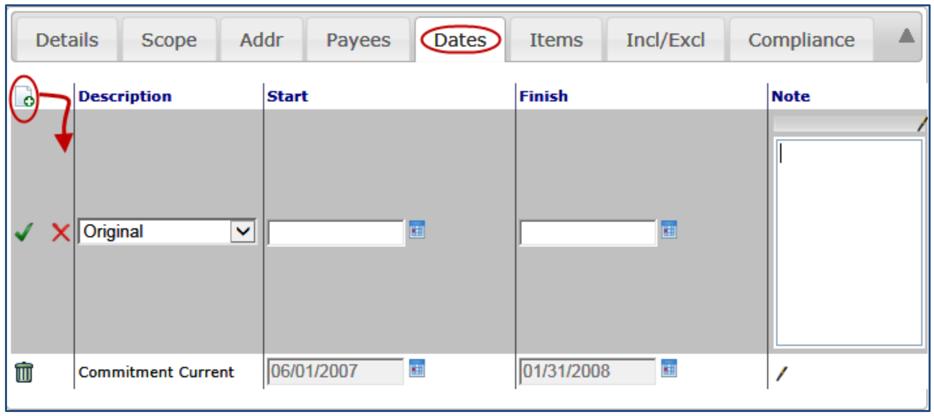
TIP
Here and elsewhere, click ▶ to get to detail view and ▲ to get back to the grid view. Click to add remarks.

TIP
More information about Compliances can be found in the *Focus on Alerts and Compliance* guide.



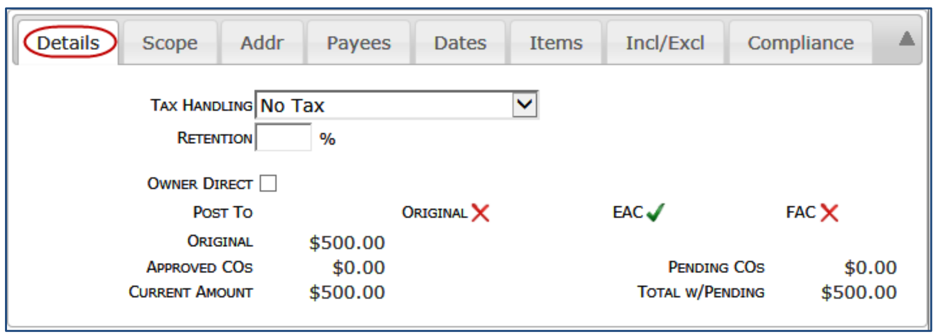
- Use the Compliance tab to list and detail your vendor's compliance items.
- Compliance items can be configured for specific Doc types by your System Administrator, and Compliance items can be configured to be required or optional.

Dates

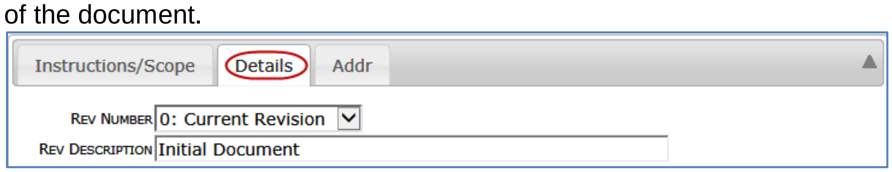


- Use this tab to keep track of important dates for the document. Appropriate descriptions (which vary depending on Doc type) are found in the drop-down list.

Details



- Use the Details tab to view, enter and edit information corresponding to the Doc type. Fields in this tab can vary greatly and can include lookup fields, drop-down lists and type-in fields. Sometimes the Details tab includes information that cannot be changed, often summarizing items for the document.
- Through customization, the Details tab can also include the **Rev Number** drop-down, shown below. This field allows for revisions of the document.



TIP

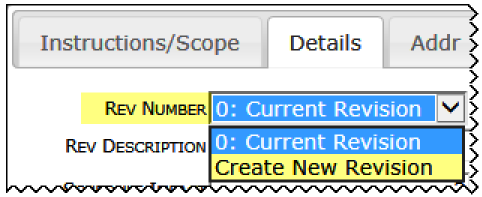
Use Doc Detail – Standard | Rev Number and Doc Detail – Standard | Rev Description in the Customization tool to make these fields visible on your Doc type.

Revisions

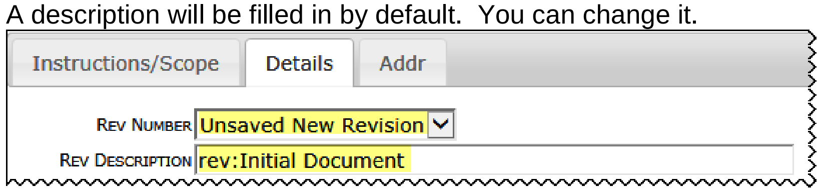
The Revision feature allows you to track changes throughout a document's life cycle. By creating a second revision, you can change the data in your document and keep both versions for record keeping.

To create a new revision:

1. Select **Create New Revision** from the Rev Number drop-down list.



2. A description will be filled in by default. You can change it.



3. Fill in other fields, as necessary and review items for removal.

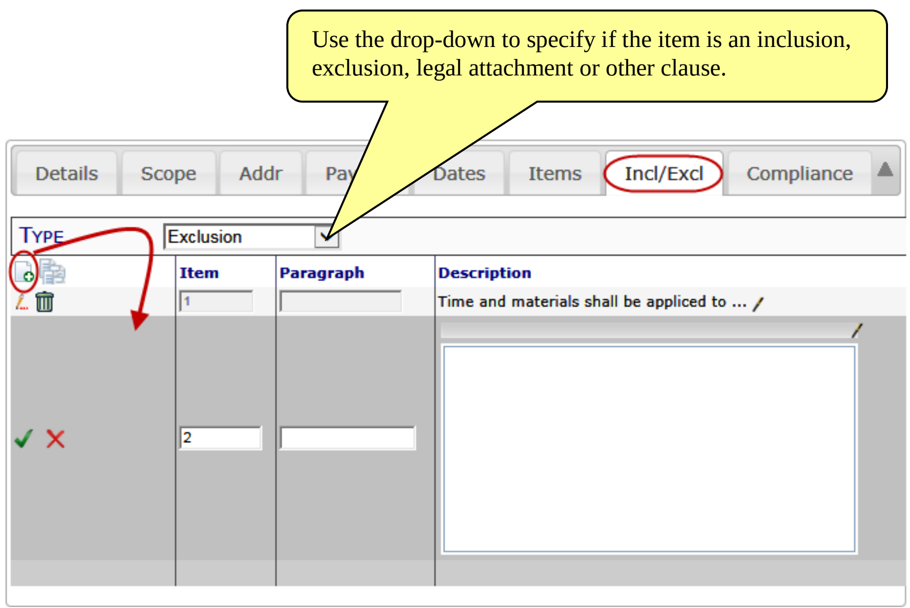
4. Click to save the document.

Once you create a new revision, older versions of the document are read-only.

Incl/Excl

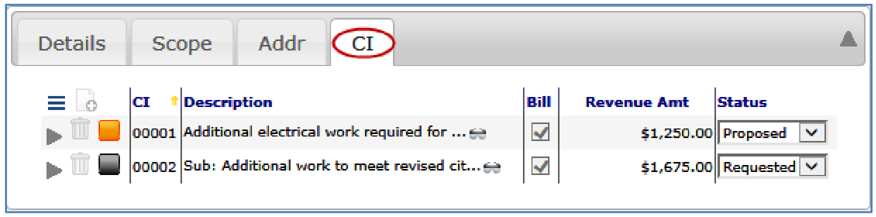
TIP

Click to copy the line item to another document (then click at the other document to paste). Click to copy all line items. Click to view, write or edit the Description in the text editor.

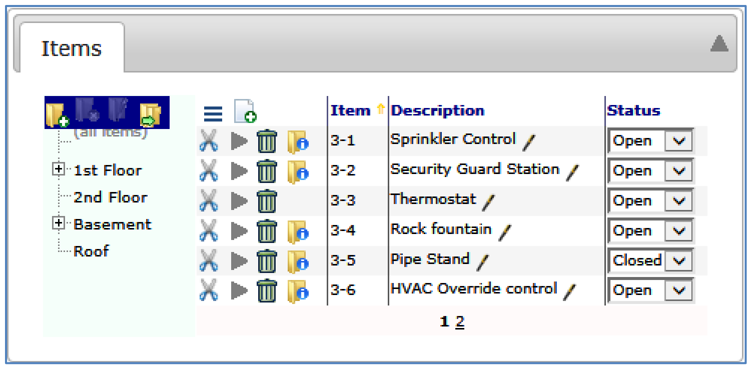


- Use this tab to list inclusions and exclusions to the document (for example, exclusions on a Commitment) or to list legal attachments or other clauses. You must select the type before entering data.

Items



First example



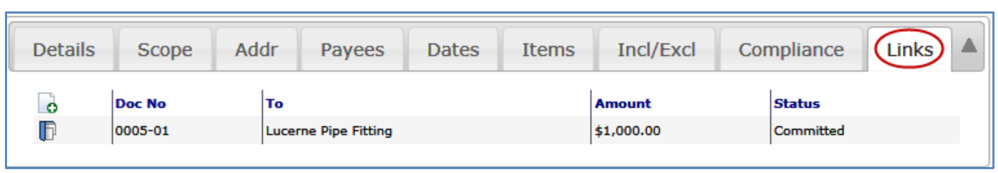
Second example

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.

- The Items tab can have different columns, depending on Doc type. As seen in the second example, the Items tab may even show a folder tree. But the Items tab always deals with information that is itemized for that particular document. For more information on Items, see page 35.

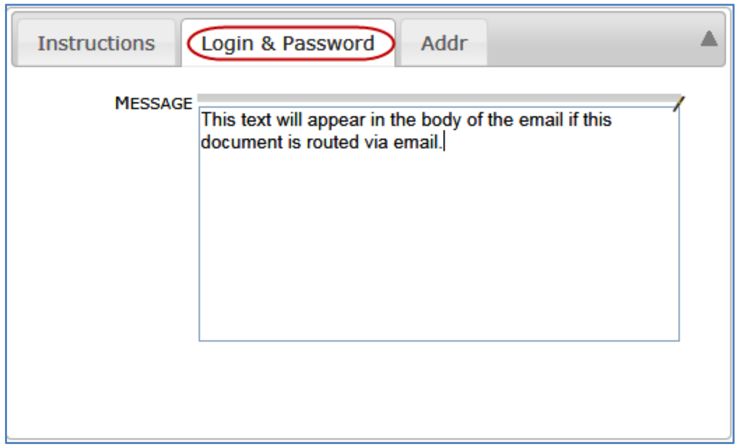
Links

TIP
Commitment docs require at least one Item before the icon is enabled on the Links tab.



- Use the links tab to list documents, of a certain Doc type, that are related to the document. In the example above, child Commitment documents can be added to the parent Commitment document through this tab. (For more information about the setup of a links tab, see KBA-01511.)

Message

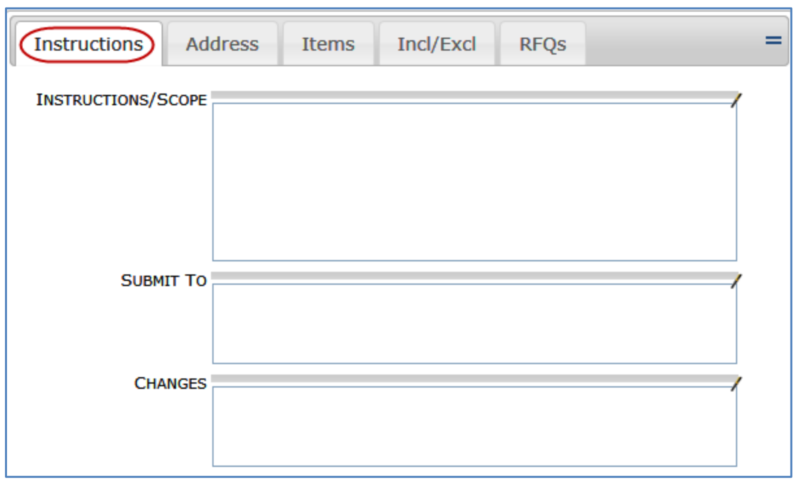


- Use the message tab to enter message text or other related information for the document.
- By default, text entered into the Message box will appear on the body of outgoing email, if the document is routed via email.

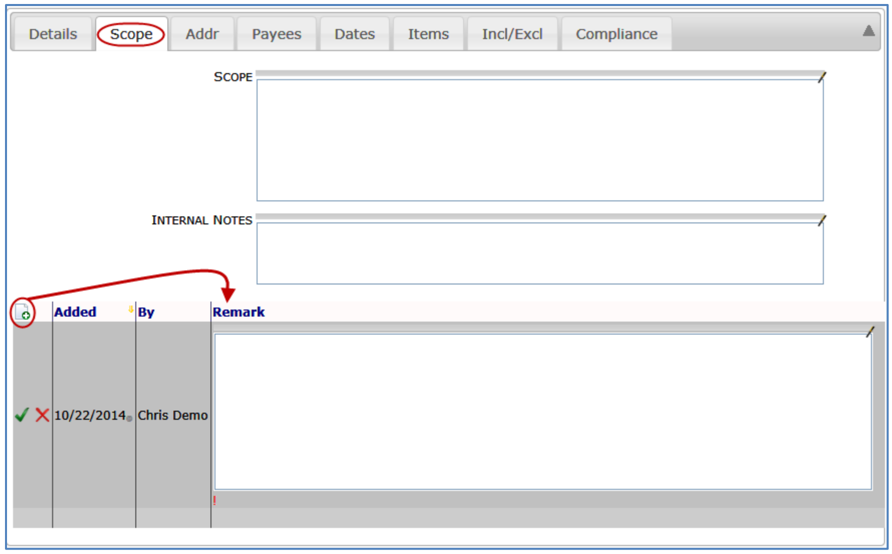
Notes

TIP

Here and elsewhere, click to open the HTML text editor window.



First example

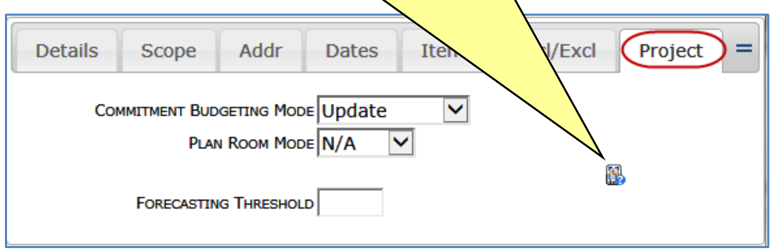


Second example with a Remarks grid

- Use the Notes tab to enter notes about the document. Up to three Note fields may be available (as shown in example 1). Documents can also include a remarks grid on the Notes tab (as shown in example 2).

Project

Click to set the latitude and longitude according to the project address.

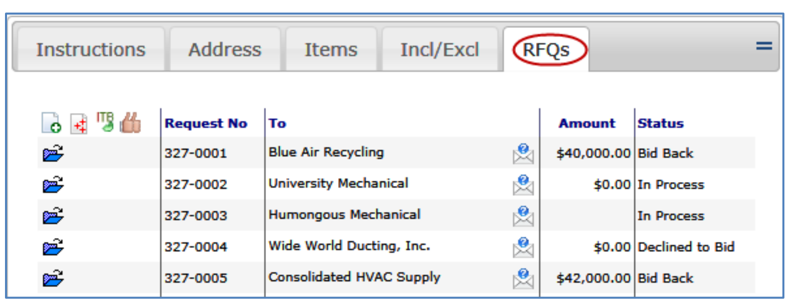


- Use the Project tab to maintain special project attributes. This tab is available only for the Project Setup Doc type.

RFQs

TIP

Click to create one RFQ, to create multiple RFQs, and to release the RFQs and send them on their routes. If you have an attached Invitation to Bid, click to create RFQs from routees who responded positively to the Invitation to Bid.



- Use the RFQs tab to generate RFQs from a Bid Package document, to route those RFQs, and to track RFQ amounts and statuses. This tab is available only for the Bid Package Doc type.

Microsoft Excel Icon

TIP
Microsoft files (templates, BFAs and SOVs) are stored in Spitfire, not on your hard drive.

TIP
More information about BFA, PD and SOV can be found in the *Focus on Budgets and Period Distribution*, *Focus on Forecast and Analysis*, and *Focus on Schedule of Values (SOV) Billing* guides.

An icon for Microsoft Excel sometimes appear on the tab line of documents: . indicates the following:

If on this Doc type	*Means*
Budget	You can create/open the BFA (Budget, Forecast and Analysis) workbook in Budget mode.
Forecast	You can create/open the BFA workbook in Forecast mode.
Period Distribution	You can create/open the PD (Period Distribution) workbook.
Pay Application	You can create/open the SOV (Schedule of Values) workbook.

To create a Microsoft Excel BFA, PD or SOV workbook:

1. Click where available.
2. Fill in information in Excel and save your workbook as you would normally. You can click to open the BFA, PD or SOV workbook again.

Attachments & Routing

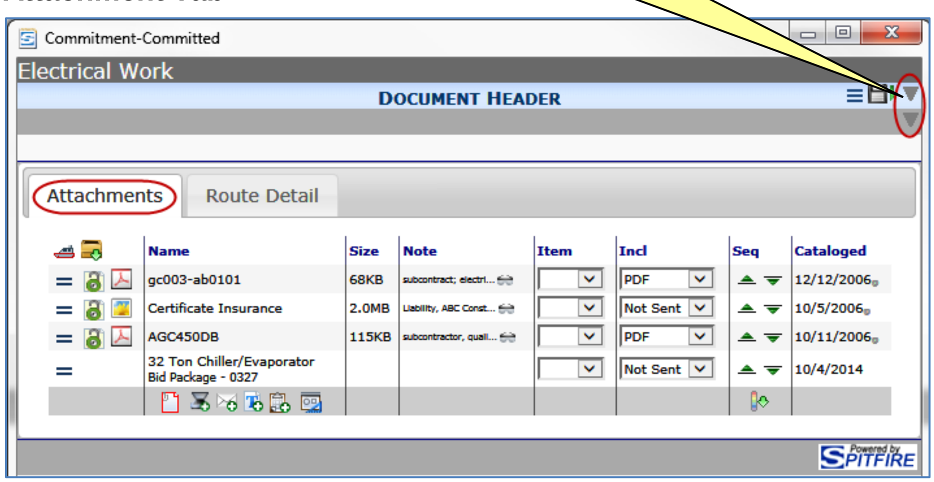
The bottom section of a document contains an Attachments tab and a Route Detail tab.

Examples

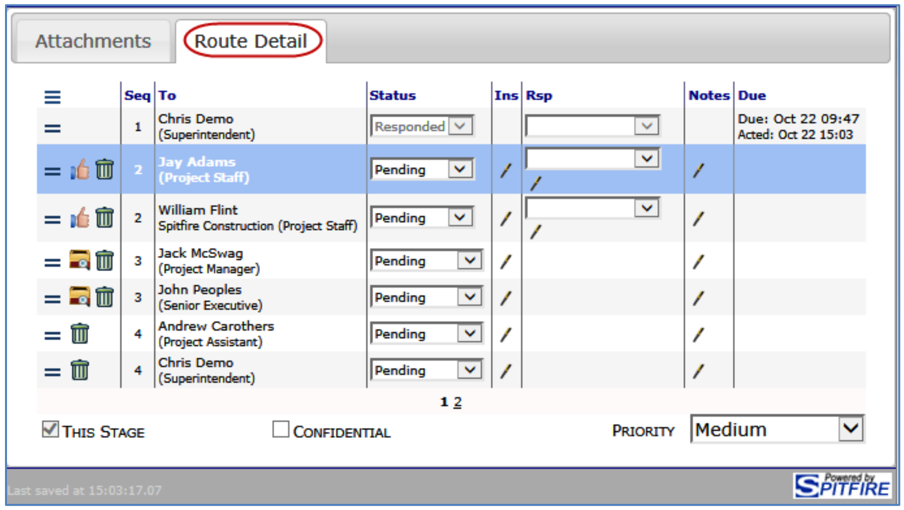
TIP
For detailed information about attachments and the Attachment tab, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.

Notice that both the Document Header and the Mid-section tabs have been hidden. Click to show a section.

Attachment Tab



Route Detail Tab



TIP

For detailed information about routing and the Route Detail tab, see the *Focus on Route* guide.

Document Creation

While there are some exceptions and alternate ways to create certain Doc types, almost all documents can be created from the Project Dashboard and some can be created from other documents. Most documents are associated with a specific project. Bid, Bid Package, Estimate, Invitation to Bid, Task, Customer, Vendor, and Employee documents can be started without a Project ID (see page 27).

Keep in mind that you may not have permission to create all possible Doc types at your site.

From the Project Dashboard

The *Focus on Doc Types and Project Workflow* guide indicates the specific ways different Doc Types can be created, but all instructions to "create a document from the Project Dashboard" are as follows:

To create a document from the Project Dashboard:

1. Go to your Project Dashboard and find the desired Doc type on the Documents menu.
   Note: you may have to click and select **Show All Types** first to see the list of all possible Doc types.
2. Click to bring up the list for that Doc type on the right hand side. **Note**: there may not be any visible documents in that list.

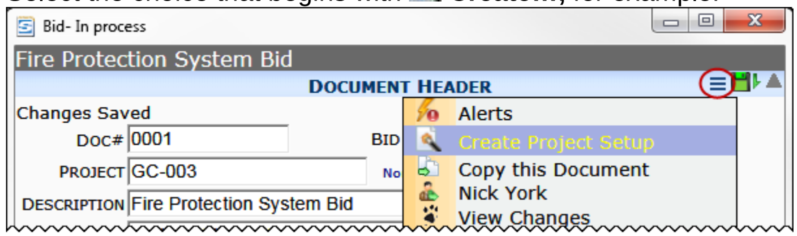
3. Click to create a new document of that Doc type. The document window will appear.
4. After filling out appropriate fields in the Document Header (see page 9), click to save (and actually create) the document.

From a Document Options Menu

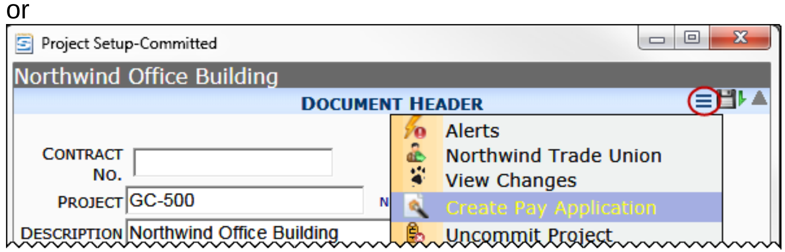
Sometimes one Doc type offers the choice to create a different Doc type on its Options menu (see page 10). Specific information on which Doc types offer this choice for which other Doc types can be found in the *Focus on Doc Types and Project Workflow* guide.

To create a document from a Document Options Menu:

1. At the appropriate document, click ≡ to open the Document Options menu.
2. Select the choice that begins with **Create…**, for example:



or

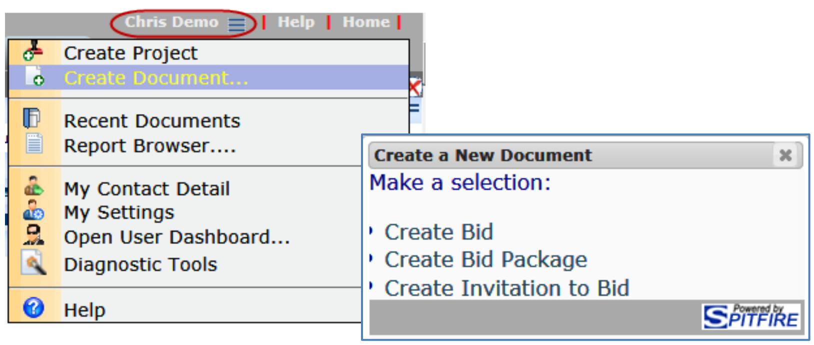


The new document will open, already created in the system.

3. Close the original document's window when appropriate.

From Site Options Menu

A few Doc types can be created from the Site Options menu. Since the menu can be customized, what appears on your system may be different from the choices shown here.



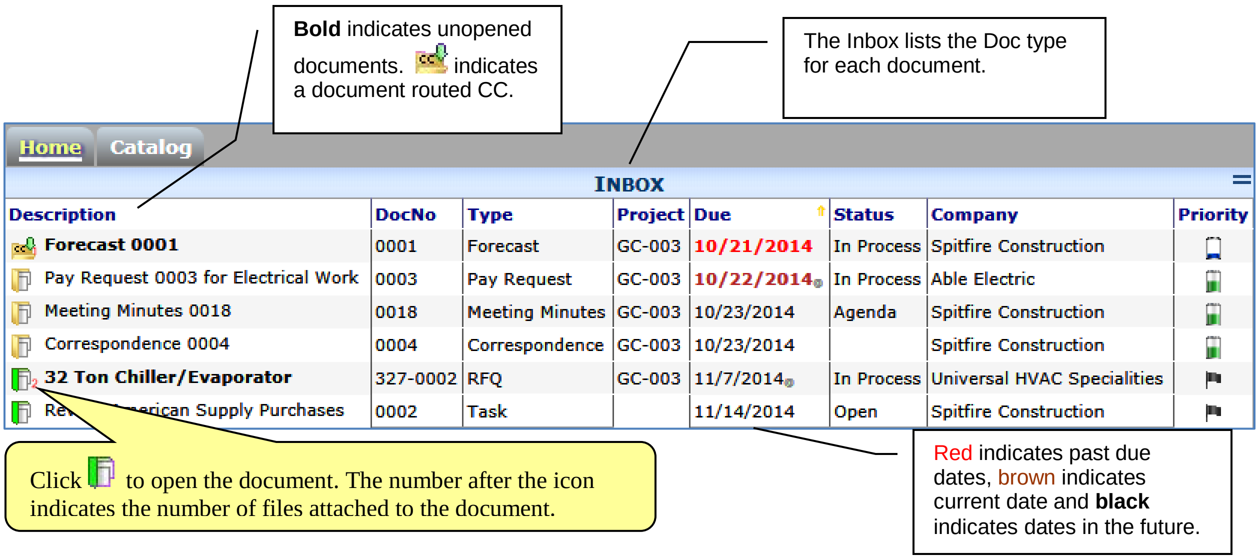
- To create the document, click your name or ≡ to open the drop-down menu then select **Create Document** and select the correct choice from the window that opens.

Document Access

Documents can be opened from various Spitfire dashboard locations. What access you have depends on your Spitfire role and what permissions you have been given.

Home Dashboard

When you create documents or when documents are routed to you, they appear in your Inbox, found on the Home Dashboard:



The Folder Icons

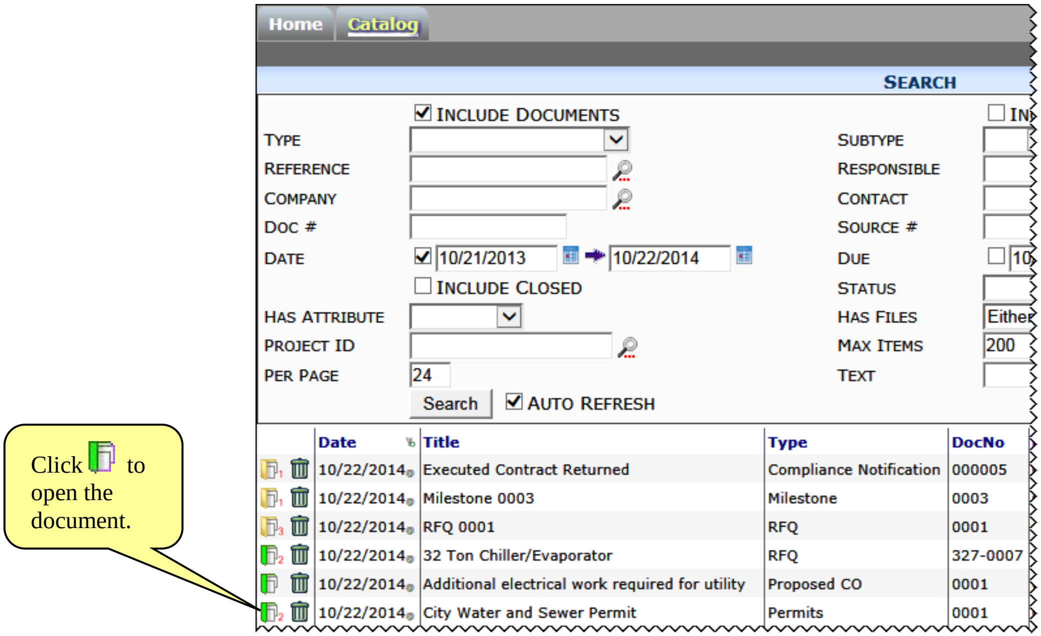
- Blue indicates that the document is closed or has no due date.
- Red indicates that the document is overdue.
- Yellow indicates that the document is due this week (through the next Sunday)
- Green indicates that the document is open and due in the future

The Priority Indicators

- means a priority of Urgent (the highest possible)
- means a priority of High
- means a priority of Medium
- means a priority of Low
- means a priority of FYI (the lowest possible)

Catalog Dashboard

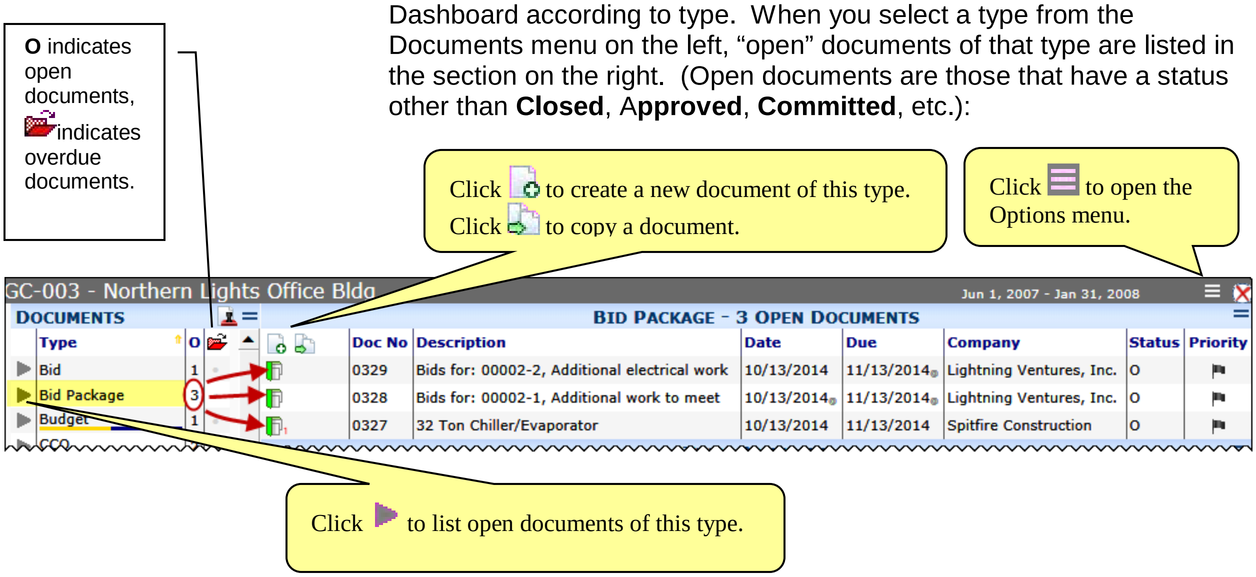
When you filter the Catalog for documents (in the Catalog Dashboard), the resulting documents are listed:



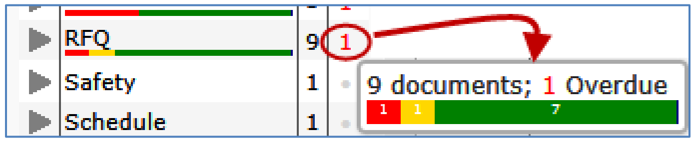
See the *Focus on Files, Attachments and the Catalog Dashboard* guide for more information.

Project Dashboard

Once a project has been created, documents are listed in the Project Dashboard according to type. When you select a type from the Documents menu on the left, "open" documents of that type are listed in the section on the right. (Open documents are those that have a status other than **Closed**, A**pproved**, **Committed**, etc.):



Color Bars



The color bar under the Doc type indicates the due status of the documents of that Doc type.

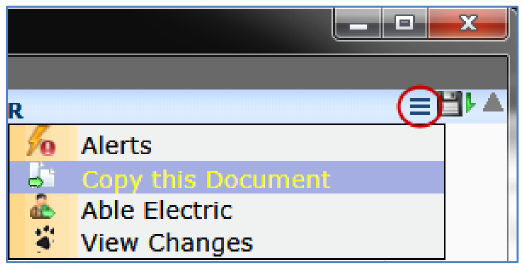
- Mouse over the due overdue column to see a larger color bar.
    - **Blue** means the document is closed or has no due date.
    - **Red** means the document is overdue.
    - **Yellow** means the document is due this week (through the next Sunday)
    - **Green** means the document is open and due more than a week in the future.

Copied Documents

Once you have created a Spitfire document, you can choose to copy that document as a starting point for a new document. The new document will have its own Doc #. There are two ways to copy a document.

Copy from Document

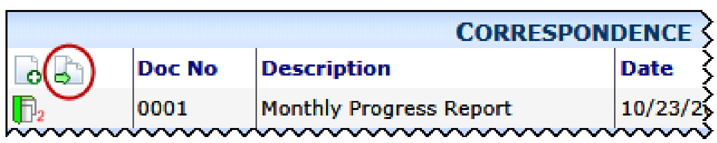
You can copy a document from its Options menu. Both open and closed documents can be copied.



When you select **Copy this Document**, the Copy Document dialog box appears (see below).

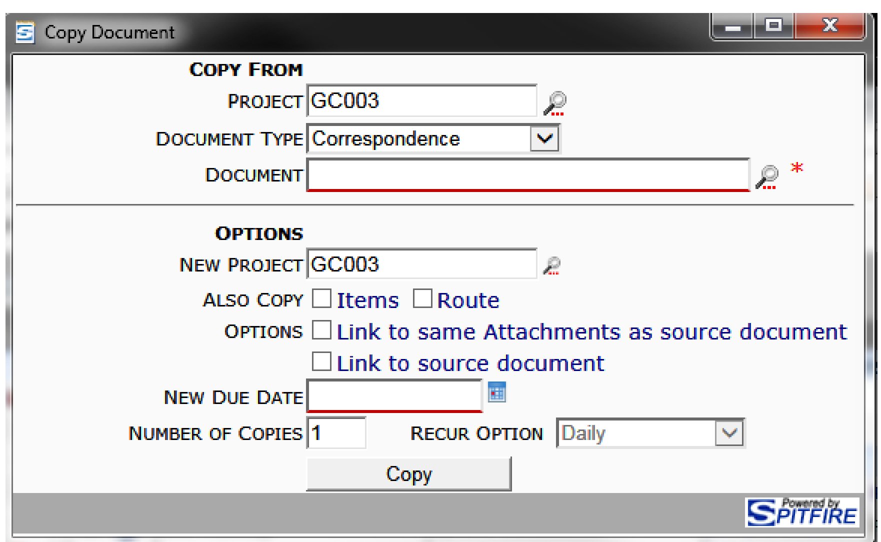
Copy from Dashboard

You can copy a document from the Project Dashboard through the icon.



When you click the icon, the Copy Document dialog box appears (see below).

Copy Document Dialog Box



Fields and Options

Copy From

- **Project** – indicates the project from which the document will be copied. If you start on a document, this field will be populated and read-only. Otherwise, you can enter or look up the project.
- **Document Type** – indicates the Doc type of the document to be copied. If you start on a document, this field will be populated and read-only. Otherwise, you can select a Doc type from the drop-down.
- **Document** – indicates the description/title of the document to be copied. If you start on a document, this field will be populated and read-only. Otherwise, you must enter or look up the specific document you want copied.

Options

- **New Project** – indicates the project for the copied document. By default, this project is the same as the source project but you can look up a different project.
- **Also Copy Items** – indicates that all Items on the original document should be copied to the new document. Items will receive new Item numbers (that correspond to the Doc number) on the new document.
- **Also Copy Route** – indicates that the route (as listed on the Routed Detail tab) on the original document should be copied to the new document.
- **Link to same Attachments as source document** – indicates that the attachments on the original document should also be listed on the new document. Documents and files on the original documents are not "copied'. For example, if File A is attached to the original document, File A can be attached to the new document also. Opening File A from either document will open the exact same file. If File A was created from a template, the bookmarks will not be refreshed on the new document. File A will always look the same.
- **Link to source document –** indicates that new document will include the original document as an attachment.
- **New Due Date –** indicates a new due date for the new document.
- **Number of Copies –** indicates how many new documents should be created. 1 is the default.
- **Recur Option –** indicates how often a new document should be created. This drop-down is available only when Number of Copies is greater than 1.

To create the new document from the original document:

- Click the 

button after filling out the dialog box.

Exclusive Update Rights

Anyone who can open a Spitfire document can view that document (although certain tabs may be hidden depending on permission levels). Making changes to a document requires proper permission. However, Spitfire prevents two or more people who have update permission on a document to make changes at the same time. Only one person can hold exclusive update rights to a document at any one time.

Assuming you have write permission to the document, you can tell if you will be able to save your document changes by looking at the color of the save icon. If the icon is not red () and you intend to make changes to the document, you should save as soon as possible to obtain exclusive update rights.

Save Icon Colors

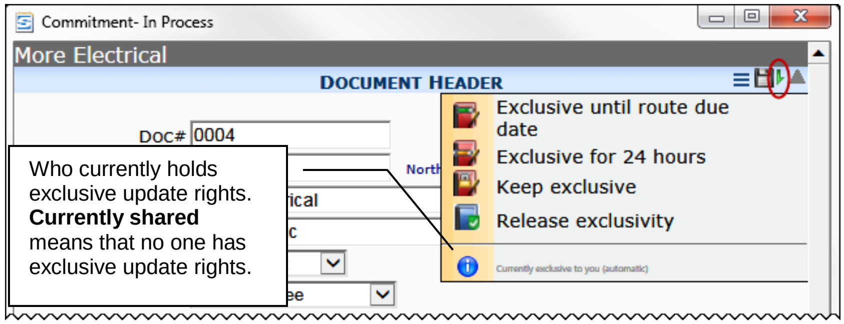
When you first create a Spitfire document and often when you open an existing Spitfire document, the save icon appears black (). Black means that no one currently has exclusive update rights to the document.

When you save an existing document, you gain exclusive update rights to it for as long as the document window is open or until you route the document. The save icon appears green () to you.

While you have exclusive update rights, no one else is allowed to save changes to the same document. The save icon for others appears red ().

If you have proper permission, you can extend the time you keep exclusive update rights. The icon would then appear orange to you () and red to everyone else. You can extend your exclusive update rights through the Exclusivity Options menu.

Exclusivity Options Menu



Exclusive until route due date

- Select this option if you want to keep the document exclusive to you until the route due date (even when the document window is closed) or until the document is routed, whichever comes first. If there is no route due date, the document due date is used instead.

Exclusive for 24 hours

- Select this option if you want to keep the document exclusive to you for 24 hours (even when the document window is closed), or until the document is routed, whichever comes first.

TIP

While a document is exclusive to you, others are able to open, but not change template-generated files.

Keep exclusive

- Select this option if you want to keep the document exclusive to you for 60 days (even when the document window is closed), or until the document is routed, whichever comes first.

Release exclusivity

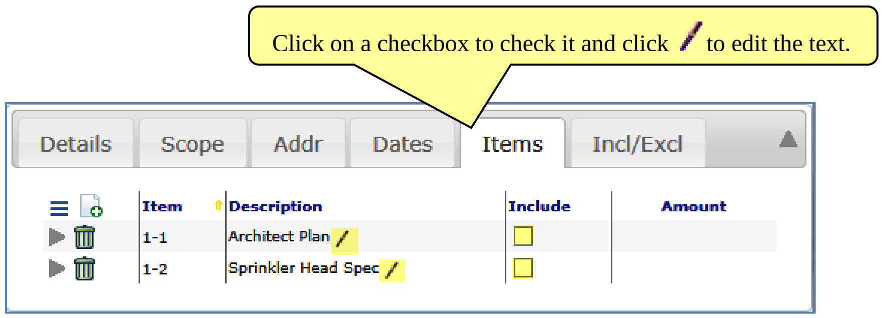
- Select this option to release the document's exclusivity regardless of how it was made exclusive.

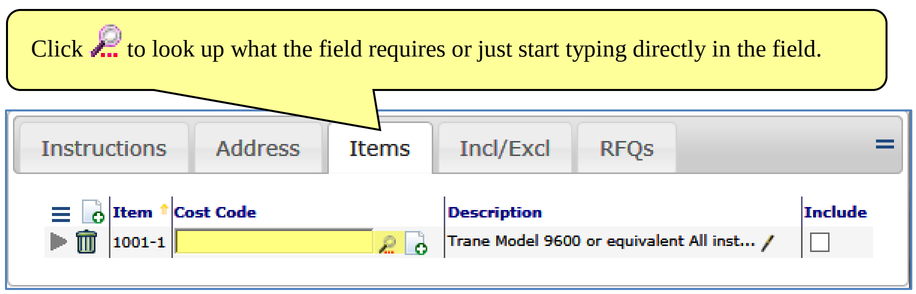
Items

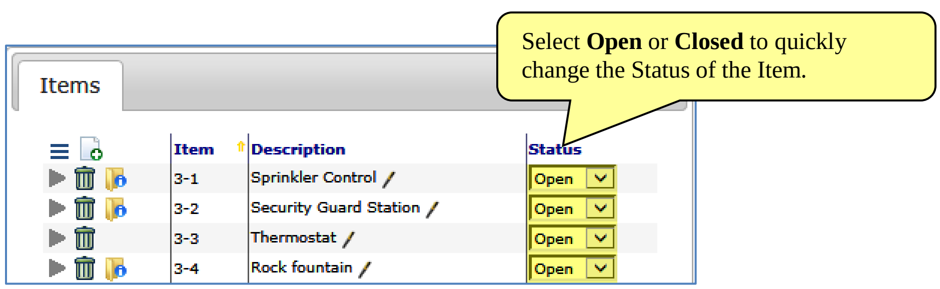
Certain documents (for example, PunchLists, Meeting Minutes, Commitments, Payment Requests and Change Orders) can include itemized lists of information. An itemized list is created and appears on the Items tab of a document.

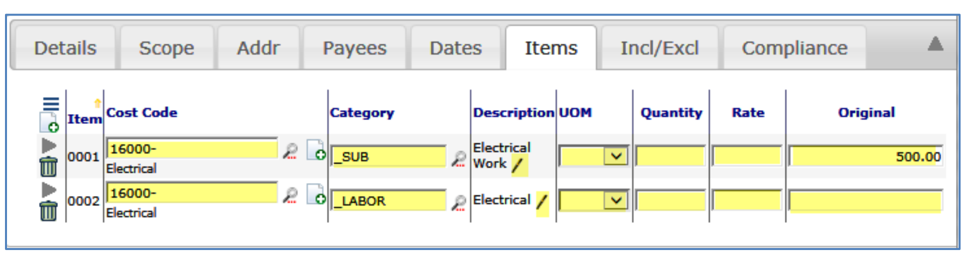
Quick Edit

Item tabs allow you to make changes to certain fields directly in grid view (without having to expand the Item first), for example:





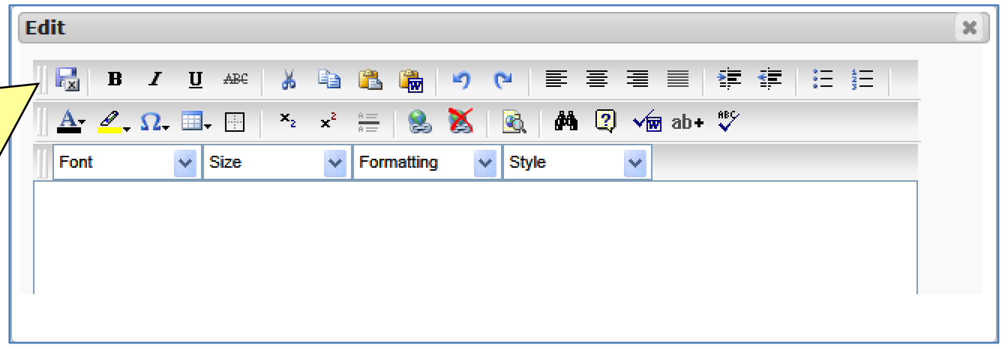




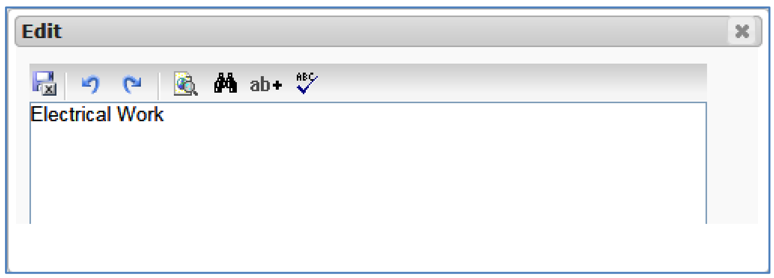
Text Editor

Wherever the icon appears in grid view, you can open the text editor for that field. Depending on the field, the text editor might offer formatting icons or not.

Mouse over each icon to see what it does. For example, will bold your text and will start a bullet list. saves and closes the window



-or-

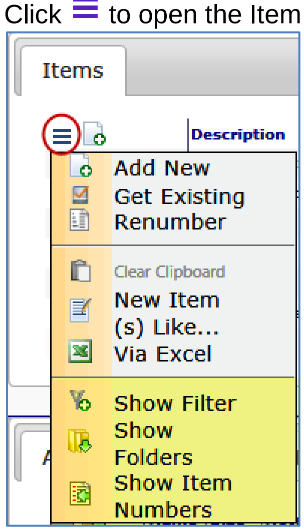


Show/Hide

There are various sections of the Items tab that you can choose to either show or hide. These sections are the filter fields, the folder list and the item numbers.

To show filters/folders/item numbers:

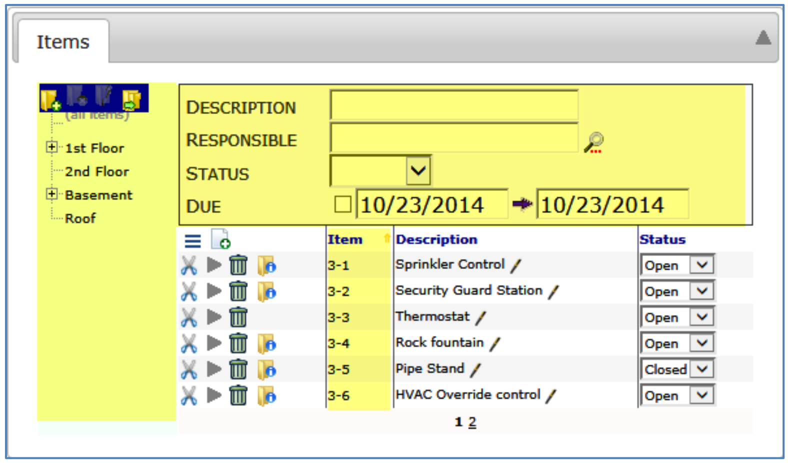
1. Click to open the Item Options menu:



TIP

You can use the wildcard % in the filters. For example, S% in the Description field would return descriptions beginning with S and %20% in the Cost Code field would return cost codes containing 20.

2. Select **Show Filter**, **Show Folders** and/or **Show Item Numbers**. An Items tab with all three sections shown would look like this:

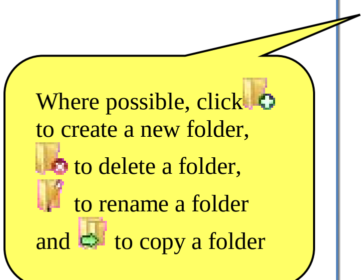


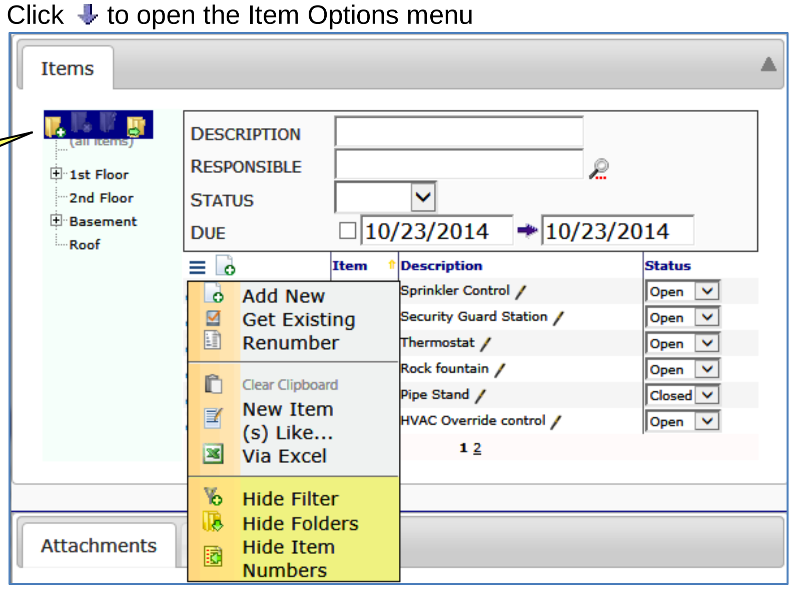
TIP

The folder tree found in the Items tab is limited to Items on the document and should not be confused with the project's file folders.

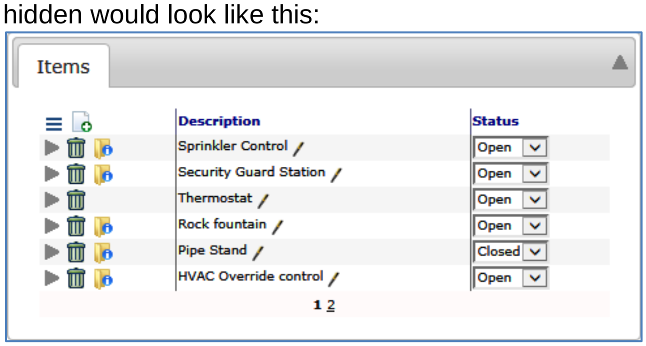
To hide filters/folders/item numbers:

1. Click to open the Item Options menu





2. Select **Hide Filter**, **Hide Folders** and/or **Hide Item Numbers**. The Items tab (shown above) with all three sections hidden would look like this:



Add Items

TIP

Doc types can be configured to copy a prior Item (such as the first one) automatically when the icon is used. See [KBA-01158]() for more information.

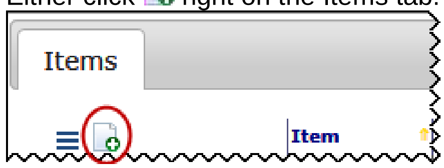
Items can be added to the Items tab using four methods:

- **Add New Item** – Enter information on an Item.
  Note: not all Doc types give you this option.
- **New Item Like** – Copy an existing Item on the document to create a new Item.
- **Get Existing** –
  - Copy or move an Item from one document to another.
  - Link an Item from a Commitment to a Pay Request or CCO (Commitment Change Order) document.
  - Get an Item from a Register.
  - Create an Item using a Budget's Cost Code/Account Category row.
- **[Via Excel]()** – Add Items from a Microsoft Excel spreadsheet. See page 51.

Add New

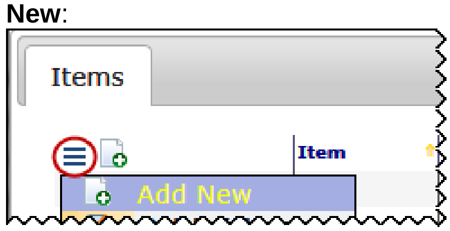
To add a new item:

1. Either click right on the Items tab:



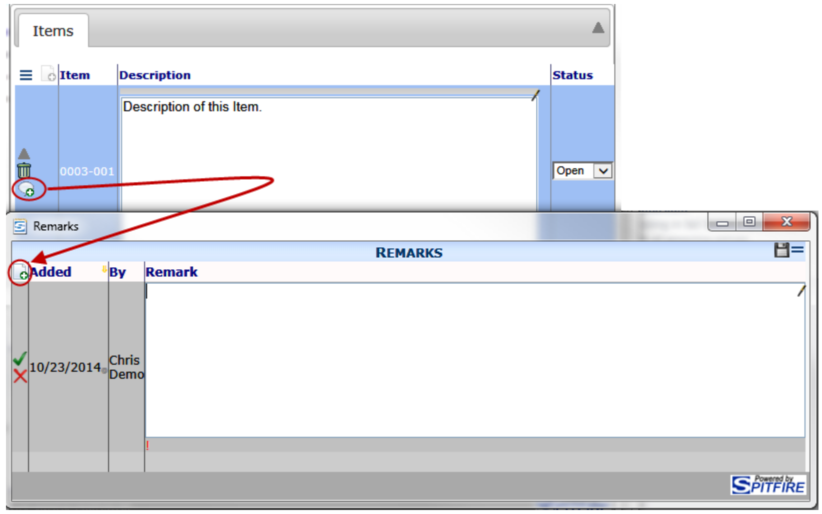
   -or-

   Click to open the Item Options menu and select **Add New**:



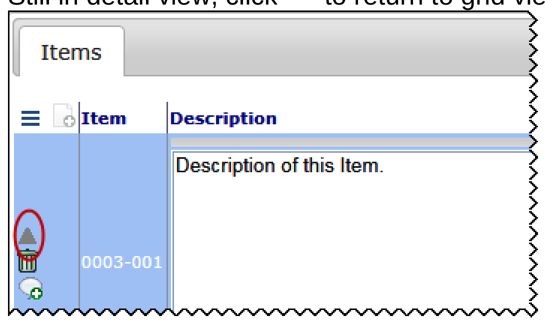
   The detail view for that Item will open.

2. Either type directly in the **Description** field or click to open the [text editor]() (see page 36). **Description** is often a required field.
3. Enter or look up other item information in the appropriate fields. (Fields will vary depending on Doc type.)
4. Click on the Document Header to save your new Item. A new icon ( ) will appear, which you can click to enter remarks/comments about the Item:



- Click to accept your note and to save it.
- Click if you do not want to add a remark.
- Click to close the Remarks window

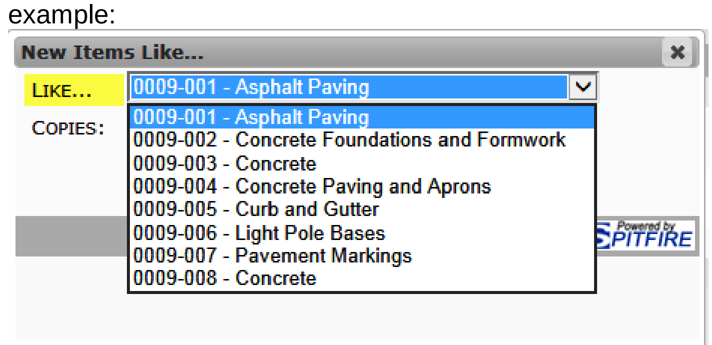
5. Still in detail view, click to return to grid view:



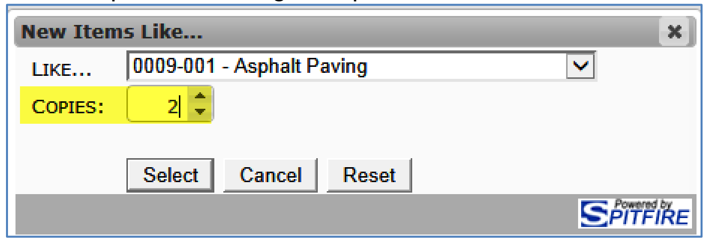
New Item Like

To copy an existing Item on the document:

1. Click to open the Item Options menu and select **New Item(s) Like.** A dialog box will appear.
2. Select an existing Item from the **Like…** drop-down menu, for example:



3. If you want more than one copy of that Item, change the number in the Copies field using the spinner.

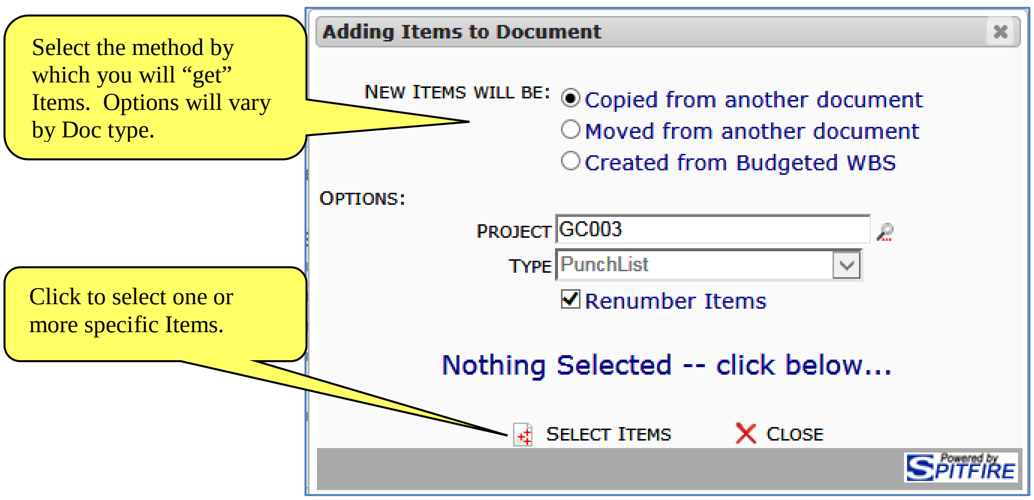


4. Click the Select button. Your new Item(s) will appear at the end of your Items list.
5. Edit the new Items as needed.

Get Existing

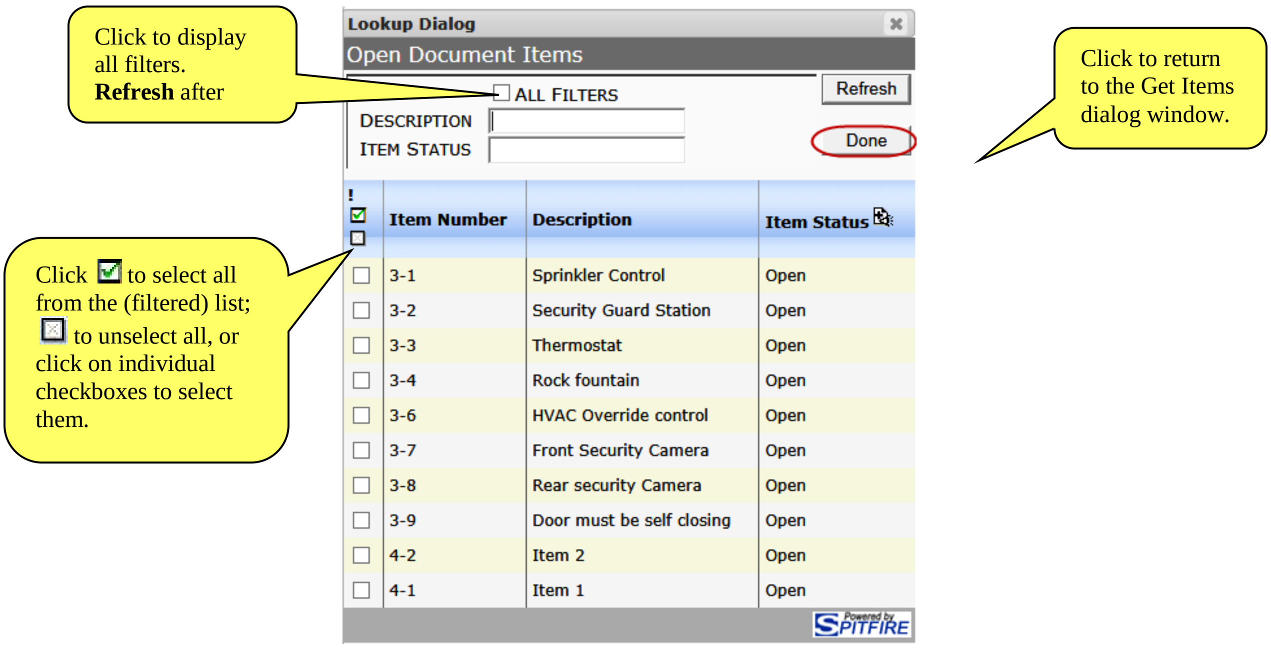
Get Items Dialog Window

The **Get Existing** option opens the Get Items dialog window:



Multi-Select Lookup Window

When you select the **Select Items** option, the multi-select lookup window will appear.



Get Existing in Most Documents

The **Get Existing** option can be used in many Doc types to either copy or move Items from one document to another or to create Items from the budget's work-breakdown structure. The **Get Existing** option is a little different for Submittal/Submittal Packages (see page 43), for Change Order and Proposed COs (see page 44), for CCOs (see page 44) and for Pay Request documents (see page 45).

To copy or move an Item:

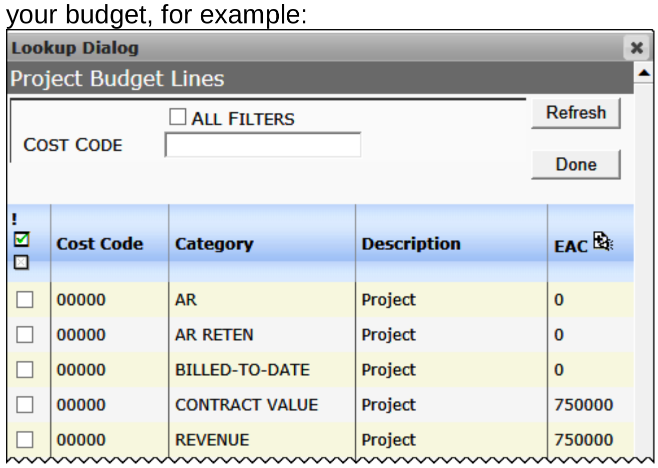
1. Select **Get Existing** from the Item Options menu to open the Get Items dialog window (shown on page 40).
2. Select either **Copy from another document** or **Move from another document**.

   Note: Move will remove the Item from its current document and place it on your document. Copy will copy the Item from its original document and leave the original Item intact.
3. (*optional*) Look up a **Project** if the Items are on a document in a project that is different from your current project.
4. (*optional*) Check or uncheck **Renumber Item** depending on whether you want the Item numbered to match your current document's numbering sequence.
   Note: you are not allowed to renumber Items on a Commitment document.

5. Click **Select Items**. The multi-select lookup window (shown on page 41) will appear.
6. After using any necessary filters, select the Item(s) that you want to copy or move.
7. Click the Done button.
8. Back on the Get Items dialog window, click ✓. The Item(s) will appear on the document in grid view.
9. (*optional*) Click to review your new Item(s) in detail view.
10. Click on the Document Header to save your document.

To create an Item using your Budget work-breakdown structure:

1. Select **Get Existing** from the Item Options menu to open the Get Items dialog window (shown on page 40).
2. Select **Created from Budgeted WBS**.
3. Click **Select Items**. The multi-select lookup window that appears will list Cost Code and Account Category rows from your budget, for example:



4. Select the row(s) that you want to use as Items on your document.
5. Click the Done button.
6. Back on the Get Items dialog window, click ✓. The Item(s) will appear on the document in grid view.
7. (*optional*) Click to review your new Item(s) in detail view.
8. Click on the Document Header to save your document.

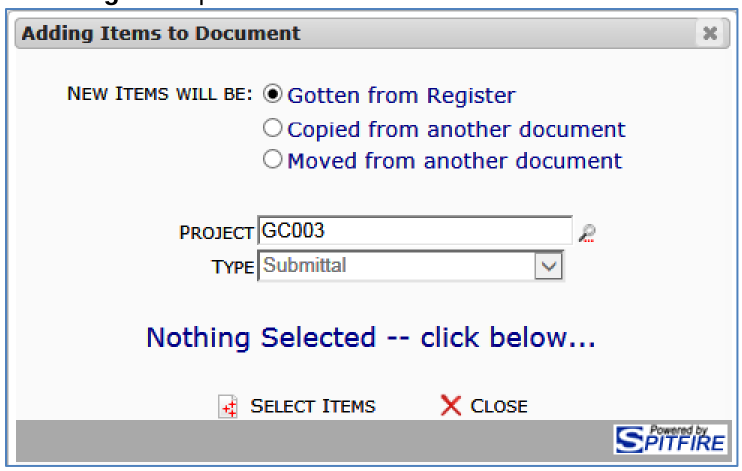
Get Existing on Submittal/Submittal Packages

The **Get Existing** option on Submittal and Submittal Package documents allows you to get Submittal Items from the Submittal Item Register.

To Get an Existing Submittal Item from the Register:

1. At a Submittal or Submittal Package document, select **Get Existing** from the Item Options menu to open the Get Items dialog window.

   The Get Items dialog window that appears will offer the **Gotten from Register** option as the default.



2. Click to **Select Items**. The multi-select lookup window that appears will list Submittal Items that don't already appear on your document.
3. Select the Items that you want to add to your Submittal or Submittal Package document.
4. Click the Done button.
5. Back on the Get Items dialog window, click . The Item(s) will appear on the document in grid view.
6. Click to add information to your new Item(s) in Detail view.
7. Click on the Document Header to save your document.

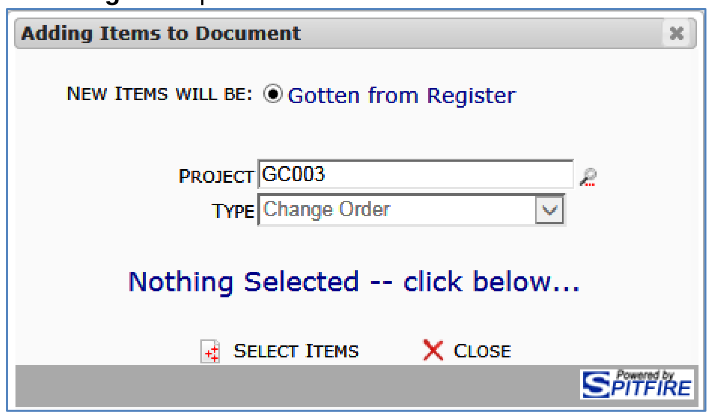
Get Existing on Change Order and PCOs

When you use the **Get Existing** option on a Change Order or Proposed CO document, you can choose to get an existing Change Item from the Change Item Register..

To get an existing Change Item from the Register:

1. At a Change Order or Proposed CO document, select **Get Existing** from the Item Options menu to open the Get Items dialog window.

   The Get Items dialog window that appears will offer the **Gotten from Register** option as the default:

2. Click **Select Items**. The multi-select lookup window that appears will list Items that don't already appear on your document.
3. Select the Items that you want to add to your Change Order or Potential CO document.
4. Click the Done button.
5. Back on the Get Items dialog window, click ✔. The Item(s) will appear on the document in Item Grid view.
6. Click to add information to your new Item(s) in Detail view.
7. Click on the Document Header to save your document.

Get Existing on CCOs

When you use the **Get Existing** option on a CCO document, you have the choice of either using an existing Commitment Item or adding a new Item using the Budget work-breakdown structure option. When you "get" an existing Commitment Item, you are actually linking the Commitment's Item with the Item on the CCO document. When you make a change to the Item in CCO document, the change is reflected back on the Commitment document once the CCO is approved.

Note: If you want to get all Items from the Commitment, you can use the Get All option (described on page 46) instead.

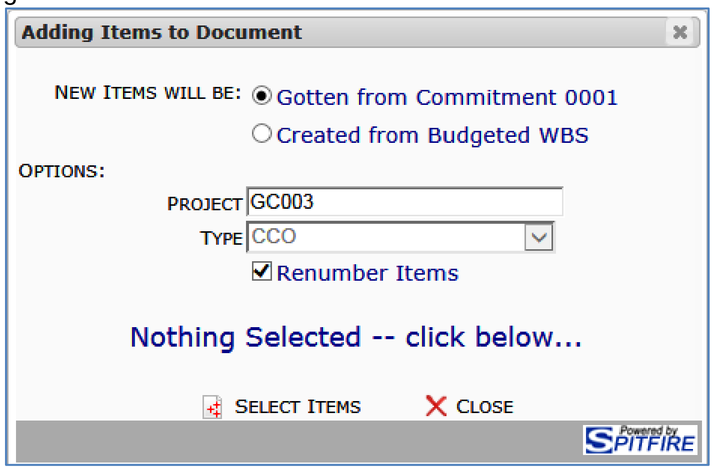
TIP

When you create a new Pay Request or CCO document, you must fill in the Commitment field and save the document before you can add or copy items to the Items tab.
Also, once the status of the document changes and is no longer In Progress, the Get Existing choice will no longer be available.

To link a Commitment item to a CCO:

1. At a CCO document, select **Get Existing** from the Item Options menu to open the Get Items dialog window.

   The Get Items dialog window that appears will offer the choice to get Items from the Commitment as the default.

   Note: to create an Item using the Budget's Cost Code/Account Category rows, see page 42.

2. Click **Select Items**. The multi-select lookup window that appears will list Commitment Items that don't already appear on your document.
3. Select the Items that you want to add to your CCO document. Click the Done button.
4. Back on the Get Items dialog window, click ✓. The Item(s) will appear on the document in grid view.
5. Click ▶ to edit the Item(s) in Detail view.
6. Click on the Document Header to save your document.

Get Existing on Pay Requests

When you use the **Get Existing** option on a Pay Request document, you have only the choice of using existing Commitment Items. When you "get" an existing Commitment Item, you are actually linking the Commitment's Item with the Item on the Pay Request document.

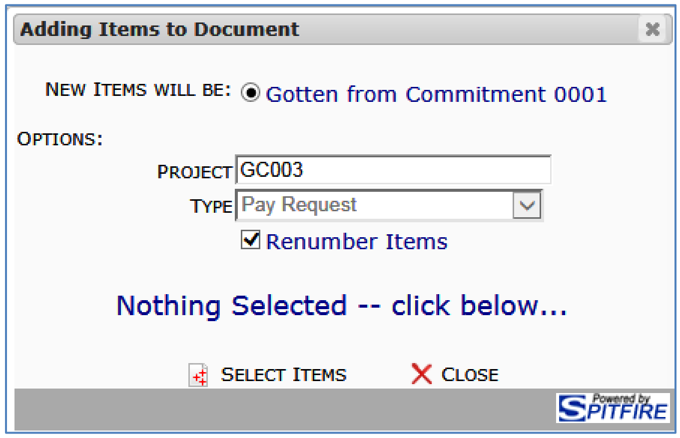
Note: If you want to get all Items from the Commitment, you can use the Get All option (described on page 46) instead.

TIP

By default, through the DocItemConfig | GetAllItems rule, all Items are loaded automatically when you first save a Pay Request.

To get existing Commitment Items for a Pay Request:

1. At a Pay Request document, select **Get Existing** from the Item Options menu to open the Get Items dialog window.
   The Get Items dialog window that appears will offer the choice to get Items from the Commitment.



2. Click **Select Items**. The multi-select lookup window that appears will list Commitment Items that don't already appear on your document.

3. Select the Items that you want to add to your Pay Request document.

4. Click the Done button.

5. Back on the Get Items dialog window, click ✓. The Item(s) will appear on the document in Item Grid view.

6. Enter data for your Items.

7. Click on the Document Header to save your document.

Get All

The Get All option allows you to get all Commitment Items to list on a Pay Request or CCO document. Items that appear on the Pay Request and CCO are linked to the Items on the Commitment.

To link all Commitment Items to a Pay Request or CCO:

1. At a Pay Request or CCO document, select **Get All** from the Item Options menu. All Items in the Commitment will be copied to your document. These Items will be linked back to the Commitment. They will appear in grid view.

2. Change or add information to the Items as needed.
   Note: not all fields can be changed. Which fields are editable depends on your permission level.

3. Click at the Document Header to save your items. Changes made to Items in the Pay Request or CCO document will be reflected back in the Commitment document.

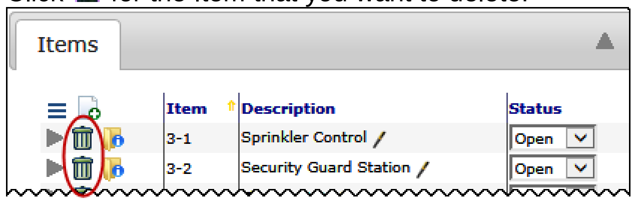
Delete Items

TIP

If you do not have permission to delete, the icon will not appear.

To delete an item from the Items tab:

1. Click for the Item that you want to delete:



2. Click to save the document. Once an Item is deleted, it cannot be retrieved.

Move Items into Folders

TIP

In order for the icon to appear, you must show folders (see page 36), create at least one folder ( ) and save.

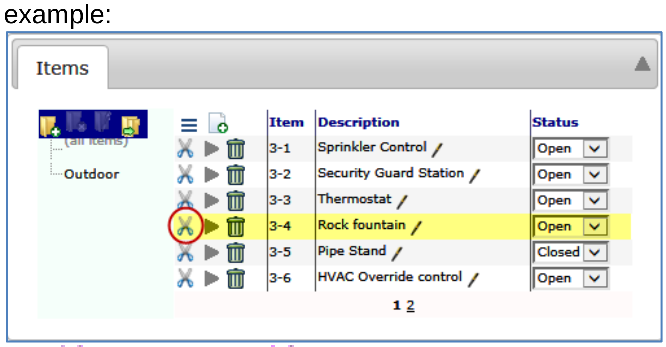
TIP

Item folders differ from file folders in that Item folders apply only to the one document in which they are created.

Much like moving files into folders, you can “place” an Item into a folder. Unlike the folders found on the Catalog, however, these folders are specific to the document.

To move a file into a folder:

1. Click at the Item that you want to place in a folder, for example:

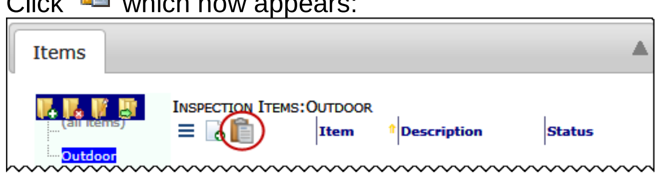


The will change to .
Note: You can click to change it back to if you change your mind about wanting to move that Item.

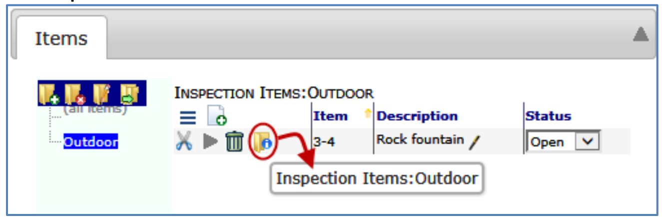
2. (*optional*) Click at other Items that you want to also move into the same folder.

3. Click on the folder name where you want to move the Item(s). Expand folders if you need to.

4. Click which now appears:



All marked items will be moved to the indicated folder, for example:



Note: if you click on **(all items)** on the folder tree, you will see all items, whether or not they are in folders. Items in folders indicate their folders through the icon.

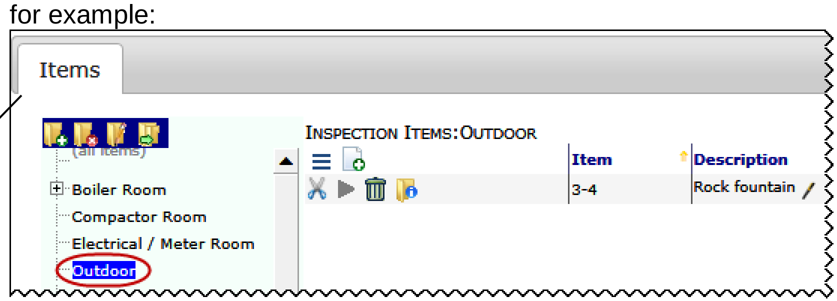
Copy Folder/ Copy Items

Once placed in a folder, you can copy all saved items in that folder from one document to another by copying the folder.

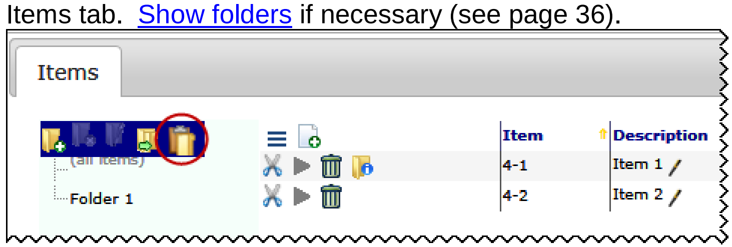
To copy a folder from one document to another:

1. At the first document, click on the folder that you want to copy, for example:

Folder icons



2. Click to place the folder and its contents (Items) in the clipboard.
3. Open (or create and save) a second document and click the Items tab. [Show folders](#) if necessary (see page 36).



4. (*optional*) Unless you want to place the folder in the root (all items), click on the folder where you want to place the copied folder.
5. At the second document, click to paste the copied folder. (The icon will appear on both the “copy to” and “copy from” documents.)
6. Click OK on the confirmation box. The copied folder and its contents will appear in the Items tab of the second document.

TIP

can only copy items that have already been saved. Items that are entered but not saved are not available. Therefore, the copy function does not copy them. Always save before copying.

Notes:

- o If you copied a folder into another folder, the parent folder will appear collapsed. You will need to expand it in order to get to your copied folder:
- o The number for the copied Items will change according to the second document's numbering.

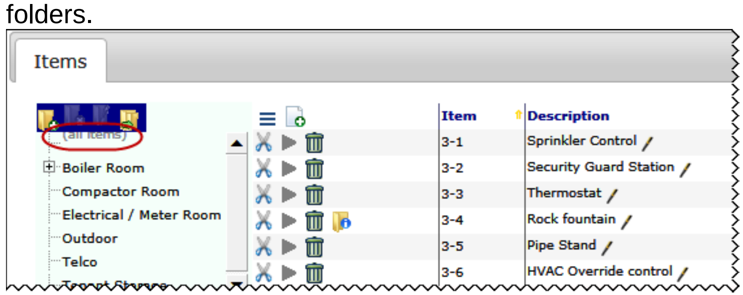
7. Click to save the second document.

Copy All Items

If you are copying some of the Items on a document, you need to first place them into one or more folders as described previously. However, if you want to copy all Items on a document, you need not place them in a folder first.

To copy all items in a document:

1. At the first document, show folders then click on **(all items)**. **Note**: (all items) displays Items in folders as well as Items not in folders.



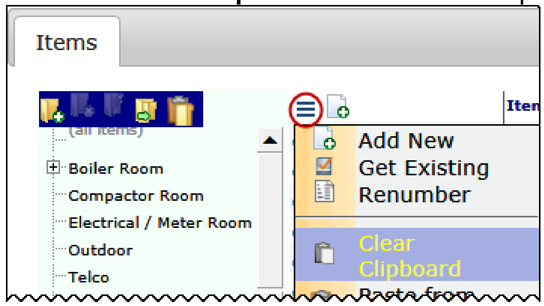
2. Click to place all Items in the clipboard.
3. Open the second document and click the Items tab. Show folders if necessary.
4. At the second document, click to paste the copied items. (The icon will appear on both the "copy to" and "copy from" documents.)
5. Click OK on the confirmation box. All Items from the first document will appear in the Items tab of the second document.
6. Review the Items in case you need to delete any.
7. Click to save the second document.

Clear Clipboard

If you place something in the clipboard (i.e., move an item, copy a folder, copy items), you can clear the clipboard and abort the task.

To clear the clipboard:

- Select **Clear Clipboard** from the Item Options menu:

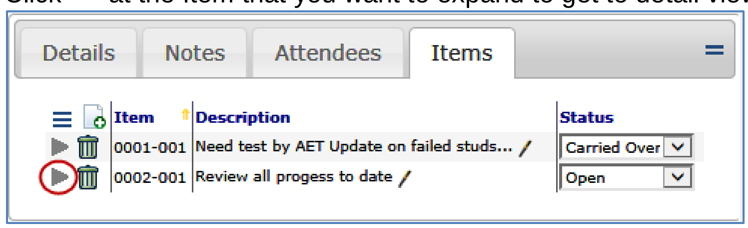


Detail View

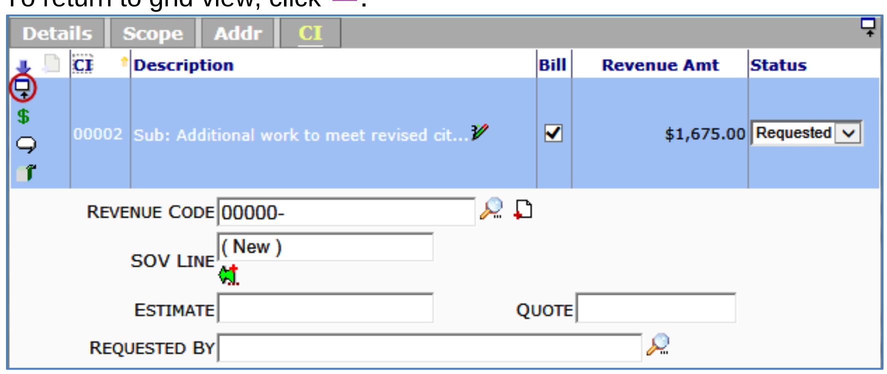
Although you [can edit many Item fields right in grid view](), you might sometimes need to expand an Item and get to its detail view in order to see or edit all its fields.

To expand an Item:

1. Click at the Item that you want to expand to get to detail view.

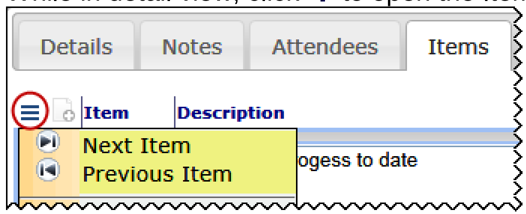


2. To return to grid view, click .



To get to the next or previous Item in detail view:

1. While in detail view, click to open the Item Options menu:



2. Click to get to the **Next Item**. Click to get to the **Previous Item**.

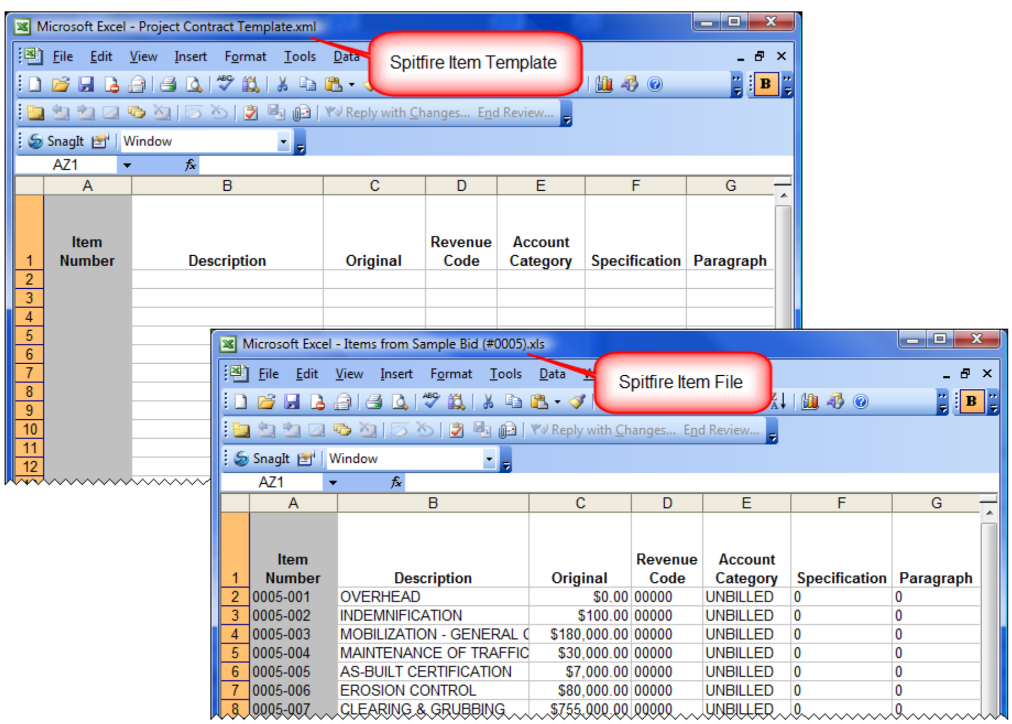
Via Excel

Because documents can have many Items, sfPMS allows you to add Items to the document from a Microsoft Excel spreadsheet, use Microsoft Excel to edit Items, and export Items to a separate Microsoft Excel file all from the Via Excel option on an Item's Options menu. The Via Excel option is particularly useful when your Items are created through other applications (such as Estimating software) that create Microsoft Excel files and you want to copy that information to a document.

The use of the Via Excel option requires either a Spitfire Item Template—which takes the Excel data and creates a Spitfire Item File that is readable by sfPMS—or an existing Spitfire Item File.

See the technical white paper *Spitfire Item Templates (for Via Excel)* for information on creating these template files.

Spitfire Item File



Spitfire Item Files are created whenever you add to or edit Items on a Spitfire document using the Via Excel option. What they look like (which columns they have, what column labels they use, etc.) depends on the

Spitfire Item Templates used to create them. When you want to enter Items on a new document or edit the Items on an existing document right away, the Spitfire Item File is created and used only briefly. When you want to export your Items to Microsoft Excel for later modification or review, the Spitfire Item File serves as a permanent copy of your data.

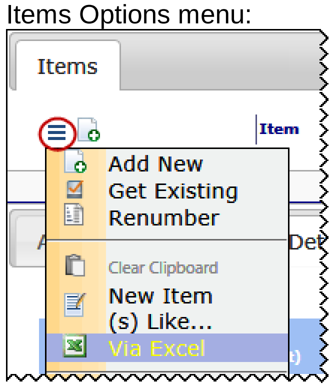
(Spitfire Item Files can also be created through Supplemental Workbooks. For more information, see the technical white papers *Supplemental Workbooks.)*

Enter Items

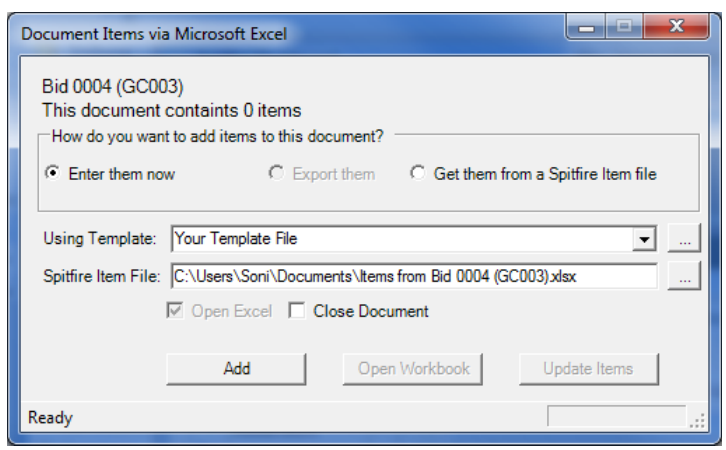
If your document does not have any Items in the Items tab, you can use the Via Excel Enter Items option to copy your Items from an external Microsoft Excel file or an existing Spitfire Item File to your Spitfire document.

To enter Items on a new document using a Spitfire Item Template:

1. At the Items tab of your document, select **Via Excel** from the Items Options menu:



Your document window will close and the Document Items via Microsoft Excel dialog box will appear:



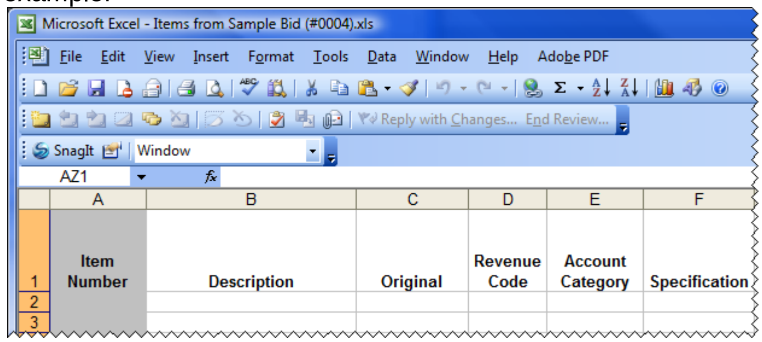
2. (*optional*) If necessary, select the **Enter them now** radio button.
3. (*optional*) A default Spitfire Item Template for your Doc type will appear at the Using Template field. If desired, use the drop-down to select a different template (if any others are available).

TIP

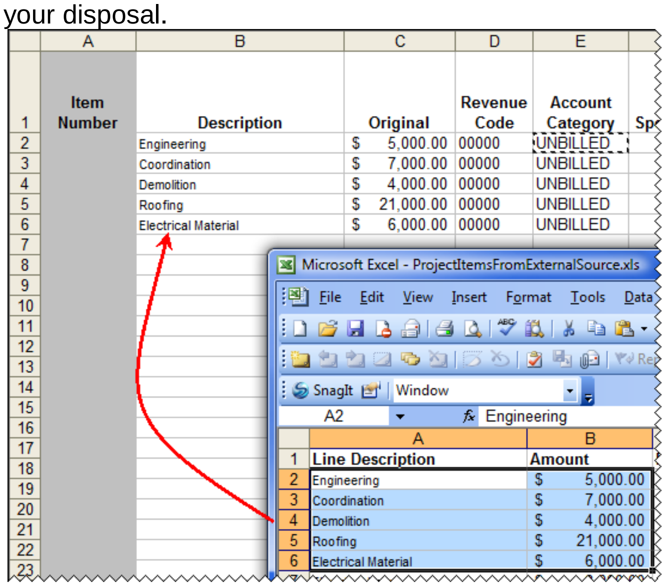
If appropriate, you can also click ... to browse for a different Spitfire Item Template on your computer.

4. Click 

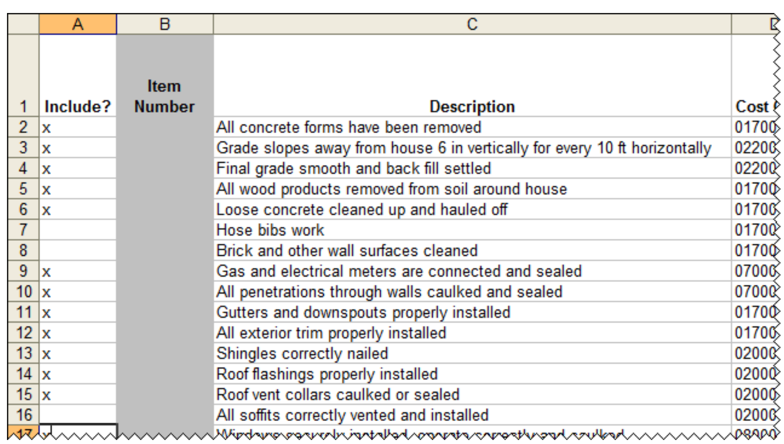
. The Spitfire Item Template will open, for example:



5. Enter Item information manually or open an existing Microsoft Excel spreadsheet and copy that information onto your template (or do both). You have the functionality of Microsoft Excel at your disposal.



Note: If the template has been set up to provide rows of data from which to choose the ones you want, type **X** in the **Include** column. Marked rows will be added to your Spitfire document.



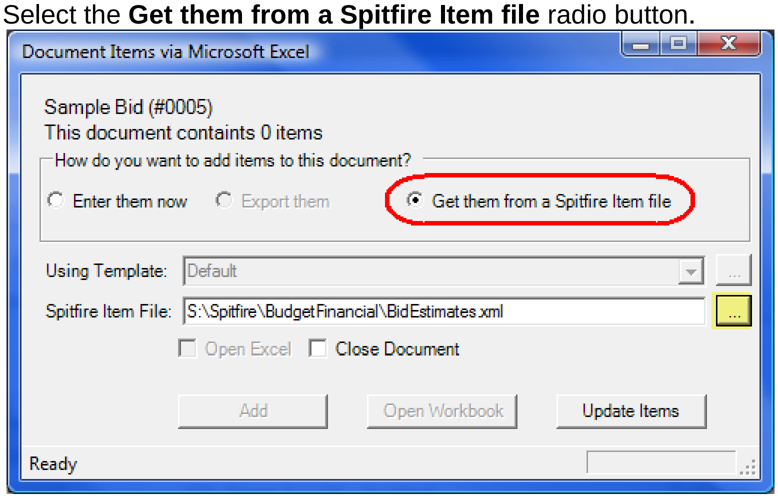
TIP

See the technical white paper [Spitfire Item Templates (for Via Excel)]() for information on the To_RowFlag column.

6. Save ( ) and close ( ) the Spitfire Item File. (In this workflow, the Spitfire Item File is only used temporarily.) When you close the file, Items will be copied to your document and the document will open. (The Via Excel dialog box will close automatically.)
7. Back at your document, click on the Items tab to see or edit your Items.
8. Click to save your document.

To enter Items from an existing Spitfire Item File:

1. At the Items tab of your document, select **Via Excel** from the Items Options menu. Your document window will close and the Document Items via Microsoft Excel dialog box will appear.
2. Select the **Get them from a Spitfire Item file** radio button.



3. Click ... at the Spitfire Item File field to browse for the existing Spitfire Item File that you want to use.
4. Click Update Items. Information from that Spitfire Item File will be imported to the document and the document will reopen. (The Via Excel dialog box will close automatically.)
5. Click on the Items tab to view or edit your Items.
6. Click to save your document.

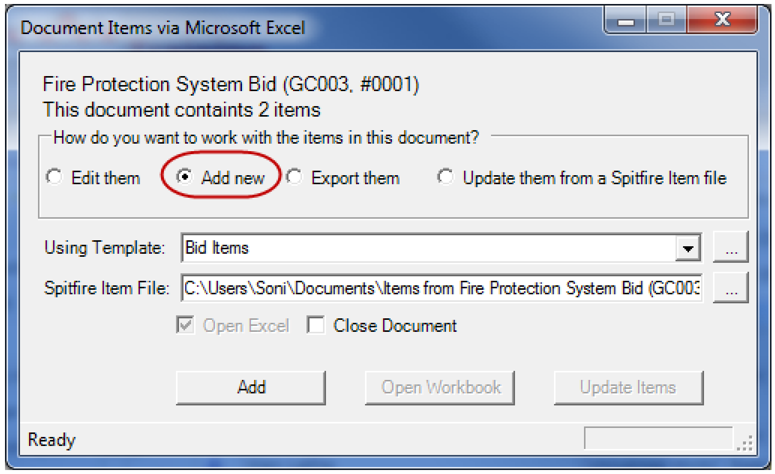
TIP

Spitfire Item Files are files created through Spitfire (the Via Excel Export option) or a supplemental workbook. Regular Microsoft Excel workbooks cannot be directly imported using this option.

To append Items to existing Items on a document:

1. At the Items tab of your document, select **Via Excel** from the Items Options menu. Your document window will close and the Document Items via Microsoft Excel dialog box will appear.

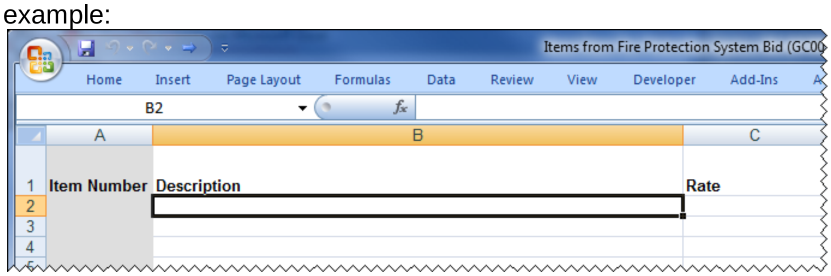
2. Select the **Add new** radio button.



3. (*optional*) A default Spitfire Item Template for your Doc type will appear at the Using Template field. If desired, use the drop-down to select a different template (if any others are available).

4. Click 

. The Spitfire Item Template will open, for example:



5. Enter Item information manually or open an existing Microsoft Excel spreadsheet and copy that information onto your template (or do both). You have the functionality of Microsoft Excel at your disposal. Item information that you enter here will be added to your document, appended after any existing Items.

6. Save () and close () the Spitfire Item File. (In this workflow, the Spitfire Item File is only used temporarily.) When you close the file, Items will be copied to your document and the document will open. (The Via Excel dialog box will close automatically.) Back at your document, click on the Items tab to review your Items.

7. Click  to save your document.

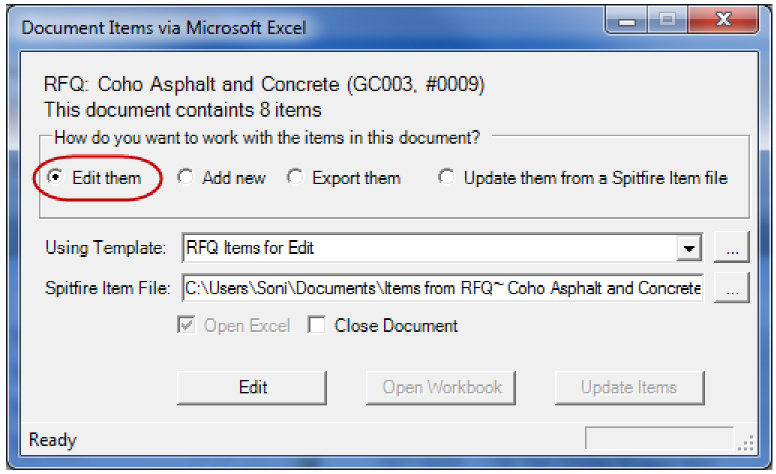
Edit Items

Once you have at least one Item on a document, you can choose to change your existing Items and/or add Items to your document through Microsoft Excel using the Via Excel Edit Items option.

Note: you can delete Items through Microsoft Excel **only** if you use a Spitfire Item Template that includes a **To_DeleteFlag** column. (See the technical white paper *Spitfire Item Templates (for Via Excel)* for more information.)

To edit/add Items in Microsoft Excel:

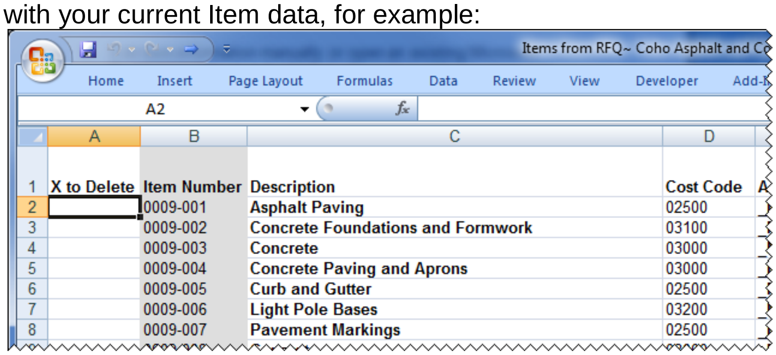
1. At the Items tab of your document, select **Via Excel** from the Items Options menu. Your document window will close and the Document Items via Microsoft Excel dialog box will appear.



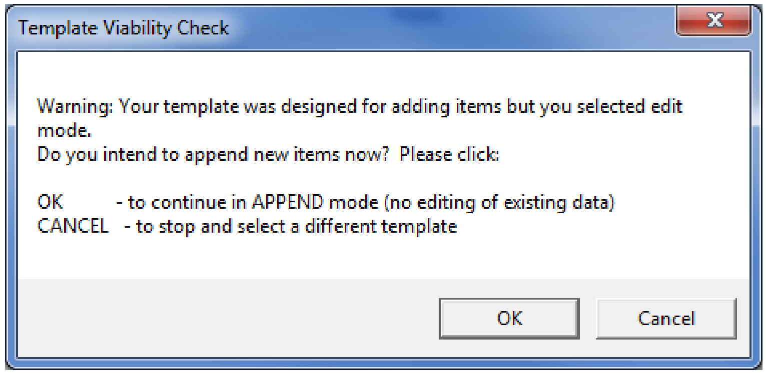
2. (*optional*) If necessary, select the **Edit them** radio button.

3. (*optional*) A default Spitfire Item Template for your Doc type will appear at the Using Template field. If desired, use the drop-down to select a different template (if any others are available).

4. Click Edit. The Spitfire Item Template will open with your current Item data, for example:



Note: if the template you selected contains a **To_RowFlag** column (which is meant for adding Items to an empty document only), you will see the following message instead:



- Click to append newly selected rows from the template to your existing Items. The template will open.
- Click to select a template that is appropriate for editing, then click again. .

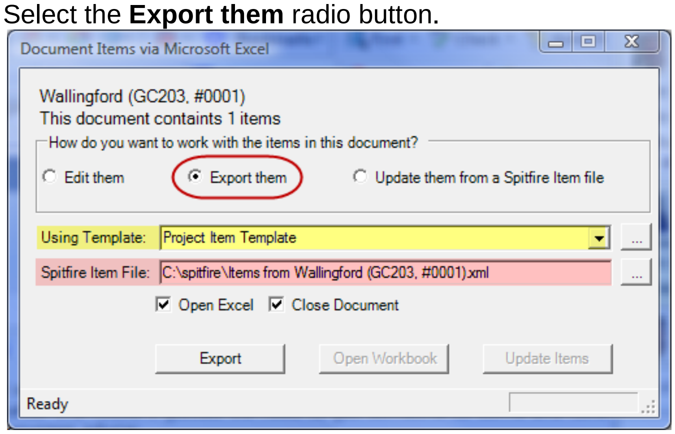
5. Edit Item information manually or open an existing Microsoft Excel spreadsheet and add that information onto your template (or do both). You have the functionality of Microsoft Excel at your disposal.
   Notes:
   - You cannot change Doc Item Numbers.
   - You cannot remove Items by deleting them in Microsoft Excel; they will remain in the Spitfire document unless you flag them for deletion through a special **To_DeleteFlag** column (as shown above).
   - Some values (such as the **Contract Amount** from a Pay Request shown above) are calculated by Spitfire and cannot be changed. If you change these values in Microsoft Excel, those changes will be ignored.
6. Once you have made your changes, save () and close () the Spitfire Item File. (In this workflow, the Spitfire Item File is only used temporarily.) When you do, your added and changed Items will be copied to your document, the document will open and the Via Excel dialog box will close.
7. Back at your document, click on the Items tab to see your data.
8. Click to save your document.

Export Items

While the edit option of Via Excel is particularly useful when you want to make changes to your Items right away, the Via Excel Export Items option exists for times when you want to copy your Items to Microsoft Excel to review or change at another time or somewhere else (when you are no longer in Spitfire).

To export Items to a Spitfire Item File:

1. At the Items tab of your document, select **Via Excel** from the Items Options menu. Your document window will close and the Document Items via Microsoft Excel dialog box will appear.
2. Select the **Export them** radio button.



3. (*optional*) A default Spitfire Item Template for your Doc type will appear at the Using Template field. If desired, use the drop-down to select a different template (if any others are available).
4. (*optional*) Check the name and location of the **Spitfire Item File** that will be created. Change it if desired.
5. (*optional*) Notice the **Open Excel** and **Close Document** checkboxes. Uncheck **Open Excel** if you don't want to open and see the Spitfire Item File at this time. Uncheck **Close Document** if you want to reopen your Spitfire document (which closed when you selected Via Excel). By default, your Spitfire document will remain closed and Microsoft Excel will open.
6. Click Export. Your data will be exported to the Spitfire Item File created from the selected Spitfire Item Template. This Spitfire Item File is a Microsoft Excel file and can be copied to another location and opened anywhere you can open Microsoft Excel.

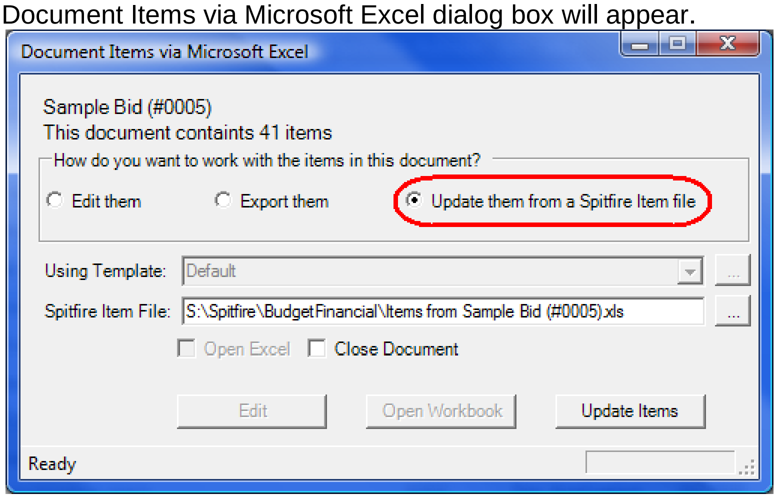
Import Items

Once you have a Spitfire Item File, you can choose to import the data from that file to a Spitfire document's Items tab. If your document doesn't have any Items yet, the data from the Spitfire Item File will populate the Item fields (as described on page 54). If your document does have Items, data from the Spitfire Item File will modify your Items as follows:

- Items added to the Spitfire Item File will be added to the document.
- Existing Items that have been modified in the Spitfire Item File will be modified in the document with the exception of values that are calculated by sfPMS.
- Items that are deleted in the Spitfire Item File will *not* be deleted in the document. Deletion of Items requires a special **To_DeleteFlag** column in the Spitfire Item Template. (See the technical white paper *Spitfire Item Templates (for Via Excel)* for more information.)
- Item numbers cannot be changed. Changes made to the Item numbers in the Spitfire Item File will be ignored by sfPMS.

To import Items from a Spitfire Item File:

1. At the Items tab of your document, select **Via Excel** from the Items Options menu. Your document window will close and the Document Items via Microsoft Excel dialog box will appear.



2. Select the **Update them from a Spitfire Item File** radio button.
3. Click ... at the **Spitfire Item File** field to browse for the existing Spitfire Item File that you want to use or use the down-arrow to select a file from the drop-down.
4. Click Update Items. Items from your Spitfire Item File will be imported to your Spitfire document and your document will open again.

Print Item (Item Covers)

TIP

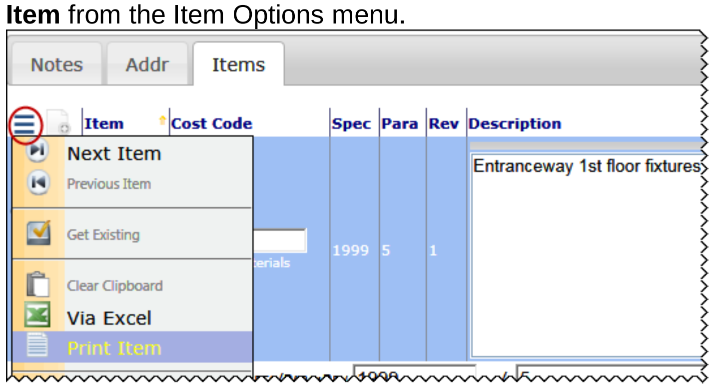
Item Covers are a kind of bookmark template. For more information about creating bookmark templates see the *Focus on Bookmark Templates* guide.

For more information about routed content, see the *Focus on Routes* guide.

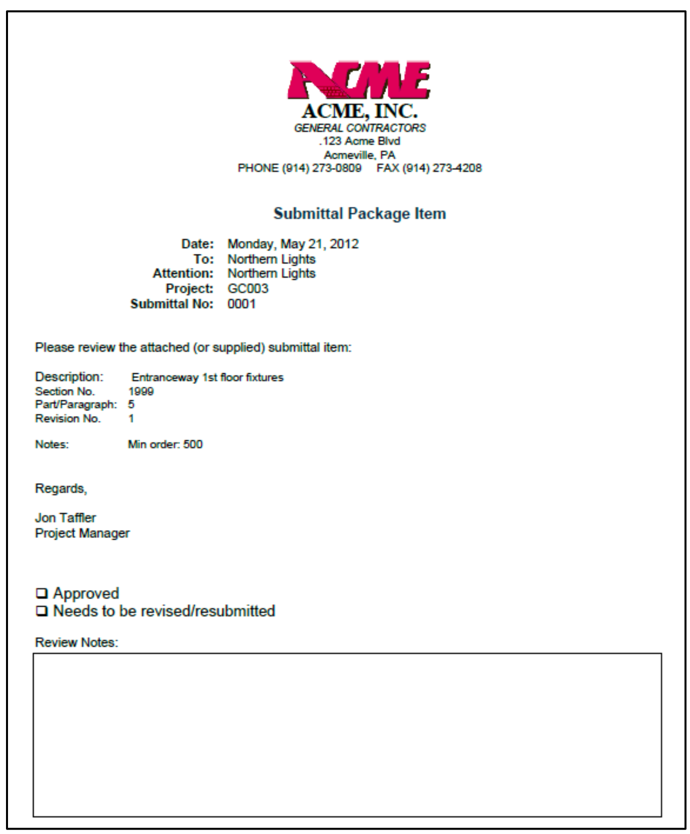
If a template of the type **Item Cover** is available for a particular Doc type, the Print Item choice will appear on the Items Options menu. Whether or not the choice is selected, an Item Cover template means that a page will be generated (as a PDF) for each Item that appears on the document. Item Covers are included in routed content.

To view a generated Item Cover PDF for a particular Item:

1. At the Items tab of a document with an Item Cover template, click to expand the Item for which you wish to view the Item Cover.
2. Click to open the Item Options menu then select **Print Item** from the Item Options menu.



The PDF of the Item Cover for that Item will open. You can review it and then close it.



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Submittal Package Item

Date: Monday, May 21, 2012
To: Northern Lights
Attention: Northern Lights
Project: GC003
Submittal No: 0001

Please review the attached (or supplied) submittal item:

Description: Entranceway 1st floor fixtures
Section No. 1999
Part/Paragraph: 5
Revision No. 1

Notes: Min order: 500

Regards,

Jon Taffler
Project Manager

❑ Approved
❑ Needs to be revised/resubmitted

Review Notes: