SPITFIRE SOFTWARE®
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In This Issue

***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

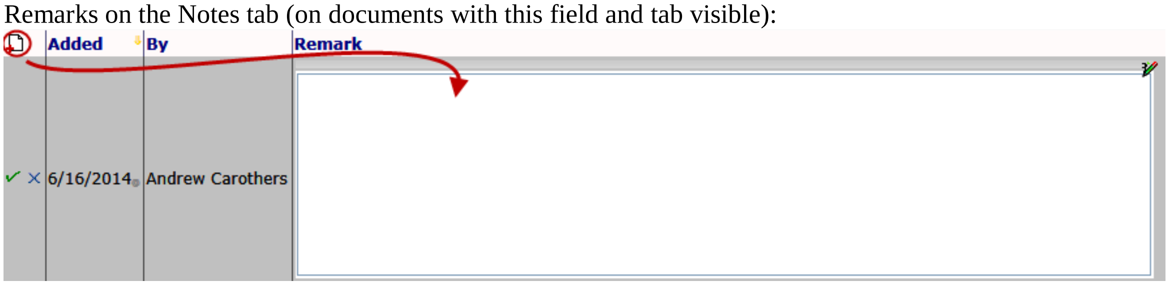
Register soon; tickets are limited!

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?

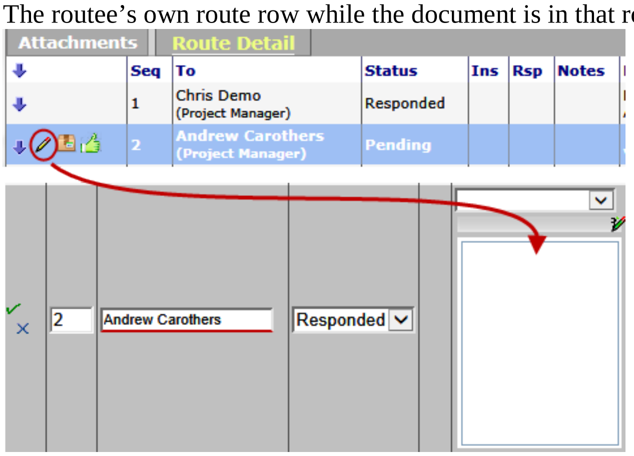
A: Yes. Documents become read-only when they are given a closed status (such as Closed, Rejected, Completed, Canceled, Approved etc.) However, all documents can be routed regardless of document status so that those who need to see final closed documents can do so. In addition, there are two places that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

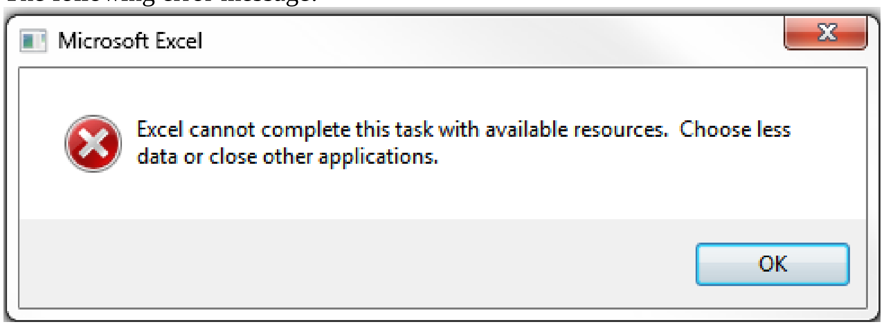
B. The routee's own route row while the document is in that routee's Inbox:



FYI: Preview Panels and BFA's Import Wizard

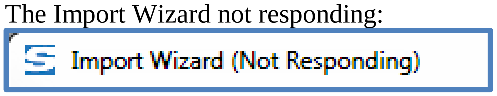
It has come to our attention that Microsoft Excel and a recent update of Microsoft Windows don't always play well together. When using the Import Wizard to create your budget in the BFA workbook, you might encounter this situation:

- The following error message:

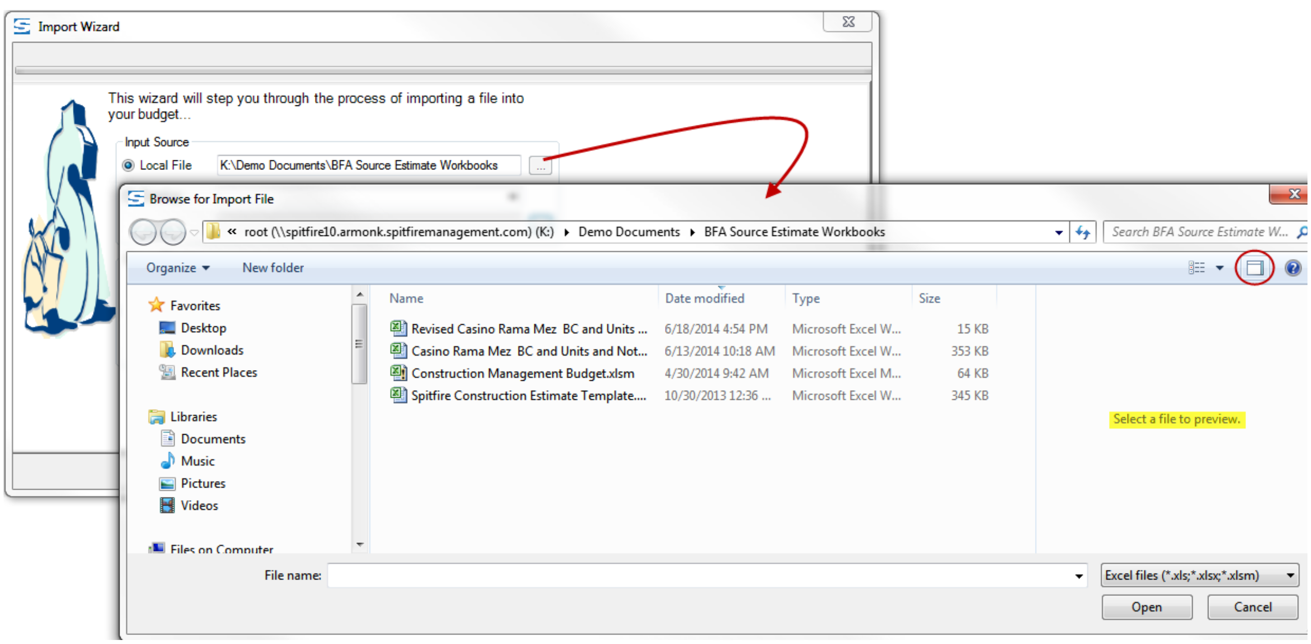


or

- 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.

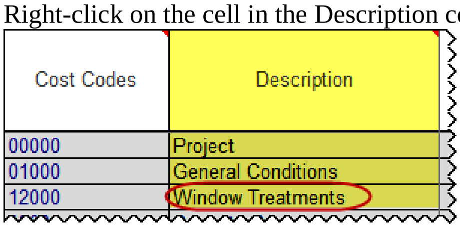
Feature Spotlight: BFA's Project/Selection Analysis Form

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.

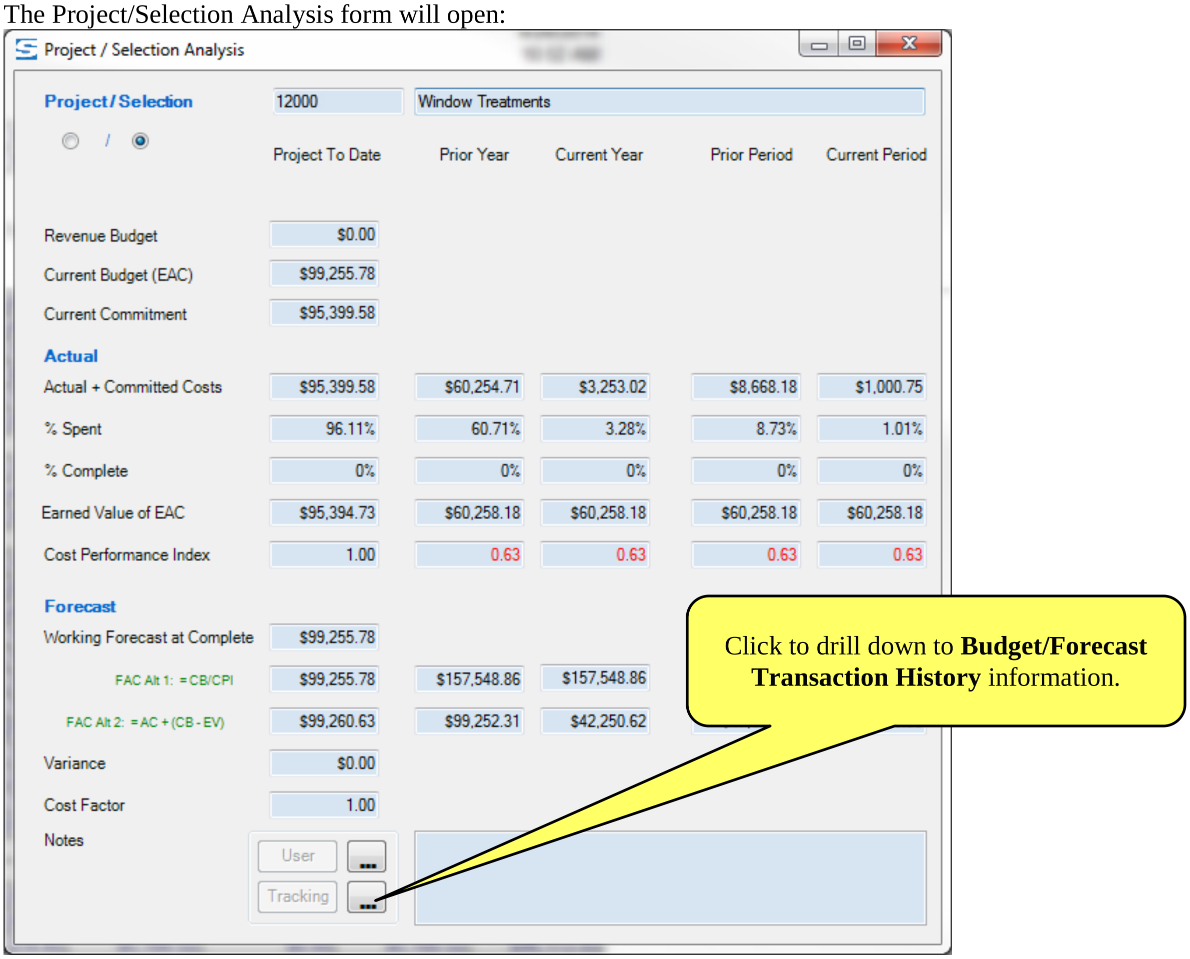
The Project/Select Analysis form is always just one click away.

To open the Project/Selection Analysis form:

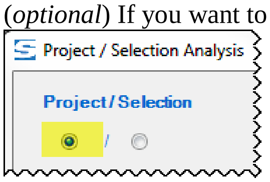
1. On the BFA workbook, find the Cost Code or Account Category for which you want information.
   Note: if you want information on the project-level, you can select any row.
2. Right-click on the cell in the Description column, for example:



The Project/Selection Analysis form will open:



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 – RFQ 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]

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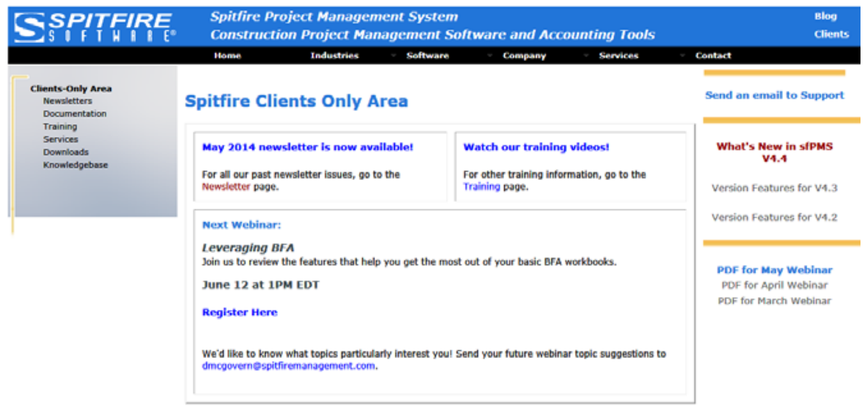
Your Clients Area

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.

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