

## In This Issue

[Next Client Webinar](#)

[Spitfire Q&A: About Closed Documents](#)

[FYI: Preview Panels and BFA's Import Wizard](#)

[Feature Spotlight: BFA's Project/Selection Analysis Form](#)

[Have You Read?](#)

[Your Clients Area](#)

[Training Classes](#)

*Note: Features mentioned in this newsletter are available in V4.3+ of sfPMS.*

## Next Client Webinar!



**July 10, 1 PM EDT**

### *Taking Control of Compliance*

Join us to learn how you can best take advantage of compliance tracking! Registration is free! To register, go to

<https://www.eventbrite.com/event/11902557871>

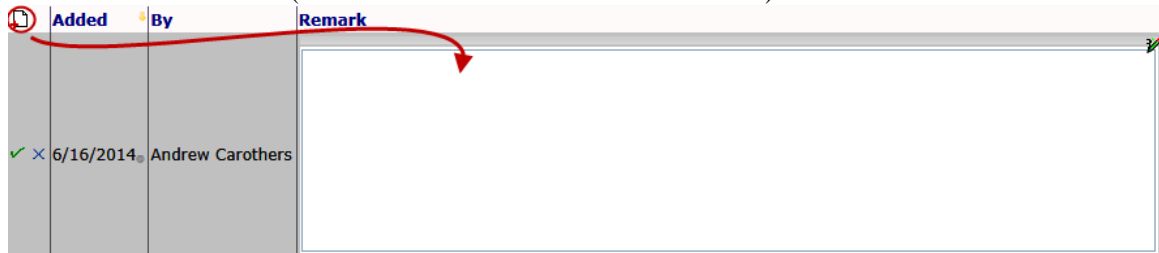
*Register soon; tickets are limited!*

## Spitfire Q&A: About Closed Documents

**Q: Can documents that have a closed status be routed? Can people still write notes or comments on closed documents?**

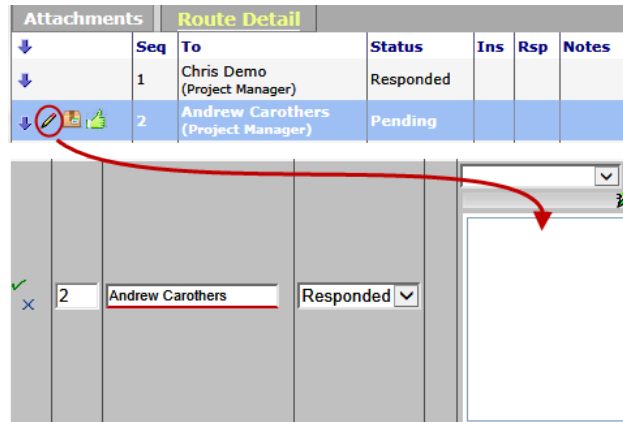
A: Yes. Documents become read-only when they are given a closed status (such as Closed, Rejected, Completed, Canceled, Approved etc.) However, all documents can be routed regardless of document status so that those who need to see final closed documents can do so. In addition, there are two places that anyone, regardless of role capabilities or document status, can write a note on a document.

A. Remarks on the Notes tab (on documents with this field and tab visible):



Notice that such notes are date and name stamped.

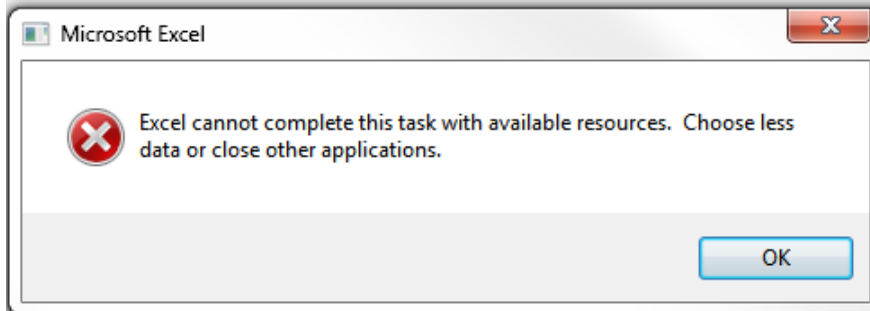
B. The routee's own route row while the document is in that routee's Inbox:



## FYI: Preview Panels and BFA's Import Wizard

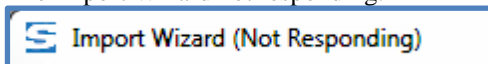
It has come to our attention that Microsoft Excel and a recent update of Microsoft Windows don't always play well together. When using the Import Wizard to create your budget in the BFA workbook, you might encounter this situation:

- The following error message:

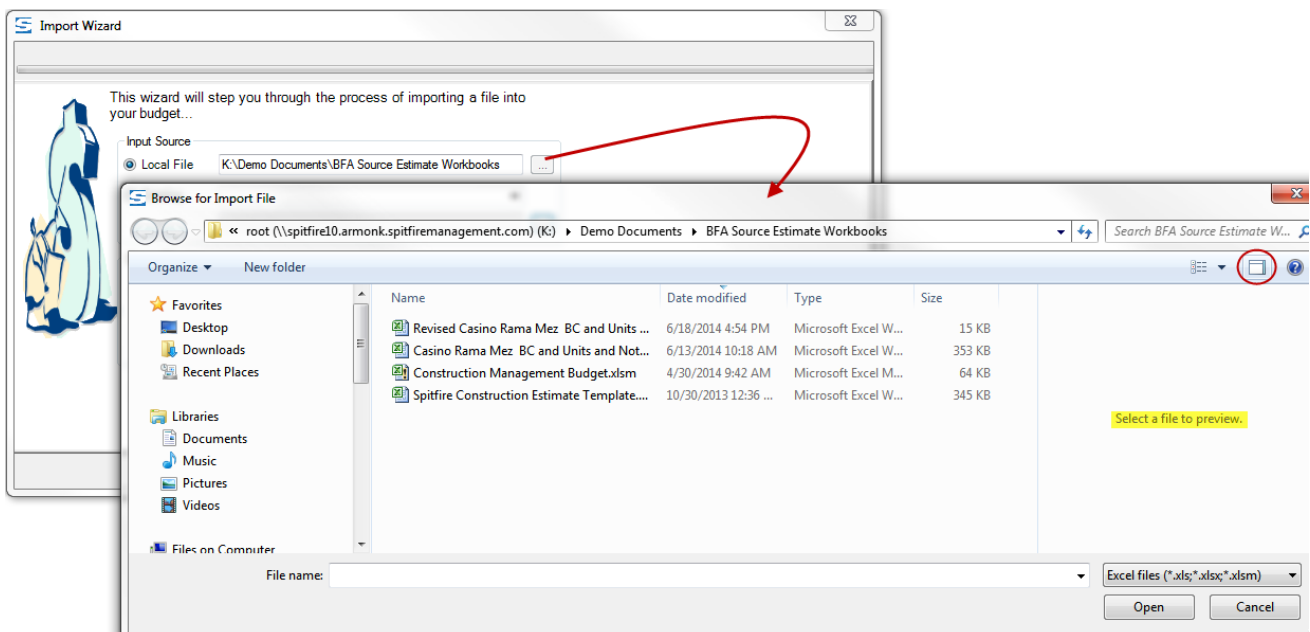


or


- The Import Wizard not responding:



Luckily, there is a simple fix for this situation. It turns out that the preview panel on the **Browse for Import File** dialog window is the root of this problem. When you browse for a local file on the Import Wizard, look for the following icon that indicates that preview mode is on.



➔ **Preview mode must be off for the Import Wizard to work smoothly.**

- To turn preview mode off, click . You will need to cancel and close the Import Wizard and close the BFA workbook before you can try again.

**Note:** Preview mode will remain off until you turn it back on again. (The preview panel setting is the same across all Windows "File Open" dialog windows and is not specific to Excel or the Import Wizard, so if you turn it on elsewhere, it will remain on until you turn it off on any "File Open" dialog window.)

See also [KBA-01577](#).

# Feature Spotlight: BFA's Project/Selection Analysis Form

Those who did not attend June's webinar might not know that the BFA workbook offers a form that consolidates and presents, in a period-based format, the amounts for a selected Cost Code /Account Category or for the whole project.

The Project/Select Analysis form is always just one click away.

## To open the Project/Selection Analysis form:

1. On the BFA workbook, find the Cost Code or Account Category for which you want information.  
**Note:** if you want information on the project-level, you can select any row.
2. Right-click on the cell in the Description column, for example:

Cost Codes	Description
00000	Project
01000	General Conditions
12000	Window Treatments

The Project/Selection Analysis form will open:

	Project To Date	Prior Year	Current Year	Prior Period	Current Period
Revenue Budget	\$0.00				
Current Budget (EAC)	\$99,255.78				
Current Commitment	\$95,399.58				
<b>Actual</b>					
Actual + Committed Costs	\$95,399.58	\$60,254.71	\$3,253.02	\$8,668.18	\$1,000.75
% Spent	96.11%	60.71%	3.28%	8.73%	1.01%
% Complete	0%	0%	0%	0%	0%
Earned Value of EAC	\$95,394.73	\$60,258.18	\$60,258.18	\$60,258.18	\$60,258.18
Cost Performance Index	1.00	0.63	0.63	0.63	0.63
<b>Forecast</b>					
Working Forecast at Complete	\$99,255.78				
FAC Alt 1: =CB/CPI	\$99,255.78	\$157,548.86	\$157,548.86		
FAC Alt 2: =AC + (CB - EV)	\$99,260.63	\$99,252.31	\$42,250.62		
Variance	\$0.00				
Cost Factor	1.00				
Notes	<input type="button" value="User"/> <input type="button" value="..."/> <input type="button" value="Tracking"/> <input type="button" value="..."/>				

3. (optional) If you want to view information on the project level, change the radio button on top to **Project**.

## Have You Read?

The following focus guides and technical white papers have been reviewed and updated, if necessary, for V4.4 since June 1:

[Focus on Batch Processing](#) [same as V4.3]

[Focus on Bookmark Templates](#)  
[previously *Focus on Doc Templates*,  
[new info](#)]

[Focus on Forecast and Analysis](#)  
[minor [new info](#)]

TWP: [Bid Package – RFO Processing](#) [same as V4.3]

TWP: [Change Order Management](#)  
[[new info](#)]

TWP: [The Executive Dashboard and EDB Report Tool](#) [[new info](#)]

TWP: [Quick Doc Type Reference Guide](#) [same as V4.3]

TWP: [Rules and Rule Values](#) [[new info](#)]

TWP: [Spitfire's Import Utility Tool](#)  
[same as V4.3]

TWP: [Viewing Changes through sfChest](#) [same as V4.3]

## Contact Us

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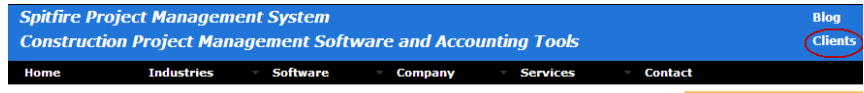
Phone: 888-287-4603  
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Support:  
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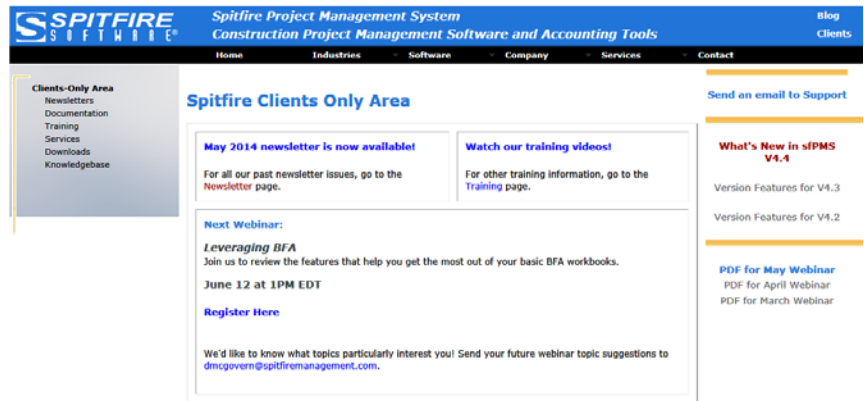
Training:  
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## Your Clients Area



The [Clients area on our website](#) includes links to our [documentation](#), our [Knowledgebase](#), our [forum](#), our [downloads](#), and a list of what's new in versions [4.2](#), [4.3](#) and [4.4](#).



You will need your login and password to get to the Clients area. If you need or have forgotten your login and password, contact [support@spitfiremanagement.com](mailto:support@spitfiremanagement.com).

## Training Classes and Videos

We offer live training classes by appointment for those who request them. Training class descriptions are available from the Clients area of our [website](#).

We also offer training videos from [the client area of our website](#) for those who want to review various topics.

### Training Video Library

Aside from, and corresponding with, our live training, we offer a series of training videos that can be accessed 24/7. These videos are particularly useful for those who need to refresh their memory about a specific topic, or for new employees at companies that are already using the Spitfire Project Management System and who need general instruction before learning the specifics at their site.

There is no limit to how many people can access or view any video at one time, nor is there a limit to how many times any video can be viewed. Click on a header tab below to select a video in that series.

#### Basic Navigation Series [Foundation]

This series is a must for anyone who has not yet used or seen the Spitfire Project Management System (sPMS).

- **101A - Basic Navigation Part 1**, [6:08 min]  
How to log in to Spitfire, change your password and access written documentation.
- **101B - Basic Navigation Part 2**, [2:56 min]  
An introduction to the Watchdog Alerts part of the Home Dashboard.
- **101C - Basic Navigation Part 3**, [6:59 min]  
An introduction to the Inbox and to Spitfire documents, and how to open a document and remove it from the Inbox.
- **101D - Basic Navigation Part 4**, [9:21 min]  
How to get to a Project Dashboard and create a new document. Also, an introduction to fields (look-ups, drop-downs and dates) and popEdit.
- **101E - Basic Navigation Part 5**, [5:25 min]  
An introduction to the Add Files tool and how to attach files to a document. Also, how to log out.
- **101F - Basic Navigation Part 6**, [7:29 min]  
How to create a new Project Setup document from the Home Dashboard and an introduction to the Addr, Dates and Items tabs.
- **101G - Basic Navigation Part 7**, [7:14 min]  
An introduction to the Team Contact part of the Project Dashboard including how to add new team members to the project.
- **101H - Basic Navigation Part 8**, [7:11 min]  
An introduction to the parts of the Project Dashboard: Conditions, Remarks, Photo, KPI, Cost Analysis Details and Files.

#### Documents, Items and Route Series [Foundation]