

System Administration



This System Administrator's guide covers system-wide issues and should be reserved for Spitfire Project Management System administrators and other users who make decisions for the entire organization.

www.spitfiremanagement.com



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About Our Documentation

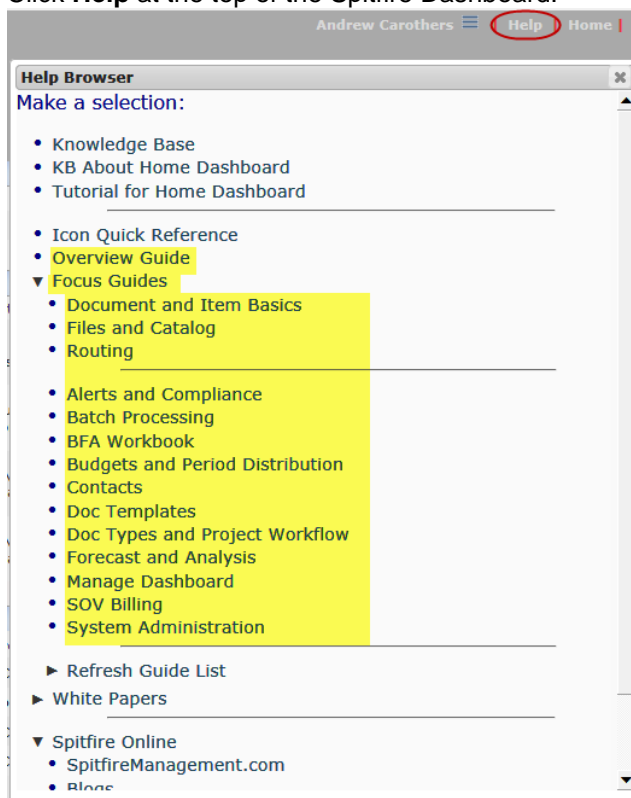
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

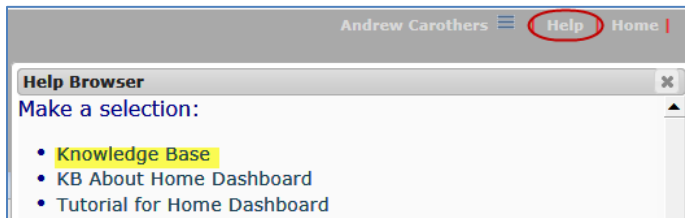


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

The guide will appear as a PDF file

The Knowledgebase

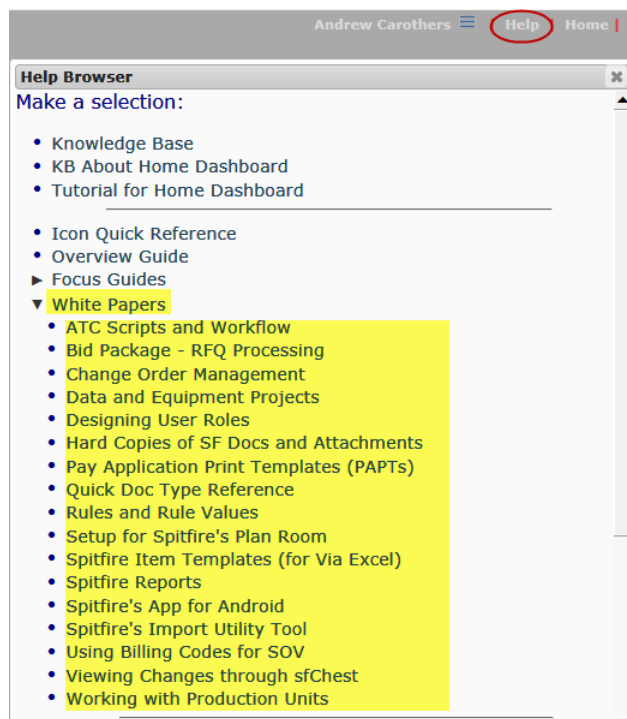
The Knowledgebase contains articles that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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

White Papers

White papers are documents that delve into some of the more technical or specific aspects of sfPMS. White Papers are accessed through the same Help menu:



Introduction to This Guide

This System Administrator's guide covers system-wide issues and should be reserved for administrators and other users who make decisions for the entire organization. The System Admin Dashboard appears only to those who have been given proper permission to use it (for example, through the **SYS | Global access** role capability). It is assumed that readers of this guide have such permission levels.

It is also assumed that readers of this guide have a general understanding of the Spitfire system, as described in the various focus guides mentioned previously.

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

Note: section, chapters and text that are new or changed from the V4.5 documentation appear with **green text** and sometimes an *. In addition, icons are shown in size 16 only; larger-sized icons are similar but not exactly the same.

TIP

Users who are System Administrators should have separate Log in IDs for when they need to act as System Administrators vs. when they act as regular users. In other words, a System Administrator should normally log in with a regular ID (for example, jsmith) that possibly gives access to the Manager, Contact and Project Dashboards. When the need arises to use the System Admin Dashboard tools, he or she would log in as **sysadmin**. Global access should not be given to production users accounts.

System Admin Dashboard

The screenshot shows the System Admin Dashboard interface. The top navigation bar includes links for Home, Catalog, Contacts, Plan Room, Executive, Manage, System Admin (selected), and GC-003. The user is identified as Chris Demo. The left sidebar lists various tool categories: Roles, Event Subscriptions, Catalog Folders, Cloud Drives, Report Folders, Account Categories, Alert Types, Company Divisions, Compliance Types, CSI Maintenance, Date Types, Doc Types, Reference, Templates, Workflow Scripts, Code Maintenance, UI Configuration, Mask Maintenance, Rule Maintenance, and System Information. The main area displays the 'ROLE LIST' table, which includes columns for Role Name, Description, Conditions, Conditions Optional, Active, and Member Count. A red arrow points from the 'Roles' category in the sidebar to the 'ROLE LIST' table. A black arrow points from the 'Filters' label to the 'Conditions' column. A box labeled 'List of tools.' points to the sidebar. A box labeled 'Filters' points to the 'Conditions' column. A box labeled 'Current cache date/time stamp.' points to the 'Cache as of May 11 12:17' text at the bottom left.

| Role Name | Description | Conditions | Conditions Optional | Active | Member Count |
|---------------------------|---------------------------|------------|---------------------|--------|--------------|
| Accounting | Accounting | X X X X | ✓ | ✓ | 2 |
| Architect | Architect | X X X X | ✓ | ✓ | 3 |
| Cataloger | Cataloger | X X X X | ✓ | ✓ | 1 |
| Compliance Admin Internal | Compliance Admin Internal | X X X X | X | ✓ | 0 |
| Compliance Admin Vendor | Compliance Admin Vendor | X X X X | X | ✓ | 0 |
| Concrete Sub | Concrete Sub | X X X X | X | ✓ | 0 |
| Consultant | Consultant | X X X X | ✓ | ✓ | 2 |
| Contact Admin | Contact Admin | X X X X | X | ✓ | 0 |
| Drywall Sub | Drywall Sub | X X X X | ✓ | ✓ | 0 |
| Electrical Sub | Electrical Sub | X X X X | ✓ | ✓ | 0 |
| Engineering Consultant | Engineering Consultant | X X X X | ✓ | ✓ | 0 |
| Everyone | Everyone | X X X X | ✓ | ✓ | 21 |
| GC | GC | X X X X | ✓ | ✓ | 2 |
| Mechanical Sub | Mechanical Sub | X X X X | X | ✓ | 0 |
| Owner | Owner/Customer | X X X X | ✓ | ✓ | 0 |

Cache as of May 11 12:17

The System Admin Dashboard is made up of a list of administrative tools on the left and the selected tool part on the right. Some of these tools (Compliance Types, CSI Maintenance, Date Types, Reference, Templates, Code Maintenance and System Information) are also available from the Manage Dashboard.

Some of the tools that are available on both the Manage Dashboard and the System Admin Dashboard are considered to be more manager tools than system administrator tools and are, therefore, documented only in the *Focus on the Manage Dashboard* guide, as indicated below. Other exceptions are also listed below.


| For information on | See |
|---|---|
| CSI Maintenance Reference Templates | The Focus on the Manage Dashboard guide |
| Workflow Scripts | ATC Scripts and Automatic Workflow on the Spitfire Client Services site |
| Event Subscriptions | <i>The Developers Primer</i> |
| All other tools on the System Admin Dashboard | This guide |

System Admin Tools

The System Admin tools enable you to do the following (shown roughly in the order you might use them):

- **[Company Division](#)**: Provide basic information for your company or for company divisions within your organization or corporation. (See page 15.)
- **[Mask Maintenance](#)**: Set up Cost Code and Project ID parameters by specifying segment, length and type. (See page 18.)
- **[Account Categories](#)**: Describe the general ledger accounts in words rather than numbers and group these accounts for reporting and analysis purposes. (See page 23.)
- **[Doc Types](#)**: Deactivate or rename Doc types and create new Doc types. (See page 27.)
- **[UI Configuration](#)**: Visually configure Doc types and a few parts of certain dashboards to include or exclude fields, columns and tabs. (See page 33.)
- **[Code Maintenance](#)**: Edit or view the options for various drop-downs (pick lists) used in documents and throughout the system. (See page 49.)
- **[Roles](#)**: Design and maintain the roles that grant users access to functions, Spitfire documents, and projects within sfPMS. (See page 59.)
- **[Catalog Folders](#)**: Indicate the type of access (view, insert, update, delete, all) that users have for file folders. (See page 72.)
- **[Report Folders](#)**: Control the access to report folders. (See page 78.)
- **[Date Types](#)**: Set up the date types to be used on the Date tabs of certain Spitfire documents. (See page 82.)
- **[Alert Types](#)**: Activate or deactivate the Alert types that appear in Alert tabs and Subscriptions. (See page 85.)
- **[Cloud Drives](#)**: Set up paths to cloud storage providers, if any. (See page 89.)
- **[Compliance Types](#)**: Design and designate Compliance types to be used in the Compliance tab of Commitments and other documents. (See page 91.)
- **[Rules Maintenance](#)**: Customize logic for how sfPMS behaves. Rules govern various aspects of the system. (See page 98.)
- **[CSI Maintenance](#)**: Create and maintain a CSI list with short and longer descriptions to be used in Spitfire documents. (See the [Focus on the Manage Dashboard](#) guide.)
- **[Reference](#)**: Create and maintain a category list based on whatever you want. (See the [Focus on the Manage Dashboard](#) guide.)

TIP

To refresh the cache, select the Doc Types tool and click  twice.

TIP

If you click on a link to get to another page in this guide, you can press **Alt + ←** (left arrow) to return to the “previous view”.

- **Templates:** Upload a variety of templates for use in Spitfire. (See the [Focus on the Manage Dashboard](#) guide.)
- **Workflow Scripts:** Create and maintain ATC workflow scripts to use with routing. (See [ATC Scripts and Automatic Workflow](#) on the Spitfire Client Services site.)
- **Event Subscriptions:** Configure connections between sfPMS and event-handling code written by your programmers. (See the *Developers Primer* and contact support for more information or contact sales to purchase consulting time with one of Spitfire's developers.)
- **[System Information:](#)** Check information about servers, versions, and last cache. (See page 105.)

Company Divisions

The Company Division tool lists some basic information about your company. If your organization or corporation comprises several companies or offices, you can list information for all of them through the Companies tool.

After Setup

Project Setup Details Tab

After you have added your company divisions to the system, you can look up the company division for each project on the Project Setup's Details tab. Whichever division you tag as "primary" will appear in the Division ID field as the default.

Note: because this is a required field, you should have at least one company division in the Company Division tool. If your organization is not divided into divisions, then the name, address and phone numbers of your organization should make up the one division record.

Project Setup- New

Project Setup 0001

DOCUMENT HEADER

Details Scope Addr Dates Items Incl/Excl Project

TYPE

CONTRACT TYPE

PROJECT REFERENCE N/A

CONTRACT FOR

RETENTION % - MATERIALS:

SQ. FOOTAGE

DIVISION ID CCC

Reports

Company divisions can be used as filters on the following reports:

- Executive | Project Cost by Account Category
- Executive | Project WIP
- General | Bid Analysis

REPORT PARAMETERS

Project Cost By Account Category

PROJECT %

CUSTOMER

PROJECT DATE 2/9/2012 2/9/2012

PM NAME

Run Report

COST CODE %

DIVISION (ALL)

PROJECT FINISH (Auto)

Contoso America, Inc.

Contoso Business Solutions

Contoso Construction, Inc.

Contoso Distribution, Inc.

Contoso Engineering, Inc.

Contoso Entertainment, Inc.

Contoso Highway Construction

Contoso HVAC Services, Inc.

Contoso Manufacturing, Inc.


Executive Dashboard


Company divisions can also serve as a filter on the Executive Dashboard.

The screenshot shows the 'EXECUTIVE' tab selected in the top navigation bar. Below it, the 'PROJECTS' section contains several filter fields: PROJECTS, CUSTOMER, TYPE, and DIVISION ID (highlighted in yellow). To the right, there are additional filters: PROGRAM, PROJECT MGR, STATUS, and START.

The Company Division Detail Part

When you select the Company Divisions tool, the corresponding part appears:

If you are integrated, click  to refresh data from your accounting system.

Click  to edit the field.

| COMPANY DIVISION DETAIL | | | | | | | | | | | | | |
|-------------------------|-------------------------------|-------------------------|-----------|--------------|-------|-------|---------|------------|------------|-----------------------------|------|------|-----|
| Div ID | Company Name | Address | Address | City | State | Zip | Country | Phone | Fax | Email | Site | Logo | Hdr |
| CAI | Spitfire America, Inc. | 1769-113 Jamestown Road | Suite 113 | Williamsburg | VA | 23185 | | 5034526981 | 5034526990 | office@spitfireamerica.com | / | / | / |
| CBS | Spitfire Business Solutions | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | | / | / | / |
| CCC | Spitfire Construction Inc. | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | office@spitfireconstruction | / | / | / |
| CDI | Spitfire Distribution, Inc. | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | | / | / | / |
| CEC | Spitfire Engineering, Inc. | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | | / | / | / |
| CEI | Spitfire Entertainment, Inc. | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | | / | / | / |
| CHC | Spitfire Highway Construction | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | | / | / | / |
| CHS | Spitfire HVAC Services, Inc. | 10260 SW Greenburg Road | Suite 200 | Portland | OR | 97223 | | 5034526981 | 5034526990 | | / | / | / |

Columns



- **Division ID:** The ID you set up for the company. Each company/company division must have a unique ID.
- **Company Name:** the name of the company/company division. A name is required.
- **Address, Address, City, State, Zip:** the mailing address of the company/company division.
- **Country:** The one- or two-character country code for the company/company division. If left blank, the United States is assumed.
- **Phone, Fax:** the voice and fax phone numbers for the company/company division.

- **Email, Site:** the email and website for the company/company division.
- **Logo:** the logo for the company/company division.
- **Hdr:** the header text for the company/company division.
- **Foot:** the footer text for the company/company division.
- **Active:** whether (☒) or not (☐) the company information can be accessed and used.
- **Main:** ☒ indicates that this division is the primary one in the organization. One division must be designated as main, even if there is only one division listed.

Adding Company Divisions




Note: If your site is integrated with an accounting system and you sync your data, company information will be copied over from your accounting system. You will not be able to add company divisions directly in sfPMS.

To add a company division:

1. Click .
2. Enter a unique ID in the **Division ID** field. This field is required.
3. Enter a name in the **Company Name** field. This field is required.
4. Enter other contact information for the company.
5. (optional) Click the **Main** checkbox if this is the primary company and address.
6. Click ☒ to accept the row.
7. Repeat steps 2 – 7 as needed.
8. Click  to save your changes.

Example

Let us say that your company has two offices—one in White Plains, NY, and the other in San Francisco. You add two divisions, one for each office and make one of them your primary company:

| COMPANY DIVISION DETAIL | | | | | | | | | | | | | | | | = |
|---|-------------|-----------------------|-----------------|-----------|---------------|-------|-------|---------|--------------|-----|--------|------|-----|------|--------|------|
|  | Division ID | Company Name | Address | Address | City | State | Zip | Country | Phone | Fax | Site | Logo | Hdr | Foot | Active | Main |
|  | ACO | Acme Corporate Office | 1000 Broadway | Suite 200 | White Plains | NY | 10601 | US | 914-555-1212 | | www... | A... | / | / | ✓ | ✓ |
|  | ASO | Acme Satellite Office | 1000 Market St. | | San Francisco | CA | 94102 | US | 415-555-2000 | | / | / | / | / | ✓ | ✗ |

This icon opens the website.

This row contains the main address.

Mask Maintenance

On the Mask Maintenance tool, Project IDs, Cost Code/Task IDs, and Commitment numbers can be configured visually to meet your company's requirements. If you are a Microsoft Dynamics SL user, your Project ID, Cost Code/Task ID, and Commitment numbers are set in Microsoft Dynamics SL; therefore, the Mask Maintenance tool is used mainly by those sites that are not integrated.

In addition to the masks that ship with sfPMS, you can add your own mask for a specific Doc type.

After Setup

If you create masks for IDs on specific Doc types, the Doc # field will reflect your mask segments (as shown in the [example on page 22](#)).

The masks that are distributed by Spitfire define

- the Project ID on the Project Setup Doc type,

The screenshot shows a 'Project Setup' form. At the top, it says 'Project Setup 0001'. Below that, there's a 'DOCUMENT H' label. The 'CONTRACT NO.' field is highlighted in yellow and contains the text 'PROJECT' followed by a mask segment '16000' and a hyphen '-'.

- the Cost Code field on documents such as Commitments,

The screenshot shows a 'Commitment' form with tabs for 'Details', 'Scope', 'Addr', 'Payees', 'Dates', and 'Items'. The 'Details' tab is selected. The 'Cost Code' field is highlighted in yellow and contains the text '16000' followed by a mask segment '16000' and a hyphen '-'. The 'Category' field contains 'SUB' and the 'Description' field contains 'Electrical Work'.


- the Commitment document ID.




Note: If you do not enter mask segments for the Commitment ID, sfPMS will use the default document numbering scheme, (i.e., the first Commitment on a project will be 0001, the second, 0002 etc.). When Spitfire prints the Commitment ID on the Commitment Agreement, the Project ID – Commitment ID are printed together to give each Commitment a unique number.

The Mask Definitions Part


When you select the Mask Maintenance tool, the Mask Definition part appears:




Integrated site:

Click  to get data from Microsoft Dynamics SL.

| MASK DEFINITIONS | | | |
|---|------------|--------------|------------|
| | Mask Name | Max Segments | Max Length |
|  | PROJECT | 6 | 16 |
|  | TASK | 6 | 32 |
|  | COMMITMENT | 6 | 16 |

Site not integrated to Microsoft Dynamics SL:

Click  to view mask details.



| MASK DEFINITIONS | | | |
|---|------------|--------------|------------|
| | Mask Name | Max Segments | Max Length |
|  | PROJECT | 6 | 16 |
|  | TASK | 6 | 32 |
|  | COMMITMENT | 6 | 16 |

Columns

- **Mask Name:** the name of the mask that you are defining:
 - **Project** refers to the Project ID
 - **Task** refers to cost codes
 - **Commitment** refers to Commitment document IDs.
Note: You may also find a mask for document IDs for other Doc types, if one was set up during installation.
- **Max Segments:** the maximum number of segments that masks can have. Segments will be separated by a dash when the ID or code is displayed.
- **Max Length:** the maximum length all segments together can have.

Mask Detail

When you expand any of the mask rows, its Mask Details appears.

| MASK DETAIL | | | | | | |
|---|-----------|--------|--------|----------------|--------|--------|
| | Segment # | Length | Name | Mask Type | Lookup | Values |
|  | 1 | 2 | Type | Validated Text | PJCODE | OCAT |
|  | 2 | 3 | Number | Numeric | | |

Columns

TIP

Related information can be found in the Spitfire Knowledgebase. See [KBA-01270](#) and [KBA-01294](#).

- **Segment #:** The number for the segment within the mask. Segments are numbered in the order that they are created.
- **Length:** The length for the particular segment.
- **Name:** a name for the segment.

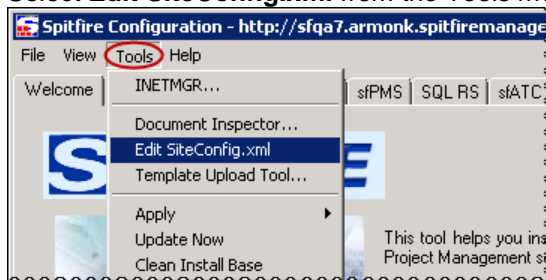
- **Mask Type:** the type for the segment. Choices are:
 - **Numeric** = 0, 1, 2, 3, 4, 5, 6, 7, 8, 9
 - **Uppercase Alpha** = A – Z
 - **Validated Text** = choices from lookups or drop-downs
 - **Uppercase Alphanumeric** = 0 – 9, A – Z
- **Lookup:** the name of a lookup such as “PJCODE” from Microsoft Dynamics SL or “CodeLookup” or “CSICode” from Spitfire.
- **Values:** possible choices for the drop-down if type is “Uppercase Alphanumeric”; or code set if type is “Validated Text.”

Adding a Mask

In order for a new mask to appear in the Mask Maintenance tool, you first need to edit your SiteConfig.xml file.

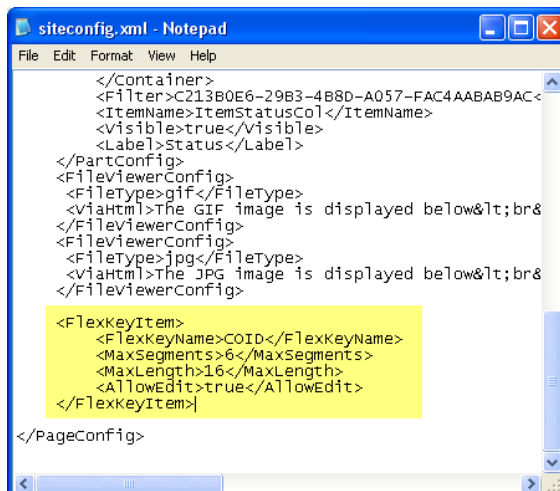
To edit your SiteConfig.xml file:

1. Open ICTool (ICTool.exe) on your computer.
2. Select **Edit SiteConfig.xml** from the Tools menu:



3. Add the following code to your SiteConfig.xml file:







```
<FlexKeyItem>
  <FlexKeyName>COID</FlexKeyName>
  <MaxSegments>6</MaxSegments>
  <MaxLength>16</MaxLength>
  <AllowEdit>true</AllowEdit>
</FlexKeyItem>
```

4. **File | Save** the SiteConfig.xml file.
5. **Close ICTool.**

Editing Mask Segments

To edit a Mask:

1. Click  to show the detail part for the mask that you would like to edit.
2. Click  to edit an existing segment or  to add a new segment to the mask. (If the icon appears as , you cannot add segments.)
3. If necessary, edit or enter a length and a name for the segment. These fields are required for new segments.
4. (optional) Select a different mask type from the drop-down list.
5. (optional) Enter a **Lookup**.
6. (optional) Enter the values that can be used in the segment.
7. Click  to accept your changes.
8. Click  to save your masks.

Example

Let us say that you want to add and define a mask (C0ID) to be used on the IDs of Change Order documents. The mask will allow users to select the first segment (**E** for External/Owner change orders or **I** for Internal change orders) and sfPMS will automatically populate the second segment with a three-digit number. So Change Order IDs will follow the format I-001, I-002, I-003 and E-001, E-002, etc.

First Task

In order for the mask to appear in the Mask Maintenance tool, you first [edit your SiteConfig.xml file](#), as described on page 20.

Second Task

Second, using the Mask Maintenance tool, you configure the mask as shown below.

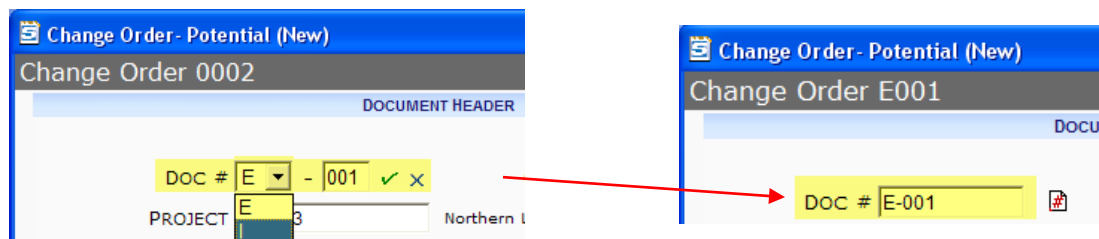
| MASK DEFINITIONS | | | | | | |
|------------------|--------------|------------|--|--|--|--|
| Mask Name | Max Segments | Max Length | | | | |
| C0ID | 6 | 16 | | | | |

| MASK DETAIL | | | | | | |
|-------------|--------|------|------------------------|--------|--------|--|
| Segment # | Length | Name | Mask Type | Lookup | Values | |
| 1 | 1 | Type | Uppercase Alphanumeric | | E,I | |
| 2 | 3 | Seqn | Numeric | | | |

Third Task

Third, you go to the Rules Maintenance tool and add the **DocTypeConfig | DocNoMaskName** rule to allow this Mask to be used on your Doc type. ([See page 104](#) for details.)

With the mask all set up, users can modify the default Doc # in Change Order documents:



Account Categories

Account Categories are easy-to-use versions of the accounting codes used by projects to track costs, revenue, assets and liabilities. Meant to be used by non-accountants, Account Categories de-emphasize account numbers. Instead, the user-defined categories with friendly labels such as "Labor," "Materials," "Equipment," and "Revenue" are used to budget and display job cost data on the screen and in printed output. The Account Category tool allows you to view and (if non-integrated) add Account Categories for use in sfPMS.

Note: sites that are integrated acquire Account Categories from the accounting system.

After Setup

BFA Workbook

Account Categories identify budget rows in the BFA workbook.

| | A | B | O |
|----|--|----------------------------|--------------|
| 1 | © Copyright 2007-2012 Spitfire Management, LLC. All Rights Reserved. | | |
| 2 | DEMO | Revise Budget (0005) (N,Y) | |
| 3 | Northern Lights Plaza | | |
| 4 | GC-003 | | |
| 5 | Totals as of: | 2/21/2012 @ 10:46 AM | \$575,000 |
| 6 | Filter: | Show All | \$575,000 |
| | Cost Codes | Description | Original EAC |
| 7 | | | |
| 9 | 00000 | Project | \$0 |
| 10 | 00000 | REVENUE | \$0 |
| 11 | 01000 | General Conditions | \$16,250 |
| 12 | 01000 | LABOR | \$7,500 |
| 13 | 01000 | MTRL PERM | \$0 |
| 14 | 01000 | OTHER | \$8,750 |
| 15 | 01700 | Contract Closeout | \$0 |
| 16 | 01700 | MTRL PERM | \$0 |
| 17 | 02000 | Site Work | \$73,875 |
| 18 | 02000 | EQ OWNED | \$0 |
| 19 | 02000 | EQ RENTAL | \$5,125 |
| 20 | 02000 | LABOR | \$18,750 |

Document Items Tab

Account Categories are used in the identification of Items on several Doc types such as Bid Package, CCO, Proposed CO and Change Order (in the Budget Entries), Commitment, RFQ:

| Item | Cost Code | Description | Include |
|----------|----------------------|-------------------------|-------------------------------------|
| 0001-001 | 16000- Electrical | General Electrical Work | <input checked="" type="checkbox"/> |

COST CODE: 16000- ACCT CATEGORY: LABOR

SOV Workbook

The SOV Workbook includes an Account Category column.

| A | B | C | I | J |
|--|-------------|--------------------|-------------------|------------------|
| © Copyright 2007-2012 Spitfire Management, LLC. All Rights Reserved. | | | | Account Category |
| Item No. | Control No. | Description | Revenue Cost Code | |
| 000100 | 000100 | General Conditions | 00000 | |
| 000200 | 000200 | Site Work | 00000 | |
| 000300 | 000300 | Concrete | 00000 | |
| 000400 | 000400 | Masonry | 00000 | |


Cost Analysis Detail

The Cost Analysis Detail part of a Project Dashboard displays financial information according to Account Category.














| COST ANALYSIS DETAIL | | | | | |
|----------------------|-----------|------|-----------|----------|----------|
| Account | EAC | U.CO | =Sum | Actual | Com Cost |
| _EQ OWNED | \$0 | \$0 | \$0 | \$8,800 | \$0 |
| _EQ RENTAL | \$5,125 | \$0 | \$5,125 | \$1,550 | \$0 |
| _LABOR | \$169,000 | \$0 | \$169,000 | \$875 | \$0 |
| _MTRL PERM | \$253,500 | \$0 | \$253,500 | \$31,939 | \$13,618 |

The Account Categories Part

When you select the Account Categories tool, the corresponding part appears:

Click  to refresh data from Microsoft Dynamics SL.

Integrated site:

| ACCOUNT CATEGORIES | | | | | | | | | | |
|---|----------------|-----------------------------|-----|----------------|-------|---------|-------------------------------|--------|---------|--------|
| NAME | | | | | TYPE | (any) ▼ | | | | |
| CLAS | | | | | | | | | | |
|  | Name | Long Name | Seq | Type | Class | Note | GL | Budget | Changes | Active |
|  | AP RETEN | Accounts Payable Retention | 0 | Liability | | | Accounts Payable - Retainage | × | × | ✓ |
|  | AR | Accounts Receivable - Trade | 0 | Asset | | | Accounts Receivable-Trade | × | × | ✓ |
|  | AR RETEN | Accounts Receivable - Reten | 0 | Asset | | | Accounts Receivable-Retention | × | × | ✓ |
|  | BILLED-TO-DATE | Billed-to-Date | 0 | Non Accounting | | | | × | × | ✓ |
|  | BONDING | Bonding | 0 | Expense | Other | | | ✓ | ✓ | ✓ |
|  | CLIENT DEP | Customer Deposits | 0 | Liability | | | Customer Deposits | × | × | ✓ |
|  | COGS | Cost of Goods Sold | 0 | Expense | | | Freight | × | × | ✓ |
|  | CONTRACT VALUE | Contract Value | 0 | Non Accounting | | | | × | × | ✓ |
|  | EQ COST APPL | Equipment Cost Applied | 0 | Expense | | | | × | × | ✓ |
|  | EQ DEPR | Equipment Depreciation | 0 | Expense | | | Equipment - Depreciation | × | × | ✓ |
|  | EQ FOG | Equipment Fuel, Oil, Gas | 0 | Expense | | | Equipment - Fuels/Lubricants | ✓ | ✓ | ✓ |
|  | EQ OWNED | Equipment Costs Owned | 0 | Expense | | | Equipment Cost Applied | ✓ | ✓ | ✓ |

1 2 3 4 5

These values are maintained in Microsoft Dynamics SL; if refreshed, any changes made here are discarded.

Non-integrated site:

| ACCOUNT CATEGORIES | | | | | | | | | |
|---|-------------|-----------------------|------------|-------------|--------------|-------------|---------------|----------------|---------------|
| NAME | | | | | TYPE | (any) ▾ | | | |
| CLASS | | | | | | | | | |
|   | Name | Long Name | Seq | Type | Class | Note | Budget | Changes | Active |
| | _EQ OWNED | Equipment Costs Owned | 0 | Expense | | | ✓ | ✓ | ✓ |

Columns



- **Name:** the name of the Account Category, up to 16 characters long.
- **Long Name:** a longer description of the category, up to 50 characters long.
- **Seq:** the lowest-to-highest sequence used to control the order that the categories are listed in reports. Where sequence is the same, categories are listed alphabetically.
- **Type:** Revenue, Expense or Non-Accounting.
- **Class:** a subset of Expense type, for example, Labor.
- **Note:** information about the category.
- **GL:** (*integrated sites only*) the General Ledger account for the category.
- **Budget:** whether (✓) or not (✗) the category is available for budgeting.
- **Changes:** whether (✓) or not (✗) the category is available for Change Orders in sfPMS.
- **Active:** whether (✓) or not (✗) the Account Category type can be used and selected in sfPMS.

Filters




- **Name:** Type the first few characters or use the wildcard (%) to find one or more Account Categories by Name.
- **Type:** Click the checkbox to select an Account Category Type from the drop-down menu.
- **Class:** Click the checkbox to select an Account Category Class from the drop-down menu.

Adding/Editing Account Categories

To add Account Categories to an integrated site:




1. Click . Account information from Microsoft Dynamics SL will appear.
Note: you cannot edit this account information in sfPMS, other than to uncheck the Active checkbox in order to make an Account Category inactive.
2. Click  to save.

To add Account Categories to a non-integrated site:

1. Click .
2. Fill in the fields for the row.
3. Click  to accept your changes.
4. Click  to save.

To edit an Account Category:

Note: integrated sites can change the Class, Budget, Changes and Active fields only.

1. Click  at the Account Category you want to change
2. Make your changes
3. Click  to accept the row.
4. Click  to save. 0.

Example

Let us say that you are not integrated with Microsoft Dynamics SL so you add some Account Categories manually. Note that the Seq numbers will determine the order of the Account Categories:







ACCOUNT CATEGORIES

NAME

TYPE

(any)

CLASS

| | Name | Long Name | Seq | Type | Class | Note | Budget | Changes | Active |
|---|--|------------------------|-----|----------------|-------|------|--------|---------|--------|
|  |  _EQ OWNED | Equipment Costs Owned | 30 | Expense | | | ✓ | ✓ | ✓ |
|  |  _EQ RENTAL | Equipment Costs Rental | 31 | Expense | | | ✓ | ✓ | ✓ |
|  |  _LABOR | Direct Labor | 20 | Expense | Labor | | ✓ | ✓ | ✓ |
|  |  _LBR BURDEN | Labor Burden | 25 | Expense | | | ✗ | ✓ | ✓ |
|  |  _MTRL EXPEND | Materials - Expendable | 50 | Expense | | | ✓ | ✓ | ✓ |
|  |  _MTRL MFG | Material - MFG | 51 | Non Accounting | | | ✓ | ✗ | ✓ |
|  |  _MTRL PERM | Material - Permanent | 52 | Expense | | | ✓ | ✓ | ✓ |
|  |  _OTHER | Other Costs | 100 | Expense | | | ✓ | ✓ | ✓ |

Doc Types

sfPMS ships with a full suite of Doc types. On the Doc Types tool, you can make some Doc types inactive and rename any Doc types to better suit your organization. In addition, you can create custom Doc types. Usually Doc types are established during the implementation stage, although the Doc Types tool can be used at any time.

After Setup

Active Doc types appear throughout the system by Site Name.

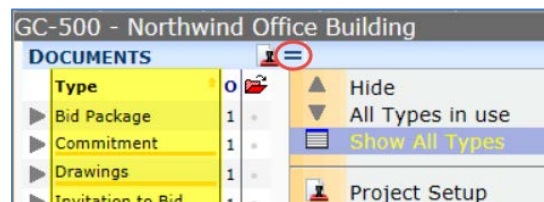
Inbox

Documents in your Inbox are identified by Doc type.

| INBOX | | | |
|--|-------|-------------|---------|
| Description | DocNo | Type | Project |
|  Initial Budget | 0001 | Budget | GC-500 |
|  Adjustments from 32 Ton Chiller/Evaporator | 0001 | Budget | GC-005 |
|  FO conduit connection details | 12345 | Submittal | GC-003 |
|  Forecast 0001 | 0001 | Forecast | GC-003 |
|  Pay Request 0001 for Paving and Asphalt | 0001 | Pay Request | GC-003 |

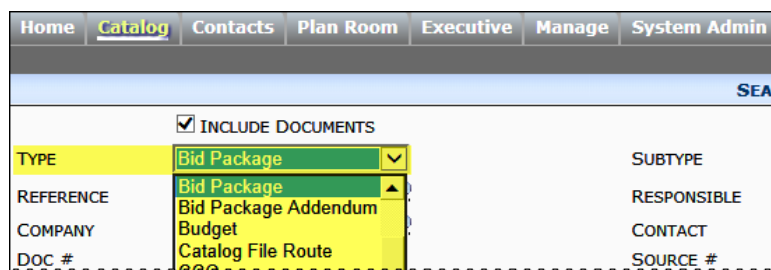
Project Documents Menu

In order to see all Doc types for which you have permission on a project, remember to select the **Show All Types** option.





Catalog

Doc type is a filter in the Catalog.





Routes Tool

The Route List can be filtered by Doc Type in the Routes tool.





| ROUTE LIST | |
|---|-------------------------------------|
| NAME: | <input type="text"/> |
| DOC TYPE | <input type="text" value="Budget"/> |
|  | Route Name |
|  | AP Voucher |

Also, Doc type can be a condition for a predefined route.

| RULES FOR SELECTED ROUTE | | | | | | |
|---|----------|----------------|---------|----------|--------|----------|
| CONTACT <input type="text"/> | | | | | | |
| <input type="checkbox"/> SHOW GLOBAL REFERENCE | | | | | | |
|  | Doc Type | Source Contact | Project | Priority | Status | Sub Type |
|  | Budget | | | | | |






Alert Subscriptions Tool

Alert Subscriptions can be set up for specific Doc types.

| ALERT SUBSCRIPTIONS | | | | | | |
|---|---|--------------|-------------|----------------------|-----------|--------------|
| DOC TYPE: | <input type="text" value="Change Order"/> | ROLE NAME | | <input type="text"/> | | |
| USER | <input type="text"/> | PROJECT | | <input type="text"/> | | |
| ALERT | <input type="text"/> | | | | | |
|  | User/Role | Alert | Description | Recurs | Lead Time | Doc Type |
|  | Doc Entered By | Document Due | | NA | 0 | Change Order |
|  | Senior Executive | Document Due | | NA | -3 | Change Order |
|  | Project Manager | Document Due | | NA | -1 | Change Order |

Compliance Types Tool

Compliance types can be mapped to specific Doc types.

| COMPLIANCE TYPES | | | | | | | | | | | |
|---|-----------------|--------|-----------|--------|------|-------------|--------|--------------|--------------|-------------|----------|
| NAMES LIKE: <input type="text"/> | | | | | | | | | | | |
|  | Compliance Name | Recurs | Lead Days | % Paid | Auto | Pay Control | Notify | Allow Amount | Check Amount | Allow Descr | All Car |
|  | Automobile Ins | NA | 0 | | ✓ | ✓ | ✓ | ✓ | × | ✓ | ✓ |
| MAPPINGS FOR 'AUTOMOBILE INS' COMPLIA | | | | | | | | | | | |
|  | Doc Type | | | | | | | | | | Sub Type |
|  | Commitment | | | | | | | | | | |
|  | Vendor | | | | | | | | | | |

Date Types Tool

Date types can be set up for specific Doc types.

| DOC DATE TYPES | | | | |
|---------------------------------------|------------|--------------------|----------|-------------|
| DATE NAMES LIKE: <input type="text"/> | | | | |
| DOC TYPE: Commitment | | | | |
| | Doc Type | Doc Date Name | Sequence | Is Required |
| | Commitment | Original | 10 | X |
| | Commitment | Revised | 30 | X |
| | Commitment | Commitment Current | 60 | ✓ |

Reference Tool

References can be set up for specific Doc types.

| REFERENCE LIST | | |
|--------------------------------------|------------|------------------|
| REFERENCE LIKE: <input type="text"/> | | |
| DOC TYPE: Commitment | | |
| | Doc Type | Reference |
| | Commitment | Concrete/Masonry |
| | Commitment | Designer |
| | Commitment | Draftsman |

Templates

Templates can be uploaded for a specific Doc type.

| TEMPLATES | | | | | | | |
|----------------------------------|------------|-------------|-------------------|----------------------|----------|---------|-----|
| NAMES LIKE: <input type="text"/> | | | | | | | |
| TYPE: Attachment (auto) | | | | | | | |
| DOC TYPE: Commitment | | | | | | | |
| | Doc Type | Name | Type | Description | Division | Doc Ref | Cus |
| | Commitment | Cost Plus | Attachment (auto) | Contract Cost Plus | | | |
| | Commitment | Fixed Price | Attachment (auto) | Contract Fixed Price | | | |
| | Commitment | T & M | Attachment (auto) | Contract T & M | | | |

UI Configuration Tool

Documents are configured through Doc type.

| UI CONFIGURATION TOOL | | | | | | | | | | |
|---|-----------------------|--------------|---------|------------|-------------|--------|---------|----|--------|-----|
| DOC TYPE: Change Order | | | | | | | | | | |
| PART: <input type="text"/> | | | | | | | | | | |
| ITEM: <input type="text"/> | | | | | | | | | | |
| <input type="checkbox"/> SHOW LIVE CONFIGURATION <input checked="" type="checkbox"/> SHOW VISIBLE ONLY | | | | | | | | | | |
| | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq |
| | Doc Detail - Standard | Change Order | | | Post Period | | ✓ | X | | |
| | Doc Detail - CO | Change Order | | | MarkupAmt | Profit | ✓ | ✓ | | |

Rules Maintenance Tool

Many rules use Doc type as a filter.

| RULE MAINTENANCE | | | | |
|---|-------------|--------------|--------------|--------------------|
| GROUP: <input type="text"/> | | | | |
| <input type="checkbox"/> SHOW CODE SET | | | | |
| | Rule Group | Filter Info | Type | Description |
| | DocApproved | DocTypeKey | Boolean | Lists the approval |
| RULE ENTRIES | | | | |
| RULE NAME <input type="text"/> | | | | |
| Doc TYPE <input type="text" value="CCO"/> | | | | |
| <input type="checkbox"/> SITE ONLY | | | | |
| | Rule | Filter Value | Result Value | |
| | A | CCO | ✓ | |
| | M | CCO | ✓ | |

The Doc Types Part

When you select the Doc Types tool, the corresponding part appears:
Note: inactive Doc types are hidden by default.

| DOC TYPES | | | | | | | | |
|-------------------------------------|-------------------------|-------------------|--|------------|-----------|-------------|--------|--|
| DOC TYPE LIKE: <input type="text"/> | | | <input type="checkbox"/> SHOW INACTIVE DOC TYPES | | | | | |
| Doc Type | Site Name | Project Dashboard | Create From Dashboard | Cloud Sync | Plan Room | Site Active | Custom | |
| Bid | Bid | ✓ | ✓ | × | × | ✓ | × | |
| Bid Package | Bid Package | ✓ | ✓ | × | ✓ | ✓ | × | |
| Bid Package Addendum | Bid Package Addendum | ✓ | ✓ | × | ✓ | ✓ | × | |
| Budget | Budget | ✓ | ✓ | × | × | ✓ | × | |
| Catalog File Router | Catalog File Route | × | × | × | × | ✓ | × | |
| CCO | CCO | ✓ | ✓ | × | × | ✓ | × | |
| Change Item Register | Change Item Register | × | × | × | × | ✓ | × | |
| Change Order | Change Order | ✓ | ✓ | × | × | ✓ | × | |
| Commitment | Commitment | ✓ | ✓ | × | × | ✓ | × | |
| Compliance Notification | Compliance Notification | ✓ | × | × | × | ✓ | × | |
| Correspondence | Correspondence | ✓ | ✓ | × | × | ✓ | × | |

Columns

- **Doc Type:** the name of the document type as shipped by Spitfire. Also, the required name you give a new Doc type.
- **Site Name:** the name of the Doc type at your site.
- **Project Dashboard:** whether (✓) or not (×) the Doc type appears on the Documents menu of the Project Dashboard. This option cannot be changed for Spitfire-created Doc types.
- **Create From Project Dashboard:** whether (✓) or not (×) users can create a document of this type from the Project Dashboard.
- **Cloud Sync:** whether (✓) or not (×) the Doc type can be included in cloud storage. For more information, see the [Setup for Cloud Drive Integration](#) technical white paper.



- **Plan Room:** whether (✓) or not (✗) the Doc type can be included on the Plan Room Dashboard.
- **Site Active:** whether (✓) or not (✗) the Doc type can be used and selected in sfPMS.
- **Custom:** whether the Doc type was created at the site (✓) or by Spitfire (✗).

Filters

- **Doc Type Like:** Type the first few characters or use the wildcard (%) to find one or more Doc types by Site Name.
- **Show Inactive Doc Types:** Click the checkbox to include inactive Doc types on the Doc Types list.



Adding Doc Types

To create a new Doc type:

1. Click  at the Doc Types tool.
2. Enter a unique name for your document type in the **Doc Type** field.
3. *(optional)* If you want to change the status of the **Create From Project Dashboard**, **Public** or **Site Active**, click the checkbox.
4. Click ✓ to accept the row.
5. Click  to save your changes.
6. Configure your new Doc type as described in the [UI Configuration](#) chapter, beginning on page **Error! Bookmark not defined..** Your new Doc type will appear on the Doc Type drop-down on the UI Configuration part.

Editing Doc Types


To edit an existing Doc Type:

1. Find the Doc type that you want to edit and click .
2. *(optional)* If you want to change the name of the Doc type, enter a new name at the **Site Name** field.
3. *(optional)* If you want to change the status of the **Create From Project Dashboard**, **Public** or **Site Active**, click the checkbox.
4. Click ✓ to accept the row.
5. Click  to save your changes.

Copying a Doc Type's GUID

Every Doc type has its own global unique identifier (GUID). This GUID is sometimes needed in the Rules Maintenance tool and in workflow scripts.





To copy a Doc type's GUID to a clipboard:

1. On the Doc Types tool, find the Doc type for which you need the GUID.
2. Click . The GUID will be copied to your Windows clipboard. You can paste the GUID where needed through usual paste commands (such as Ctrl + V).

Example



First Task

First, you look over the Doc types and decide to make **Invitation to Bid** inactive because your site will not be using it.

| DOC TYPES | | | | | | | | |
|---|-------------------|-------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| DOC TYPE LIKE: <input type="text" value="In"/> | | | <input checked="" type="checkbox"/> SHOW INACTIVE DOC TYPES | | | | | |
|  | Doc Type | Site Name | Project Dashboard | Create From Dashboard | Cloud Sync | Plan Room | Site Active | Custom |
|  | Inspection | Inspections | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|  | Inv & Adj | Inv & Adj | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|  | Invitation to Bid | Invitation to Bid | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |



Second Task

Second, you make the AR Invoice Doc type (hidden by default) site-active.

| DOC TYPES | | | | | | | | |
|---|------------|------------|---|--------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|
| DOC TYPE LIKE: <input type="text" value="AR"/> | | | <input checked="" type="checkbox"/> SHOW INACTIVE DOC TYPES | | | | | |
|  | Doc Type | Site Name | Project Dashboard | Create From Dashboard | Cloud Sync | Plan Room | Site Active | Custom |
|  | AR Invoice | AR Invoice | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Third Task

Third, you find the Commitment Doc type and change its name to Subcontract:

| DOC TYPES | | | | | | | | |
|---|------------|-------------|---|-------------------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|
| DOC TYPE LIKE: <input type="text" value="com"/> | | | <input checked="" type="checkbox"/> SHOW INACTIVE DOC TYPES | | | | | |
|  | Doc Type | Site Name | Project Dashboard | Create From Dashboard | Cloud Sync | Plan Room | Site Active | Custom |
|  | Commitment | Subcontract | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

UI Configuration

Much of what you see in sfPMS is configurable. The UI (User Interface) Configuration tool allows you to display or hide fields, change field labels, and add or delete tabs on a Doc type. **Note:** prior to V4.5, the UI Configuration tool was called the Customization tool.

Concepts

The UI Configuration tool uses the term **Part** to indicate the “where” of what needs to be configured and the term **Item** to indicate the “what” of what needs to be configured. For example, the Doc Dates part refers to the document’s Dates tab and the items refer to each field that can be configured on the Dates tab:

Tip

To see which Doc types use which Parts, see [Appendix C](#) on page 143.

UI CONFIGURATION TOOL

DOC TYPE: [dropdown]

PART: [dropdown] Doc Dates

ITEM: [dropdown] Description Col

DESCRIPTION

- Description Col
- Done Col
- Finish Col
- Lead Time Col
- Note Col
- Start Col

Where appropriate, configurations are made for specific Doc types.

After Setup

Documents

Most aspects of a document, from Document Header to mid-section tabs to the Attachments and Route Detail tabs, can be configured.

Commitment- In Process

Commitment 0001

DOCUMENT HEADER

DOC# 0001

PROJECT GC-500 Northwind Office Building

DESCRIPTION Commitment 0001

VENDOR [dropdown]

COMMITMENT TYPE [dropdown]

CONTRACT TYPE Cost Plus Fee

TERMS 2% 10 Days, Net 30 Days

PAY STATUS No primary contact document

APPROVED BY [dropdown]

STATUS In Process

DATE 05/12/2015 DUE 05/13/2015 APPROVED [dropdown]

Details Scope Addr Payees Dates Items Incl/Excl Compliance

TAX HANDLING No Tax

RETENTION %

OWNER DIRECT [checkbox]

POST TO

ORIGINAL \$0.00

APPROVED COs \$0.00

CURRENT AMOUNT \$0.00

ORIGINAL X EAC X FAC X

PENDING COs \$0.00

TOTAL w/PENDING \$0.00

Attachments Route Detail

| Seq | To | Status | Ins | Rsp | Notes | Due |
|-----|------------------------------|---------|-----|-----|-------|---|
| 1 | Chris Demo (Project Manager) | Pending | | | | Due: May 12 15:18 Viewed: May 12 04:10 |

THIS STAGE [checkbox] CONFIDENTIAL [checkbox] PRIORITY Medium

SPITFIRE

Inbox

The columns of the Inbox can be configured.

| INBOX | | | | | | | |
|--|-------|-----------|---------|-----------|------------|-----------------------|----------|
| Description | DocNo | Type | Project | Due | Status | Company | Priority |
| Initial Budget | 0001 | Budget | GC-500 | | Approved | Spitfire Construction | |
| Adjustments from 32 Ton Chiller/Evaporator | 0001 | Budget | GC-005 | | In Process | Spitfire Construction | |
| FO conduit connection details | 12345 | Submittal | GC-003 | 5/10/2015 | Open | Able Electric | |
| Forecast 0001 | 0001 | Forecast | GC-003 | 5/10/2015 | In Process | Spitfire Construction | |

Project Dashboard

The columns of the document list can be configured.

| RFQ - 9 OPEN DOCUMENTS; 1 OVERDUE; 1 DUE THIS WEEK | | | | | | | | |
|--|----------|---------------------------|-------------|-----------|-----------|--------------------------|------------|----------|
| | Doc No | Description | Amount | Date | Due | Company | Status | Priority |
| | 327-0008 | 32 Ton Chiller/Evaporator | \$0.00 | 2/2/2010 | 2/5/2010 | Spitfire Construction | In Process | |
| | 327-0007 | 32 Ton Chiller/Evaporator | \$0.00 | 5/12/2015 | 5/28/2015 | Baldwin Construction | In Process | |
| | 327-0006 | 32 Ton Chiller/Evaporator | \$0.00 | 4/30/2015 | 5/28/2015 | Able Electric Corp | In Process | |
| | 327-0005 | 32 Ton Chiller/Evaporator | \$42,000.00 | 4/30/2015 | 5/28/2015 | Consolidated HVAC Supply | Bid Back | |

Some of the columns on the Team Contacts part can be configured.

| TEAM CONTACTS | | | | | |
|---------------|-----------------|-----------------------|----------------|--------------------|-------------------|
| | Name | Company | Phone | Role | Contact's Project |
| | Jack McSwag | Spitfire Construction | (914) 273-0809 | Project Manager | |
| | Jason Sunderson | Able Electric Corp | (555) 555-1212 | Subcontractor Base | AB0101 |
| | Chris Demo | Spitfire Construction | (203) 952-6552 | Superintendent | |

The Cost Analysis Detail part can be configured.

| COST ANALYSIS DETAIL | | | | | | | | | |
|----------------------|-----------|---------|-----------|---------|----------|----------|---------|-----------|----------|
| Account | EAC | U.CO | =Sum | Actual | Com Cost | =A+C | Spent | FAC | Variance |
| EQ PARTS | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | n/a | \$0 | \$0 |
| REVENUE | \$750,000 | \$2,925 | \$752,925 | \$0 | \$0 | \$0 | n/a | \$750,000 | \$2,925 |
| _SUB | \$138,625 | \$0 | \$138,625 | \$5,350 | \$21,004 | \$26,354 | 19.01 % | \$138,625 | \$0 |
| LABOR | \$169,000 | \$0 | \$169,000 | \$0 | \$0 | \$0 | 0.00 % | \$169,000 | \$0 |

The Key Performance Indicators display on the Project Dashboard can be configured.

| KEY PERFORMANCE INDICATORS | | | | |
|----------------------------|-----------|--------------|-----------|--------------------------|
| Contracts & Budgets | | AR Summary | | Project Cash Flow |
| Original Contract | \$750,000 | | | Billed to Date \$1,250 |
| Posted CO | \$0 | AGED AR | | Less Open AR \$0 |
| Current Contract | \$750,000 | Under 30 | \$0 | Less Retention \$125 |
| Unposted CO | \$0 | 30 - 60 Days | \$0 | CASH IN \$1,125 |
| Original Commitment | \$46,354 | 60 - 90 Days | \$0 | |
| Approved CCO | \$8,419 | Over 90 | \$0 | AP Cost to Date \$13,759 |
| Current Commitment | \$54,773 | | TOTAL \$0 | Less Open AP \$5,350 |
| Pending Commitment | \$1,200 | | | Less Retention \$0 |
| Approved Pay Request | \$5,350 | UNBILLED | | AP Cash Out \$316 |
| Commitment Remaining | \$36,153 | Under 30 | \$0 | Other Cash Out \$0 |
| Original EAC | \$575,000 | 30 - 60 Days | \$0 | NET CASH FLOW \$809 |

Filters

The filters on the Catalog Dashboard, Doc Items, Inbox, Change Item Register, Cost Analysis, Project Doc List, and Executive Dashboard can all be configured.

SEARCH

☒ INCLUDE DOCUMENTS

TYPE

☐ INCLUDE FILES

SUBTYPE

REFERENCE

COMPANY

DOC #

☒ 05/12/2014 → 05/13/2015

DATE

☐ INCLUDE CLOSED

HAS ATTRIBUTE

PROJECT ID

PER PAGE

17

Search

☐ AUTO REFRESH

RESPONSIBLE

CONTACT

SOURCE #

DUE

5/13/2015 → 5/13/2015

STATUS

HAS FILES

Either

MAX ITEMS

200

TEXT

The UI Configuration Tool Part

When you select the UI Configuration tool, the corresponding part appears:

UI CONFIGURATION TOOL

DOC TYPE: CCO

ITEM:

PART: Doc Detail - CCO

☒ SHOW LIVE CONFIGURATION

☒ SHOW VISIBLE ONLY

| | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag | Extended | SF | Active |
|--|------------------|----------|---------|------------|----------------|-------|---------|----|--------|-----|--------|--------|------|-----|---------|----------|----|--------|
| | Doc Detail - CCO | CCO | | | Approved Days | | ✓ | ✗ | | | | | | | 0 | | ✓ | ✓ |
| | Doc Detail - CCO | CCO | | | Sched Imp:Req | | ✓ | ✗ | | | | | | | 0 | | ✓ | ✓ |
| | Doc Detail - CCO | CCO | | | Total Estimate | | ✓ | ✓ | | | | | | | 0 | | ✓ | ✓ |
| | Doc Detail - CCO | CCO | | | Amount (Exp) | | ✓ | ✓ | | | | | | | 0 | | ✓ | ✓ |
| | Doc Detail - CCO | CCO | | | Total Quote | | ✓ | ✓ | | | | | | | 0 | | ✓ | ✓ |

Last loaded Configuration at 08:22:48.10

Click on an item name in the grid to update the guide picture

Details

Scope

Addr

Items

Incl/Excl

TITLE

Changes for CO 0001-002: Outlets in Lobby

SOURCE

REV NUMBER

0: Current Revision

REASON

CREATED

6/9/2006

SCHEDULE IMPACT:REQ

DAYS

APPROVED

DAYS

TOTAL ESTIMATE

\$0.00

TOTAL QUOTE

\$0.00

AMOUNT

\$1,200.00

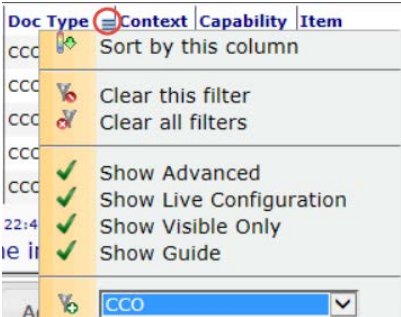
For Configuration information, tips and some examples, see the KBA and Focus on System Administration guide

Show Live Configuration lets you see what Items have been changed from the internal defaults (Spitfire Configurations) as well as your configurations.

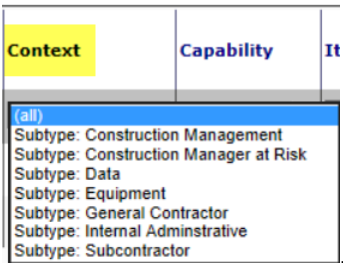
Only visible items are listed if you Show Visible Only.

Columns

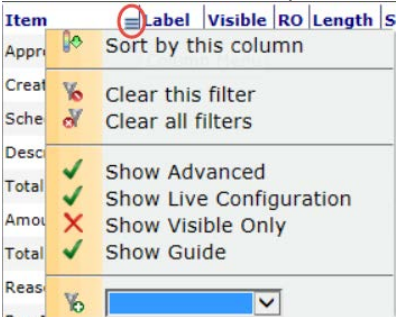
- **Part Name:** the name of the Part. Parts refer to the visual aspects of sfPMS.
- **Doc Type:** the document type that you are customizing or have customized. This column offers a drop-down sort/filter menu:



- **Context:** the system context in which you want to limit the configuration. Most configurations do not need Context to be specified but, with this option, you can have something look different in different areas of the system. This column can be sorted by clicking on the header **This column offers subtypes (if any) in a drop-down menu of choices in editing mode; (all) is the default:**




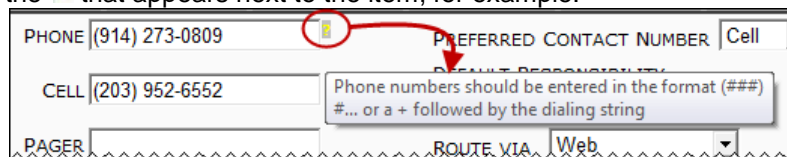
- **Capability:** the role capability by which you want to limit access to the configured item. When specified, this field overrides visible and read-only settings for this configuration and only users with this particular capability will be able to see and use the item (depending on the permissions given to the capability). Other users will not see the item at all. See page 144 [for examples](#) and more information. This column can be sorted by clicking on the header.
- **Item:** the specific item in the Part. Items identify fields, drop-downs, date fields, checkboxes, tabs, columns and a combination of these within documents and Spitfire dashboards. This column offers a drop-down sort/filter menu:




- **Label:** the label for the Item on the document. If left blank, the Spitfire default is used. This column can be sorted by clicking on the header.
Note: this field supports in-field editing. [See page 45.](#)
- **Visible:** whether or not the Item is visible on the specified Doc type. Making an Item not visible is the same as “removing” it from sight.
- **RO:** whether or not the item is read-only.
This checkbox does not apply when you use capabilities. Also, a warning message appears if an item is meant to be read-only and you do not have RO checked.
- **Length:** the maximum number of characters a user can type in a text field. This column can be sorted by clicking on the header.
- **Seq:** the sequence number that indicates the order that tabs appear on the document, for example, 10 then 20 then 30, etc. See [KBA-01328](#) for more information. This column can be sorted by clicking on the header.
- **Lookup:** the name of the lookup used for this field (as it appears in the xsfLookup SQL table with no spaces). This column can be sorted by clicking on the header. Some common lookup names are
 - **CompanyContactList** – Active Contacts by Company
 - **CustomerList** – Active Customer Company List (primary)
 - **CustomerContactList** – Active Customer Contacts (primary and secondary)
 - **FullContactList** – Active Contacts
 - **UserContactList** – Active Spitfire Users
 - **UserEmployeeContact** – Active Spitfire Users that are also employees
 - **SubcontractorList** – Active Primary Spitfire Vendor Contacts with project purchasing flag
 - **VendorContactList** – Active Spitfire Vendor Contacts

Note: this field supports in-field editing. [See page 45.](#)

- **Format:** a standard .NET format specification, such as F2 or C2. This column can be sorted by clicking on the header.
Note: this field supports in-field editing. [See page 45.](#)
- **Help:** the text that appears when a user moves the mouse over the  that appears next to the item, for example:



PHONE (914) 273-0809  PREFERRED CONTACT NUMBER Cell

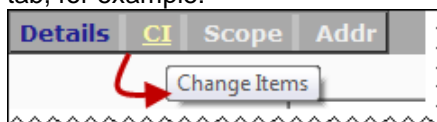
CELL (203) 952-6552 Phone numbers should be entered in the format (###) #... or a + followed by the dialing string

PAGER ROUTE VIA Web

This column can be sorted by clicking on the header.

Note: this field supports in-field editing. [See page 45.](#)

- **Tip:** the text that appears when a user moves the mouse over a tab, for example:



This column can be sorted by clicking on the header.

Note: this field supports in-field editing. [See page 45.](#)

- **Rq Flag:** if and when a value is required in the field. This column can be sorted by clicking on the header.
 - **0** – no value is required in the field
 - **1** – a value is required in the field before the document can be saved, even on a brand new document
 - **2** – a value is required in the field before the document can be saved, after the initial save (and creation) of the document
 - **4** – a value is required in the field before the document can be saved into a pending state (e.g., status = Pending or Committed)
 - **8** – a value is required in the field before expenses can be posted
 - **16** – a value is required in the field before revenue can be posted
 - **32** – a value is required in the field before the document can be set to any closed status
 - **64** – a value is required in the field before the document can be saved into an approved state (e.g., status = Approved)
- **Extended:** one or more of the advanced options available for configuration. Several of these options are quite advanced and require an understanding of the Spitfire Lookup and Validation engine, which is documented in the Spitfire Developers Primer. See [KBA-01336](#) and [KBA-01362](#) for more information and examples.



Note: this field supports in-field editing. [See page 45.](#)
- **SF:** whether the row represents a Spitfire or user configuration.
 - ☒ indicates an underlying Spitfire internal default.
 - ☒ indicates a Spitfire configuration.
 - ☐ indicates a user configuration.
- **Active:** whether or not the configuration in this row is to be used. Making a row inactive is a way to quickly remove a configuration without deleting it.

TIP

Indicate C2 as the Format for items in the Project KPI part if you want decimals to appear on the Key Performance Indicators.

Warnings

If there is an incorrect configuration, the  icon appears on the row:

|  | Part Name | Doc Type | Capability | Item |
|---|--------------|----------|------------|--------|
|  | Doc Attendee | Warranty | | Amount |
| Warning: Unrecognized option: [width] Request CSTM:Internal Staff Approved Date | | | | |









Filters

The filters in the UI Configuration tool work together to display different results.

Doc Type


- Select a **Doc Type** from the drop-down to see configurations just for the Doc type:

Items in Parts that you have configured for this Doc Type are listed here, especially if you **Show Live Configuration**.

| UI CONFIGURATION TOOL | | | | | | | |
|---|-----------------------|-------------|---------|---------------------|---------------|---------------------|---------|
| DOC TYPE: Bid Package | | PART: | | | | | |
| ITEM: | | | | | | | |
| | | | | | | | |
|  | Part Name | Doc Type | Context | Capability | Item | Label | Visible |
|  | Doc Detail - CCO | Bid Package | (all) | | Approved Days | Approved | ✓ |
|  | Doc Items | Bid Package | | | Billable Col | Include | ✓ |
|  | Doc Header - Standard | Bid Package | | CSTM:Internal Staff | Contract Type | | ✓ |
|  | Doc Items | Bid Package | | | Cost Code Col | | ✓ |
|  | Doc Detail - CCO | Bid Package | (all) | | Created Date | Created | ✓ |
|  | Doc Tabs | Bid Package | | | Dates Tab | | ✓ |
|  | Doc Detail - CCO | Bid Package | (all) | | Sched Imp:Req | Schedule Impact:Req | ✓ |

Part

- Select a Spitfire **Part** from the drop-down menu and see which part it is, for example:

| UI CONFIGURATION TOOL | | | | | | | | | | | |
|--|-----------|----------|---------|------------|------|-----------------------|---------|----|--------|-----|--------|
| DOC TYPE: | | | | PART: | | Doc Header - Standard | | | | | |
| ITEM: | | | | | | | | | | | |
| | | | | | | | | | | | |
|  | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup |
| Last loaded Configuration at 08:22:48.10 | | | | | | | | | | | |
| This SFDBX column is stored in DocMeetingAttendee.Amount; data type Decimal; SQL table xsfmeetingattendee; size (n/a) | | | | | | | | | | | |
| DOCUMENT HEADER | | | | | | | | | | | |
| DOC# 0002 SOURCE# PROJECT GC-500 Northwind Office Building DESCRIPTION Drawings 0002 SOURCE CUSTOMER APPR RESPONSIBLE TYPE % PROB CONTRACT TYPE SOURCE STATUS In Process PRIORITY Medium APPROVED DATE DUE SOURCE | | | | | | | | | | | |

- If you also select a Doc Type (and **Show Live** Configuration is on), you will see a list of the configurations on that part, for example:

UI CONFIGURATION TOOL



























DOC TYPE:Bid Package

PART:Doc Header - Standard

ITEM:

☒ SHOW LIVE CONFIGURATION

☒ SHOW VISIBLE ONLY

|   | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help |
|---|-----------------------|-------------|---------|---------------------|----------------|--------------|--|---|--------|-----|--------|--------|------|
|  | Doc Header - Standard | Bid Package | | CSTM:Internal Staff | Contract Type | |  |  | | | | | |
|  | Doc Header - Standard | Bid Package | (all) | | Date | Date |  |  | 0 | 0 | | | |
|  | Doc Header - Standard | Bid Package | (all) | | Due Date | Due |  |  | 0 | 0 | | | |
|  | Doc Header - Standard | Bid Package | (all) | | Doc Num | Doc # |  |  | 0 | 0 | | | |
|  | Doc Header - Standard | Bid Package | (all) | | Project | Project |  |  | 0 | 0 | | | |
|  | Doc Header - Standard | Bid Package | | | Adv Project RO | 0 |  |  | | | | | |
|  | Doc Header - Standard | Bid Package | (all) | | Show Expanded | ShowExpanded |  |  | 0 | 0 | | | |
|  | Doc Header - Standard | Bid Package | | CSTM:Internal Staff | Type | |  |  | | | | | |

Item

- Select an **Item** from the drop-down menu and see where that item appears on the part.
- Note:** you should always select a Part before selecting an Item.

| UI CONFIGURATION TOOL | | | | | | | | | | | | | |
|---|--------------------|---------|------------|----------|-----------------------|---------|----|--|-----|--------|--------|------|-----|
| DOC TYPE: | | | | PART: | Doc Header - Standard | | | <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION <input checked="" type="checkbox"/> SHOW VISIBLE ONLY | | | | | |
| ITEM: | Priority Drop Down | | | | | | | | | | | | |
| Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip |
| Last loaded Configuration at 08:22:48.10 | | | | | | | | | | | | | |
| This element is stored in DocHeader.Priority; data type Int16; SQL table xsfdocheader; size 5 | | | | | | | | | | | | | |
| DOCUMENT HEADER | | | | | | | | | | | | | |
| DOC# | 0002 | | | SOURCE# | | | | | | | | | |
| PROJECT | GC-500 | | | | | | | | | | | | |
| DESCRIPTION | Drawings 0002 | | | | | | | | | | | | |
| SOURCE | | | | | | | | | | | | | |
| CUSTOMER | | | | | | | | | | | | | |
| APPR | | | | | | | | | | | | | |
| RESPONSIBLE | | | | | | | | | | | | | |
| TYPE | | | | % PROB | | | | | | | | | |
| CONTRACT TYPE | | | | SOURCE | | | | | | | | | |
| STATUS | In Process | | | PRIORITY | Medium | | | | | | | | |
| APPROVED | | | | | | | | | | | | | |
| DATE | | | | DUE | | | | SOURCE | | | | | |

Additional information for this item (needed for templates and reports) is given here.

The item is highlighted in the image.

- If you also select a Doc Type (and perhaps **Show Live Configuration**), you will see a list of how that item has been configured for that Doc type, for example:

UI CONFIGURATION TOOL

DOC TYPE: PART:
 ITEM: ☒ SHOW LIVE CONFIGURATION
☒ SHOW VISIBLE ONLY

| Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag | Ex |
|-----------------------|----------|---------|------------|------------|---------|---------|----|--------|-----|--------|--------|------|-----|---------|----|
| Doc Header - Standard | CCO | (all) | | Source Num | Source# | ✓ | × | 0 | 0 | | | | | 0 | |

Last loaded Configuration at 08:22:48.10
 This element is stored in DocHeader.SourceDocNo; data type String; SQL table xsfdocheader; size 40

DOCUMENT HEADER

Doc# SOURCE#
 PROJECT GC-500 Northwind Office Building

Show Live Configuration

- Click the **Show Live Configuration** checkbox to see all configurations and Spitfire defaults for a Doc type (and, optionally, a specific Part and Item). If you do not check this option, only your own configurations and not Spitfire defaults will appear.

UI CONFIGURATION TOOL

DOC TYPE: PART:
 ITEM: ☐ SHOW LIVE CONFIGURATION
☐ SHOW VISIBLE ONLY

| Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag | Extended | SF |
|-----------------------|----------|---------|------------|-------------|-------|---------|----|--------|-----|--------|--------|------|-----|---------|----------|--------------------------|
| Doc Detail - Standard | CCO | | | Post Period | | ✓ | × | | | | | | | 0 | / | <input type="checkbox"/> |

Last loaded Configuration at 08:22:48.10
 This element is stored in DocHeader.SourceDocNo; data type String; SQL table xsfdocheader; size 40

(No Image Available)

UI CONFIGURATION TOOL

DOC TYPE: PART:
 ITEM: ☒ SHOW LIVE CONFIGURATION
☐ SHOW VISIBLE ONLY

| Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag | Extended | SF |
|-----------------------|----------|---------|------------|---------------------|-------|---------|----|--------|-----|--------|--------|------|-----|---------|----------|-------------------------------------|
| Doc Item Detail - CCO | CCO | | | Account Category | | ✓ | × | | | | | | | 0 | | <input checked="" type="checkbox"/> |
| Doc Items | CCO | | | Category (Acct) Col | | ✓ | × | | | | | | | 0 | | <input checked="" type="checkbox"/> |
| Doc Detail - CCO | CCO | | | Approved Days | | ✓ | × | | | | | | | 0 | | <input checked="" type="checkbox"/> |
| Doc Detail - Standard | CCO | | | Post Period | | ✓ | × | | | | | | | 0 | / | <input type="checkbox"/> |

Show Visible Only

- Click the **Show Visible Only** checkbox to display only configurations that are visible (i.e., that have the Visible column checked).

| UI CONFIGURATION TOOL | | | | | | | | | | | | | | | | |
|-----------------------|-----------------------|----------|---------|------------|---------------------|---|---------|----|--------|-----|--------|--------|------|-----|---------|-----|
| DOC TYPE: | | CCO | | PART: | | | | | | | | | | | | |
| ITEM: | | | | | | <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION <input checked="" type="checkbox"/> SHOW VISIBLE ONLY | | | | | | | | | | |
| | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag | Ext |
| | Doc Item Detail - CCO | CCO | | | Account Category | | ✓ | × | | | | | | | 0 | |
| | Doc Items | CCO | | | Category (Acct) Col | | ✓ | × | | | | | | | 0 | |
| | Doc Detail - CCO | CCO | | | Approved Days | | ✓ | × | | | | | | | 0 | |
| | Doc Detail - Standard | CCO | | | Post Period | | ✓ | × | | | | | | | 0 | |


Configuring Doc Types

Adding Items

If your Doc type or other Spitfire area (e.g., the Executive Summary) is missing an item (field, checkbox, tab, etc.), you can easily add that item to the Doc type or area. What you are really doing is making that item visible on the Doc type or area.

To add an item:

- (if applicable) Select a **Doc Type** from the drop-down menu.
Note: some parts refer to areas in Spitfire, such as the Executive Summary, and not to Doc types.
- Determine what part holds the item you want to add. Use [Appendix C](#) on page 143 for help.
- Select the **Part** you want from the drop-down menu. The image that appears will show you the items that are in that part.
- Select the specific **Item** you want to add from the drop-down menu. Some trial and error might be needed. Use the image that appears to help you realize which item you want. Keep in mind that labels can be changed.
- Click the **Show Visible Only** checkbox to uncheck it.
- (if necessary) Click the **Show Live Configuration** checkbox if it is not already checked. A row with the Part and Item for the Doc type should appear.

7. Click  to copy the row, for example:.

UI CONFIGURATION TOOL

DOC TYPE: PART: ITEM:

☒ SHOW LIVE CONFIGURATION ☐ SHOW VISIBLE ONLY

| Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup |
|-----------------------|----------------|---------|------------|------------|----------|-------------------------------------|-------------------------------------|--------|-----|--------|
| Doc Detail - Standard | Correspondence | (all) | | Related To | IssueRef | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 | 0 | |
| Doc Detail - Standard | Correspondence | (all) | | Related To | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | |

8. (optional) If you want to limit this item by capability, [look up the Capability](#). You may need to use filters to find the capability you want. (See also page 144.)

Lookup Dialog




Capability List

☒ ALL FILTERS

UCMODULE DESCRIPTION PERMITS

| Pick | UCModule | Description |
|-------------------------------------|----------|----------------|
| <input checked="" type="checkbox"/> | CSTM | Customizable 1 |
| <input checked="" type="checkbox"/> | CSTM | Customizable 2 |
| <input checked="" type="checkbox"/> | CSTM | Customizable 3 |
| <input checked="" type="checkbox"/> | CSTM | Internal Staff |




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9. (optional) If you want a specific label, enter it in the **Label** field. All labeled items have a default label so you can leave this field blank.
10. Assuming you want this item to be visible on documents and active (turned on), leave those checkboxes alone.
11. Click  to accept your changes.
12. (optional) If you want to add another item in the same part for the same Doc type, click  and this time select a different Item from the drop-down.
13. Click  to save all your changes.

Editing Spitfire-Defined Items

If you want to change a Spitfire default or configuration on a Doc type (for example, the label), or if you want to remove an item (field, checkbox, etc.) that was placed there by Spitfire, you need to change the configuration for that item. For example, if you want to change the label of a Responsible field on a Correspondence document to "Foreman," you would need to copy the **Responsible** item (on the Doc Header – Standard part) on the Correspondence Doc type and give it a label of **Foreman**. And if you want to remove the Responsible field from the Bid document, you would need to copy the **Responsible** item on the Bid Doc type and make it not visible. Your configurations override the configurations and defaults of the document.



To edit a Spitfire-defined item:

1. *(if applicable)* On the UI Configuration tool, select a **Doc Type** from the drop-down menu.
Note: some parts refer to areas in Spitfire, such as the Executive Summary, and not to Doc types
2. Select the **Part** you want from the drop-down menu. The image that appears will show you the items that are in that part.
3. Select the specific **Item** you want to add from the drop-down menu. Some trial and error might be needed. Use the image that appears to help you realize which item you want. Keep in mind that labels can be changed.
4. *(if necessary)* Click the **Show Live Configuration** checkbox if it is not already checked. A row with the Part and Item for the Doc type should appear.
5. Click  to copy the row.
6. Make your changes on the row (e.g., change the label, make the item not visible, etc.)
7. Click  to accept your changes.
8. Click  to save all your changes.


Editing User Configurations

Any row that you add in the UI Configuration tool can be edited.




To edit a Configured item on a Doc type:

1. *(if checked)* Click the **Show Live Configuration** checkbox to unselect it.
2. *(if applicable)* Select a **Doc Type** from the drop-down menu.
Note: some parts refer to areas in Spitfire, such as the Executive Summary, and not to Doc types.
3. Either use the Part and Item filters to find the row you want or look for it on the item grid. The row will show the  and  icons.
4. Choose an editing method (below), based on what you want to do.

To edit directly in a field:

1. Move your mouse to the field you want to edit. If the cursor changes to include a little curved arrow, it means that you can edit directly in that field.
2. Click your mouse to display an edit field.
3. Edit your field then press <Enter>.
4. Click  to save your change.

To edit the row:

1. Click  at the row you want to edit.
2. Make your changes then click .
3. Click  to save all your changes.







Copying All Configured Items

You can copy the configurations (i.e., what you see when you Show Live Configuration) from one Doc type to another.

Tip

The Admin | Configuration Changes report indicates changes in the UI Configuration tool between two dates. For more information, see [Configuration Changes Report](#) on the Spitfire Client Services site.

To copy all configured items:




1. Select a **Doc Type** from the drop-down menu.
2. Click . A  icon will appear next to it.
3. At the **Doc Type** filter, select another Doc type. This is the Doc type to which you want to copy.
4. Click . The configured Items will be listed in the Item Grid.
5. (optional) Click  if you want to make any changes to an Item.
6. (optional) Click  if you want to delete any item customizations for this Doc type.
7. Click  to save.




Example

Let us say that you want the Drawings Doc type to include a Due Date field on the Document Header and a Details tab with the Commitment ID field.

First Task

First, you use the filters (and uncheck **Show Visible**) to see how Drawings are configured and discover that **Due Date** on the **Doc Header – Standard** part is not currently visible. Also, **Commitment** on the **Doc Detail – Standard** part is not visible.

| UI CONFIGURATION TOOL | | | | | | | | | | | | | | | | |
|---|---|-----------------------|----------|---------|------------|----------|---|---------|-----------------------|--------|-----|--------|--------|------|-----|---------|
| DOC TYPE: | | Drawings | | | | | PART: | | Doc Header - Standard | | | | | | | |
| ITEM: | | Due Date | | | | | <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION <input type="checkbox"/> SHOW VISIBLE ONLY | | | | | | | | | |
|  |  | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag |
|  | | Doc Header - Standard | Drawings | | | Due Date | | X | X | | | | | | | 0 |

| UI CONFIGURATION TOOL | | | | | | | | | | | | | | | | |
|---|---|-----------------------|----------|---------|------------|------------|---|---------|-----------------------|--------|-----|--------|--------|------|-----|---------|
| DOC TYPE: | | Drawings | | | | | PART: | | Doc Detail - Standard | | | | | | | |
| ITEM: | | Commitment | | | | | <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION <input type="checkbox"/> SHOW VISIBLE ONLY | | | | | | | | | |
|  |  | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup | Format | Help | Tip | Rq Flag |
|  | | Doc Detail - Standard | Drawings | | | Commitment | | X | X | | | | | | | 0 |

Second Task

In order to make the Commitment and Due Date items visible on the Drawing Doc type, you uncheck **Show Visible** and use the filters to find those rows, then copy them to add your own configurations for these items and make them visible.

| UI CONFIGURATION TOOL | | | | | | |
|---|----------|--|------------|----------|-------|-------------------------------------|
| DOC TYPE: Drawings | | PART: Doc Header - Standard | | ITEM: | | |
| <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION | | <input type="checkbox"/> SHOW VISIBLE ONLY | | | | |
| Part Name | Doc Type | Context | Capability | Item | Label | Visible |
| Doc Header - Standard | Drawings | | | Due Date | | X |
| Doc Header - Standard | Drawings | (all) | | Due Date | | <input checked="" type="checkbox"/> |

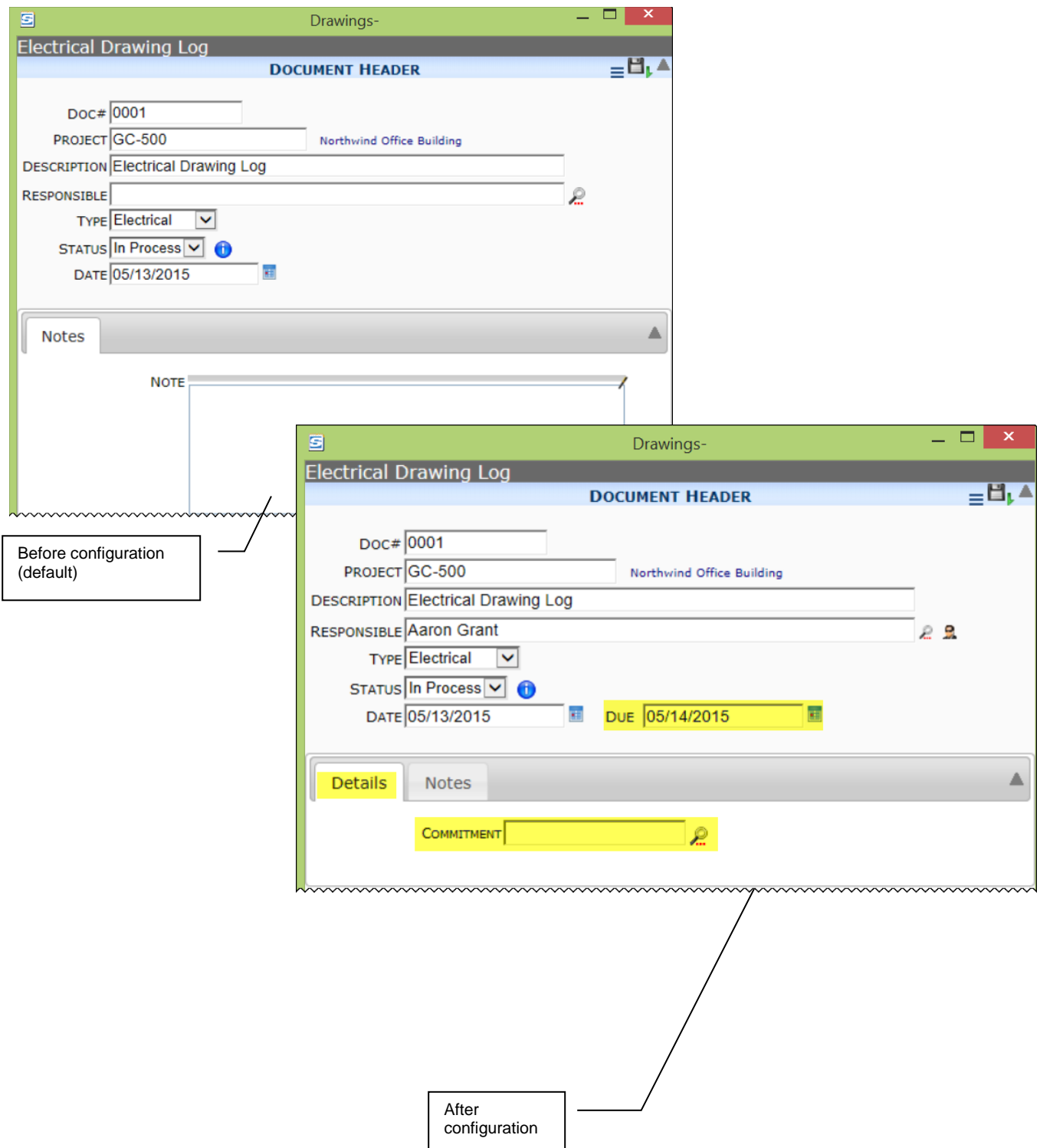
| UI CONFIGURATION TOOL | | | | | | |
|---|----------|--|------------|------------|-------|-------------------------------------|
| DOC TYPE: Drawings | | PART: Doc Detail - Standard | | ITEM: | | |
| <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION | | <input type="checkbox"/> SHOW VISIBLE ONLY | | | | |
| Part Name | Doc Type | Context | Capability | Item | Label | Visible |
| Doc Detail - Standard | Drawings | | | Commitment | | X |
| Doc Detail - Standard | Drawings | (all) | | Commitment | | <input checked="" type="checkbox"/> |

Third Task

The Commitment (Subcontract) field is found on the Details tab of a document. However, you realize that the Details tab is not currently visible on the Drawing Doc type. Therefore, you need to add one more configuration (the **Details Tab** item on the **Doc Tabs** part) in order to see the Commitment field on the document:

| UI CONFIGURATION TOOL | | | | | | |
|---|----------|--|------------|-------------|-------|-------------------------------------|
| DOC TYPE: Drawings | | PART: Doc Tabs | | ITEM: | | |
| <input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION | | <input type="checkbox"/> SHOW VISIBLE ONLY | | | | |
| Part Name | Doc Type | Context | Capability | Item | Label | Visible |
| Doc Tabs | Drawings | | | Details Tab | | X |
| Doc Tabs | Drawings | (all) | | Details Tab | | <input checked="" type="checkbox"/> |

After you save your configurations, Drawing documents include the Due date and a Subcontract field on the Details tab:



Code Maintenance

Throughout sfPMS, there are configurable drop-down menus on specific Doc types. For example, on the Change Order document, the Change Code field is a configurable field. You can populate this drop-down with pick list options that make sense for your company or organization.












You create your codes and link them to specific Doc types through the Code Maintenance tool. We recommend entering your codes during the implementation phase. Additions can be made later, but changing or deleting a code after it has been used on documents may produce unexpected results.

Concepts































Relationship between Code Sets

You can set up a relationship between two code sets (for example, Subtype and ItemType) using the **ItemCodeLike** rule (see the [Example](#) on page 56). You would then use one-character codes in the parent code set (e.g., Subtype) and two-character codes in the related code set (e.g., ItemType) where the first characters correspond to the codes in the parent code set

For example, Permits might use the following codes in the **Subtype** code set:

|   | Doc Type | Code | Description |
|---|----------|------|-------------|
|   | | ? | |
|   | Permits | e | Equipment |
|   | Permits | f | Fencing |
|   | Permits | l | Electrical |
|   | Permits | m | Mechanical |

And Permits might use the following corresponding codes in the **ItemType** code set:

|   | Doc Type | Code | Description |
|---|----------|------|-------------------|
|   | Permits | eb | Backhoe |
|   | Permits | ec | Crane |
|   | Permits | en | Storage Container |
|   | Permits | fe | Electric Fencing |
|   | Permits | fr | Wire Fencing |
|   | Permits | ft | Temporary Fencing |
|   | Permits | fw | Wood Fencing |
|   | Permits | fx | Invisible Fencing |
|   | Permits | lc | Cable work |
|   | Permits | lh | Electric Hookup |
|   | Permits | lo | Optic Wiring |
|   | Permits | ma | Air Conditioner |
|   | Permits | mb | Boiler |
|   | Permits | mh | HVAC |

After Setup

Drop-Down Menus

Codes are used throughout the system in many drop-down menus. See [Appendix A](#) on page 108 for a description of which drop-downs are affected by which code sets.

Rules

Certain rules groups, such as CodeSetRedirect, use codes as rules. That is why the Rule Maintenance tool has the **Show Code Set** filter.

| RULE MAINTENANCE | | | | |
|---|-----------------|-------------------------------|---|--|
| GROUP: <input type="text"/> | | | <input checked="" type="checkbox"/> SHOW CODE SET | |
| | Rule Group | Filter Info | Type | Description |
| ▲ | CodeSetRedirect | DocTypeKey | DocTypeKey | Lists the code sets + document type combination redirected to another document type. This rules end of the filter creation and effects the value sub \$DOCTYPE\$ placeholder |
| RULE ENTRIES | | | | |
| RULE NAME <input type="text"/> | | DOC TYPE <input type="text"/> | | |
| <input checked="" type="checkbox"/> SITE ONLY | | | | |
| | Rule | Filter Value | Result Value | |
| ▲ | Subtype | Bid | Project Setup | |
| ▲ | DocReference | Vendor | Commitment | |
| ▲ | SubType | Invitation to Bid | Commitment | |
| ▲ | SubType | Project Setup | Project Setup | |
| ▲ | ContractType | Project Setup | Project Setup | |
| CODE SET | | | | |
| SET NAME LIKE: <input type="text"/> | | | | |
| | Set Name | Set Type | Flag | Next Set |
| ▲ | | (none) | | X |
| ▲ | AcctClass | CodeList | | X |
| ▲ | AcctType | CodeList | | X |
| ▲ | ActiveFlags | CodeList | | X |
| ▲ | AddrType | DocTypeSubcodes | | X |
| ▲ | AlertStatusList | CodeList | | X |

TIP

The Admin | Doc Type Code Sets report displays the codes being used in your system.

The Code Maintenance Part

When you select the Code Maintenance tool, the corresponding part appears:

| CODE MAINTENANCE | | | | | |
|-------------------------------------|-----------------|-----------------|------|----------|------|
| SET NAME LIKE: <input type="text"/> | | | | | |
| | Set Name | Set Type | Flag | Next Set | Size |
| | | (none) | | × | 8 |
| | AcctClass | CodeList | | × | 4 |
| | AcctType | CodeList | | × | 8 |
| | ActiveFlags | CodeList | | × | 1 |
| | AddrType | DocTypeSubcodes | | × | 1 |
| | AlertStatusList | CodeList | | × | 4 |
| | AllocEntryType | CodeList | | × | 1 |
| | AttrType | DocTypeSubcodes | | ✓ | 8 |
| | AuditMode | CodeList | | × | 1 |
| | BFAmode | CodeList | | × | 2 |
| | Boolean | CodeList | | × | 4 |
| | Certification | DocTypeSubcodes | | × | 8 |
| | CodeSetType | CodeList | | × | 15 |
| | ContactScope | CodeList | | × | 4 |
| | ContractType | DocTypeSubcodes | | × | 8 |
| 1 2 3 4 5 6 | | | | | |

Columns

TIP

For a description of the available code sets, see [Appendix A](#) on page 108.

- **Set Name:** the name of the set of choices, i.e., the code set.
- **Set Type:** whether the code set is associated with Doc types (DocTypeSubcodes) or not (CodeList).
- **Flag:** The flag, if any, associated with the code set. See page 53 for a description of [possible flags](#).
- **Next Set:** whether or not a second code set offers further choices within the option selected at the Set Name. By default, AcctType and AttrType are the only code sets that allow a next set.
- **Size:** the maximum number of characters for codes in this set. Size can be 1, 2, 4 or 8.


Filter

- **Set Name Like:** Type the first few characters or use the wildcard (%) to find one or more code sets by Set Name.

Detail View

When you click on a code set row, you open a Detail view for that code set. Detail view is slightly different for code sets that you can edit and those that you can't.

Non-Editable Code Set

Click  to return to Grid view.

CODE MAINTENANCE

SET NAME LIKE:

| Set Name | Set Type | Flag | Next Set | Size |
|-----------|----------|------|----------|------|
| AcctClass | CodeList | | X | 4 |

SET NAME:

DESCR LIKE:

CODE LIKE:

| Code | Description |
|------|--------------|
| L | Labor |
| LB | Labor Burden |
| M | Material |

Columns

- **Code:** the alphanumeric code within the code set.
- **Description:** a description of the code.

Filters

- **Set Name:** Select another code set from the drop-down to go directly to the Detail view of that code set.
- **Descr Like:** Type the first few characters or use the wildcard (%) to find one or more codes by Description.
- **Code Like:** Type the first few characters or use the wildcard (%) to find one or more codes within the set.

Editable Code Set Columns

CODE MAINTENANCE

SET NAME LIKE:

| Set Name | Set Type | Flag | Next Set | Size |
|-----------|-----------------|-------|----------|------|
| DocStatus | DocTypeSubcodes | Alert | X | 2 |

SET NAME:

DESCR LIKE:

CODE LIKE:

DOC TYPE:

| Doc Type | Code | Description | Alert |
|--------------|------|-------------|-------|
| | C | Closed | X |
| | O | Open | X |
| Change Order | A | Approved | X |
| Change Order | C | Canceled | X |
| Change Order | I | In Process | X |
| Change Order | P | Pending | X |
| Change Order | R | Rejected | X |
| Schedule | C | History | X |
| Schedule | O | Current | X |
| Receipt | A | Received | X |

Columns

Tip

The Admin | **Doc Type Code Sets** report lists codes by Doc type. For more information, see [Doc Type Code Sets Report](#) on the Spitfire Client Services site.

- **Doc Type:** the document type that will use the specified code choices in the set. If the Doc type is blank, the set will apply to all documents that don't override it. For example, the DocStatus codes of **C** (Closed) and **O** (Open) apply to all Doc types unless a Doc type has its own set for DocStatus (as do ChangeOrder, Schedule and Receipt, seen in the picture above.)
- **Code:** the alphanumeric code representing a choice on the drop-down on the specified Doc type. The code "?" can be used to include a blank choice on the drop-down. Codes must be unique within sets for a Doc type, for example:

It is okay for the **C** to be repeated in DocStatus because the first is a common C, and the other four are for specific Doc Types.

| | Doc Type | Code | Description |
|--|--------------|------|-------------|
| | | C | Closed |
| | | O | Open |
| | Change Order | A | Approved |
| | Change Order | C | Canceled |
| | Change Order | I | In Process |
| | Change Order | P | Pending |
| | Change Order | R | Rejected |
| | Schedule | C | History |
| | Schedule | O | Current |
| | Receipt | A | Received |
| | Receipt | C | Canceled |
| | Receipt | I | In Process |
| | Pay Request | A | Approved |
| | Pay Request | C | Canceled |

- **Description:** the label that appears on the drop-down menu for the corresponding code. Descriptions can be up to 30 characters long.
- (optional flag):
 - **Alert** (for DocStatus only): whether or not the Alert type "Document Status Change" will apply to the specific code in the Doc type. For example, you may want to get an Alert if the Change Order status is changed to Approved, but not when the status is changed to anything else.

| | Doc Type | Code | Description | Alert |
|--|--------------|------|-------------|-------|
| | | C | Closed | X |
| | | O | Open | X |
| | Change Order | A | Approved | ✓ |
| | Change Order | C | Canceled | X |
| | Change Order | I | In Process | X |
| | Change Order | P | Pending | X |
| | Change Order | R | Rejected | X |

- **OnAdd** (for RouteStatus only): whether the code is a choice when the user is creating or editing a routee list (✓) or when the user is taking action on a routed document (X).

- (optional) **Next Set**: the name of another Code Set selected by the Code. For example, the code **VC** in the Code Set **AttrType** leads to a second Code Set called **VendorClassif**, which in turn has its own codes.

CODE MAINTENANCE

SET NAME LIKE: Attr

| Set Name | Set Type | Flag | Next Set | Size |
|----------|-----------------|------|----------|------|
| AttrType | DocTypeSubcodes | | ✓ | 8 |

SET NAME: AttrType

CODE LIKE:

DESCR LIKE:

DOC TYPE:

| Doc Type | Code | Description | Next Set |
|----------|------|----------------|-----------------|
| IN | IN | Instruction | InstructionType |
| DDLY | DDLY | Delay | DFRDelay |
| DEQP | DEQP | Equipment | DFREquip |
| VC | VC | Classification | VendorClassif |
| VE | VE | EEO | VendorEEO |

CODE MAINTENANCE

SET NAME LIKE: Ins

| Set Name | Set Type | Flag | Next Set |
|-----------------|-----------------|------|----------|
| InstructionType | DocTypeSubcodes | | X |

SET NAME: InstructionType

CODE LIKE:

DESCR LIKE:

DOC TYPE:



| Doc Type | Code | Description |
|----------|------|-------------------------------|
| RFI | AL | Alternate Proposal |
| RFI | AP | Request Approval |
| RFI | CF | Drawing/Spec Conflict |
| RFI | CL | Need Clarification/Direction |
| RFI | IN | Insufficient Data |
| RFI | OT | Other (see explanation below) |






Filters

- **Set Name**: Select another code set from the drop-down to go directly to the Detail view of that code set.
- **Descr Like**: Type the first few characters or use the wildcard (%) to find one or more codes by Description.
- **Code Like**: Type the first few characters or use the wildcard (%) to find one or more codes within the set.
- **Doc Type**: Click the checkbox to select a Doc type from the drop-down menu.




Adding Code Sets

To add a code set to the Code Maintenance tool:

1. At the Code Maintenance tool, click  to add a row.
2. Type a name for your code set in the **Set Name** field.
3. Select a **Set Type** from the drop-down.
4. (optional) Type a **Flag** if appropriate. Most code sets do not use a Flag.
5. (optional) Click the **Next Set** checkbox if the codes in this set will reference another code set.
6. Type the **Size** of the codes. Valid numbers are 1 – 8.
7. Click  to accept your information.












8. Click  to get to Detail view for the code:
9. Click  to add a specific code.
10. Enter a Doc type (if appropriate), code and a description.
11. Click  to accept your information.
12. Repeat steps 10 – 12 for as many codes as needed.
13. Click  to save your new code set.
14. Click  to return to Grid view.

Editing Code Sets




You can edit only the code set rows that were added to your site during implementation or through the  icon. Those are marked by the icon . Only code set with a  can be deleted.

TIP


For a list of code sets that you cannot edit, see [Appendix A](#) on page 108.

| CODE MAINTENANCE | | |
|---|-----------------|-----------------|
| SET NAME LIKE: <input type="text" value="c"/> | | |
|  | Set Name | Set Type |
|   | Certification | DocTypeSubcodes |
|  | CodeSetType | CodeList |
|  | ContactScope | CodeList |
|   | ContractType | DocTypeSubcodes |
|  | CostCodeStatus | CodeList |
|  | CostingMethod | CodeList |
|   | Country | CodeList |

To edit a code set row:







1. Click  at the code row that you want to edit.
2. Make a change to the **Set Name**, **Set Type**, **Flag**, **Next Set** or **Size**.
3. Click  to accept your changes.
4. Click  to save.





To edit codes in a set:

1. Find the code set you want to edit then click  to get to Detail view.
2. Review the codes for the Doc type you selected before you begin editing, for example:

TIP

The Admin | Configuration Changes report indicates changes in the Code Maintenance tool between two dates. For more information, see [Configuration Changes Report](#) on the Spitfire Client Services site.

| CODE MAINTENANCE | | | | |
|---|--------------|-----------------|--------------------|--|
| SET NAME LIKE: ContractType | | | | |
| | Set Name | Set Type | Flag | |
|  | ContractType | DocTypeSubcodes | | |
| SET NAME: ContractType DESCR LIKE: CODE LIKE: DOC TYPE: Commitment | | | | |
|  | Doc Type | Code | Description | |
|  | Commitment | CP | Cost Plus Fee | |
|  | Commitment | FP | Fixed Price | |
|  | Commitment | GM | Guaranteed Maximum | |
|  | Commitment | TM | Time & Material | |





3. Click  to add a new code to the set or  to edit one of the existing codes.
4. Click  to save.
5. Click  to return to Grid view.

Example

Let us say that you want to set up the relationship between the [code sets mentioned on](#) page 49 and set up the codes to be used in each code set for Permit documents.

First Task

In order for the relationship between code sets to be recognized by sfPMS, you must use the **ItemCodeLike | ItemType** rule. (See page 98 for the chapter on the [Rules Maintenance tool](#).)

| RULE MAINTENANCE | | | | | |
|---|--------------|--|--------------|---|--|
| GROUP: | | <input type="checkbox"/> SHOW CODE SET | | | |
|  | Rule Group | Filter Info | Type | Description | |
|  | ItemCodeLike | DocTypeKey | String | Lists the Item code sets + document type combinations that filter available choices based upon the named document code field. ? | |
| RULE ENTRIES | | | | | |
| RULE NAME | | DOC TYPE | | | |
| <input checked="" type="checkbox"/> SITE ONLY | | | | | |
|  | Rule | Filter Value | Result Value | SF | |
|  | ItemType | Permits | Subtype / | x | |

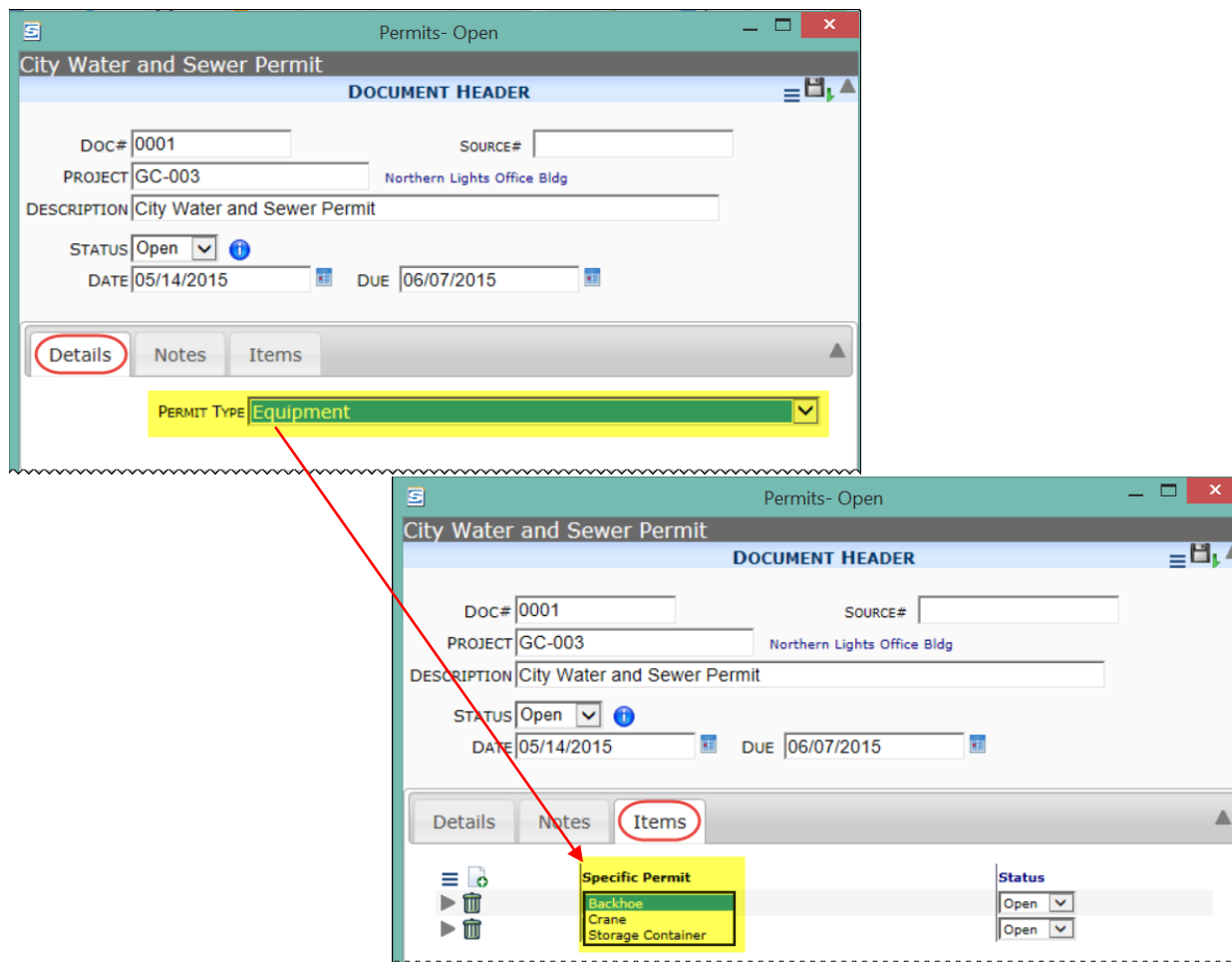
Second Task

You add codes to each of the Code Sets, using a one-character/two-character correlation.

| CODE MAINTENANCE | | | |
|------------------------|-----------------|-----------------|--------------------|
| SET NAME LIKE: SubType | | | |
| Set Name | | Set Type | |
| SubType | | DocTypeSubcodes | |
| SET NAME | SubType | DESCR LIKE: | |
| CODE LIKE: | | DOC TYPE | |
| | Doc Type | Code | Description |
| | | ? | |
| | Permits | e | Equipment |
| | Permits | f | Fencing |
| | Permits | l | Electrical |

| CODE MAINTENANCE | | | |
|---------------------|-----------------|-----------------|--------------------|
| SET NAME LIKE: Item | | | |
| Set Name | | Set Type | Flag |
| ItemType | | DocTypeSubcodes | |
| SET NAME | ItemType | DESCR LIKE: | |
| CODE LIKE: | | DOC TYPE | Permits |
| | Doc Type | Code | Description |
| | | | |
| | Permits | eb | Backhoe |
| | Permits | ec | Crane |
| | Permits | en | Storage Container |
| | Permits | fe | Electric Fencing |
| | Permits | fr | Wire Fencing |
| | Permits | ft | Temporary Fencing |
| | Permits | fw | Wood Fencing |
| | Permits | fx | Invisible Fencing |
| | Permits | lc | Cable work |
| | Permits | lh | Electric Hookup |
| | Permits | lo | Optic Wiring |

When users select a Permit Type (SubType) on the Details tab of a Permits document, they can select one of the corresponding choices for the Specific Permit (ItemType) on the Items tab:



Roles

TIP
See [Appendix A](#) on page 135 for a list of default roles that ship with Spitfire.

Security in sfPMS is role based. Through the Roles tool, you create roles that will later be assigned to users. Users can have multiple roles assigned to them. Since roles grant access rather than restrict access to specific functions, there are no conflicts among roles. If you change a role, that change applies to all users who have that role assigned to them.

Some roles can be project-specific. For example, the Project Manager role can be assigned to company executives so that they have access to all projects. And the Project Manager role can also be assigned to another user with a limitation to a specific project.

Concepts

Capability Modules

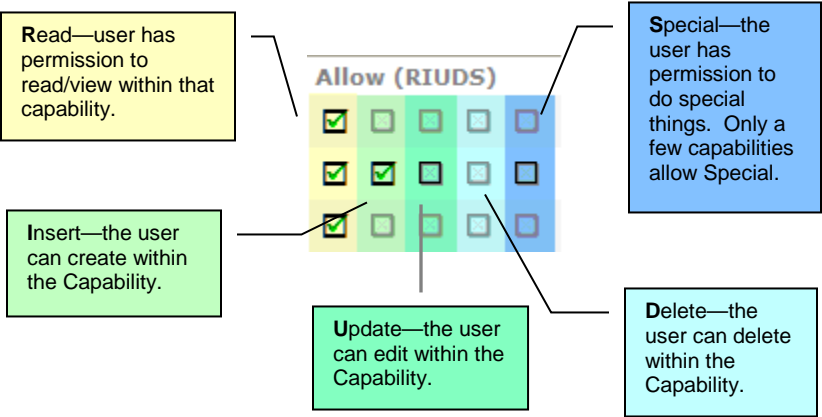
Roles contain a list of capabilities that govern what the person can see and do within the system. Capabilities affect various aspects of sfPMS and are, therefore, grouped into modules. Currently there are six modules: CSTM, DOC, LIST, PAGE, PART, and SYS.

| Module | Description | Examples |
|--------|--------------------------|--|
| CSTM | Customization tool level | See pages 37 and 144 |
| DOC | Spitfire document level | Submittal, Meeting Minutes, RFI, etc. |
| LIST | Spitfire list level | Accessing freeform mode (vs. Lookup list) to add members to the Meeting Attendees List |
| PAGE | Spitfire page level | Project Dashboard, Catalog Dashboard, Home Dashboard, etc. |
| PART | Spitfire part level | Project List, Web Photo, Weather, etc. |
| SYS | Spitfire system level | Access to Microsoft Dynamics SL, global access, adding Roles, etc. |

Permissions - Allow (RIUDS)

TIP
See the technical white paper [Designing User Roles](#) for an explanation of available capabilities and permissions.

Once a capability is assigned to a role, permission levels must be selected. The Allow checkboxes indicate the permission level for that capability in that role. The checkboxes are in the order of **Read**, **Insert**, **Update**, **Delete**, **Special**:

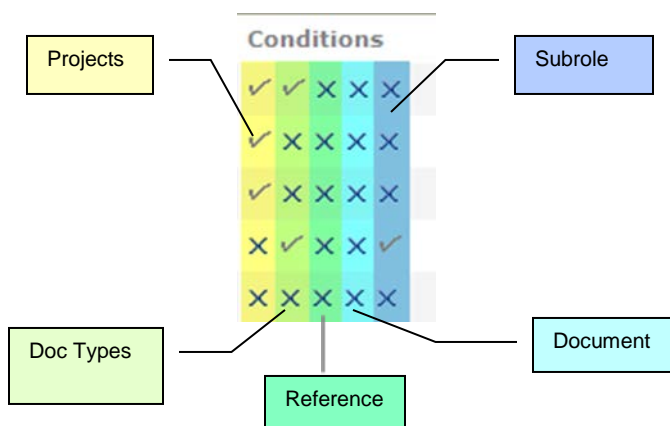


Note: Only the permission levels that apply will be available for edits. For example, only the **R** checkbox can be edited for the Executive Dashboard because users cannot Insert, Update, or Delete the Executive Dashboard; they simply have access or do not have access. Checkboxes that you cannot edit appear grayed out.

When the **R** checkbox is the only one that can be edited, the checkbox means **Allow**.

Conditions

Because the capabilities given to roles apply to all people with that role, sfPMS allows you to limit the capabilities of roles for certain people by four types of conditions—Project, Doc type, Reference, and Document. For example, you might give subcontractors the capability of creating documents, but then limit that capability by project so that a specific subcontractor can create documents only for his project.

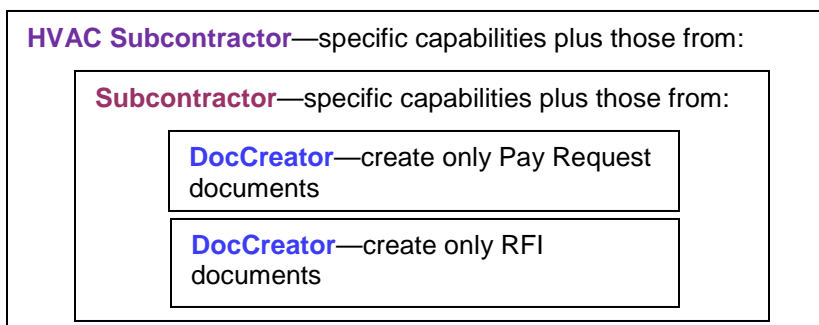


TIP

For more information about References, see the [Focus on the Manage Dashboard](#) guide.

SubRoles

A fifth condition, `SubRole`, does not restrict, but rather designates the role as a possible `SubRole`. `SubRoles` can be included within roles. All capabilities and conditions of the nested `SubRole` apply to the role. For example, if you had a role called `DocCreator`, which had the capability of creating documents and was restricted by the `Doc` type condition, and you made `DocCreator` a `SubRole`, you could include (nest) `DocCreator` in the role called `Subcontractor`. `Subcontractor` would then have the same capability of creating a document, restricted by the `Doc` type condition. You could even go a step further and create a role called `HVAC` `Subcontractor` that included `Subcontractor` (which in turn would include `DocCreator`).



Responsibilities

A role's responsibility tells sfPMS the "weight" of that role (i.e. what kind of role it is within a project) regardless of what you actually called the role. Internally, sfPMS understands the responsibilities of the following:

- Accountant
- Alternate CM
- Alternate PM
- Architect
- Associate
- Bonder
- Construction Manager
- Customer/Owner
- Development Manager
- General Contractor
- Lender
- Operations Manager
- Project Manager
- Project Staff
- Senior Executive
- Superintendent

For example, if you create a role called **Project Assistant** and give it the responsibility of **Project Staff**, sfPMS would know that a person with a role of Project Assistant is a Project Staff person. As another example, you could create several roles for your subcontractors such as **Electrical Subcontractor** or **HVAC Subcontractor**. You would then give them all the responsibility of **Associate**. sfPMS uses responsibilities to identify the roles needed in certain locations (such as the team Contacts on the Project Dashboard and on various reports).

After Setup

Contact Member Of Tab

TIP

For more information about Contacts, see the [Focus on Contacts](#) guide.

TIP

The Admin | User Role Matrix report indicates what roles each user has been assigned.

The Admin | Access Analysis report indicates the roles that give users access to documents and files.

For more information about reports, see [Index of Spitfire Reports](#) on the Spitfire Client Services site.

Once you have roles in your system, you can assign one or more roles to your Contacts, depending on what each person should be allowed to do in the system and which roles carry the correct responsibility of that person on a project.

| Name | Company | Email | Phone | Fax |
|---------------|-------------------------|----------------------------------|----------------|----------------|
| ▲ Jack McSwag | = Spitfire Construction | support@spitfireconstruction.com | (914) 273-0809 | (503) 452-6981 |

| CONTACT DETAIL | |
|------------------|-------------|
| General | Address |
| Member Of | Connections |
| Notification | Comments |

| ROLES LIKE: | PROJECTS LIKE: |
|-------------|----------------|
| | |

| User's Role(s) | Additional Roles |
|-----------------------|---------------------------|
| Everyone | Accounting |
| Project Manager GC001 | Architect |
| Project Manager GC002 | Cataloger |
| Project Manager GC003 | Compliance Admin Internal |
| Project Manager GC004 | Compliance Admin Vendor |

If your role is restricted according to one of the [conditions](#) (see page 60), then the Member Of tab will allow the role to be copied and restricted through a "limited by" field.

| Name | Company | Email | Phone | Fax | Type |
|---------------|-------------------------|-------------------|----------------|-----|-------|
| ▲ Wilma Flint | = Spitfire Construction | wilma@rockcon.com | (203) 758-9834 | | Other |

| CONTACT DETAIL | |
|------------------|-------------|
| General | Address |
| Member Of | Connections |
| Notification | Comments |

| ROLES LIKE: | PROJECTS LIKE: |
|-------------|----------------|
| | |

| User's Role(s) | Additional Roles |
|-------------------------|---------------------------|
| Accounting VOUCHERS | Architect |
| Accounting INV & Adj | Cataloger |
| Accounting AP SCANS | Compliance Admin Internal |
| Accounting CONS BILLING | Compliance Admin Vendor |
| Accounting CONS BILLING | Concrete Sub |
| Everyone | Consultant |
| | Contact Admin |
| | Drywall Sub |
| | Electrical Sub |

THE USER'S PARTICIPATION IN THIS ROLE IS LIMITED BY:

| | |
|---------------|--------------|
| PROJECT | |
| DOCUMENT TYPE | Cons Billing |
| REFERENCE | |

Project Team Contacts

Once your Contacts have roles, and especially if a Contact has more than one role, you can look up the role that indicates that person's "role" on a project, on the Team Contacts part of the Project Dashboard.

| TEAM CONTACTS | | | | |
|---------------|-------------|-----------------------|----------------|-----------------|
| | Name | Company | Phone | Role |
| ✓ X | Jack McSwag | Spitfire Construction | (914) 273-0809 | Project Manager |


You can, in fact, add a Contact more than once in order to select different roles for the same person on one project.

| TEAM CONTACTS | | | | |
|---------------|-----------------|-----------------------------|----------------|--------------------|
| | Name | Company | Phone | Role |
| ✓ X | Jack McSwag | Spitfire Construction | (914) 273-0809 | Project Manager |
| ✓ X | Jason Sunderson | Able Electric Corp | (555) 555-1212 | Subcontractor Base |
| | | Spitfire Construction | (203) 952-6552 | Superintendent |
| | | Universal HVAC Specialities | (914) 273-7263 | Subcontractor Base |
| | | Northern Lights | (555) 555-1212 | Owner |
| | | Coho Asphalt and Concrete | (555) 555-1212 | Subcontractor Base |
| | | Spitfire Construction | (914) 273-0808 | Project Assistant |
| | | York Architects, Inc. | (973) 452-9585 | Architect |

The Role List Part

When you select the Roles tool, the corresponding part appears:

| ROLE LIST | | | | | | |
|-----------|---------------------------|---------------------------|------------|---------------------|--------|--------------|
| ROLE LIKE | | TYPE | Primary | | | |
| HAS | | | | | | |
| | Role Name | Description | Conditions | Conditions Optional | Active | Member Count |
| ▶ / | Accounting | Accounting | ✓ X X X X | ✓ | ✓ | 2 |
| ▶ / | Architect | Architect | ✓ X X X X | ✓ | ✓ | 3 |
| ▶ / | Cataloger | Cataloger | X X X X X | ✓ | ✓ | 1 |
| ▶ / | Compliance Admin Internal | Compliance Admin Internal | X X X X X | X | ✓ | 0 |
| ▶ / | Compliance Admin Vendor | Compliance Admin Vendor | X X X X X | X | ✓ | 0 |
| ✓ X | Concrete Sub | Concrete Sub | ✓ X X X X | | ✓ | 0 |

Click  to edit the row by Role Name, Description, Conditions. Conditions Optional and/or Active.

Columns

- **Role Name:** The name of the role. You can edit this name.
- **Description:** A description of the role. Often, the description is the same as the name, but it doesn't have to be. You can edit this description.
- **Conditions:** Which conditions (Project, Doc type, Reference, Document) have restrictions (✓) and which have no restrictions (X). For SubRole, ✓ means the role can be included as a SubRole; X means it cannot.

- **Conditions Optional:** whether (✓) or not (✗) the conditions are optional and can be omitted. If not optional, the indicated conditions are required.
- **Active:** Whether (✓) or not (✗) the role is currently active and can be used.
- **Member Count:** The number of users to whom the role has been assigned. Only roles with a Member Count of 0 can be deleted.

Filters

- **Role Like:** Type the first few characters or use the wildcard (%) to find one or more roles by name.
- **Type:** Select **Primary** or **Subordinate** (Sub role) roles.
- **Has:** Select a capability from the drop-down to find roles that include that capability.

Role Detail Tabs

When you expand any of the role rows, its Role Detail part appears. The Role Detail part has three tabs. The Capabilities tab is displayed by default.

Capabilities

Click ▲ to get back to Grid View.

| Role Name | Description | Conditions | Conditions Optional | Active | Member Count |
|------------|-------------|------------|---------------------|--------|--------------|
| Accounting | Accounting | ✗ ✓ ✗ ✗ ✗ | ✓ | ✓ | 2 |

ROLE DETAIL

Capabilities | Responsibility | Included Roles

MODULE:
 CAPABILITIES:
 AREA:

| Module | Role Capabilities | Permit (RIUDS) | Module | Additional Capabilities |
|--------|-------------------|----------------|--------|--|
| PAGE | Document Access | ✓ ✓ □ ✗ □ | CSTM | Customizable 1 |
| | | | CSTM | Customizable 2 |
| | | | CSTM | Customizable 3 |
| | | | CSTM | Internal Staff |
| | | | DOC | Attach File From Template |
| | | | DOC | Can add attachments to a closed document |
| | | | DOC | Can be designated as another users proxy |
| | | | DOC | Can change document status (if collaborator) |
| | | | DOC | Can control exclusive access |

Assigned Capabilities

Capabilities that can be assigned



Capabilities Columns

- **Module:** the group to which the [capability](#) belongs (see page 59).
- **Role Capabilities:** the name of the capability.
- **Permit (RIUDS):** the [permissions](#) on the capability assigned to the role (see page 59).
- **Additional Capabilities:** the names of other capabilities that are not currently assigned to the role.

Capabilities Filters

- **Module:** Select a module from the drop-down menu.
- **Capabilities:** Type the first few characters or use the wildcard (%) to find one or more capabilities by name.
- **Area:** Select an area (of the system or document) from the drop-down menu.

Responsibility

| ROLE DETAIL | | | |
|--------------|--|--|---|
| Capabilities | Responsibility | Included Roles | |
| | Role Capabilities   Accountant | Permit (RIUDS) <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | Additional Capabilities <div> <div>←</div> Alternate CM </div> <div> <div>←</div> Alternate PM </div> <div> <div>←</div> Architect </div> <div> <div>←</div> Associate </div> <div> <div>←</div> Bonder </div> <div> <div>←</div> Construction Manager </div> <div> <div>←</div> Customer/Owner </div> <div> <div>←</div> Development Manager </div> <div> <div>←</div> General Contractor </div> |
| | | | 1 2 |

Responsibility Columns

- **Role Capabilities:** the name of the capability.
- **Permit (RIUDS):** the [permissions](#) on the capability assigned to the role (see page 59).
- **Additional Capabilities:** the names of other Responsible capabilities that are not currently assigned to the role.
Note: only one capability can be assigned as the Responsible capability. Selecting a new capability replaces an old capability in the Responsibility tab.

Included Roles

| ROLE DETAIL | | |
|--------------|------------------------------|----------------|
| Capabilities | Responsibility | Included Roles |
| | Included Sub Role(s) | |
| | Doc Creator Vouchers | |
| | Doc Creator Pay Request | |
| | Doc Creator Pay Application | |
| | Doc Creator Vendor | |
| | Available Sub Role(s) | |
| | Doc Approver | |
| | Doc Editor | |
| | Doc Viewer | |
| | DocItemsVisible | |
| | Sub | |
| | Subcontractor Base | |

Assigned Sub Roles

Sub Roles that can be assigned

Included Roles Columns

- **Included Sub Role(s)**: the names of the roles assigned as sub roles to the current role.
- **Available Sub Role(s)**: the names of other Sub Roles that are not currently assigned to the role.

Adding Roles

To add a new role:

1. At the Role List, click to create a new role.
2. Fill in the **Role Name** and **Description** fields. (They can be the same thing.)
3. Click on any of the **Conditions** to toggle between the and the marks. You can mouse over them to remind yourself which column corresponds to which condition.
4. If you want the Conditions to be optional, click the **Conditions Optional** checkbox to check it.
5. Click to accept the row.
6. Click to save your changes.

Building or Editing Roles

Conditions

To add or edit conditions for a role:



1. On the Role List, find the role that you want to edit and click .
2. Click on any of the **Conditions** to toggle between the and the marks.
3. Click to accept the row.
4. Click to save your changes.








Capabilities


TIP



See the technical white paper [Designing User Roles](#) for help in determining the capabilities you need and where to find them.



To edit or add capabilities to a role:

1. Click  next to the role you want to edit.
2. Use the filters or browse through the pages of **Additional Capabilities** until you locate the capability to be assigned to the role.
3. Click  to move that capability to the list on the left.

| Module | Role Capabilities | Permit (RIUDS) | Module | Additional Capabilities |
|--|-------------------|--|--|--|
|  CSTM | Internal Staff | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |  CSTM | Customizable 1 |
|  PAGE | Document Access | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |  CSTM | Customizable 2 |
| | | |  CSTM | Customizable 3 |
| | | |  DOC | Attach File From Template |
| | | |  DOC | Can add attachments to a closed document |

4. (optional) Click  to edit the newly assigned role capability.
5. If possible, click on the checkboxes depending on whether you want to give **Read**, **Insert**, **Update**, **Delete** (or **Special**) permission for the capability to the role.
Note: if the capability does not allow for certain permissions, those checkboxes will be grayed out. If all the checkboxes except the first are grayed out as shown below, you can only **Allow** that capability.




| Module | Role Capabilities | Permit (RIUDS) |
|---|-------------------|---|
|   | Can edit workflow | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

6. Click  to accept the changes to the capability.
7. Repeat steps 2 through 9 to add more capabilities, if desired.
8. Click  to save all capabilities for your role.

Responsibilities

To add a responsibility to a role:

Note: each role can have only one responsibility. Responsibilities are not required for roles.

1. Click  next to the role you want to edit.
2. Click on the Responsibility tab.
3. Click  next to the responsibility you want to assign to the role. Just like Capabilities, the Responsibility will move to the left side and no longer be listed on the right side.
Note: if you move a responsibility to a role that already has a responsibility, the new responsibility will replace the existing one.
4. Click  to save the responsibility for the role.

Included Roles

TIP

More information about the use of roles and SubRoles can be found in the technical white paper [Designing User Roles](#).

TIP

A [Capability Matrix](#) report is available in the **Admin** report folder. This report shows all the capabilities for each role as defined in your site. Reports are available from the Report Browser off the Spitfire File menu.

To include (nest) a SubRole in a Role:

1. If necessary, first [create the role](#) that will become the SubRole (as described on page 66). Make sure to check the fifth Condition checkbox to designate it as a SubRole, for example:

| | Role Name | Description | Conditions |
|--|-------------|-------------|--|
| | Doc Creator | Doc Creator | <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |

2. Click at the role that is to include that SubRole.
3. Click on the Included Roles tab. All **Available Sub Role(s)** appear on the list on the right.
4. Click next to the Sub Role you want to move to the **Included Sub Role(s)** side.
5. If applicable, click to limit the Sub Role by a certain condition such as Doc type.
6. If the Sub Role can be copied, the icon, used to copy the Sub Role, will appear.
7. Click to save your role information then to get back to Item Grid view or to copy the Sub Role (see below).

To copy a Sub Role:

1. Click next to the Sub Role you want to copy. A copy of the Sub Role will appear below it, for example:

| Capabilities | Responsibility | Included Roles |
|-----------------------------|----------------|--------------------------------|
| Included Sub Role(s) | | |
| | | Doc Creator Catalog File Route |
| | | Doc Creator |

2. Click at the copied Sub Role and select the condition by which it will be limited:

| Included Sub Role(s) | |
|----------------------|--------------------------------|
| | Doc Creator Catalog File Route |
| | Doc Creator Daily Field Report |

THE INCLUSION OF THIS ROLE IS LIMITED BY:

DOCUMENT TYPE

3. Click to save. Both Sub Roles will appear on the **Included Sub Role(s)** list.

Example

Let us say that you want to [create roles](#) for the situation described on page 60.

First Task

First, in the Roles tool, you review the Spitfire-defined **Doc Creator** role to see its capabilities:

DocCreator is limited by Doc Type and can be used as a SubRole.

TIP

For an explanation of each capability, see the [Designing User Roles](#) technical white paper.

| Role Name | Description | Conditions | Conditions Optional |
|---|---|----------------|---------------------|
| Doc Creator | Doc Creator | X X X X X | ✓ |
| ROLE DETAIL | | | |
| Capabilities | Responsibility | Included Roles | |
| MODULE <input type="text"/> CAPABILITIES <input type="text"/> | | | |
| AREA <input type="text"/> | | | |
| Module | Role Capabilities | Permit (RIUDS) | Module Addit |
| DOC | Can change document status (if collaborator) | ✓ X X X X X | CSTM Custo |
| DOC | Can move items among folders | ✓ X X X X X | CSTM Custo |
| DOC | Checkout files or see status | ✓ X X X X X | CSTM Custo |
| DOC | Control Document Attachments | ✓ X X X X X | CSTM Intern |
| DOC | Control the folders that contain items | ✓ X X X X X | DOC Attach |
| PAGE | Add Files | ✓ X X X X X | DOC Can a |
| PAGE | Attach existing Files and sfDocs to Documents | ✓ X X X X X | DOC Can b |
| PAGE | Can Load an alternate route | ✓ X X X X X | DOC Can c |
| PAGE | Document Access | ✓ X X X X X | DOC Can D |
| PART | Maintain Catalog and Report folders | ✓ X X X X X | DOC Can e |

Second Task

Second, you review the SubRole called **Subcontractor Base**, which includes **DocCreator** limited to a few Doc types:

Subcontractor Base can be used as a SubRole.

Subcontractor Base includes DocCreator but only for RFI, Pay Request and RFQ Doc types

| Role Name | Description | Conditions |
|----------------------|-------------------------|----------------|
| Subcontractor Base | Subcontractor Base role | X X X X X |
| ROLE DETAIL | | |
| Capabilities | Responsibility | Included Roles |
| Included Sub Role(s) | | |
| ▶ | Doc Creator RFI | ← |
| ▶ | Doc Creator Pay Request | ← |
| ▶ | Doc Creator RFQ | ← |

Subcontractor Base has all the capabilities of **Doc Creator** plus a few others:

| Role Name | Description | Conditions |
|--------------------|--|----------------|
| Subcontractor Base | Subcontractor Base role | XXXXX✓ |
| ROLE DETAIL | | |
| Capabilities | Responsibility | Included Roles |
| MODULE | | CAPABILITIES |
| AREA | | |
| Module | Role Capabilities | Permit (RIUDS) |
| DOC | Can see all items that have the same company | ✓ X X X X X |
| DOC | Maintain Document Template output | X X X X X X |
| DOC | Self Service RFQ | ✓ X X X X X |
| LIST | Can change catalog file filter | ✓ X X X X X |
| PAGE | Catalog Dashboard | ✓ X X X X X |
| PAGE | Plan Room Dashboard | ✓ X X X X X |
| PAGE | Project Dashboard | ✓ X X X X X |
| PART | Project Document Menu and List | ✓ X X X X X |
| PART | Project Photo | ✓ X X X X X |
| PART | Project Site Conditions | ✓ X X X X X |
| PART | User Project List | ✓ X X X X X |

Subcontractor Base has the Responsibility of “Associate.”

| Role Name | Description | Conditions |
|--------------------|-------------------------|----------------|
| Subcontractor Base | Subcontractor Base role | XXXXX✓ |
| ROLE DETAIL | | |
| Capabilities | Responsibility | Included Roles |
| Role Capabilities | Permit (RIUDS) | |
| Associate | ✓ X X X X X | |

Third Task

Third, you create the role of **HVAC Subcontractor**, limiting it by Project and including **Subcontractor Base** as an Included Role.

When the Role is assigned to a person, it will be limited by project.

| Role Name | Description | Conditions | Cap |
|----------------------|--------------------|----------------|-----|
| HVAC Subcontractor | HVAC Subcontractor | ✓XXXXX | X |
| ROLE DETAIL | | | |
| Capabilities | Responsibility | Included Roles | |
| Included Sub Role(s) | Available Sub Role | | |
| Subcontractor Base | Doc Approver | | |

HVAC Subcontractor includes all the capabilities of Subcontractor Base

Fourth Task

Fourth, on the Contact Dashboard, you assign the **HVAC Subcontractor** role to your HVAC vendor and limit the role to a specific project.

| Name | Company | Email | Phone |
|--------------|---------|-------|-------|
| Chris Subson | = | | |

CONTACT DETAIL

General

Address

Member Of

Connections

Notification

Comments

ROLES LIKE:

PROJECTS LIKE:

| User's Role(s) | |
|--------------------------|---|
| Everyone | ← |
| HVAC Subcontractor GC003 | ← |
| | ← |
| | ← |
| | ← |
| | ← |
| | ← |
| | ← |
| | ← |
| | ← |

THE USER'S PARTICIPATION IN THIS ROLE IS LIMITED BY:

PROJECT GC-003

Catalog Folders

The Catalog Folders tool is used to assign permission levels for each folder on the Catalog folder tree. Folders can be created, deleted and renamed at the Catalog Folders tool and also on the Catalog Dashboard. Files can then be organized into these Catalog folders.

As the System Administrator, you can create a hierarchal tree structure for your system, keeping in mind that the Catalog folder tree is the same for all projects.

Concepts

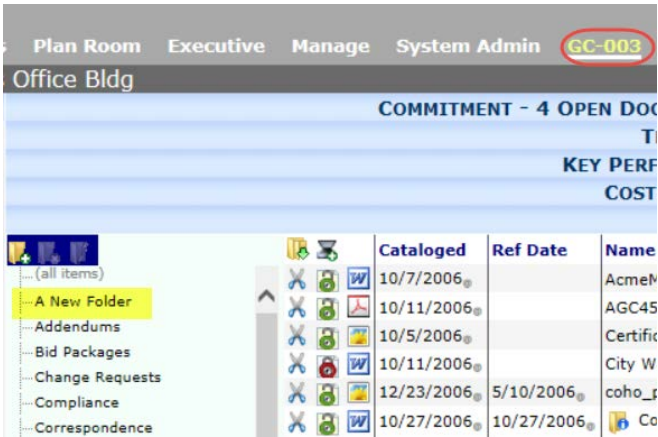
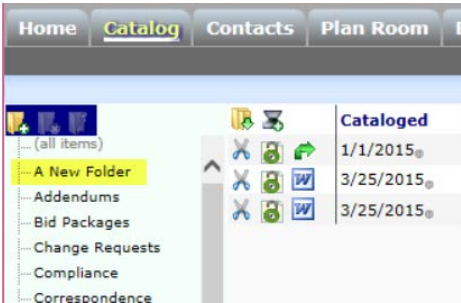
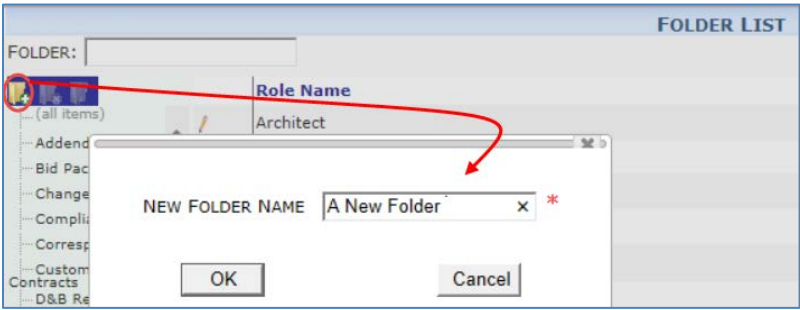
Folders

TIP

We recommend that you do NOT create folders for Projects since the project filter will already limit files pertaining to a particular project.

The File parts that appear on Project Dashboards are just filtered views of the Catalog Dashboard Files part. So folders that are created either on the Catalog Folders tool or the Catalog Dashboard also appear on all Project Dashboards. On the Project Dashboard, the contents of the folder will be filtered for that project. For example, a Contracts folder on the Catalog Dashboard would include all contracts, but on the Project Dashboard for GC003, only contracts for Project GC003 would be included in the Contracts folder.

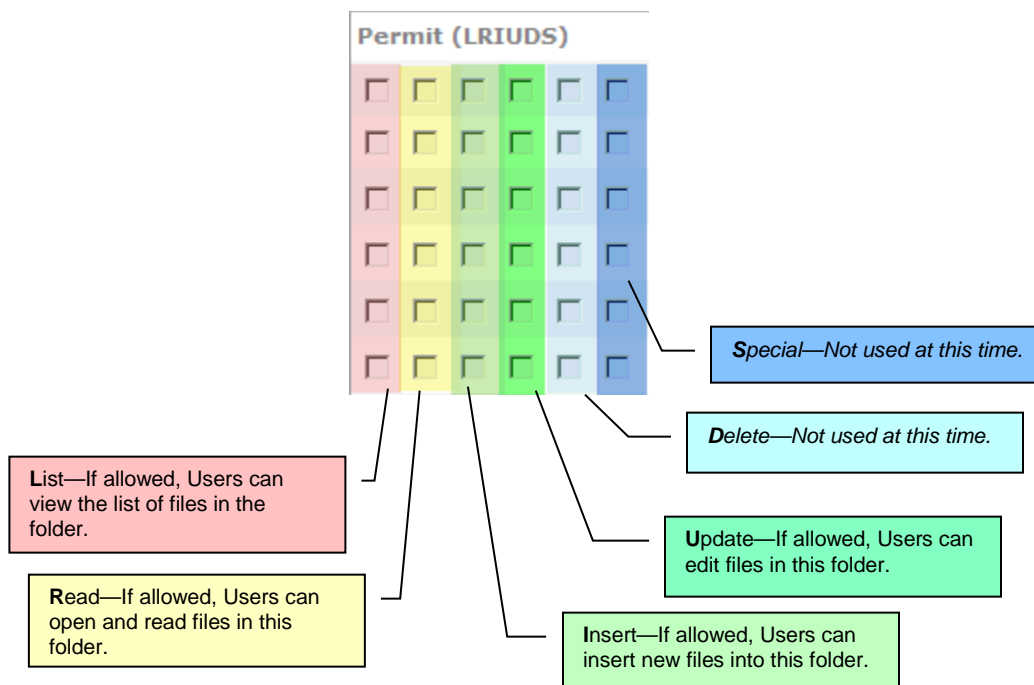
However, only users with permission to view or open folders can do so.



Access Levels by Roles

Once a catalog folder has been created, you'll need to assign an access level to the folder according to roles so that certain users can access the contents of the folder. Access levels are assigned on a folder by folder basis. If your folder structure has nested folders, all the folders nested in that folder would inherit the access levels of the parent folder, but the access levels in these nested folders can be edited.

Folders can be assigned the following access levels, which are in the order of **List**, **Read**, **Insert**, **Update**, **Delete**, **Special**:



After Setup

Once a role has access to a folder, all users with that role have access to that folder.

Note: Users with the **PART | Maintain Catalog and Report Folders (RIUD)** role capability may create, delete, and rename folders at any time. Those folders will have the inherited access levels from their parent folder. You may need to review or change access levels for new folders to ensure that the proper roles have access to the new folders.

Adding and Editing Folders

Tip


Users gain access to files attached to a document if they have access to the document. **In addition, they gain access to the default folder for the target Doc type.**

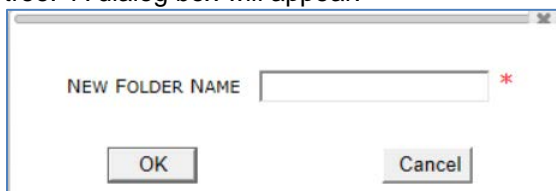
If users have read access to a folder, they can view all files in that folder – even if they don't have access to the project with which the file is associated...so it is beneficial to plan folder structures intelligently.

Tip


Remember that any folder created here appears in the Catalog Dashboard as well as all project dashboards. Any folder deleted here is deleted from the Catalog Dashboard and all project dashboards.

To create a catalog folder:

1. Click  on the Folder toolbar to add a new folder to the folder tree. A dialog box will appear:




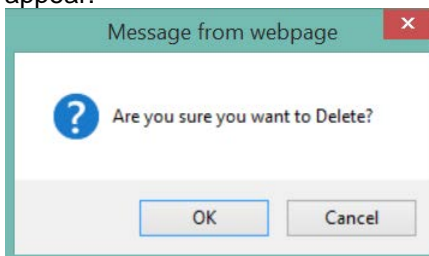
A dialog box titled 'NEW FOLDER NAME' with a text input field and a red asterisk. Below the input field are 'OK' and 'Cancel' buttons.

Note: you can nest a folder within an existing folder by selecting the folder and then clicking .

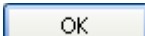
2. Type the name of your new folder and click . The folder will appear on the folder tree.

To delete a catalog folder:

1. Click on the folder in the folder tree.
2. Click  on the Folder toolbar. A confirmation dialog box will appear:




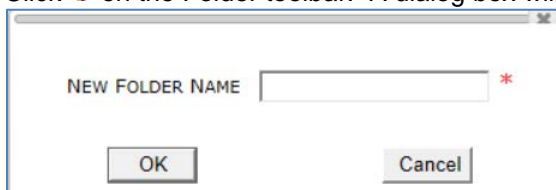
A confirmation dialog box titled 'Message from webpage' with a question mark icon and the text 'Are you sure you want to Delete?'. Below the text are 'OK' and 'Cancel' buttons.

3. Click . The folder will be removed from the folder tree.

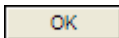
Note: files in the folder will NOT be deleted.

To rename a catalog folder:

1. Click on a folder in the folder tree.
2. Click  on the Folder toolbar. A dialog box will appear:



A dialog box titled 'NEW FOLDER NAME' with a text input field and a red asterisk. Below the input field are 'OK' and 'Cancel' buttons.

3. Enter your new folder name and click .

Report Folders

Report folders are created in SQL Server Reporting Services (SSRS). By default, sfPMS has the Admin, Executive and General folders. The Report Folder tool allows you to assign the proper access levels for each of the Report folders.

Concepts

Custom Report Folders

If you create custom reports using SQL Server Reporting Services and place them in one of Spitfire's standard Report folders, the access rights to that folder will apply to your custom reports. However, if you create a new folder and place your custom reports in this new folder, you'll need the Report Folders tool to assign access rights to the folder. Without access rights to your new folder, your custom folder and reports will not appear with the other reports on the Report Browser:

List/Read Access

Only **List** and **Read** access is allowed for Report Folders.

REPORT FOLDERS

FOLDER:

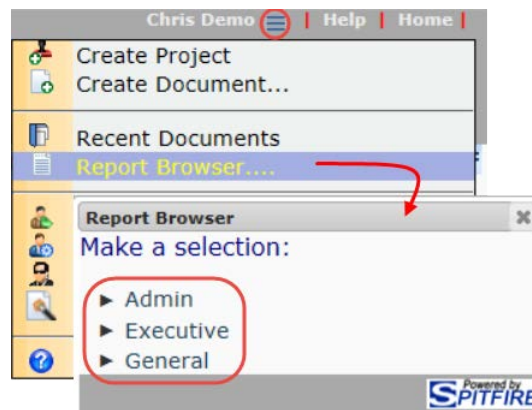
| | Role Name | Permit (LRIUDS) |
|-------------|---------------------------|---|
| (all items) | | |
| Admin | Architect | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Executive | Compliance Admin Internal | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| General | Compliance Admin Vendor | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Concrete Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Drywall Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Electrical Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Engineering Consultant | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Everyone | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | GC | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Mechanical Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Owner/Customer | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Paving Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Plan Room Visitor | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

List—If allowed, Users can view the list of files in the folder.

Read—If allowed, Users can open and read files in this folder.

After Setup

Once a role has access to a report folder, all users with that role have access to that folder through the Report Browser.



By default, there are several reports in the Admin folder, which may be of interest to the system administrator:



- **Access Analysis:** indicates if and why a user has access to a particular file, document or folder.
- **Archive List:** indicates how many files are deemed archive-able within a specified month range.
- **Capability Matrix:** indicates which role capabilities and permissions have been assigned to which roles.
- **Configuration Changes:** indicates the changes to rules, codes and customizations between two points in time.
- **Doc Type Code Sets:** indicates codes for your Doc types as established in the Code Maintenance tool.

- **Email Alerts by Address:** indicates email routees whose emails have not been sent (due to no email address or email being bounced back, etc.)
- **Full Text Indexing:** indicates summary information about the SQL full text index.
- **Integrity Check:** indicates, and allows you to repair, issues with your system.
- **Login History:** indicates login information during a set period of time.
- **Next Doc Status Matrix:** indicates the document statuses available for each document status as established through the NextDocStatus rules.
- **Outbound Email Pending:** indicates the documents that the system has queued to route via email, but has not yet sent.
- **Rule Configuration:** indicates rule values that have been manually added to the system.
- **User Capability Detail:** indicates the role capabilities and permissions that have been granted to Contacts.
- **User Role Matrix:** indicates which roles have been given to Contacts and how many times (because roles limited by conditions can be granted more than once.)
- **Work Accomplished:** indicates some statistics on work accomplished in Spitfire on a particular date.

TIP

For more information, see [Index of Spitfire Reports](#) on support.spitfirepm.com.

The Report Folders Part

The Report Folders part is very similar to the Catalog Folder List part. One difference is that there is no Folder toolbar in this part, since folders are created by SSRS.

When you select the Report Folders tool, the corresponding part appears:

This field is not a filter, but rather a display of the chosen folder (when you select a folder).

| REPORT FOLDERS | | |
|----------------|---------------------------|--|
| FOLDER: | Role Name | Permit (LRIUDS) |
| (all items) | | |
| Admin | Architect | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Executive | Compliance Admin Internal | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| General | Compliance Admin Vendor | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Concrete Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Drywall Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Electrical Sub | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Engineering Consultant | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | Everyone | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| | GC | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Columns




- **Role Name:** the roles as set up through the [Roles Maintenance tool](#) (see page 59).
Note: only roles with no Doc Type, Reference, Document, or Sub Role [conditions](#) are shown (see page 63).
- **Permit (LRIUDS):** the List and Read permission level for the role.

Assigning Access Levels

TIP

For a user to be granted access to a folder based upon a project-specific role, that user must be a global member of the role or be a member with **project (unassigned)**. For more information, see the [Focus on Contacts](#) guide.

To assign access levels to a folder:

1. Click on a folder in the file folder tree.
2. Look over the **Permit (LRIUDS)** checkboxes to see if access levels are what you want them to be for the different roles. Remember that only **List** and **Read** access apply to Report Folders.
3. Click  to edit the access level for a Role.
4. Check or uncheck the LRIUDS checkboxes as desired. ☒ means “allow”; ☐ means “do not allow”.
5. Click  to accept your changes.
6. Repeat steps 3 through 5 for each Role that requires changes.
7. Click  to save your changes for that folder.

Example

Let us say that you want to give only certain roles access to Admin folders.

| REPORT FOLDERS | | | |
|----------------------------------|-------------------|-------------------------------------|--|
| FOLDER: /Spitfire-SoniSol6/Admin | | | |
| (all items) | Role Name | Permit (LRIUDS) | |
| Admin | Architect | <input type="checkbox"/> | <input type="checkbox"/>  |
| Executive | Everyone | <input type="checkbox"/> | <input type="checkbox"/>  |
| General | GC | <input type="checkbox"/> | <input type="checkbox"/>  |
| | Mechanical Sub | <input type="checkbox"/> | <input type="checkbox"/>  |
| | Owner/Customer | <input type="checkbox"/> | <input type="checkbox"/>  |
| | Paving Sub | <input type="checkbox"/> | <input type="checkbox"/>  |
| | Plan Room Visitor | <input type="checkbox"/> | <input type="checkbox"/>  |
| | Project Assistant | <input type="checkbox"/> | <input type="checkbox"/>  |
| | Project Manager | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| | Project Staff | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Date Types

The Date Types tool allows you to set up the date types that are used throughout the system. Among other things, dates can be used to determine if requirements for a document are out of compliance.

After Setup

Dates Tab

Date types appear on the Dates tab of Spitfire documents, either as required dates or as options on the Description drop-down.

Pay Application- In Process

Pay Application 0002

DOCUMENT HEADER

DOC# 0002 INVOICE# 000707

PROJECT GC-003 Northern Lights Office Bldg

DESCRIPTION Pay Application 0002

RESPONSIBLE Elizabeth Keyser-Rubble

STATUS In Process

DATE 05/19/2015

Details Notes Addr **Dates**

| Description | Start | Finish | Note |
|--------------------|------------|------------|------|
| Application Period | 12/01/2015 | 12/14/2015 | |

The Doc Date Types Part

When you select the Date Types tool, the corresponding part appears:

| DOC DATE TYPES | | | | | | | | |
|---------------------------|-----------------|--------------------|----------|-------------|---------------|----------------|-------|--------|
| DATE NAMES LIKE | | | | | | | | |
| DOC TYPE: Pay Application | | | | | | | | |
| | Doc Type | Doc Date Name | Sequence | Is Required | Include Start | Include Finish | Alert | Active |
| | Pay Application | Application | 10 | ✓ | ✓ | ✓ | ✗ | ✗ |
| | Project Setup | Original | 10 | ✗ | ✓ | ✓ | ✗ | ✓ |
| | Commitment | Original | 10 | ✗ | ✓ | ✓ | ✗ | ✓ |
| | Bid Package | Pre Bid Meeting | 10 | ✗ | ✓ | ✓ | ✗ | ✓ |
| | Commitment | Revised | 30 | ✗ | ✓ | ✓ | ✗ | ✓ |
| | Project Setup | Revised | 30 | ✗ | ✓ | ✓ | ✗ | ✓ |
| | Pay Application | Application Period | 50 | ✓ | ✓ | ✓ | ✗ | ✓ |
| | Commitment | Commitment Current | 60 | ✓ | ✓ | ✓ | ✗ | ✓ |
| | Project Setup | Project Current | 60 | ✓ | ✓ | ✓ | ✗ | ✓ |
| | Project Setup | Project Closeout | 65 | ✓ | ✗ | ✓ | ✗ | ✓ |

Columns




- **Doc Type:** the document type on which the date is available or required on the Date tab. If blank, the date type applies to all Doc types.
- **Doc Date Name:** the name of the date type for the specified Doc type.
- **Sequence:** a number which determines the order that the date types appear on the Description drop-down on a particular Doc type. 0 is first, the next highest number is second, etc. For example, based on the previous picture, **Original** would come before **Commitment Current** on a Commitment document.
Note: a sequence of -1 means that the date type will not appear on the drop-down.
- **Is Required:** whether the date type will appear automatically on the document's Date tab (✓) or will appear as an option on the Description drop-down on the document's Date tab (✗).
- **Include Start:** whether (✓) or not (✗) users are allowed to enter a start date.
- **Include Finish:** whether (✓) or not (✗) users are allowed to enter a finish date.
- **Alert:** whether (✓) or not (✗) there is an Alert type for this Date type. Such an Alert would be included in Alert type lookups.
- **Active:** whether (✓) or not (✗) the date type can be used and selected in sfPMS.

Filters


- **Date Names Like:** Type the first few characters or use the wildcard (%) to find one or more date types by Doc Date Name.
- **Doc Type:** Select a Doc Type from the drop-down menu.

Adding and Editing Date Types

To add or edit a date type:








1. Click  to add or  to edit a date type.
2. (*optional*) If you want the date type to apply to just one Doc type, select it from the **Doc Type** drop-down.
3. Enter a descriptive name for the date type in the **Doc Date Name** field.
4. Enter a sequence number for the date type in the **Sequence** field.
5. Click on the desired checkboxes.
6. Click ✓ to accept your changes.
7. Click  to save.

To delete a date type:

- Click  at the date type row.
Note: once the date type is used (filled in) on a document, the date type can no longer be deleted.

Example

Let us say that you want to add **Anticipated** dates for Commitments and a **Substantial Completion** date for Project Setups. You want **Anticipated** dates to come before other dates on the Commitment, but not be required. You also want the **Substantial Completion** date to not include a Start date. Finally, you want to create an Alert for **Substantial Completion** that can be selected at the Alert Subscriptions tool.







| DOC DATE TYPES | | | | | | | | |
|--|-----------------|------------------------|----------|-----------------|---------------|----------------|-------|--------|
| DATE NAMES LIKE | | DOC TYPE: | | Pay Application | | | | |
|  | Doc Type | Doc Date Name | Sequence | Is Required | Include Start | Include Finish | Alert | Active |
|  | Commitment | Anticipated | 5 | X | ✓ | ✓ | X | ✓ |
|  | Pay Application | Application | 10 | ✓ | ✓ | ✓ | X | X |
|  | Project Setup | Original | 10 | X | ✓ | ✓ | X | ✓ |
|  | Commitment | Original | 10 | X | ✓ | ✓ | X | ✓ |
|  | Bid Package | Pre Bid Meeting | 10 | X | ✓ | ✓ | X | ✓ |
|  | Project Setup | Substantial Completion | 20 | X | ✓ | ✓ | ✓ | ✓ |

Lookup Dialog

Alert List

☐ ALL FILTERS

NAME

| Pick | AlertName |
|---|--|
|  | Cost Code End |
|  | Cost Code End Change |
|  | Cost Code Start |
|  | Cost Code Start Change |
|  | Doc Date: Project Setup Substantial Completion |
|  | Document Created |

Alert Types

Using the Alert Type tool, you can control which Alert types are active (and available for selection) or inactive. You can also create a version of the “Other” Alert.

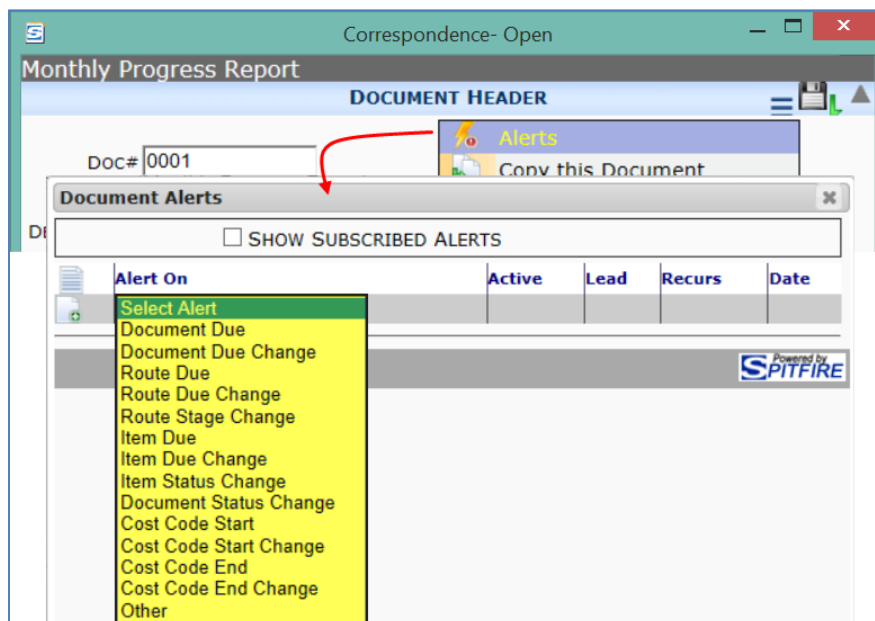
After Setup

Document's Alert Window

When alerts are set up for documents, the alert type must be selected.

TIP

For more information about Alerts, see the [Focus on Alerts and Compliance](#) guide.

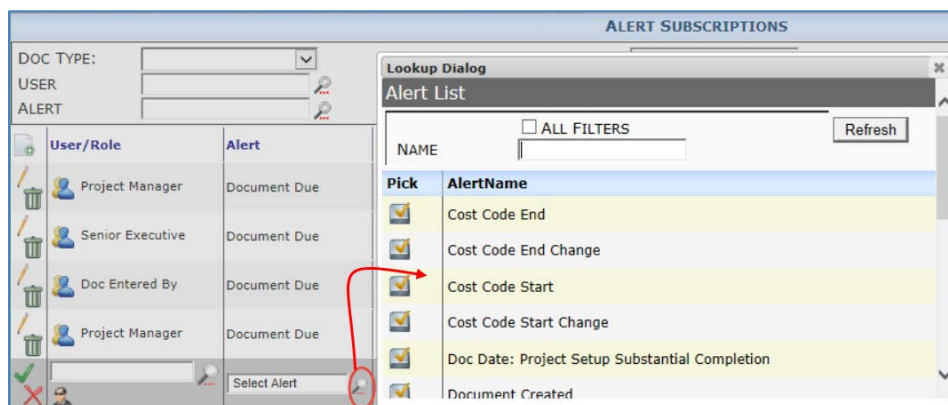


Alert Subscription Tool

Alert types appear in the lookup on the Alert Subscription Tool (found on the Manage Dashboard).

TIP

Any Alerts set up for specific Date types (see [page 83](#)) appear on this lookup also.



The Alert Types Part

When you select the Alert Types tool, the corresponding part appears:

| ALERT TYPES | | | | | | | | | |
|------------------------|--------|-----------|----------|-----------|-----------|--------------|-----------------|--------|--|
| Alert Name | Recurs | Lead Time | Sequence | Edit Name | Show Date | Allows Recur | Allows LeadTime | Active | |
| Document Created | NA | 0 | -1 | X | X | X | X | ✓ | |
| Item Created | NA | 0 | -1 | X | X | X | X | ✓ | |
| Out-of-Compliance | NA | 0 | -1 | X | X | X | X | ✓ | |
| Document Due | Daily | 1 | 50 | X | X | ✓ | ✓ | ✓ | |
| Document Due Change | NA | 0 | 55 | X | X | X | ✓ | ✓ | |
| Route Due | Daily | 1 | 60 | X | X | ✓ | ✓ | ✓ | |
| Route Due Change | NA | 0 | 65 | X | X | X | ✓ | ✓ | |
| Route Stage Change | NA | 0 | 67 | X | X | X | X | ✓ | |
| Item Due | Daily | 1 | 70 | X | X | ✓ | ✓ | ✓ | |
| Item Due Change | NA | 0 | 75 | X | X | X | ✓ | ✓ | |
| Item Status Change | NA | 0 | 80 | X | X | X | X | ✓ | |
| Document Status Change | NA | 0 | 90 | X | X | X | X | ✓ | |
| Cost Code Start | NA | 0 | 110 | X | X | X | ✓ | ✓ | |
| Cost Code Start Change | NA | 0 | 115 | X | X | X | ✓ | ✓ | |
| Cost Code End | NA | 0 | 120 | X | X | X | ✓ | ✓ | |
| Cost Code End Change | NA | 0 | 125 | X | X | X | ✓ | ✓ | |
| Other | NA | 0 | 500 | ✓ | ✓ | ✓ | ✓ | ✓ | |

Columns

- **Alert Name:** the name of the Alert. You can rename "Other."
Note: the Out-of-Compliance alert type applies to [Compliance types](#) (see page 91).
- **Recurs:** how often the Alert should recur by default, or NA for not applicable. The only Alerts that can recur are **Document Due**, **Route Due** and **Item Due**. For these Alert types, the system will check as often as indicated to see if the Alert is still triggered. If the previous Alert has been removed from the Watchdog Alerts part, but the Alert is still valid, a new Alert will be sent.
- **Lead Time:** can be used in two ways:
 - (If the Alert is for a due date) the number of days before or after the date, indicating when the Alert should be triggered. (Leads for *after the date* are expressed as negative numbers.)
 - (If the Alert is for the change of a date) The number of days that the date needs to change in order to generate an Alert. (For example, if you enter 3, then you'll receive an Alert if the date changes by three or more days, but you will not receive an Alert if the date changes by a day or two).

TIP

The Document Created Alert type does not accept a Lead Time or Recurs increment.

Tip

Options for the Recur column are set through the [Recur code](#) set in the Code Maintenance tool (see page 124).



- **Sequence:** a number which determines the order that the Alert types appear on the Alert Type drop-down. 0 is first, the next highest number is second, etc.
Note: a -1 means that the Alert Type does not appear on the drop-down.
- **Edit Name:** whether (✓) or not (✗) the name of the Alert can be changed in a document's Alert tab.
- **Show Date:** whether (✓) or not (✗) the date of the Alert can be changed in a document's Alert tab.
- **Allows Recur:** whether (✓) or not (✗) the Recur time of the Alert can be changed in a document's Alert tab.
- **Allows Lead Time:** whether (✓) or not (✗) the Lead Time of the Alert can be changed in a document's Alert tab.
- **Active:** whether (✓) or not (✗) the Alert can be chosen and used in sfPMS.

Adding Alert Types

Tip



New Alert types require custom programming in order for sfPMS to use them. See your implementer or contact Spitfire about this important step.

To add an Alert Type:




1. Click .
2. Enter a unique **Alert Name**.
3. Select, enter or check other information as appropriate. You should check the **Show Date** checkbox.
4. Click ✓ to accept your changes.
5. Click  to save.

Editing Alert Types

To edit an Alert type:













1. Review the Alert types and locate the Alert type you'd like to edit or make inactive.
2. Click .
3. Make your changes to the Alert type. To make an Alert type inactive at your site, click the **Active** checkbox to remove the checkmark: ☐.
4. Click ✓ to accept your changes.
5. Click  to save.

To rename the “Other” Alert type:

1. Click  at the **Other** line item.
2. Change the **Alert Name** to something more descriptive.
3. Make sure the **Show Date** checkbox is checked. “Other” Alerts are used to send an Alert on a specific date so it is important that users be able to change the date.
4. Click  to accept your changes.
5. Click  to save.

Example

Let us say that you want to change the order of the Alert types so that Document Status Change appears first; change the Lead Time for the Item Due alert type, and rename the Other Alert type as FYI. You also bring the FYI Alert type higher in the sequence.

| ALERT TYPES | | | | | | | |
|---|------------------------|--------|-----------|-----------------------|-----------|-----------|--------------|
|  | Alert Name | Recurs | Lead Time | Sequence ⁹ | Edit Name | Show Date | Allows Recur |
|  | Document Created | NA | 0 | -1 | X | X | X |
|  | Item Created | NA | 0 | -1 | X | X | X |
|  | Out-of-Compliance | NA | 0 | -1 | X | X | X |
|  | Document Status Change | NA | 0 | 40 | X | X | X |
|  | Document Due | Daily | 1 | 50 | X | X | ✓ |
|  | Document Due Change | NA | 0 | 55 | X | X | X |
|  | Route Due | Daily | 1 | 60 | X | X | ✓ |
|  | Route Due Change | NA | 0 | 65 | X | X | X |
|  | Route Stage Change | NA | 0 | 67 | X | X | X |
|  | Item Due | Daily | 2 | 70 | X | X | ✓ |
|  | Item Due Change | NA | 0 | 75 | X | X | X |
| | Item Status Change | NA | 0 | 80 | X | X | X |
| | FYI | NA | 0 | 100 | ✓ | ✓ | ✓ |

Cloud Drives

If you are using a cloud storage provider such as Box.com or OneDrive, the setup of these cloud storage providers includes the Cloud Drives tool. For more complete information about what is involved in cloud storage integration, see the [Setup for Cloud Storage Integration](#) technical white paper.

After Setup

Project Setup

What you enter on the Cloud Drives tool shows up on the Cloud Storage drop-down on the Project Setup document.

The screenshot shows the 'Project Setup-Committed' window for 'Northern Lights Office Bldg'. The 'DOCUMENT HEADER' section contains the following fields:

- CONTRACT NO. (empty)
- PROJECT: GC-003 (Northern Lights Office Bldg)
- DESCRIPTION: Northern Lights Office Bldg
- CUSTOMER: Northern Lights
- STATUS: Committed
- EXECUTED: 11/05/2004
- DATE: 12/11/2007

Below the header is a tabbed interface with tabs: Details, Scope, Addr, Dates, Items, Incl/Excl, and Project. The 'Project' tab is selected. In this tab, the 'COMMITMENT BUDGETING MODE' is set to 'Update'. The 'PLAN ROOM MODE' is set to 'N/A'. The 'CLOUD STORAGE' dropdown menu is open, showing two options: '(none)' and 'GDrive'. The 'FORECASTING THRESHOLD' field is empty.

The Cloud Drives Part

When you select the Cloud Drives tool, the corresponding part appears:

| CLOUD STORAGE | | | | | | |
|---------------|------------|-----------------------------------|----------|-------|-------|--------|
| ID: | | | | | | |
| | Drive Name | Default Project Path | Projects | API D | API U | Active |
| | (none) | | 99 | X | X | ✓ |
| | GDrive | /Integrated Training Projects/... | 4 | ✓ | ✓ | ✓ |

Columns

- **Drive Name:** the name you want to give to your cloud drive. This name will appear on the Project Setup's Cloud Storage drop-down.
- **Default Project Path:** the default folder structure for this cloud storage provider.
- **Projects:** the number of projects synced to this drive.
- **API D** and **API U:** whether (✓) or not (✗) the connection secrets have been configured for the drive in ICTool.
- **Active:** whether (✓) or not (✗) the drive can be chosen and used in sfPMS.

Filters



- **ID:** Type the first few characters or use the wildcard (%) to find one or more drives.

Adding and Editing Cloud Drives



TIP

For more information about the project path, see the [Setup for Cloud Storage Integration](#) technical white paper.

To add a new cloud drive:

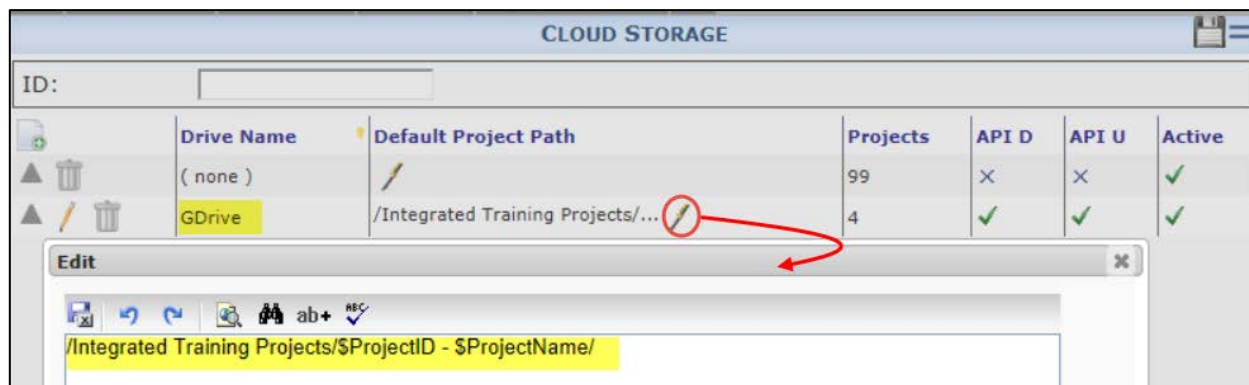
1. Click .
2. Enter a unique **Drive Name**.
3. Enter the **Default Project Path**.
4. Click ✓ to accept your changes.
5. Click  to save.

To edit a cloud drive:

- Either click  to edit just the Default Project Path or  to edit other information on the row.

Example

Let us say that you are integrated with Google Drive and so indicate such on the Cloud Storage tool:



Compliance Types

The Compliance Types tool allows you to set up the Compliance types for use in your system on the Commitment and Vendor levels. Compliance types are mapped to specific Doc types either as required or optional compliance items. For more information about compliance, see the [Focus on Alerts and Compliance](#) guide.

After Setup

Document Compliance Tab

Compliance types appear on a document's Compliance tab. Compliance types that are set up as "required" appear from the start on the tab. Compliance types that are "optional" appear on the drop-down menu. By default, only Commitment and Vendor documents have a Compliance tab.



The Compliance Types Part

When you select the Compliance Types tool, the corresponding part appears:

| COMPLIANCE TYPES | | | | | | | | | | | | | | | | | |
|----------------------------------|--------|-----------|--|------|-------------|--------|--------------|--------------|-------------|---------------|-------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| NAMES LIKE: <input type="text"/> | | | <input type="checkbox"/> FOR VENDORS <input type="checkbox"/> FOR COMMITMENTS | | | | | | | | | | | | | | |
| Compliance Name | Recurs | Lead Days | % Paid | Auto | Pay Control | Notify | Allow Amount | Check Amount | Allow Descr | Allow Carrier | Allow Proof | Allow Effective | Allow Expire | Allow Lead Days | Allows Recurs | Allow Multi | Active |
| Automobile Ins | NA | 0 | | ✓ | ✓ | ✓ | ✓ | × | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Bond | NA | 0 | | ✓ | ✓ | ✓ | ✓ | × | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Executed Contract Returned | NA | 0 | | ✓ | × | ✓ | ✓ | × | ✓ | × | ✓ | × | ✓ | ✓ | ✓ | × | ✓ |
| General Liability Insurance | NA | 0 | | ✓ | ✓ | ✓ | ✓ | × | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | × | ✓ | × |
| Lien Waiver | NA | 0 | | ✓ | ✓ | × | ✓ | × | ✓ | ✓ | ✓ | × | × | ✓ | ✓ | ✓ | × |
| Performance Bond | NA | 0 | | ✓ | ✓ | ✓ | ✓ | × | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | × | ✓ | × |
| Project Manager Hold | NA | 0 | | × | ✓ | ✓ | × | × | ✓ | ✓ | × | ✓ | ✓ | ✓ | ✓ | ✓ | × |

Column

Tip

Recur options are set with the [Code Maintenance Tool](#). See page 49.

Tip

By default, sfPMS does not send Alerts for vendors who do not have any current Commitments.

Tip

For more information about capabilities, see the technical white paper, [Designing User Roles](#).

- **Compliance Name:** the name of the Compliance type.
- **Recur:** how often Out-of-Compliance alerts and the Compliance Notification document should be sent by default (for example, Daily, Weekly, Monthly, etc.) when the Compliance requirement is out of compliance; or **NA** if not applicable.
Notes:
 - Alerts are sent only if the Notify column (see below) is checked and any prior Alerts have been deleted from the Watchdog Alerts part.
 - Compliance Notification documents are sent only if the Doc type has an automatic workflow. Any prior Compliance Notification documents are set to the Closed status.
- **Lead Days:** the default lead time prior to non-compliance for sending Compliance Notification documents and Out-of-Compliance alerts.
- **% Paid:** the percentage of the Commitment amount that will cause an out-of-compliance requirement to automatically block approval of the current and additional Pay Requests. Percentages below this number will automatically be treated as warnings.
Note: **Auto** (see below) must also be checked and the document's Pay Control option must be set to **Auto** in order for % Paid to be effective.
- **Auto:** whether sfPMS should evaluate conditions for Compliances and, if an item is found to be out of compliance, display a warning message (✓) or you must manually release compliances in order for them to be in compliance (✗).
- **Pay Control:** whether (✓) or not (✗) users with the **DOC | Can Modify Pay Control** capability are able to select a Pay Control option from the document's Compliance tab.
Note: Pay Control options are active only if Auto Control (see above) is also checked.
- **Notify:** whether (✓) or not (✗) a Compliance Notification document will be created (through an automatic workflow script) and Out-of-Compliance alerts will be sent when the requirement is out of compliance.
Note: a Compliance type that is checked here can be unchecked on a document's Compliance tab to prevent the Compliance Notification document from being created for that compliance item only.
- **Allow Amount:** whether (✓) or not (✗) users are able to enter and edit the Amount field on Compliance rows on the Compliance tab.
- **Check Amount:** whether (✓) or not (✗) the Compliance Amount will be checked against the Commitment amount.
Note: This option requires a check in the Allow Amount column (see above).

- **Allow Descr:** whether (✓) or not (✗) users are able to enter and edit the Description field on Compliance rows on the Compliance tab.
- **Allow Carrier:** whether (✓) or not (✗) users are able to enter and edit the Carrier field on Compliance rows on the Compliance tab.
- **Allow Proof:** whether (✓) or not (✗) users are able to enter and edit the Received field on Compliance rows on the Compliance tab.
- **Allow Effective:** whether (✓) or not (✗) users are able to enter and edit the Effective field on Compliance rows on the Compliance tab.
- **Allow Expire:** whether (✓) or not (✗) users are able to enter and edit the Expiration field on Compliance rows on the Compliance tab.
- **Allow Lead Days** whether (✓) or not (✗) users are able to enter and edit the Lead Days field on Compliance rows on the Compliance tab.
- **Allows Recurs:** whether (✓) or not (✗) users are able to enter and edit the Recurs field on Compliance rows on the Compliance tab.
- **Allow Multi:** whether (✓) or not (✗) documents can have more than one Compliance of this type.
- **Active:** whether (✓) or not (✗) the Compliance type is in use in sfPMS.

Filters

- **Names Like:** Type the first few characters or use the wildcard (%) to find one or more Compliance types by Name.
- **For Vendors:** Click the checkbox for a list of Compliance types that are mapped to the Vendor Doc type only.
- **For Commitments:** Click the checkbox for a list of Compliance types that are mapped to the Commitment Doc type only.

Mappings

When you expand any of the Compliance type rows, a Mappings view appears.

Click to return to grid view.



| | Compliance Name | Recurs | Lead Days | % Paid | Auto | Pay Control | Notify | Allow Amount | Check Amount | Allow Descr | Allow Carrier | Allow Proof | Allow Effective | Allow Expire | Allow Lead Days | Allows Recurs | Allow Multi | Active |
|---|---|--------|-----------|--------|------|-------------|--------|--------------|--------------|-----------------|---------------|-------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| | Automobile Ins | NA | 0 | | ✓ | ✓ | ✓ | ✓ | ✗ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| MAPPINGS FOR 'AUTOMOBILE INS' COMPLIANCE TYPE | | | | | | | | | | | | | | | | | | |
| | Doc Type | | | | | | | | | Sub Type | | | Reqd | | Active | | | |
| | Commitment | | | | | | | | | | | | ✗ | | ✓ | | | |
| | Vendor | | | | | | | | | | | | ✗ | | ✓ | | | |
| | <div style="border: 1px solid black; padding: 2px;"> </div> | | | | | | | | | | | | | | | | | |

Columns

- **Doc Type:** both the list of Doc types to which the Compliance type is mapped and a lookup from which you can select another Doc type.
- **Sub Type:** the document's Sub type to which the Compliance type is or should be mapped. If no Sub type is indicated, the Compliance type is mapped to all documents of the indicated Doc type.
- **Reqd:** whether (✓) or not (✗) the Compliance type is required for the indicated Doc type.
- **Active:** whether (✓) or not (✗) the mapping is currently active in sfPMS.

Adding Compliance Types



To add a Compliance type:


1. In the Compliance Types tool, click .
2. Give a descriptive name for your Compliance type at the **Compliance Name** field.
3. Fill in the remaining fields and checkboxes as desired.
4. Click ✓ to accept your row.
5. Click  to save.

Mapping Compliance Types to Doc Types

You need to tell sfPMS which Compliance types are required and available for which Doc types. You do this by mapping each desired Compliance type to one or more Doc types.




To map a Compliance type to a Doc type:

1. Click  at the Compliance type row that you want to map.
2. In the Mappings section, select a **Doc Type** from the drop-down or leave blank to indicate that the Compliance type should apply to all Doc types.
3. Click  to edit the new row.
4. *(optional)* If the Doc type you selected has subtypes, select a Sub Type from the drop-down or leave blank to indicate that the Compliance type should apply to all subtypes.
5. *(optional)* If the Compliance type is to be optional on the Doc type + subtype, click the **Reqd** checkbox to uncheck it.


6. Leave the **Active** checkbox checked unless you want the Compliance type to be inactive for the designated Doc type + subtype.
7. Click ✓ to accept your row.
8. Click  to save your mapping.

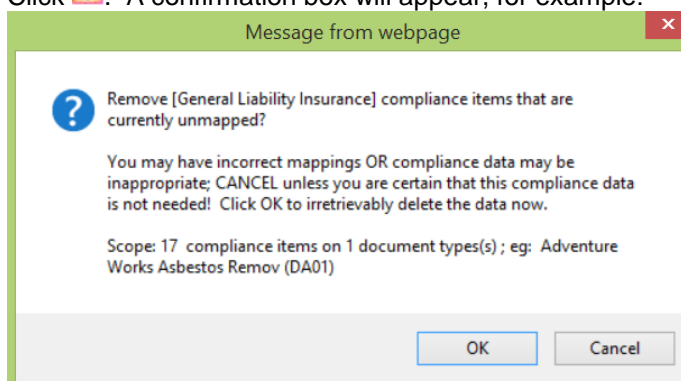
Warnings

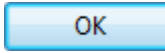
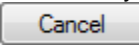
A warning icon appears on the Compliance type row if compliance items exists but are no longer mapped. When not mapped, they are ignored by the system.

|  | Compliance Name | Recurs | Lead Days | % Paid | Auto | Pay Control | Notify | Allow Amount | Check Amount |
|---|-----------------------------|--------|-----------|--------|------|-------------|--------|--------------|--------------|
|  | General Liability Insurance | NA | 0 | | ✓ | ✓ | ✓ | ✓ | × |
| MAPPINGS FOR 'GENERAL LIABILITY INS' | | | | | | | | | |
| Doc Type | | | | | | | | | |
|  | <input type="text"/> | | | | | | | | |

To delete unmapped compliance items from documents:






1. Click . A confirmation box will appear, for example:




2. Click . All corresponding compliance items will be deleted from your documents.
Note: if you decide that you should re-map the Compliance type instead, click .

Editing Compliance Types

To edit an existing Compliance type:

1. Click  at the Compliance type row that you wish to edit.
2. Click  to edit any of the fields for the Compliance type, including the Active checkbox.
3. Click  to accept your changes or  to ignore your changes.
4. Click  to save your changes.

To delete a Compliance type:



- Click  at the Compliance type row.
Note: once the Compliance type is used on a document, the Compliance type can no longer be deleted.

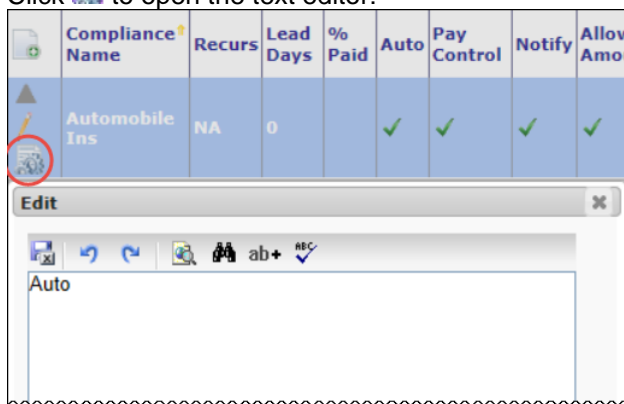
Automatic Workflow

There is automatic workflow for the Compliance type. The commands in the automatic workflow tell sfPMS what to do whenever a Compliance requirement is out of compliance.

It is possible to replace the Spitfire-generated workflow script with one of your own, if you deem it necessary.

To create your own automatic workflow for a Compliance type:

1. Click  to expand the Compliance type.
2. Click  to open the text editor:



The **Auto** workflow appears by default. The Auto command means the following:

Tip

Changing the workflow script is totally optional. The **Auto** workflow script has been written to function “as is” at most sites based on fine tuning using rules during implementation.



For more information about the ATC commands, see [Index of ATC Commands](#) on support.spitfirepm.com.

```
ATC: COPY GUID * NEW
ATC: SET SourceContact = *
ATC: SET Subtype = *
ATC: SET Subcontract = *
ATC: SET Due = $$ComplianceDue$
ATC: SET Title = $@ComplianceName$
ATC: SET DocRevision.Notes = $@ComplianceIntro$
ATC: SET DocRevision.NoteA = $@ComplianceNote$
ATC: SET DocRevision.NoteB = $@ComplianceAction$
ATC: ROUTE AUTO; AutoAccepted FROM FINAL
```

which means...

“Create a new Compliance Notification document, Set the Source Contact to the vendor, Set the document subtype and Commitment number, Set the Due Date to the Compliance Required Date, Set the document title to the Compliance type name, Create three notes using text from the ComplianceNotificationText rule and Route the document according to automated routes set up for Compliance Notifications, then set Seq 1 to match the final routee in the resolved routing and accept the route so that the document gets routed to the Inbox of the routee in Seq 2.”


Note: The ATC: ROUTE AUTO command can be customized using the **ComplianceNotificationText | WorkflowRouting** rule. See [KBA-01200](#).

- If you want a different set of commands, delete the word **Auto** and type your new commands, then click  to save.
- If you saved the text editor, you must also click  in the Compliance Types tool to save your automatic workflow.

Example

Let us say that you want to make the **Lien Waiver** compliance type active at your site and required for Contract/Subcontract Pay Requests.

Note: in order to track Lien Waiver compliance on your Pay Requests, you would need to also customize the Pay Request to include the Compliance tab [part = **Doc Tabs**, item = **ComplianceTab**]. See page 33 for the chapter on the [UI Configuration](#) tool.

| COMPLIANCE TYPES | | | | | | | | | | | | | | | | | | |
|---|-----------------|--------|-----------|--------|------|-------------|--------|--------------|--------------|-------------|---------------|-------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| NAMES LIKE: <input type="text"/> | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> FOR VENDORS <input type="checkbox"/> FOR COMMITMENTS | | | | | | | | | | | | | | | | | | |
| | Compliance Name | Rekurs | Lead Days | % Paid | Auto | Pay Control | Notify | Allow Amount | Check Amount | Allow Descr | Allow Carrier | Allow Proof | Allow Effective | Allow Expire | Allow Lead Days | Allows Recurs | Allow Multi | Active |
|  | Lien Waiver | NA | 0 | | ✓ | ✓ | × | ✓ | × | ✓ | ✓ | ✓ | × | × | ✓ | ✓ | ✓ | × |
| MAPPINGS FOR 'LIEN WAIVER' COMPLIANCE TYPE | | | | | | | | | | | | | | | | | | |
| Doc Type | Sub Type | Reqd | Active | | | | | | | | | | | | | | | |
| Pay Request | | ✓ | ✓ | | | | | | | | | | | | | | | |

Rules Maintenance

A variety of rules govern the logic for how sfPMS behaves. These rules allow you to configure how the system works, giving you a great deal of control over your system. For example, through a rule, you can decide which document statuses on which Doc types are considered “closed” (and which are considered “open”). Rules are modified through the Rules Maintenance tool.

Concepts

Rule Groups and Values

Rules are organized into rule groups. Each rule has a rule name and a result value. Many rules also take a filter value (such as Doc type). Some rule groups require specific rule names. For example, the AlertText rule group allows only the following rules:

TIP

For information about all rule groups and rule, filter and result values, see [Rules and Rule Values](#) on support.spitfirepm.com.

| Rule Group |
|------------|
| AlertText |

RULE NAME

☒ SITE ONLY

| Rule |
|---------------|
| Body |
| CmplAmount |
| CmplBody |
| CmplEffective |
| CmplExpires |
| CmplManual |
| CmplRequired |
| CmplSubject |
| CompliedOK |
| DuePrepPast |
| DuePrepSoon |
| HowDuePast |
| HowDueSoon |
| Subject |

Other rule groups create rules from codes, as set up in your Code Maintenance tool. For example, the DocApproved rule group allows any DocStatus code to be used as a rule:

| Rule Group | Filter Info | Type |
|-------------|-------------|---------|
| DocApproved | DocTypeKey | Boolean |

RULE NAME

☐ SITE ONLY

| Rule | Filter Value |
|------|--------------|
| D | Commitment |
| A | Change Order |

In documentation, the rule in a rule group is expressed as *rulegroup | rule*, for example, **AlertText | Body**.

Rule Validation

Because rule groups accept specific rule values and those rules often accept very specific result values, the Rules Maintenance tool indicates rule groups that have invalid values.

| RULE MAINTENANCE | | | | |
|-----------------------------|--------------|---|--------|--------|
| GROUP: <input type="text"/> | | <input checked="" type="checkbox"/> SHOW CODE SET | | |
| | Rule Group | Filter Info | Type | Desc |
| | AlertText | AlertTypeKey | String | Provid |
| | BudgetConfig | DocTypeKey | String | Provid |

The icon indicates that a rule group contains an invalid rule or value. When you expand the rule group, the icon indicates which rule contains the invalid value. When you mouse over the icon, a message tells you where or what the problem is.










Tip

For an explanation of rule validation warning messages, see [KBA-01465](#).

| | Rule | Filter Value | Result Value |
|--|------------------------|--------------|--------------|
| | PostAutomaticRevisions | | ✓ |
| | | | 2 |
| | | | 5 |

Result value does not match list of allowed values

If the invalid rule is not obvious when you expand the rule group, you can search for all invalid rules through the Warnings Only filter:

| | | | | |
|---|--------------|--------------|---|---|
|  | Rule Group | Filter Info | Type | Description |
|   | BudgetConfig | DocTypeKey | String | Provides d |
| RULE ENTRIES | | | | |
| RULE NAME | | DOC TYPE | | |
| <input checked="" type="checkbox"/> WARNINGS ONLY | | | | |
|  | Rule | Filter Value |  | Result Va |
|      | BidTargets | | 5 |  |

Once you correct the rule and save, the icon will disappear.

After Setup

Rules can affect many aspects and functions in sfPMS such as:

- Alert text
- Budget and WBS configuration and behavior
- Code set behavior
- Compliance Notification text
- Doc status functionality
- Item functionality

- Document numbering options
- Doc type configurations
- Email text
- Executive Dashboard computations
- File Catalog options
- File type options
- Lien Waiver and other merge templates
- Contacts configurations
- KPI and Cost Analysis computations
- Project-level configurations
- SSRS customization
- Routing configurations
- Custom stored procedure options
- SOV workbook options

The Rule Maintenance Tool

When you select the Rules Maintenance tool, the rules grid view part appears:

| RULE MAINTENANCE | | | | |
|-----------------------------|----------------------------|---|------------|--|
| GROUP: <input type="text"/> | | <input checked="" type="checkbox"/> SHOW CODE SET | | |
| | Rule Group | Filter Info | Type | Description |
| ▶ | AlertText | AlertTypeKey | String | Provides the format of the alert messages (subject and body) generated for various alert types. ? |
| ▶ | BudgetConfig | DocTypeKey | String | Provides defaults for budget update modes. ? |
| ▶ | CloudStorageConfig | DocTypeKey | String | Allows customization of cloud drive storage features ? |
| ▶ | CodeSetFilterOverride | DocTypeKey | String | Overrides the default system generated filter for drop down choices. Use this rule as a last resort. See Also: ExcludeCommonChoices, ItemCodeLike and CodeSetRedirect first. Note that \$DOCTYPE\$ can be used as a placeholder for the document type. ? |
| ▶ | CodeSetRedirect | DocTypeKey | DocTypeKey | Lists the code sets + document type combinations that should be redirected to another document type. This rule is applied at the end of the filter creation and effects the value substituted for the \$DOCTYPE\$ placeholder ? |
| ▶ | ComplianceNotificationText | ComplianceTypeKey | String | Provides the format of the compliance messages (introduction, notification and action) generated for various compliance types. ? |
| ▶ | CustomerBlock | | String | For any customer status, can provide WARNING or BLOCKING message. ? |
| ▶ | DocApproved | DocTypeKey | Boolean | Lists the approving statuses for a document ? |

Rule Entries

When you expand a rule group, the Rule Entries grid appears.

The screenshot shows the 'RULE MAINTENANCE' window. At the top, there's a 'GROUP:' field and a 'SHOW CODE SET' checkbox. Below this is a table with columns: Rule Group, Filter Info, Type, and Description. The 'CodeSetRedirect' rule group is expanded, showing a 'DocTypeKey' filter and a description about redirecting code sets. Below this is the 'RULE ENTRIES' section, which includes a 'RULE NAME' field, a 'DOC TYPE' dropdown, and a 'SITE ONLY' checkbox. The main part of the interface is a grid with columns: Rule, Filter Value, Result Value, and SF. The grid lists five rules: Subtype (Bid), DocReference (Vendor), SubType (Invitation to Bid), SubType (Project Setup), and ContractType (Project Setup). Each rule has a corresponding result value and an SF (Spitfire-distributed) status.

| Rule | Filter Value | Result Value | SF |
|--------------|-------------------|---------------|----|
| Subtype | Bid | Project Setup | X |
| DocReference | Vendor | Commitment | X |
| SubType | Invitation to Bid | Commitment | X |
| SubType | Project Setup | Project Setup | X |
| ContractType | Project Setup | Project Setup | X |

Columns

- **Rule:** the name of the rule value. Each rule group uses specific rule values.
- **Filter Value:** the value that will limit the rule action to a specific data element (often a Doc type, Alert type or Compliance type).
- **Result Value:** the value that specifies the result for the rule. The result value can be a simple true (✓) or false (✗) to indicate whether the rule should be executed or not, or a rule-specific value, or an alphanumeric string, depending on the rule.
- **SF:** whether the rule + filter value + result value is Spitfire-distributed (✓) or user-defined (✗).

Note: KBAs list all available rules and corresponding result and filter values. For a list of possible rule groups, see [Rules and Rule Values](#) on support.spitfirepm.com.

Filters

Tip

The Admin | Rule Configuration report lists your rule values. For more information, see [Rule Configuration Report](#) on support.spitfirepm.com.

- **Rule Name:** Type the first few characters or use the wildcard (%) to find one or more rules by name.
- **Doc Type:** Click the checkbox to select a Filter Doc type from the drop-down menu.
- **Site Only:** Click the checkbox to clear the Site Only checkbox if you want to include the Spitfire-distributed rules.




Adding a Rule Group

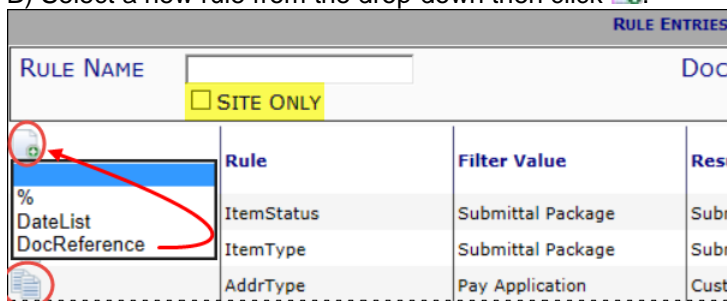
It is possible to add rule groups to the system. However, adding a rule group is an advanced topic, usually of interest to programmers and report designers only. Contact Spitfire Sales (sales@spitfiremanagement.com) to purchase a consulting session with one of our developers.

Editing Rule Groups / Adding Rules



Editing rule groups by adding rules can be a very effective way to customize how Spitfire works at your company. Be careful and take notes of the changes you make in Rule Maintenance, just in case you need to backtrack and undo some of your changes.

To edit a rule group and add a rule:

1. Find the correct rule group and click  to expand the group.
2. Click the **Site Only** checkbox to clear it. Before adding a rule, you should see if the rule already exists at your site through Spitfire defaults.
3. Either
 - A) Click  to copy an existing rule and enter new values, -or-
 - B) Select a new rule from the drop-down then click .





| RULE NAME | RULE | FILTER VALUE | RESULT |
|--------------|------------|-------------------|-------------------|
| % | ItemStatus | Submittal Package | Submittal Package |
| DateList | ItemType | Submittal Package | Submittal Package |
| DocReference | AddrType | Pay Application | Pay Application |

4. Select a new **Filter Value** and enter a **Result Value**, as appropriate.
5. Click  to accept the row.
6. Click  to save your changes.

Editing Rules

Note: Spitfire-distributed rules cannot be edited directly. Such rules must be copied first (as described above). The copy can then be edited.


- Click  to edit an existing rule.
- Click  to delete a rule.

TIP

We recommend that you use caution when you make changes to the default rules since changes to the rules affect the entire system. Working in your test system before applying your changes in the live system is highly recommended.

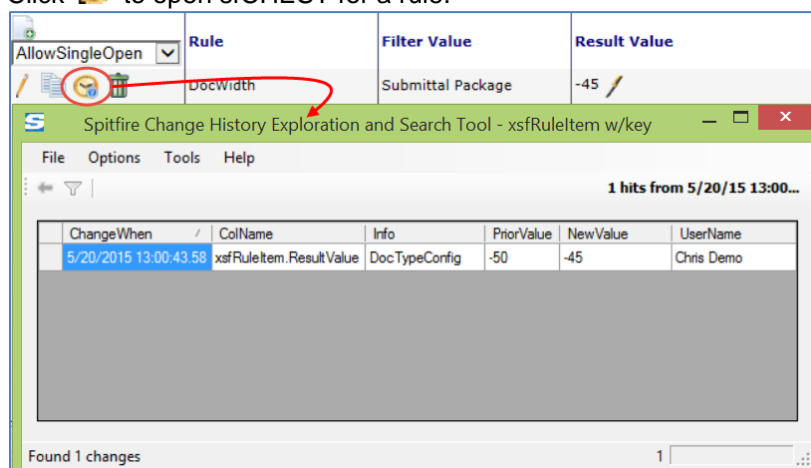
View Changes to a Rule

You can access the Spitfire Change History Exploration and Search Tool (sfCHEST) to see changes (if any) made to a user-configured rule.

- Click  to open sfCHEST for a rule.

TIP






The Admin | Configuration Changes report indicates changes in the Rules Maintenance tool between two dates. For more information, see [Rule Configuration Report](#) on support.spitfirepm.com.



Example

Let us say that you want to add a rule to the DocTypeConfig rule group so that Change Order documents will use a mask for document numbers. You will reference [the mask that you defined](#) on page 22.

(**Prerequisite:** In Mask Maintenance, the COID Mask must be configured first.)

| RULE MAINTENANCE | | | | |
|---|---------------|---|--------------|--|
| GROUP: <input type="text"/> | | <input type="checkbox"/> SHOW CODE SET | | |
|  | Rule Group | Filter Info | Type | Description |
|  | DocTypeConfig | DocTypeKey | String | Allows customization of document options such as CanCopyItems. ? |
| RULE ENTRIES | | | | |
| RULE NAME <input type="text" value="DOCn"/> | | DOC TYPE <input type="text"/> | | |
| <input type="checkbox"/> WARNINGS ONLY | | <input checked="" type="checkbox"/> SITE ONLY | | |
|  | Rule | Filter Value | Result Value | |
|   | DocNoMaskName | Change Order | COID / | |

For [another example](#) of the Rules Maintenance tool (ItemCodeLike rule group), see page 56.

System Information

The System Information tool displays relevant information for your system including the version of sfPMS you are running (and the version available), your Spitfire and Microsoft Dynamics SL databases, and even your current sessions.

The System Information Part

When you select the System Information tool, the corresponding part appears:

SYSTEM INFORMATION

SFPMS VERSION 4.6.5866.26291 **i**

| Name | Version | Released | Notes |
|------------------------|----------------|-------------------|-------------------------|
| v4.6 Stable Release | 4.6.5821.25596 | Dec 9 2015 14:21 | History |
| v4.6 Release Candidate | 4.6.5858.28074 | Jan 15 2016 15:44 | History |
| v4.6 General Release | 4.6.5858.28074 | Jan 15 2016 15:44 | History |

LICENSED BY _Internal
 SESSIONS Licensed Users: 10; Current 1, IIS 9
 LICENSED SERVER SFQA15
 SPITFIRE DB server=();database=sfTrain101DocSys;APP=sfPMS-sfTraining;Asynchronous Processing=true;
 INTEGRATED DB server=();database=sfTrain101App;APP=sfPMS-sfTraining;Asynchronous Processing=true;
 REPORT SERVER <http://SFQA15/ReportServer/Spitfire-SoniTraining> (Report Manager)
 SFATC SERVER (local):14491; Last WSRq: 2.8 min ago; Response: [OK, Running;2775][No active tasks]
 INBOUND EMAIL status=Completed; waiting=0; completed=15:17:06; started=15:17:05; runs=116; secs/run=0.9; scheduled=400,1350,4;
 TEXT SEARCH Last indexed Dec 16 2015 2:02PM; Currently 0 items in OCR Queue
 PERFORMANCE METRICS 176 Objects Cached;
 RAM: Using 68(192)MB, PeakV=752MB; CPU=111.4s;
 1492 Requests @ 182.3 ms/r 92% Since 2:55:33 PM: 184.4 ms/r 92%
 LOGGING Created Jan 26 04:06; size 431K
 CODES LAST CACHED Jan 26 14:51

Current Sessions Loaded Modules

| CURRENT SESSIONS | # | User | Login | Last Request | Last At | Type |
|------------------|---|------------|----------|--------------------|----------|-------------------|
| | 1 | Chris Demo | 11:27:46 | POST:n/cusysm (54) | 15:19:54 | sfDash, WindowsOS |

- as of 15:19:54.64 server time

Build Releases

SYSTEM INFORMATION


SFPMS VERSION 4.4.5213.32148 **i**


| Name | Version | Released | Notes |
|------------------------|----------------|-------------------|-------------------------|
| v4.4 Stable Release | 4.4.5166.19060 | Feb 22 2014 10:42 | History |
| v4.4 General Release | 4.4.5190.39955 | Mar 18 2014 23:20 | History |
| v4.4 Release Candidate | 4.4.5213.32148 | Apr 10 2014 18:58 | Running Now |

To view information about different builds:

1. Click **i** to view a list of previous builds.
2. Click on the word **History** (or **Updates**) to see release notes.

Updates

When a new update is available, the  icon is replaced by an animated icon. You can click on this icon to get the same list as above, but this icon lets you know that you can get a new build through ICTool.

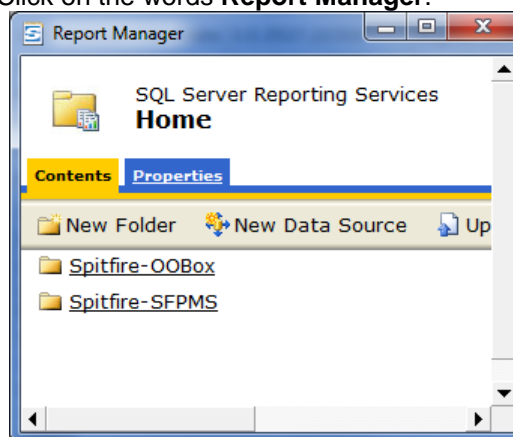
| SYSTEM INFORMATION | | | | |
|------------------------|----------------|---|-------------------------|--|
| SFPMS VERSION | 4.5.5613.32543 |  | | |
| Name | Version | Released | Notes | |
| v4.5 Stable Release | 4.5.5577.25815 | Apr 9 2015 15:28 | History | |
| v4.5 General Release | 4.5.5606.17637 | May 8 2015 10:55 | History | |
| v4.5 Release Candidate | 4.5.5618.32648 | May 20 2015 19:16 | Updates | |

Report Manager

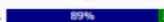
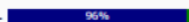
EXTERNAL DB server=();database=sfTrain101App;APP=sfPMS-sfTraining;Asynchronous Processing=true;
 REPORT SERVER <http://SFQA07/ReportServer/Spitfire-SoniTraining> (**Report Manager**)
 SFATC SERVER (local):14491; Last WSRq: 1.3 min ago; Response: [OK, Running;322][No active tasks]

To open Report Manager in SQL Server Reporting Services:

- Click on the words **Report Manager**.

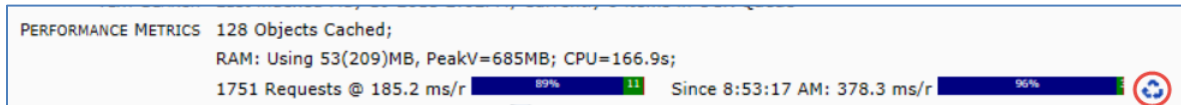


Performance Metrics

PERFORMANCE METRICS 128 Objects Cached;
 RAM: Using 53(209)MB, PeakV=685MB; CPU=166.9s;
 1751 Requests @ 185.2 ms/r  Since 8:53:17 AM: 378.3 ms/r 

Colored bars indicate response time being experienced by the users. The bar on the left corresponds to the whole day; the bar on the right corresponds to the most recent 100 requests. The blue section indicates the percentage of requests that took less than 1 second. The green section indicates the percentage of requests that took 1-3 seconds. A red section indicates the percentage of requests that took more than 3 seconds. Your system is doing well if the sum of blue and green is over 95%.

Recycle the System



To recycle sfPMS for all users:

- Click . •

Logging

LOGGING Created May 24 06:18; size 525K

To open or save the server log:

1. Click . A message will appear next to the icon:

Click here to open log as of 9:16, or right click to save to file.

2. Click on the message to open the log file or right-click to save the file.

Current Sessions




| Current Sessions | | Loaded Modules | | | | |
|---------------------------------|---|----------------|---------|-------------------|----------|-------------------|
| CURRENT SESSIONS | # | User | Login | Last Request | Last At | Type |
| | 1 | Chris Demo | 8:53:10 | POST:n/cusysm (7) | 8:53:33+ | sfDash, WindowsOS |
| - as of 09:13:35.69 server time | | | | | | |




The tab section at the bottom gives you information about the current session.

- **User:** the name of the user(s) currently using the system.
- **Login:** the time the user logged in.
- **Last Request:** the last action/request made of the system.
- **Last At:** the time of the last request
- **Type:** the type of client (such as Microsoft Internet Explorer, Chrome or iPad, etc.)

Appendix A: Code Sets

Sets used in [Code Maintenance](#) apply either to all documents (if the Doc type is left blank) or to the specified Doc type. Some of them apply to other drop-downs in sfPMS. This Appendix shows you which drop-down or list is affected by each code set.

Note: Some of the code sets used in sfPMS are defined by the system and cannot be edited. Other sets are user-defined and can be edited. For example, you'll notice that the , , and  icons are shown on the DocStatus set, but not on the AcctClass set. The Doc Status code set is editable; while the AcctClass code set is not.

| SET NAME | DocStatus | DESCR LIK |
|---|-----------------|-----------------|
| CODE LIKE: | | DOC TYPE |
|  | | Doc Type |
|  | | Code |
|  | | |
| | Pay Application | A |
| | Pay Application | C |
| | Pay Application | I |

| SET NAME | AcctClass |
|-------------|--------------------|
| CODE LIKE: | |
| Code | Description |
| L | Labor |
| LB | Labor Burden |
| M | Material |

Non-editable Code Sets

The following code sets are controlled by sfPMS and cannot be edited.

- Acct Class
- Acct Type
- ActiveFlag
- AlertStatusList
- AllocEntryType
- AuditMode
- BFAMode
- Boolean
- CodeSetType
- ContactScope
- CostingMethod
- EventItemType
- InclusionType
- MailRoute
- MaskType
- PayControlList
- PrimarySource
- Priority
- RoleType
- RouteAccess
- RouteViaList
- RuleResultType
- SCBudgetMode
- StopTypeList
- TemplateType

The Code Set List

If applicable, the corresponding part and item name used to customize your documents are included below because these drop-downs will appear only if they are configured for the Doc type, either through configuration or internal defaults.

AcctClass

Appears on the Account Category tool on the System Admin Dashboard:

| ACCOUNT CATEGORIES | | | | |
|--------------------|-------|--------------|-----|---------|
| NAME | | | | |
| CLASS | Labor | | | |
| | Name | Long Name | Seq | Type |
| | LABOR | Direct Labor | 0 | Expense |

AcctType

Appears on the Account Category tool on the System Admin Dashboard:

| ACCOUNT CATEGORIES | | | | |
|--------------------|----------|-----------------------|-----|---------|
| NAME | | | | |
| TYPE | Expense | | | |
| CLASS | | | | |
| | Name | Long Name | Seq | Type |
| | EQ OWNED | Equipment Costs Owned | 0 | Expense |

ActiveFlags

Appears on the filters of the Contacts Dashboard:

| CONTACT LIST | | | |
|--|-------------|-----------------------|-----------------------|
| NAME | | | EMAIL |
| PHONE/FAX | | | LOCATION |
| COMPANY | | | MEMBERS |
| <input checked="" type="checkbox"/> SPITFIRE USERS ONLY <input type="checkbox"/> EMPLOYEES ONLY <input type="checkbox"/> PUBLIC ONLY | | | |
| ACTIVE | Active | | |
| | Name | Company | Email |
| | Jack McSwag | Spitfire Construction | support@spitfireconst |

AddrType

Appears on Spitfire documents with an Addr tab, such as Correspondence:

[UI Configuration Part = Doc Tabs, Item = Address Tab]

| Details | | Note | Addr |
|-----------------|-------------|------|------|
| TYPE | From/Author | | |
| FROM Chris Demo | | | |

Tip

The letter "P" is reserved in the AddrType code set so should not be used.

AlertStatusList

Not currently used.

AllocEntryType

Appears on the Allocations tool on the Manage Dashboard:

| ALLOCATIONS | | | | | | |
|------------------------------|-----------|---------------|---------|------------------|-------------------------|----------|
| PROJECT <input type="text"/> | | | | | | |
| | EntryType | Contract Type | Project | Source Cost Code | Source Account Category | Sequence |
| | Markup | | GC003 | 02200- | _EQ RENTAL | 0 |

AttrType

TIP

For Vendor documents, see also the [VendorClassif](#), [VendorEEO](#), [VendorLabor](#), and [VendorReference](#) code sets.

Appears on Spitfire documents with an Attributes tab, such as Daily Field Report or Vendor.



Note: when the Attributes tab is added to the Vendor Doc type, it actually appears on the Company Contact Detail window for the Vendor (and not on the Vendor document).

[UI Configuration Part = Doc Tabs, Item = Attributes Tab; the Type drop-down is always included in the Attributes tab]

| Details | Work | Job Safety | Resources | Equipment |
|---|------|-------------|-----------|-----------|
| TYPE <input type="text" value="Instruction"/> | | | | |
| Value | | Description | | |

AuditMode

Appears on the Audit Log, accessed from the Contact list:

| AUDIT LOG | | | |
|--------------|--|------------|----------|
| MODE | <input type="text" value="Auto:Family"/> | CHANGE BY | |
| CHANGED | <input checked="" type="checkbox"/> 12/22/2014 | 05/22/2015 | PER PAGE |
| | | | LIMIT |
| Changed When | Change By | ColName | |

BFAmode

Appears on the Budget/Forecast Transaction History window, accessed by drilling down on certain columns in the BFA workbook.

| BUDGET / FORECAST TRANSACTION HISTORY | | |
|---------------------------------------|---------------------------------------|------------|
| ACCOUNT CATEGORY | <input type="text"/> | |
| MODE | <input type="text" value="All"/> | |
| COST | <input type="text" value="All"/> | |
| | <input type="text" value="Budget"/> | |
| | <input type="text" value="Forecast"/> | |
| Close Date | Notes | Changed By |

Boolean

Appears on filters that require a Yes/No option, such as on a lookup:

Lookup Dialog

Active Contacts

☒ ALL FILTERS

USER NAME

TITLE

EMAIL

COMPANY

ADDRESS

CITY

STATE

ZIP

ON TEAM

PRIMARY

Yes

No

Certification

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail-Standard, Item = Certification]

Notes

Addr

Items

| Item | Cost Code | Spec | Para | Rev | Description | Item Type | Responsible |
|-------|-----------|------|------|-----|-------------|-----------|-------------|
| 00437 | | | | | | | |

SPEC/PARA:REV

/

:

CERTIFICATION

Pending

CodeSetType

Appears on the Code Maintenance tool on the System Admin Dashboard:

CODE MAINTENANCE

SET NAME LIKE:

| Set Name | Set Type |
|---------------|-----------------|
| ImgButtonSize | CodeList |
| New Code | DocTypeSubcodes |
| InfraType | CodeList |

ContactScope

Appears on the Project Dashboard filter and the Contacts Dashboard filter, when the Company field is used:

Submittal - 0 of 1 open documents accessible

| | | | |
|---------|---------------|---------|------|
| TYPE | Submittal | DOC # | |
| STATUS | | SUBTYPE | |
| COMPANY | Able Electric | SCOPE | From |

ContractType

Appears on Spitfire documents that have been configured to include this field on the Details tab, such as Project Setup.

[UI Configuration Part = Doc Tabs, Item = Details Tab (for Details tab); also Part = Doc Detail - Standard, Item = Contract Type]

Details | Scope | Addr | Dates | Items

TYPE

CONTRACT TYPE: Fixed Price to Rev

Also, on Spitfire documents that have been configured to include this field on the Document Header, such as Commitment:

[UI Configuration Part = Doc Header – Commitment, Item ContractType]

Commitment- New

Commitment 0001

DOCUMENT HEADER

Doc# 0001

PROJECT GC-500 Northwind Office Building

DESCRIPTION Commitment 0001

VENDOR

COMMITMENT TYPE

CONTRACT TYPE: Time & Material

Note: this drop-down menu should not be confused with the document's Subtype (see page 130).

CostCodeStatus

Appears on the Cost Code Maintenance window, accessed from the Project Options menu:

The screenshot shows the 'GC500 Cost Code Maintenance' window. At the top, there's a 'MAINTENANCE' header. Below it, the 'STATUS' dropdown menu is open, showing 'Active' as the selected option. Other visible elements include a 'SHOW ACTUAL DATES' checkbox, a 'FIND:' search bar, and a 'PER PAGE' dropdown.

CostingMethod

Appears on the Cost Code Maintenance window:

This screenshot shows the same 'GC500 Cost Code Maintenance' window, but with the 'Costing Method' dropdown menu open. The dropdown shows 'Fixed Price' as the selected option. The window also displays a table with columns: Cost Code, Description, Contract Type, UOM, SOV Line, Status, %, and Costing Method. The first row shows '00000-' for Cost Code, 'General Default' for Description, and 'Active' for Status.

Country

Not currently used.

DFRDelay

Appears on the Equipment (Attribute) tab of a Daily Field Report document, when the Delay type is chosen:

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Info tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'Equipment' tab in a 'Daily Field Report' document. The 'TYPE' dropdown menu is set to 'Delay'. Below this, there's a table with columns 'Value' and 'Description'. The first row shows 'Weather' as the value, with a green checkmark and a red 'X' icon to its left.

DFREquip

Appears on the Equipment (Attribute) tab of a Daily Field Report document, when the Equipment type is chosen:

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Info tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows a form with tabs: Details, Work, Job Safety, Resources, Equipment, Subs, and Major Deli. The 'Equipment' tab is active. Below the tabs, there is a 'TYPE' dropdown menu with 'Equipment' selected. Below this is a table with columns 'Value' and 'Description'. The 'Value' column has a dropdown menu with 'Equipment' selected. There are also checkmark and X icons next to the 'Value' column.

DocStatus

TIP

The Admin | Next Doc Status Matrix report indicates which statuses follow each Doc status. For more information, see [Next Doc Status Matrix Report](#) on support.spitfirepm.com.

Appears on the Document Header of many Spitfire documents:

[UI Configuration Part = Doc Header – Standard, Item = Status]

The screenshot shows a 'DOCUMENT HEADER' form. It contains the following fields: DOC# (0017), PROJECT (GC-003), SUBJECT (Weekly meeting 17), STATUS (Agenda), DATE (01/09/2010), and SCHEDULED (01/17/2010 11:30). There is also a field for 'Northern Lights Office Bldg'.

Drawings

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail-Standard, Item = Drawings]

The screenshot shows a form with tabs: Notes, Addr, and Items. The 'Items' tab is active. It contains a table with columns: Item, Cost Code, Spec Para Rev, and Description. The 'Item' column has a dropdown menu with '00004' selected. The 'Cost Code' column has a dropdown menu with '08100-Metal Doors' selected. The 'Description' column has a text area with 'Hardware' entered. At the bottom, there is a 'DRAWINGS' dropdown menu.

Evaluation

Appears on Spitfire documents that have been configured to include this field on the Items (or CI) tab, such as Change Order:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for CI tab); also Part = Doc Item Detail-CO, Item = Evaluation]

The screenshot shows a web application interface with a tabbed menu at the top containing 'Details', 'Scope', 'Addr', and 'CI'. The 'CI' tab is selected. Below the tabs is a table with columns: 'CI', 'Description', 'Bill', 'Revenue Amt', and 'Status'. A single row is visible with '00001' in the 'CI' column, 'Additional electrical work required for ...' in the 'Description' column, a checked box in the 'Bill' column, '\$1,250.00' in the 'Revenue Amt' column, and 'Proposed' in the 'Status' column. Below the table, there is a yellow button labeled 'EVALUATION' and a dropdown menu labeled 'Owner Review'.

EventItemType

Appears on the Event Subscriptions tool on the System Admin Dashboard:

The screenshot shows a web application interface with two main sections. The top section is titled 'AGENT LIST' and contains a table with columns: 'Agent URI', 'Agent Type', 'Select', and 'Active'. A single row is visible with 'cp://HOST:PORT/ISpitfireEventInterface' in the 'Agent URI' column, 'EI' in the 'Agent Type' column, an unchecked box in the 'Select' column, and a checked box in the 'Active' column. The bottom section is titled 'SUBSCRIPTIONS FOR SELECTED AGENT' and contains a table with columns: 'Action', 'Folder', 'File', 'File Type', 'Project', 'Event Flags', 'For Type', and 'Active'. A single row is visible with empty fields for 'Action', 'Folder', 'File', 'File Type', and 'Project', '0' in the 'Event Flags' column, 'All' in the 'For Type' column, and a checked box in the 'Active' column.

ExternalSchedule

Appears on Project Setup documents that have been configured to include the Public Schedule field on the Project tab:

[UI Configuration Part = Doc Tabs, Item =Project Setup tab (for Project tab); also Part = Doc Project Setup, Item = Public Schedule]

The screenshot shows a web application interface with a tabbed menu at the top containing 'Details', 'Scope', 'Addr', 'Dates', 'Items', 'Incl/Excl', and 'Project'. The 'Project' tab is selected. Below the tabs, there is a yellow button labeled 'PUBLIC SCHEDULE'. Below this button, there is a label 'COMMITMENT BUDGETING MODE' and a dropdown menu with 'Update' selected.

ExternalStatus

Appears on Project Setup documents that have been configured to include the Public Status field on the Project tab:

[UI Configuration Part = Doc Tabs, Item =Project Setup tab (for Project tab); also Part = Doc Project Setup, Item = Public Status]

A screenshot of a software interface showing a tabbed menu with 'Details', 'Scope', 'Addr', 'Dates', 'Items', 'Incl/Excl', and 'Project'. The 'Project' tab is selected. Below the tabs, there is a yellow rectangular field labeled 'PUBLIC STATUS' with a dropdown arrow on the right.

FieldMockup

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail – Standard, Item = Mockup]

A screenshot of a software interface showing a tabbed menu with 'Notes', 'Addr', and 'Items'. The 'Items' tab is selected. Below the tabs, there is a table with columns: Item, Cost Code, Spec, Para, Rev, and Description. The first row shows '00004', '08100-', 'Metal Doors', and 'Hardware'. Below the table, there are fields for 'SPEC/PARA:REV', 'DRAWINGS', and 'MOCKUP'. The 'MOCKUP' field is highlighted in yellow.

FileAccessType

Appears on the Access History tab of the File Properties window. This code list is for system use only.

A screenshot of a 'FILE PROPERTIES' window. It has three tabs: 'File Properties', 'File Version', and 'Access History'. The 'Access History' tab is selected. Below the tabs, there is a table with columns: Rev#, Accessed, By, and Reason. The first row shows '1', 'May 1, 2015 07:46', 'Skip Reardon', and 'Read'. The 'Reason' column is highlighted in yellow.

FilterAny

Internal use only.

Guarantee

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail – Standard, Item = Guarantee]

| Spec | Para | Rev | Description | Item Type | Responsible |
|------|------|-----|-------------|--------------|---------------|
| | | | Hardw | Product Data | Jillian Smart |

GUARANTEE

ImgButtonSize

Appears on the My Settings/User Information window accessed from the Site Options menu:

My Settings / User Information

Settings / Preferences Client Session Information License Information

USER NAME Chris Demo

PASSWORD LAST CHANGED: 2015-05-16

THESE SETTINGS ARE SPECIFIC TO THIS DEVICE

PRIMARY THEME Spitfire Standard

CONTRAST THEME Smoothness

PRIORITIZED DOC TYPE Submittal

DOC POSITION Right Edge

ICON SIZE 16 Use Legacy Icons

IMTypeList

Appears on the Connections tab of a Contact Detail window:

CONTACT DETAIL

General Address Member Of **Connections** Notification Comm

PHONE (914) 273-0809
 CELL (203) 555-1212
 PAGER
 FAX (503) 452-6981
 IM HANDLE

PREFERRED CONTACT NUMBER
 DEFAULT RESPONSIBILITY Proj
 ROUTE VIA Web
 ALLOW ROUTE ACTION PROXY Project Assistant
 IM SERVICE: Google

InclusionType

Appears on Spitfire documents with an Incl/Excl tab, such as CCO:

[UI Configuration Part = Doc Tabs, Item = InclusionTab]

Details Scope Addr Items **Incl/Excl**

TYPE Legal Attachments

InstructionType

Appears on Spitfire documents with an Instruction tab, such as Safety:

[UI Configuration Part = Doc Tabs, Item = Instr/Attributes Tab (for Instruction tab); also Part = Doc Attributes, Item = Value (Attr) Col]

Notes **Instructions**

| | Value |
|-----|-------------------------|
| ✓ X | Distribute to Employees |

IntegrityCheck

Appears on the Integrity Check report (found on the Admin folder):

Spitfire Integrity Check

/Spitfire-SoniTraining/Admin/Integrity Check

REPORT PARAMETERS

Integrity Check

☐ AUTO REPAIR
☐ SHOW AUDIT DATA
☒ HIDE WARNINGS

IC TYPE Approved documents that are not closed

ItemSource

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Drawings:

[UI Configuration Part = Doc Tabs, Item = Items Tab (for Item tab);
also Part = Doc Item Detail – Standard, Item = Source]

| Item |
|-------------------------|
| 2-1 Site Utilities R. 4 |

DRAWING TYPE [dropdown]

ItemStatus

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Meeting Minutes:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Item tab);
also Part = Doc Items, Item = ItemStatus]

| Item | Description | Status |
|------|-------------------------------|--------------|
| 17-1 | Review utility changes / | Open |
| 17-2 | FO re-routing clarification / | Carried Over |

Another example: Change Order document:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for CI tab);
also Part = Doc Item Detail – CO, Item = PCOItemStatus]

| Item | Bill | Revenue Amt | Status |
|--------------------------------------|-------------------------------------|-------------|-----------|
| al electrical work required for ... | <input checked="" type="checkbox"/> | \$1,250.00 | Proposed |
| ditional work to meet revised cit... | <input checked="" type="checkbox"/> | \$1,675.00 | Requested |

ItemSubtype

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Punch List:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = DocItemDetail – Standard, Item = Subtype]

The screenshot shows a software interface with two tabs: 'Items' and 'Instructions'. The 'Items' tab is active, displaying a table with two columns: 'Item' and 'Description'. The table contains one row with the item code '0005-001' and the description 'The first item'. To the left of the table is a sidebar with icons for adding, deleting, and refreshing. At the bottom right of the interface, there is a yellow dropdown menu labeled 'SUB TYPE'.

ItemType

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Permit:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = DocItemDetail - Standard, Item = ItemType]

The screenshot shows a software interface with four tabs: 'Details', 'Notes', 'Instructions', and 'Items'. The 'Items' tab is active, displaying a table with two columns: 'Item' and 'Description'. The table contains two rows: 'Water Supply' and 'Water Hookup'. To the left of the table is a sidebar with icons for adding, deleting, and refreshing. At the bottom right of the interface, there is a yellow dropdown menu labeled 'Specific Permit'.

Note: ItemType is often used as a subset of another code set, such as [Subtype](#) (see page 130). Be sure to add to the [ItemCodeLike](#) rule through the Rules Maintenance tool if your ItemType field is to be filtered by your Subtype field choice.

LaborClass

Appears on Spitfire documents that have been configured to include this lookup on the Items tab, such as Commitment:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = DocItemDetail-Commitment, Item = Commitment-LaborClass]

The screenshot shows a software interface with eight tabs: 'Details', 'Scope', 'Addr', 'Payees', 'Dates', 'Items', 'Incl/Excl', and 'Compliance'. The 'Items' tab is active, displaying a table with eight columns: 'Item', 'Cost Code', 'Category', 'Description', 'UOM', 'Quantity', 'Rate', and 'Original'. The table contains one row with the item code '0001', cost code '16000-', category '_SUB', description 'Electrical V', and original value '\$500'. Below the table, there are three input fields: 'SPECIFIC PERMIT', 'REQUIRED DATE', and 'ITEM ID'. At the bottom right of the interface, there is a yellow dropdown menu labeled 'LABOR CLASS'.

MailRoute

Appears on the Attachment tab on Spitfire documents:


Attachments


Route Detail

| | Name | Size | Note | Item | Incl |
|---|--|------|------|-------------|----------------|
|     |  Commitment 32 Ton Chiller/Evaporator.doc | | | <div></div> | <div>PDF</div> |

MaskType

Appears on the Mask Maintenance tool on the System Admin Dashboard:

| MASK DEFINITIONS | | | |
|---|------------|--------------|--|
| | Mask Name | Max Segments | |
|  | COMMITMENT | 6 | |

| MASK DETAIL | | | | |
|---|-----------|--------|--------|------------------------|
| | Segment # | Length | Name | Mask Type |
|   | 1 | 6 | Vendor | Uppercase Alphanumeric |

MixDesign

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:






[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail - Standard, Item = Design]

Notes

Addr

Instructions

Items

| | Item | Cost Code | Spec | Para | Rev | Descrip |
|---|-------|-----------------------|------|------|-----|---------|
|      | 00004 | 08100- Metal Doors | | | | Hardw |

SPEC/PARA:REV

/

SPECIFIC PERMIT

Product Data

DESIGN

PayControl

Appears on Spitfire documents with a Compliance tab, such as Commitment:

[UI Configuration Part = Doc Tabs, Item = ComplianceTab (for Compliance tab); also Part = Doc Compliance, Item = PayControl]

The screenshot shows the 'Compliance' tab of a document. It contains several sections: 'Required' with an 'Overrides Start' field, 'Received' with a date field, and 'Notify' with a checkbox. Below these are fields for 'Amount', 'Expiration', and 'Lead Days' (set to 0). At the bottom, there is a 'PAY CONTROL' dropdown menu currently set to 'Warn'.

PlanRoomMode

Appears on the Project tab on Project Setup documents:

[UI Configuration Part =Doc Project Setup, Item = Plan Room Mode]

The screenshot shows the 'Project' tab of a document. It includes fields for 'PUBLIC STATUS', 'PUBLIC SCHEDULE', and 'BUDGETING MODE' (set to 'Update'). The 'PLAN ROOM MODE' dropdown menu is highlighted and set to 'Public'.

PrimarySource

Appears on certain lookups, such as Contact Company:

The screenshot shows a 'Lookup Dialog' window titled 'Contact Company'. It has a 'Refresh' button and a list of fields: 'COMPANY', 'USER NAME', 'TITLE', 'EMAIL', 'ADDRESS', 'CITY', 'PRIMARY', and 'SOURCE'. The 'SOURCE' field is highlighted and set to 'Customer'. The dialog is overlaid on a 'Monthly Progress Report' document window.

Priority

Appears on the Route Detail tab on Spitfire documents:

Attachments

Route Detail

| | Seq | To | Status | Ins | Rsp | Notes | Due |
|--|-----|---|---------|-----|-----|-------|---|
| | 1 | Chris Demo (Superintendent) | Pending | | | | Due: Jun 14 22:02 Viewed: May 26 06:17 |
| | 2 | Jason Sunderson Able Electric Corp (Subcontractor Base) | Pending | | | | |

☐ THIS STAGE☐ CONFIDENTIAL

PRIORITYUrgent

ProductData

On Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail - Standard, Item = Data]

Notes

Addr

Instructions

Items

| Item | Cost Code | Spec | Para | Rev | Descr |
|------|-----------|-------------|------|-----|-------|
| | 00004 | 08100- | | | Hard |
| | | Metal Doors | | | |

SPEC/PARA:REV

SPECIFIC PERMIT

DATA

Reason

Appears on the Document Header of some Spitfire documents, such as Change Order:

[UI Configuration Part = Doc Header – CO/CCO, Item = ReasonCode]

Change Order-Pending

Change Order 0001

DOCUMENT HEADER

Doc # 0001 CUST CO #

PROJECT GC-003 Northern Lights Office Bldg

CONTRACT General Construction

STATUS Pending

CONTRACT TYPE Fixed Price to Rev

REJECT CODE Not enough Time

Also found on the Details tab of some Spitfire documents, such as Bid document:

[UI Configuration Part = Doc Tabs, Item = DetailsTab (for Details tab); also Part = Doc Detail – Standard, Item = Reason]

Details Scope Addr Instructions Dates Items Incl/Excl

TYPE

CONTRACT TYPE

W/L REASON Price

Recur

Appears on the Alert Subscriptions tool on the Manage Dashboard:

ALERT SUBSCRIPTIONS

DOC TYPE: USER ALERT

ROLE NAME PROJECT

| User/Role | Alert | Description | Recur | Lead Time | Doc Type |
|-----------------|--------------|-------------|-------|-----------|----------|
| Project Manager | Document Due | | NA | -3 | |

ResponseCode

Appears on a document's Route Detail tab:

Attachments Route Detail

| Seq | To | Status | Ins | Rsp |
|-----|-----------------------------|---------|-----|----------|
| 1 | Chris Demo (Superintendent) | Pending | | Approved |

RetentionMethod

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as CCO:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail – CCO, Item = RetentionMethod]

The screenshot shows the 'Items' tab configuration in the Spitfire UI. The 'RetentionMethod' is highlighted in yellow and set to '% of Total'. Other visible fields include 'Cost Code' (16000-), 'Category' (SUB), 'Description' (Planning), 'SPECIFIC PERMIT', 'LINE ITEM' (0001), 'REVENUE CODE' (16000-), 'CAP' (checked), 'UNITS', 'RATE' (100.0000), and 'AMOUNT'.

RoleType

Appears on the Roles tool on the System Admin Dashboard:

The screenshot shows the 'ROLE LIST' tool. The 'TYPE' field is highlighted in yellow and set to 'Primary'. Other visible fields include 'ROLE LIKE' and 'HAS'.

RouteAccess

Appears on the Routes tool on the Manage Dashboard:

The screenshot shows the 'ROUTE LIST' tool. The 'Access Level' field is highlighted in yellow and set to 'Collaborate'. Other visible fields include 'NAME:', 'DOC TYPE', 'Route Name' (AP Voucher), 'STATUS:', 'Seq. No.' (2), 'User/Role' (Project Manager), 'Description', and 'Default Status' (Pending).

RouteStatus

Appears on the Routes tool on the Manage Dashboard:

| ROUTE LIST | | | | | |
|------------------------------|------------|-----------------|-------------|--------------|----------------|
| NAME: | | | | DOC TYPE | |
| | Route Name | | | Active | |
| | AP Voucher | | | | |
| DETAILS FOR SELECTED | | | | | |
| STATUS: <input type="text"/> | | | | | |
| | Seq. No. | User/Role | Description | Access Level | Default Status |
| | 2 | Project Manager | | Collaborate | Pending |
| | | | | | |

RouteViaList

Appears on the Connections tab of the Contact Detail window:

| CONTACT DETAIL | |
|--------------------------|----------------|
| General | Address |
| Member Of | Connections |
| Notification | Comments |
| PHONE | (914) 273-0809 |
| CELL | (203) 555-1212 |
| PAGER | |
| PREFERRED CONTACT NUMBER | Phone |
| DEFAULT RESPONSIBILITY | Project Staff |
| ROUTE VIA | E-Mail |

RuleResultType

Appears on the Rules Maintenance tool on the System Admin Dashboard:

| RULE MAINTENANCE | | | | |
|-----------------------------|--------------|--------------|--------|----------------------|
| GROUP: <input type="text"/> | | | | |
| | Rule Group | Filter Info | Type | Description |
| | AlertText | AlertTypeKey | String | Provides for various |
| | BudgetConfig | DocTypeKey | String | Provides |

Samples

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail – Standard, Item = Samples]

| Item | Cost Code | Spec | Para | Rev | Description | Item Type | Responsible |
|-------|-----------|------|------|-----|-------------|--------------|---|
| 00004 | 08100- | | | | Hardw | Product Data | Jillian Smart Adventure Works Architecture |

SPEC/PARA:REV / :
SPECIFIC PERMIT Product Data
SAMPLES

SCBudgetMode

Appears on Project Setup documents that have been configured to include the Commitment Budgeting Mode field on the Project tab:

[UI Configuration Part = Doc Tabs, Item = Project Setup Tab (for Project tab); also Part = Project Setup, Item = Commitment Budgeting Mode]

| Details | Scope | Addr | Instructions | Dates | Items | Incl/Excl | Project |
|---------|-------|------|--------------|-------|-------|-----------|----------------------------------|
| | | | | | | | PUBLIC STATUS |
| | | | | | | | PUBLIC SCHEDULE |
| | | | | | | | COMMITMENT BUDGETING MODE Update |

Shop

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail - Standard, Item = Shop]

Source

Appears on Spitfire documents that have been configured to include the Terms field on the Document Header, such as Commitment:

[UI Configuration Part = Doc Header – Commitment, Item = Terms]

Also, on Spitfire documents that have been configured to include this field on the Details tab, such as Change Order:

[UI Configuration Part = Doc Tabs, Item = DetailsTab (for Details tab); also Part = Doc Detail - CO, Item = Source]

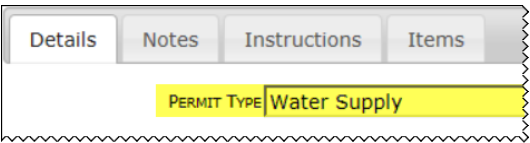
StopTypeList

Legacy. Currently not in use.

SubType

Appears on Spitfire documents that have been configured to include this field on the Details tab, such as Permits:

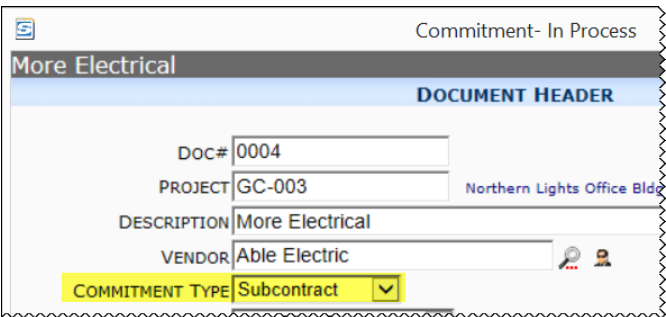
[UI Configuration Part = DocTabs, Item = DetailsTab (for Details tab); also Part = Doc Details – Standard, Item = Subtype]



Note: See also [ItemType](#) on page 120.

Also, on Spitfire documents that have been configured to include this field on the Document Header, such as Commitment:

[UI Configuration Part = Doc Header – Commitment, Item = Commitment Type]



Note: this drop-down menu should not be confused with [Contract Type](#) (see page 112).

TaskCostType

Appears on the Budget Entries window accessed from the CI tab:

The screenshot shows a software window with tabs: Details, Scope, Addr, Instructions, and CI. The CI tab is active, displaying a table with columns CI and Description. A row shows CI '00001' and Description 'Additional electrical work'. Below this is a 'Change Item Budget' dialog box. The dialog has a table with columns Seq#, Description, and Cost Type. The first row shows Seq# '2', an empty Description field, and a 'Self Perform' dropdown menu.

TaxHandling

Appears on Spitfire documents that have been configured to include this field on the Details tab, such as Commitments:

[UI Configuration Part = Doc Detail - Standard, Item = Tax Handling]

The screenshot shows a document window with tabs: Details, Scope, Addr, Payees, Dates, and Items. The Details tab is active, showing a field labeled 'TAX HANDLING' with a dropdown menu currently set to 'Tax Added'.

TemplateType

Appears on the Templates tool on the Manage or System Admin Dashboard:

The screenshot shows a 'TEMPLATES' tool window. It contains search filters: 'NAMES LIKE:' with a text input field, 'TYPE:' with a dropdown menu set to 'Attachment (all)', and 'DOC TYPE:' with a dropdown menu set to 'Commitment'.

TestReport

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Submittal:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail - Standard, Item = Reports]

The screenshot shows a document window with the 'Items' tab active. It displays a table with columns: Para, Rev, Description, Item Type, and Responsible. A row shows 'Hardware' in the Description column, 'Product Data' in the Item Type column, and 'Jillian Smart' in the Responsible column. Below the table is a 'Product Data' dropdown menu. At the bottom right, there is a 'REPORTS' dropdown menu.

ThemeVariant

Appears on the My Settings/User Information window accessed from the Site Options menu:

My Settings / User Information

Settings / PreferencesClient Session InformationLicense Information

USER NAME Chris Demo

PASSWORD LAST CHANGED: 2015-05-16

THESE SETTINGS ARE SPECIFIC TO THIS DEVICE

PRIMARY THEMESpitfire Standard

CONTRAST THEMESmoothness

TimeZone

Appears on the Address tab of the Contact Detail window:

CONTACT DETAIL

GeneralAddressMember OfConnectionsNotification

COMPANYSpitfire Construction

ADDRESS80 Business Park Drive

CITY/StArmonk, NY10504

SALUTATION

TIME ZONEEastern Standard Time (North America) - UTC-05

UIPartContext

Appears on the UI Configuration tool:

UI CONFIGURATION TOOL

PART:Doc Item Detail - StandardITEM:

☒ SHOW VISIBLE ONLY

| Context | Capability | Item | Label |
|---------|------------|--------|-------|
| (all) | | Amount | |

UOM

Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Commitment:

[UI Configuration Part = Doc Tabs, Item = ItemsTab (for Items tab);
also Part = Doc Item Detail- Commitment,
Item = Commitment – UOM Caption]

DetailsScopeAddrPayeesDatesItemsIn

| Item | Cost Code | Category | Description | UOM |
|------|------------------|----------|-----------------|------|
| 0001 | 16000-Electrical | _SUB | Electrical Work | Each |

VendorClassif

Appears on the Attributes tab on a document or the Attributes tab of a Vendor's Company Detail window, when the Classification type is chosen:

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Attributes tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'COMPANY DETAIL' window with the 'Attributes' tab selected. A red circle highlights the 'TYPE' dropdown menu, which is set to 'Classification'. Below the dropdown, there is a table with columns 'Value', 'Spec', and 'Note'. The 'Value' column contains a yellow box with a green checkmark and a red 'X' icon, and the text 'MBE - Minority' with a dropdown arrow. The 'Spec' and 'Note' columns are empty.

VendorEEO

Appears on the Attributes tab on a document or the Attributes tab of a Vendor's Company Detail window, when the EEO type is chosen:

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Attributes tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'COMPANY DETAIL' window with the 'Attributes' tab selected. A red circle highlights the 'TYPE' dropdown menu, which is set to 'EEO'. Below the dropdown, there is a table with columns 'Value', 'Spec', and 'Note'. The 'Value' column contains a yellow box with a green checkmark and a red 'X' icon, and the text 'Asian' with a dropdown arrow. The 'Spec' and 'Note' columns are empty.

VendorLabor

Appears on the Attributes tab on a document or the Attributes tab of a Vendor's Company Detail window, when the Labor Source type is chosen:

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Attributes tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'COMPANY DETAIL' window with the 'Attributes' tab selected. A red circle highlights the 'TYPE' dropdown menu, which is set to 'Labor Source'. Below the dropdown is a table with columns 'Value', 'Spec', and 'Note'. The 'Value' column contains a yellow box with 'Local Union' and a dropdown arrow. To the left of the table are green and red checkmark icons. The 'Spec' and 'Note' columns are empty.

VendorLicense

Appears on the Attributes tab on a document or the Attributes tab of a Vendor's Company Detail window, when the License type is chosen.

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Attributes tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'COMPANY DETAIL' window with the 'Attributes' tab selected. A red circle highlights the 'TYPE' dropdown menu, which is set to 'License'. Below the dropdown is a table with columns 'Value', 'Spec', and 'Note'. The 'Value' column contains a yellow box with 'Primary' and a dropdown arrow. To the left of the table are green and red checkmark icons. The 'Spec' and 'Note' columns are empty.

VendorReference

Appears on the Attributes tab on a document or the Attributes tab of a Vendor's Company Detail window, when the Reference type is chosen.

[UI Configuration Part = Doc Tabs, Item = Attributes Tab (for Attributes tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'COMPANY DETAIL' window with the 'Attributes' tab selected. A red circle highlights the 'TYPE' dropdown menu, which is set to 'Reference'. Below the dropdown is a table with columns 'Value', 'Spec', and 'Note'. The 'Value' column contains a yellow box with 'Bank' and a dropdown arrow. To the left of the table are green and red checkmark icons. The 'Spec' and 'Note' columns are empty.

Appendix B

Default Roles and Their Capabilities

Spitfire ships with a few primary default roles: Architect, Everyone, Owner, Plan Room Visitor, Project Manager, Project Staff, Senior Executive, System Admin and Vendor RFQ Respondee.

Architect

Use the role of **Architect** to identify a person as the architect on a project. He/she will be displayed as such on the Project Dashboard Team Contacts part and on various reports.

- The role of Architect is restricted by the Project condition (checkmark in the first position).

| | Role Name | Description | Conditions |
|---|-----------|-------------|------------|
|  | Architect | Architect | ✓ X X X X |

- This role is given the Responsibility of “Architect.”

| Capabilities | Responsibility | Included Roles |
|---|-------------------|----------------|
|  | Role Capabilities | Permit (RIUDS) |
| | Architect | ✓ X X X X |

- There are no default Capabilities for this role.
- There are no default Included Roles for this role.

Everyone

Use the role of **Everyone** as your base or foundation. You may, however, need to modify the default capabilities if you want Everyone to be a more limited role. Once your Everyone role is as you want it, you can assign this role to all or most of your users and then add supplemental capabilities by adding other roles to specific people.

- The role of Everyone has no restrictive conditions.
- There is no default Responsibility for this role.
- There are no default Included Roles for this role.

This role includes capabilities within the Doc and Page modules, with permission to

- Change the document’s status if a collaborator
DOC | Can change document status (if collaborator)
- Add routees to a document’s route
DOC | Document Routees
- Update all parts of a document created by self
DOC | Owns documents created, routed, global
- View files through the Document Viewer
PAGE | Document Viewer (jVue)

- Access the Home Dashboard
PAGE | Home Dashboard
- View and print reports
PAGE | Report viewer
- View and respond to miscellaneous system prompts
PAGE | Virtual Popup Pages
- View the Watchdog Alerts part on the Home Dashboard
PART | Watchdog Alerts

Owner

Use the role of **Owner** to identify a person as the owner of a company.

- The role of Owner is restricted by the Project condition (checkmark in the first position).

| | Role Name | Description | Conditions |
|--|-----------|----------------|------------|
| | Owner | Owner/Customer | ✓ X X X X |

- The role is given a Responsibility of “Customer/Owner.”

| Capabilities | Responsibility | Included Roles |
|--------------|-------------------|----------------|
| | Role Capabilities | Permit (RIUDS) |
| | Customer/Owner | ✓ X X X X X |

- There are no default Capabilities for this role.
- There are no default Included Roles for this role.

Plan Room Visitor

Use the role of **Plan Room Visitor** for those vendors and subcontractors who should have access to the Plan Room Dashboard.

- The role of Project Manager is restricted by the Project condition (checkmark in the first position).

| | Role Name | Description | Conditions |
|--|-------------------|-----------------------------------|------------|
| | Plan Room Visitor | Access to the plan room dashboard | ✓ X X X X |

- There is no default Responsibility for this role.
- The default Included Role for this role is **Doc Viewer** for a few Doc types

| Capabilities | Responsibility | Included Roles |
|-----------------------------|----------------|----------------------|
| Included Sub Role(s) | | |
| | Doc Viewer | Bid Package Addendum |
| | Doc Viewer | Drawings |
| | Doc Viewer | Invitation to Bid |
| | Doc Viewer | Bid Package |


The Plan Room Visitor includes capabilities in the PAGE module with permission to

- Export files
PAGE | Can Export file from the catalog
- Access the Plan Room Dashboard
PAGE | Plan Room Dashboard

Project Manager

Use the role of **Project Manager** to identify those in charge of projects. The Project Manager has many responsibilities and therefore requires broad access to projects. In addition, sfPMS automatically assigns projects to Project Managers when they are assigned as Project Managers in Microsoft Dynamics SL.

- The role of Project Manager is restricted by the Project condition (checkmark in the first position).

|  | Role Name | Description | Conditions |
|---|-----------------|-----------------|------------|
|  | Project Manager | Project Manager | ✓ X X X X |

- The role is given the Responsibility of "Project Manager."

| Capabilities | Responsibility | Included Roles |
|---|-------------------|---|
|  | Role Capabilities | Permit (RIUDS) |
|  | Project Manager | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

- There is no default Included Role for the role.

Project Manager is given many capabilities within various modules, with permission to

- Add Attachments to a document that is read-only closed
DOC | Can add attachments to a closed document
- Be designated as someone else's proxy
DOC | Can be designated as another users proxy
- Change a document's status if not the owner of the document, but as a collaborator
DOC | Can change document status (if collaborator)
- Move items among folders
DOC | Can move items among folders
- Resend faxes and emails
DOC | Can Resend Fax/Email
- Set a document status to Approved
DOC | Can set document status to Approved
- Set a document status to Committed/Pending
DOC | Can set document status to committed/pending
- View and add CCOs and Commitments created from Change Order documents
DOC | Change Order linking
- Check out and view files and see their status
DOC | Checkout files or see status
- View folders that contain items
DOC | Control the folders that contain items
- View, add and edit document Alerts
DOC | Document Alerts
- See all parties to whom a document has been routed
DOC | Document Routees

- View, add and delete inclusions/exclusions
DOC | Inclusion/Exclusion lines
- View and edit cataloged items
DOC | Maintain a Catalogued Item
- Add, edit and delete Document Template output
DOC | Maintain Document Template output
- Add remarks
DOC | Maintain Remarks
- Have edit rights to documents created by the user, or routed to the user
DOC | Owns documents created, routed, global
- View any item on a document
DOC | Permissions for any item on the document
- Post revenue
DOC | Post Revenue
- See all Contacts
LIST | Can see all contacts
- See revenue transactions
LIST | Can see Revenue Transactions
- View and create new files
PAGE | Add Files
- View, create, edit and delete attachments to documents
PAGE | Attach existing Files and sfDocs to Documents
- Use Auto Add Routee options
PAGE | Auto Add Routee Options
- View BFA History
PAGE | BFA History
- Change Route Via option
PAGE | Can change Route Via
- Get an item from another document
PAGE | Can get an item from another document
- Load an alternate route
PAGE | Can Load an alternate route
- See a list of documents related to a file
PAGE | Can see list of documents related to a file
- Use Project Analysis through Microsoft Excel
PAGE | Can use Excel Project Analysis
- Access the Catalog Dashboard
PAGE | Catalog Dashboard
- View Commitment details
PAGE | Commitment Detail
- Copy documents and view copied documents
PAGE | Copy a document


- View the Change Item Register
PAGE | COR Inquiry
- View and add documents
PAGE | Document Page
- View files through the Document Viewer
PAGE | Document Viewer (jVue)
- View and edit information in the BFA workbook
PAGE | Excel Project Budgeting & Forecasting
- Access the Home Dashboard
PAGE | Home Dashboard
- Access the Project Change Order Markup list from the Project Dashboard
PAGE | Project Change Order Markup
- Access Project Dashboards
PAGE | Project Dashboard
- View and update the address for the project site
PAGE | Project Site Address Maintenance
- View reports
PAGE | Report Viewer
- Access the Submittal Item Register
PAGE | Submittal Item Register
- View transactions details (drill-down on BFA and Cost Analysis Summary)
PAGE | Transaction Detail
- Access users' Contact information
PAGE | User / Contact Display
- View and respond to miscellaneous system prompts
PAGE | Virtual Popup Pages
- View the history of the site's weather conditions
PAGE | Weather History
- Customize BFA settings
PART | Can customize BFA settings
- View and edit Version Histories for Catalog files
PART | Catalog File Version History
- View the file list on the Project Dashboard
PART | Library of Catalogued Documents
- View, create, update and delete Catalog and Report folders
PART | Maintain Catalog and Report folders
- View and add Project Cost Codes
PART | Maintain Project Cost Codes
- View documents and the Document Menu on a Project Dashboard
PART | Project Document Menu and List

- View Project KPIs
PART | Project Key Performance Indicators
- View and insert project photos
PART | Project Photo
- View project revenue/expense by account
PART | Project Revenue/Expense By Account
- View site conditions for projects
PART | Project Site Conditions
- View, create and update Team Contact information for Project members
PART | Project Team Contacts
- View and add to the Project List and create new Project Lists
PART | User Project List

Project Staff

Use the role of **Project Staff** to identify those on a project who need access to the Project Dashboard, but who do not require the broad access rights that the Project Manager requires.

- The role of Project Staff is restricted by the Project condition (checkmark in the first position).

|  | Role Name | Description | Conditions |
|--|---------------|---------------|------------|
|  | Project Staff | Project Staff | ✓ X X X X |

- This role is given the responsibility of “Project Staff.”

| Capabilities | Responsibility | Included Roles |
|---|-------------------|---|
|  | Role Capabilities | Permit (RIUDS) |
| | Project Staff | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

- There are no default Included Roles for this role.

Project Staff is given several capabilities within various modules, with permission to


- Move items among folders
DOC | Can move items among folders
- Resend a fax or email
DOC | Can Resend Fax/Email
- View folders that contain items
DOC | Control the folders that contain items
- Access the Add Files tool
PAGE | Add Files
- View attachments to documents
PAGE | Attach existing Files and sfDocs to Documents
- Access Auto Route option on the Route drop-down menu
PAGE | Auto Add Routee Options
- Access Reset Route and Append Route options on the Route drop-down menu
PAGE | Can Load an alternate route

- Access the Catalog Dashboard
PAGE | Catalog Dashboard
- View documents
PAGE | Document Page
- Access the Project Dashboard
PAGE | Project Dashboard
- View the Executive Project Summary
PART | Executive Project Summary
- View Catalog and Report folders
PART | Maintain Catalog and Report folders
- View project photos
PART | Project Photo
- View site conditions for projects
PART | Project Site Conditions
- View Team Contact information for Project members
PART | Project Team Contacts
- Access the Project List
PART | User Project List

Senior Executive

The role of **Senior Executive** is another block in the building block approach. Use this role if you want to add access to the Executive Dashboard to a person.

- The role of Senior Executive has no restrictive conditions.
- This role is given the responsibility of “Senior Executive.”

| Capabilities | Responsibility | Included Roles |
|---|---|--|
|   | Role Capabilities Project Staff | Permit (RIUDS) <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

- There are no default Included Roles for this role.

Senior Executive is given capabilities with permission to

- Access the Executive Dashboard
PAGE | Executive Dashboard
- View the Executive Project Summary
PART | Executive Project Summary

System Admin

Tip

You can assign RIUDS permissions for Global Access. For example, you could grant an owner Global Access but only at the R permission level so that he or she could see everything but not delete or update anything.

The System Admin role has only one capability: Global access. This Global access capability gives the System Admin access to all pages and parts in the system. Use this role for the person who has control over sfPMS at your site.

IMPORTANT NOTE: The System Admin role should be assigned to a specific user login—one that is not used for everyday processing. This will prevent unintentional deletions and present a clearer audit trail of who made changes when.

- The role of System Admin has no restrictive conditions.
- The role has no Responsibility.
- There are no default Included Roles for the role.

This role is given total permission to view, add, update and delete everything within the SYS module.

- **SYS | Global access**

RFQ Vendor Contact

Use the RFQ Vendor Contact role to identify those vendors who receive and respond to RFQs. This role can be used in predefined routes.

- The role of RFQ Vendor Contact has no restrictive conditions.
- The role has no Responsibility.
- There are no default Included Roles for the role.
- The role has no capabilities.

Appendix C

| Part in UI Configuration Tool | Area covered | Is used by |
|--------------------------------------|--|--|
| Alert List | Watchdog Alerts part | Home Dashboard |
| Budget Targets | Post to Original, EAC and FAC indicators | Budget, Forecast, Change Order and PCO |
| Catalog Search Filters | Filters for the Catalog | Catalog Dashboard |
| Doc A&R | Attachments and Routing tabs | All Doc types |
| Doc Address | Address tab | All Doc types |
| Doc Alerts | Alerts tab | All Doc types |
| Doc Attendee | Attendees tab | All Doc types |
| Doc Attributes | Attributes tab | All Doc types |
| Doc Compliance | Compliance tab | All Doc types |
| Doc Dates | Dates tab | All Doc types |
| Doc Detail – Standard | Details tab | All Doc types except those mentioned below |
| Doc Detail – CCO | “ | CCO |
| Doc Detail – CO | “ | Change Order, PCO |
| Doc Detail – Commitment | “ | Commitment |
| Doc Detail – Payment Request | “ | Pay Request |
| Doc Detail – Project Setup/Contract | “ | Project Contract |
| Doc Header – Standard | Doc Header | All Doc types except below |
| Doc Header – CO/CCO/PR | “ | Change Order, CCO, Pay Request |
| Doc Header – Commitment | “ | Commitment |
| Doc Inclusion | Incl/Excl tab | All Doc types |
| Doc Item Budget | Budget Entries window | Change Order, PCO |
| Doc Items | Items (CI) tab | All Doc types |
| Doc Item Detail – Standard | An expanded Item (Detail view) | All Doc types except below |
| Doc Item Detail – CCO | “ | CCO |
| Doc Item Detail – CO | “ | Change Order |
| Doc Item Detail – Commitment Receipt | “ | Receipt |
| Doc Item Detail – Commitment, RFQ | “ | Commitment, RFQ |
| Doc Item Detail – Pay Request | “ | Pay Request |
| Doc Item Detail – Project. Bid | “ | Project Contract, Bid |
| Doc Item Detail – Voucher, Expense | “ | Charge Entry, Voucher |
| Doc Item Filters | Filters for the Items tab | All Doc types |
| Doc Item Remarks | Remarks on the Items tab | All Doc types |
| Doc Msg | The Email tab | All Doc types |
| Doc Notes | The Notes tab | All Doc types |
| Doc Project Setup | The Project tab | Project Setup |
| Doc Remarks | Remarks on the Notes tab | All Doc types |
| Doc Tabs | The mid-section tabs | All Doc types |
| Inbox | Inbox | Home Dashboard |
| Inbox Filters | Filters for the Inbox | Home Dashboard |
| Manage Routes | Routes tool | Manage Dashboard |
| Project CI Register | Change Item Register | Project Dashboard |
| Project CI Register Filters | Filters for Change Item Register | Project Dashboard |
| Project Cost Analysis | Cost Analysis Detail | Project Dashboard |
| Project Cost Analysis Filters | Filters for Cost Analysis part | Project Dashboard |
| Project Doc List | Document list | Project Dashboard |
| Project Doc List Filters | Filters for the Document List | Project Dashboard |
| Project Exec Summary | Project summary | Executive Dashboard |
| Project Exec Summary Filters | Filters for the Project list | Executive Dashboard |
| Project KPI | Key Performance Indicators | Project Dashboard |
| Project List | Project List part | Home and Plan Room Dashboards |
| Project Team | Contacts | Project Dashboard |

Capabilities Used In Configurations

When you want only users who have a certain capability (access level) to be able to see and use certain fields and tabs in sfPMS, you would use the Capability lookup in the configuration of the item. (For more on [Role capabilities](#), see the section on page 59.)

For example, the configuration below indicates that only those users who have permission to view the contents of the Attendees/Lien tab (through the **DOC | Contact/Attendee Maintenance** capability) will be able to see the Attendees tab on a Commitment document.

| UI CONFIGURATION TOOL | | | | | | | | | | |
|-----------------------|------------------|-----------------|----------------|---|--------------|--------------|----------------|-----------|---------------|------------|
| DOC TYPE: | Commitment | | | PART: | Doc Tabs | | | | | |
| ITEM: | Attendee Tab | | | <input checked="" type="checkbox"/> SHOW LIVE <input checked="" type="checkbox"/> SHOW VISIB | | | | | | |
| | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq |
| | Doc Tabs | Commitment | | DOC: Contact / Attendee Maintenance | Attendee Tab | Payees | ✓ | X | | |

As another example, if you want the BTB (Billed to Date) column on the Executive Dashboard to be seen only by users who can access all projects, you could configure the column as follows:

| UI CONFIGURATION TOOL | | | | | | | | | | | |
|--|----------------------|-----------------|----------------|---|-------------|--------------|----------------|-----------|---------------|------------|---------------|
| PART: | Project Exec Summary | | | | ITEM: | BTB Col | | | | | |
| <input type="checkbox"/> SHOW LIVE CONFIGURATION | | | | <input type="checkbox"/> SHOW VISIBLE ONLY | | | | | | | |
| | Part Name | Doc Type | Context | Capability | Item | Label | Visible | RO | Length | Seq | Lookup |
| | Project Exec Summary | | | LIST: Can access all projects without being a team member | BTB Col | | X | ✓ | | 9 | |

Note that the user with the **LIST | Can access all projects without being a team member** capability would also require capabilities to access the Executive Dashboard and Executive Summary part in order to see the Billed to Date column. See the technical white paper [Designing User Roles](#) for more information.

Various capabilities can be used in the Customization tool. The most common are as follows:

| Capability | Note |
|--|---|
| CSTM Internal Staff | Often used for tabs/fields meant to be seen by internal staff only. |
| CSTM Customizable 1 | |
| CSTM Customizable 2 | |
| CSTM Customizable 3 | |
| DOC Contact/Attendee Maintenance | Often used for the Attendee tab |
| DOC Inclusion/Exclusion lines | Often used for the Incl/Excl tab |
| DOC Self Service RFQ | Used for the self-service link on RFQs |
| LIST Can access all projects without being a team member | |

