System Administration

Focus Guide

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

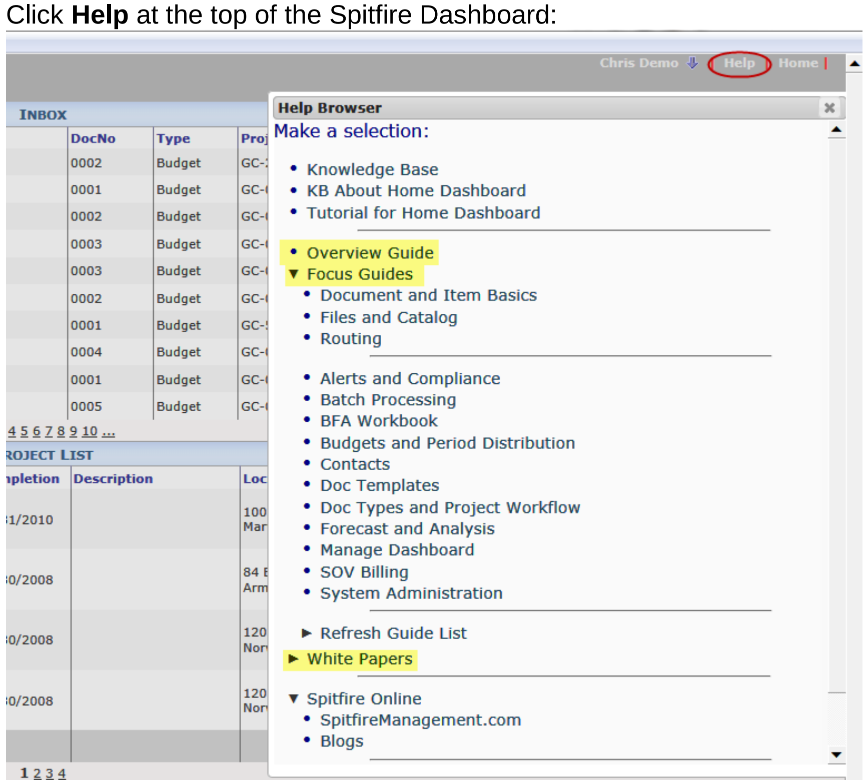
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

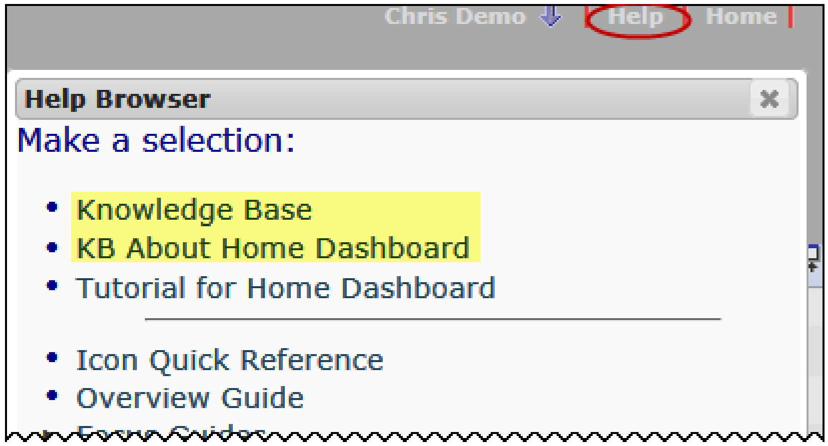


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

   The guide will appear as a PDF file

The Knowledgebase

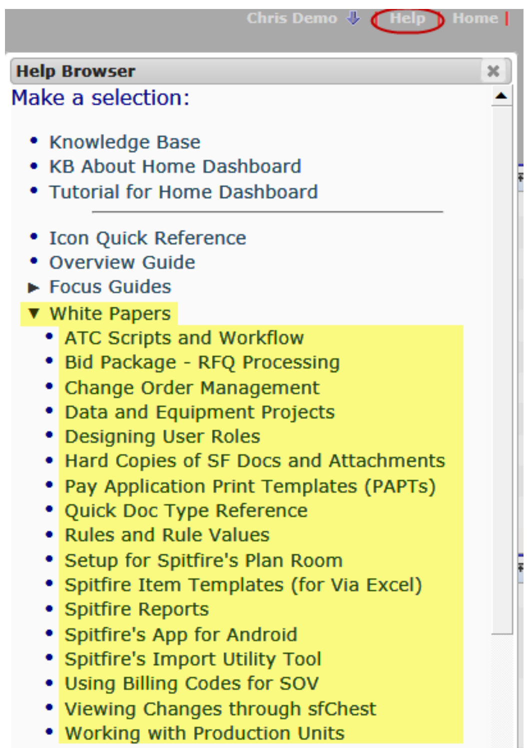
The Knowledgebase contains articles that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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.

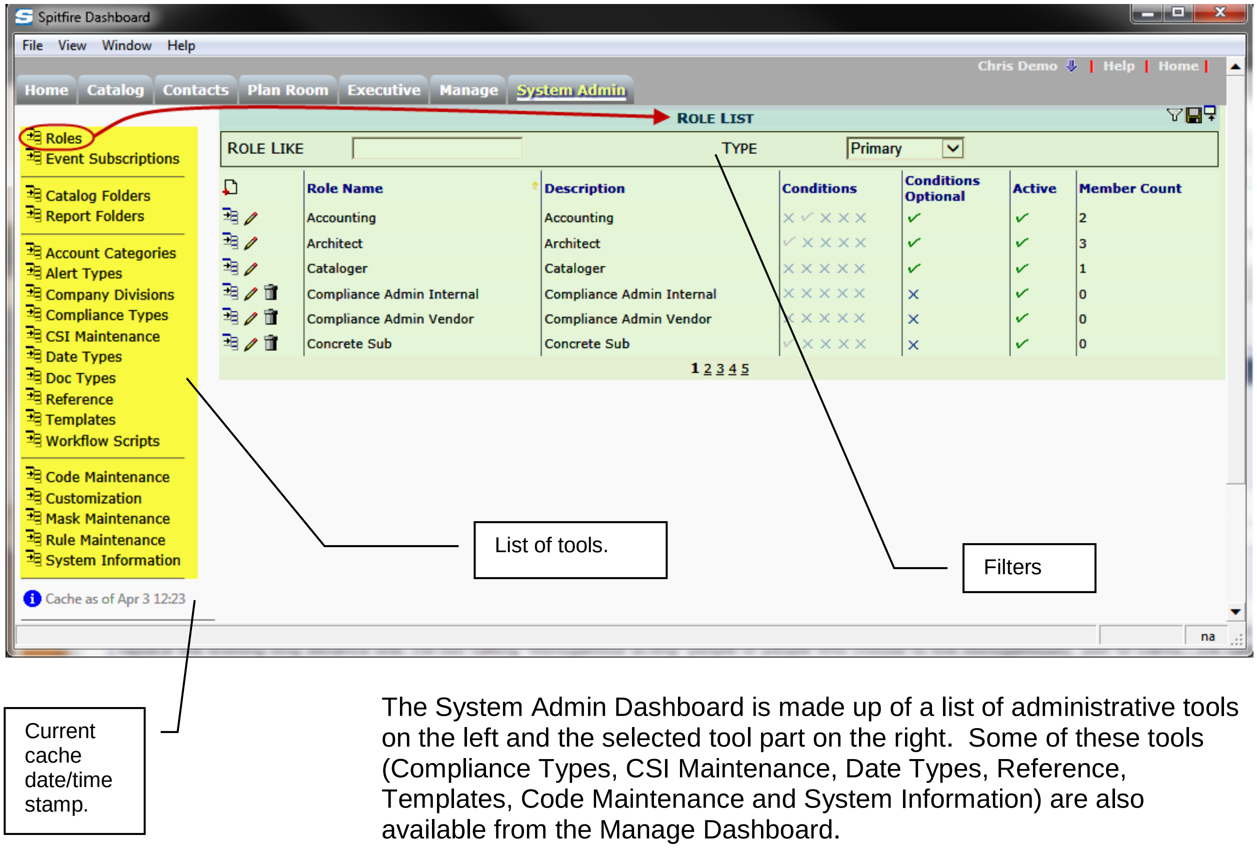
Note: Because sfPMS is configurable and because different users have different levels of access rights and permissions, the screens shown and the fields described in this guide may not be the same as those in your system.

Note: section, chapters and text that are new or changed from the V4.3 documentation appear with **green text** and sometimes an *.

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 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	The *ATC Scripts and Automatic Workflow* technical white paper
Event Subscriptions	*The Developers Primer*
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.)
- **Customization**: Visually customize 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 58.)
- **Catalog Folders**: Indicate the type of access (view, insert, update, delete, all) that users have for file folders. (See page 71.)
- **Report Folders**: Control the access to report folders. (See page 77.)
- **Date Types**: Set up the date types to be used on the Date tabs of certain Spitfire documents. (See page 81.)
- **Alert Types**: Activate or deactivate the Alert types that appear in Alert tabs and Subscriptions. (See page 84.)
- **Compliance Types**: Design and designate Compliance types to be used in the Compliance tab of Commitments and other documents. (See page 88.)
- **Rules Maintenance**: Customize logic for how sfPMS behaves. Rules govern various aspects of the system. (See page 95.)
- **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.)
- **Templates**: Upload a variety of templates for use in Spitfire. (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".

- **Workflow Scripts**: Create and maintain ATC workflow scripts to use with routing. (See the *ATC Scripts and Automatic Workflow* technical white paper.)
- **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 102.)

Company Divisions

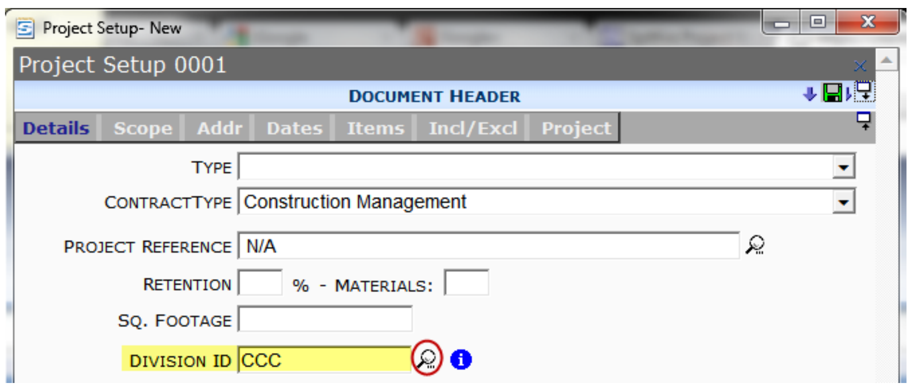
The Company Division tool lists some basic information about your company. If your organization or corporation comprises several companies or offices, you can list information for all of them through the Companies tool.

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.

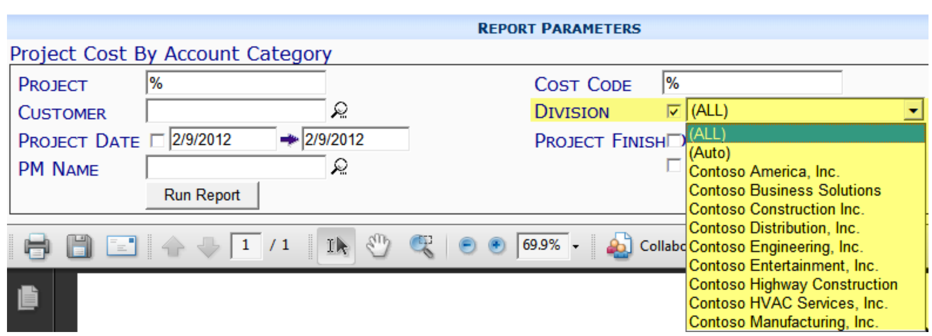
Note: because this is a required field, you should have at least one company division in the Company Division tool. If your organization is not divided into divisions, then the name, address and phone numbers of your organization should make up the one division record.



Reports

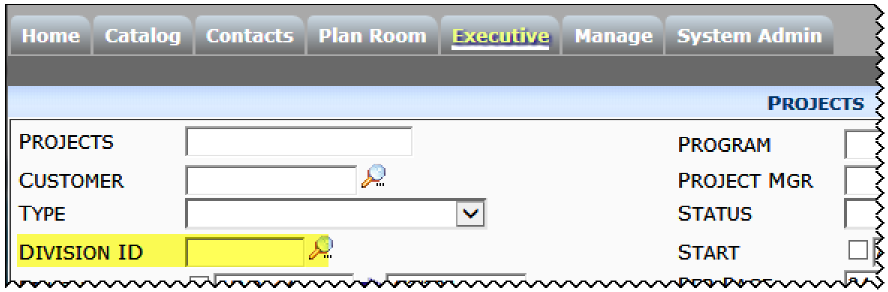
Company divisions can be used as filters on the following reports:

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



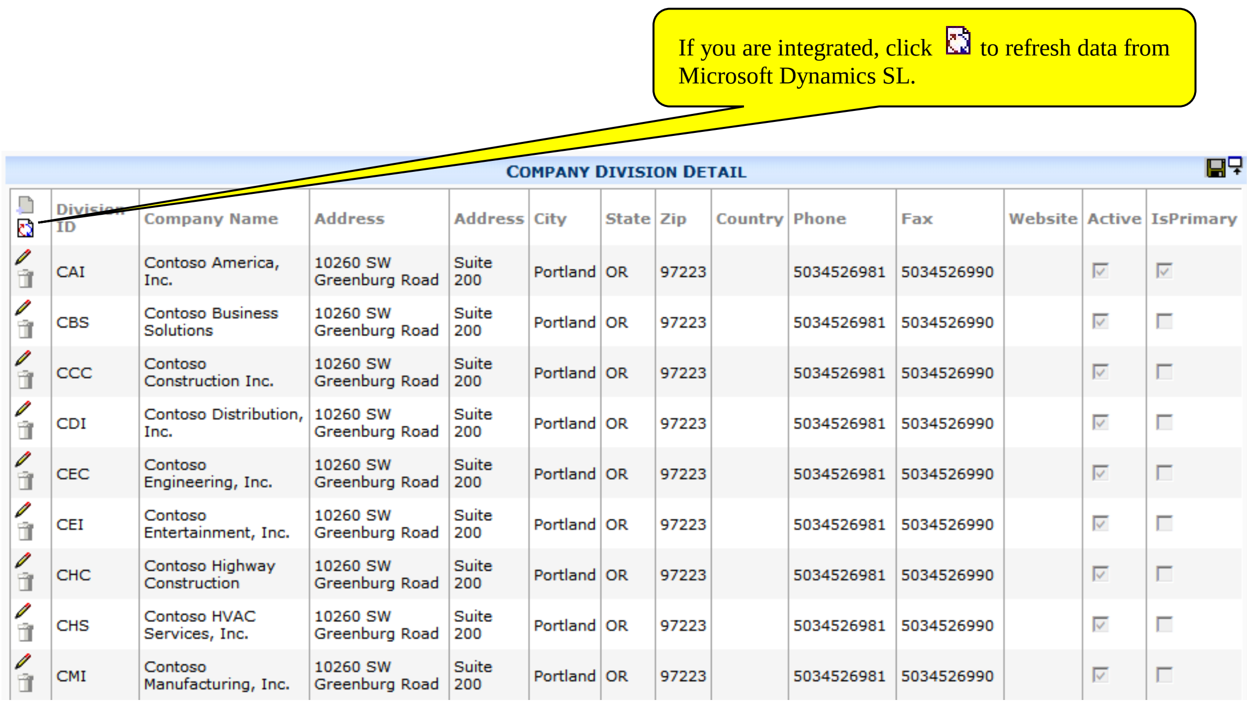
Executive Dashboard

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



The Company Division Detail Part

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



Division ID	Company Name	Address	Address	City	State	Zip	Country	Phone	Fax	Website	Active	IsPrimary
CAI	Contoso America, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☑
CBS	Contoso Business Solutions	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CCC	Contoso Construction Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CDI	Contoso Distribution, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CEC	Contoso Engineering, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CEI	Contoso Entertainment, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CHC	Contoso Highway Construction	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CHS	Contoso HVAC Services, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		☑	☐
CMI	Contoso Manufacturing, 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, Website**: the voice and fax phone numbers and the website for the company/company division.
- **Active**: whether ( ) or not ( ) the company information can be accessed and used.
- **IsPrimary**: indicates that this division is the primary one in the organization. One division must be designated as primary, even if there is only one division listed.

Adding Company Divisions

Note: If your site is integrated with Microsoft Dynamics SL and you synch your data, company information will be copied over from Microsoft Dynamics SL. 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.
3. Enter a name in the **Company Name** field.
4. Enter other contact information for the company.
5. (*optional*) Click the **IsPrimary** 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	Website	Active	IsPrimary
	ACO	Acme Corporate Office	1000 Broadway	Suite 231	White Plains	NY	10601	US	914-555-1200	914-555-1212	www.acmeent.com	☑	☑
	ASO	Acme Satellite Office	1000 Market St.		San Francisco	CA	94102	US	415-555-2000	415-555-2188		☑	☐

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.

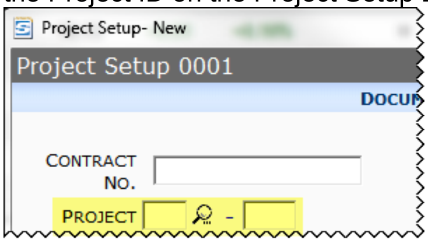
In addition to the masks that ship with sfPMS, you can add your own mask for a specific Doc type.

After Setup

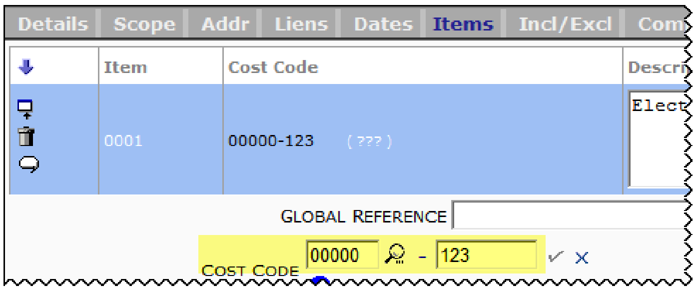
If you create masks for IDs on specific Doc types, the Doc # field will reflect your mask segments (as shown in the example on page 22).

The masks that are distributed by Spitfire define

- the Project ID on the Project Setup Doc type



- the Cost Code field on documents such as Commitments



- 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:

Click to get data from Microsoft Dynamics SL.

Integrated site:

MASK DEFINITIONS

	Mask Name	Max Segments	Max Length
	PROJECT	6	16
	TASK	6	32
	COMMITMENT	6	16

Non-integrated site:

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	Uppercase Alpha		GC, SB, PM
	2	4	Number	Numeric		

Columns

- **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.

TIP
Related information can be found in the Spitfire Knowledgebase. See KBA-01270 and KBA-01294.

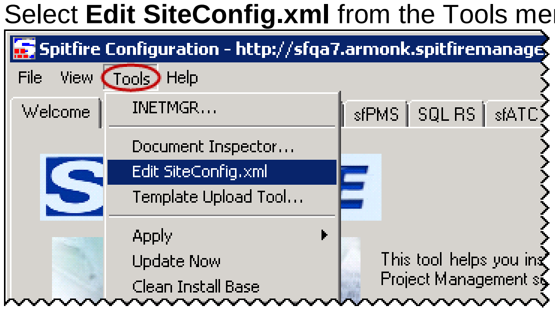
- **Mask Type**: the type for the segment. Choices are:
  - **Numeric** = 0, 1, 2, 3, 4, 5, 6, 7, 8, 9
  - **Uppercase Alpha** = A – Z
  - **Validated Text =** choices from lookups or drop-downs
  - **Uppercase Alphanumeric** = 0 – 9, A – Z
- **Lookup**: the name of a lookup such as “PJCODE” from Microsoft 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.

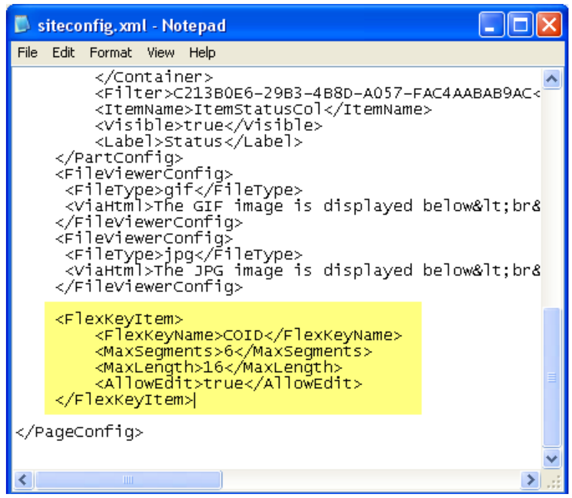
To edit your SiteConfig.xml file:

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

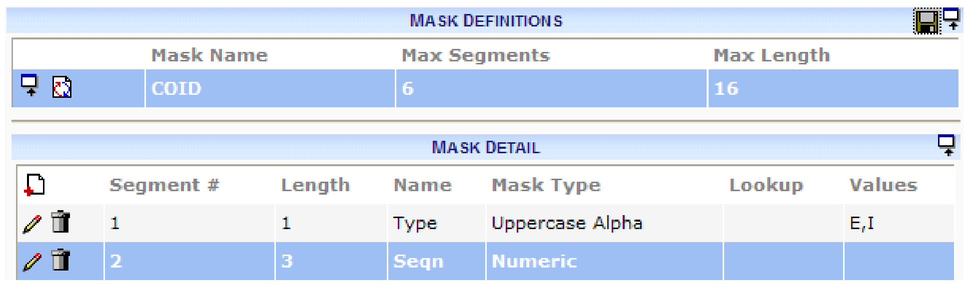
Let us say that you want to add and define a mask (COID) to be used on the IDs of Change Order documents. The mask will allow users to select the first segment (**E** for External/Owner change orders or **I** for Internal change orders) and sfPMS will automatically populate the second segment with a 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
COID	6	16

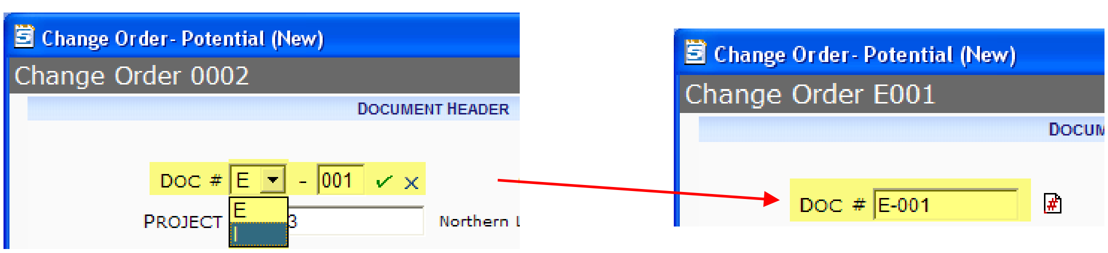
MASK DETAIL

Segment #	Length	Name	Mask Type	Lookup	Values
1	1	Type	Uppercase Alpha		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 101 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 Microsoft Dynamics SL.

After Setup

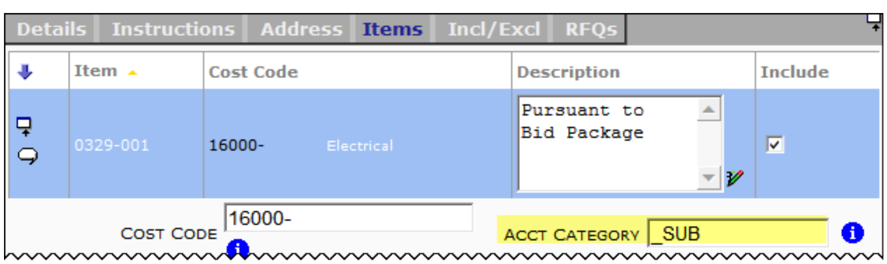
BFA Workbook

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
7	Cost Codes	Description	Original EAC
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,



SOV Workbook

The SOV Workbook includes an Account Category column.

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Item No.	Control No.	Description	Revenue Cost Code	Account Category
000100	000100	General Conditions	00000	REVENUE
000200	000200	Site Work	00000	REVENUE
000300	000300	Concrete	00000	REVENUE
000400	000400	Masonry	00000	REVENUE

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

CLASS

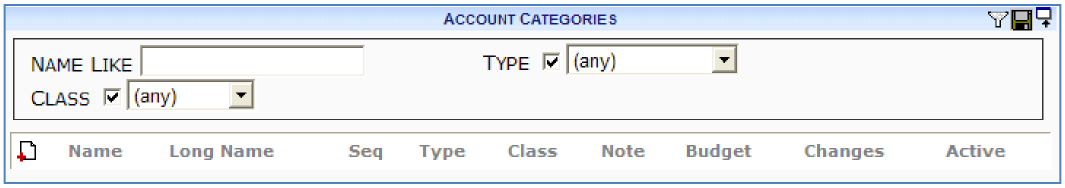
TYPE (any)

Name	Long Name	Seq	Type	Class	Note	GL	Budget	Changes	Active
_EQ OWNED	Equipment Costs Owned	0	Expense			Equipment Costs	✓	✓	✓
_EQ RENTAL	Equipment Costs Rental	0	Expense				✓	✓	✓
_LABOR	Direct Labor	0	Expense	Labor		Direct Labor-T&M	✓	✓	✓
_LBR BURDEN	Labor Burden	0	Expense			Burden - CP	×	✓	✓
_MTRL EXPEND	Materials - Expendable	2	Expense			Mateial-Expend-T&M	✓	✓	✓
_MTRL MFG	Material - MFG	0	Non Accounting				✓	×	✓
_MTRL PERM	Material - Permanent	0	Expense			Material Permanent-T&M	✓	✓	✓
_OTHER	Other Costs	0	Expense			Other-T&M	✓	✓	✓
_SUB	Subcontractor Cost	0	Expense			Subcontracts-T&M	✓	✓	✓
AP RETEN	Accounts Payable Retention	0	LB			Accounts Payable - Retainage	×	×	✓
AR	Accounts Receivable - Trade	0	AS			Accounts Receivable-Trade	×	×	✓
AR RETEN	Accounts Receivable - Reten	0	AS			Accounts Receivable-Retention	×	×	✓

1 2 3 4 5

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

Non-integrated site:



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.

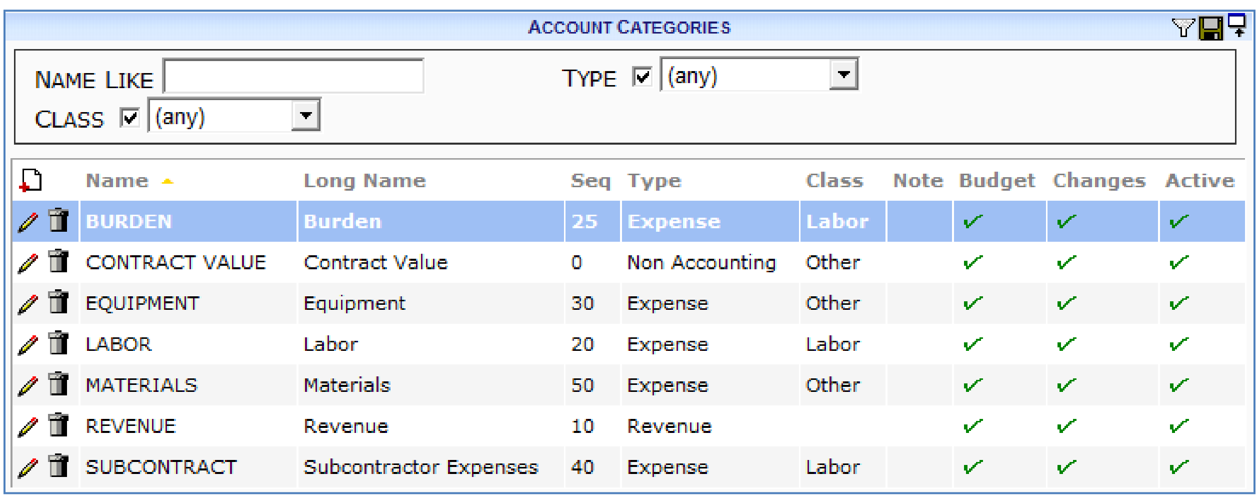
To edit an Account Category:

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 LIKE

TYPE ☑ (any)

CLASS ☑ (any)

Name	Long Name	Seq	Type	Class	Note	Budget	Changes	Active
BURDEN	Burden	25	Expense	Labor		✓	✓	✓
CONTRACT VALUE	Contract Value	0	Non Accounting	Other		✓	✓	✓
EQUIPMENT	Equipment	30	Expense	Other		✓	✓	✓
LABOR	Labor	20	Expense	Labor		✓	✓	✓
MATERIALS	Materials	50	Expense	Other		✓	✓	✓
REVENUE	Revenue	10	Revenue			✓	✓	✓
SUBCONTRACT	Subcontractor Expenses	40	Expense	Labor		✓	✓	✓

Doc Types

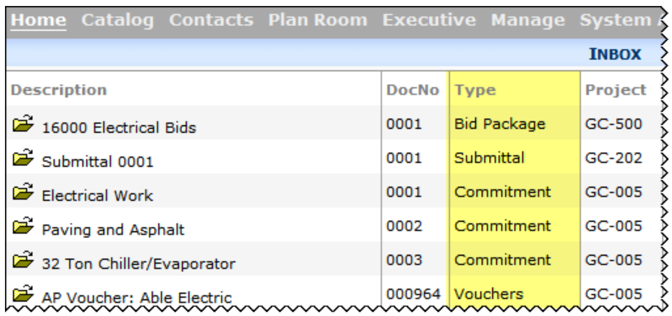
sfPMS ships with a full suite of Doc types. On the Doc Types tool, you can make some Doc types inactive and rename any Doc types to better suit your organization. In addition, you can create custom Doc types. Usually Doc types are established during the implementation stage, although the Doc Types tool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

After Setup

Active Doc types appear throughout the system by Site Name.

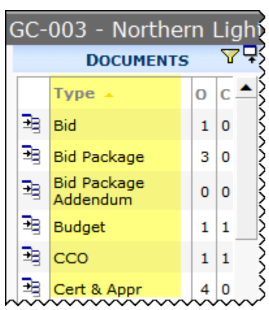
Inbox

Documents in your Inbox are identified by Doc type.



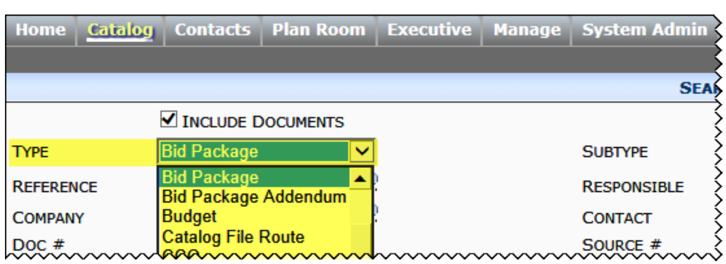
Project Documents Menu

In order to see all Doc types for which you have permission on a project, remember to click the icon first.



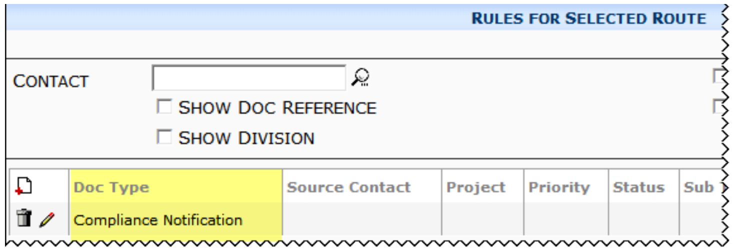
Catalog

Doc type is a filter in the Catalog.



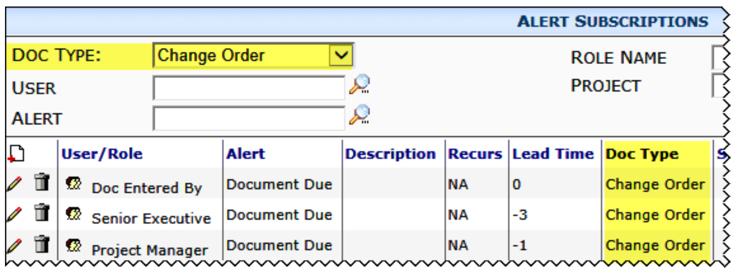
Routes Tool

Doc type can be a condition for a predefined route in the Routes tool.



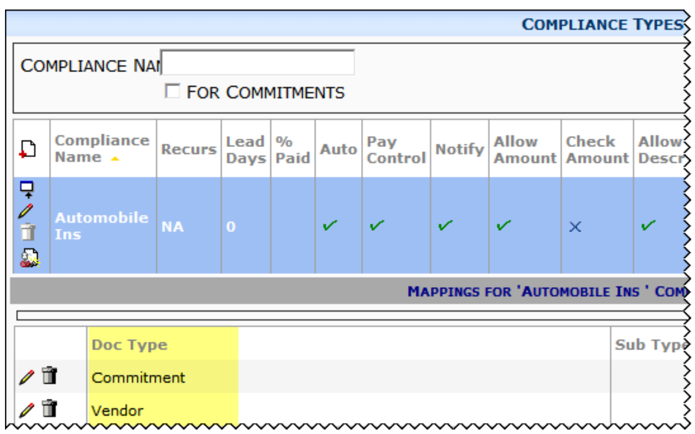
Alert Subscriptions Tool

Alert Subscriptions can be set up for specific Doc types.



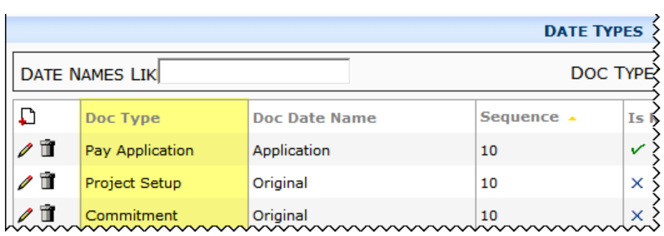
Compliance Types Tool

Compliance types can be mapped to specific Doc types.



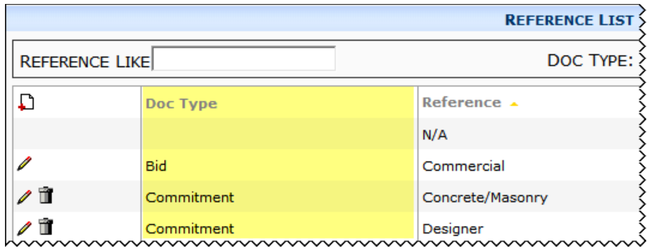
Date Types Tool

Date types can be set up for specific Doc types.



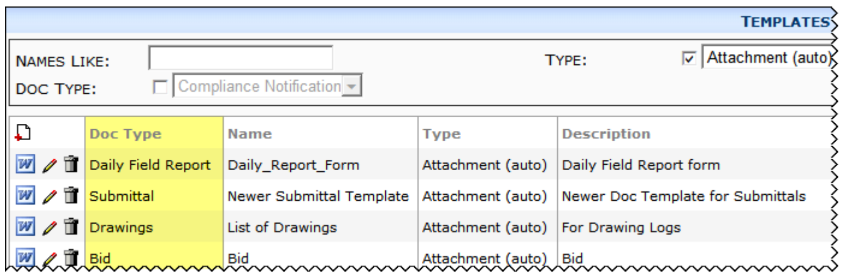
Reference Tool

References can be set up for specific Doc types.



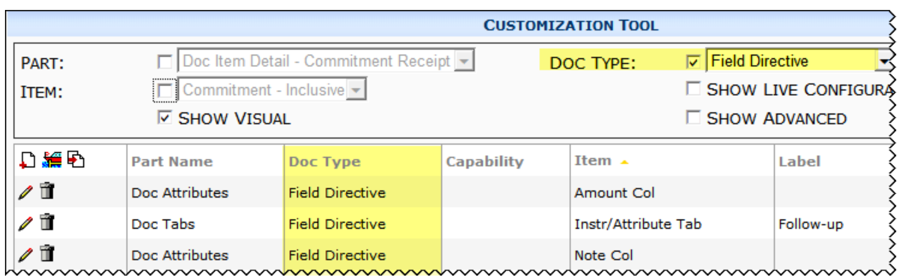
Templates

Templates can be uploaded for a specific Doc type.



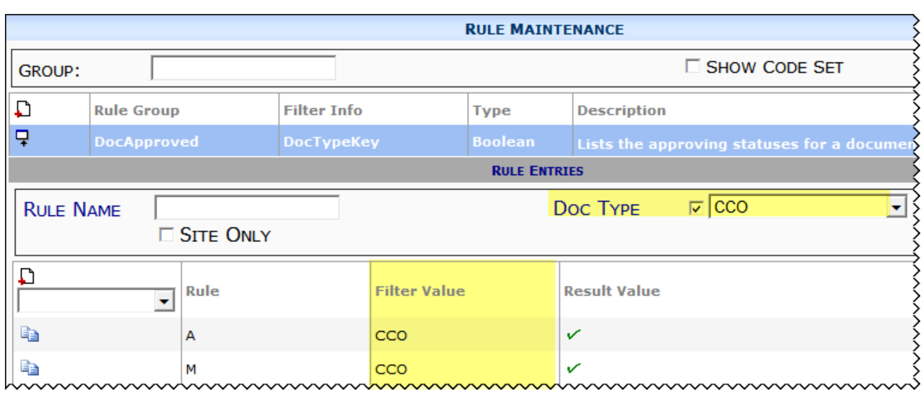
Customization Tool

Documents are customized through Doc type.



Rules Maintenance Tool

Many rules use Doc type as a filter.



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: ☐ SHOW INACTIVE DOC TYPES

Doc Type	Site Name	Project Dashboard	Create From Dashboard	Plan Room	Site Active	Custom
AP Scans	AP Scans	✗	✗	✗	✓	✗
Bid	Bid	✓	✓	✗	✓	✗
Bid Package	Bid Package	✓	✓	✓	✓	✗
Bid Package Addendum	Bid Package Addendum	✓	✓	✓	✓	✗
Budget	Budget	✓	✓	✗	✓	✗
Catalog File Router	Catalog File Route	✗	✗	✗	✓	✗
CCO	CCO	✓	✓	✗	✓	✗
Certificates and Approval	Cert & Appr	✓	✓	✗	✓	✗
Change Item Register	Change Item Register	✗	✗	✗	✓	✗
Change Order	Change Order	✓	✓	✗	✓	✗
Commitment	Commitment	✓	✓	✗	✓	✗
Compliance Notification	Compliance Notification	✓	✗	✗	✓	✗
Correspondence	Correspondence	✓	✓	✗	✓	✗
Customer	Customer	✗	✗	✗	✓	✗
Daily Field Report	Daily Field Report	✓	✓	✗	✓	✗

1 2 3 4

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.
- **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. Customize your new Doc type as described in the Customization chapter, beginning on page 33. Your new Doc type will appear on the Doc Type drop-down on the Customization 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 your 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.

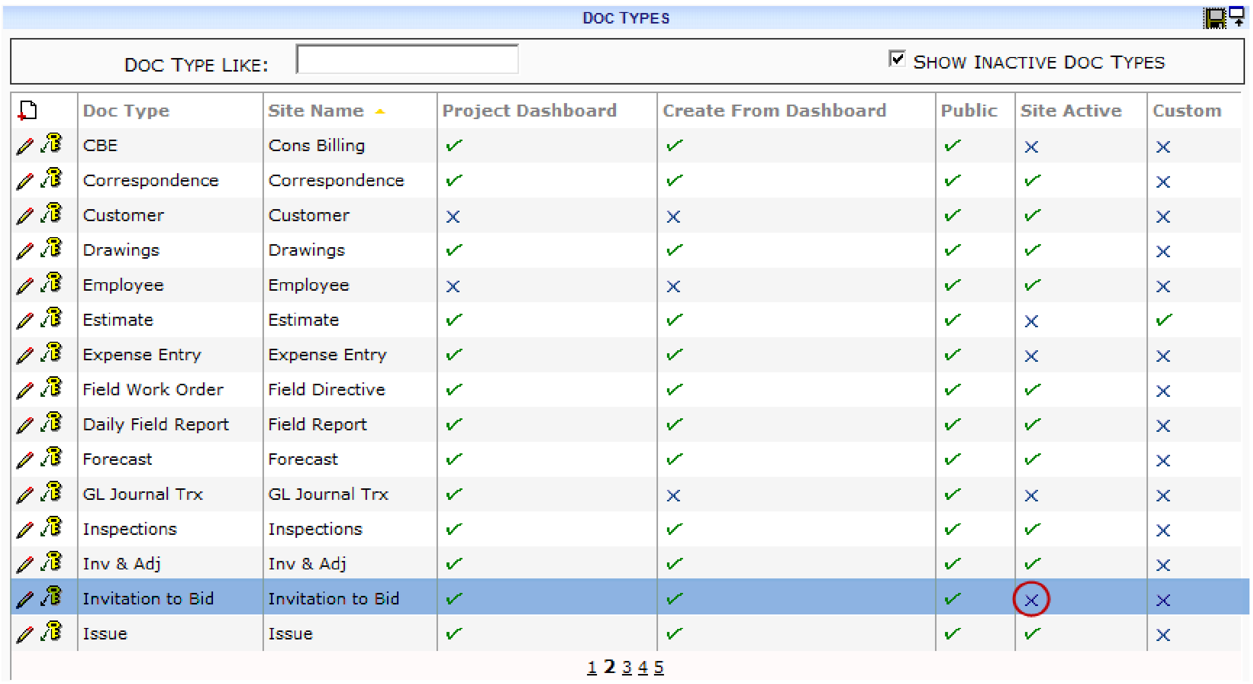
To copy a Doc type's GUID to a clipboard:

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

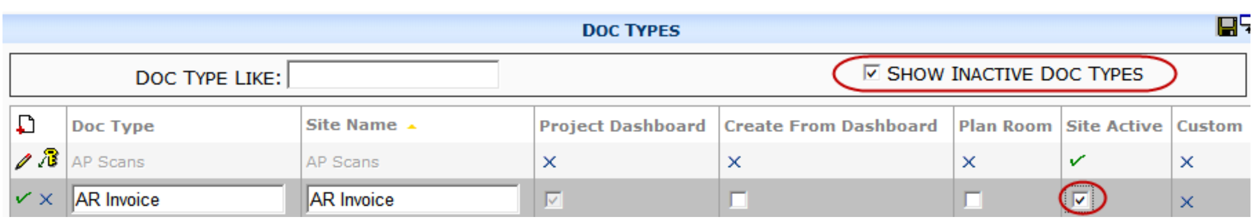
DOC TYPE LIKE: | ☑ SHOW INACTIVE DOC TYPES

	Doc Type	Site Name	Project Dashboard	Create From Dashboard	Public	Site Active	Custom
	CBE	Cons Billing	✓	✓	✓	×	×
	Correspondence	Correspondence	✓	✓	✓	✓	×
	Customer	Customer	×	×	✓	✓	×
	Drawings	Drawings	✓	✓	✓	✓	×
	Employee	Employee	×	×	✓	✓	×
	Estimate	Estimate	✓	✓	✓	×	✓
	Expense Entry	Expense Entry	✓	✓	✓	×	×
	Field Work Order	Field Directive	✓	✓	✓	✓	×
	Daily Field Report	Field Report	✓	✓	✓	✓	×
	Forecast	Forecast	✓	✓	✓	✓	×
	GL Journal Trx	GL Journal Trx	✓	×	✓	×	×
	Inspections	Inspections	✓	✓	✓	✓	×
	Inv & Adj	Inv & Adj	✓	✓	✓	✓	×
	Invitation to Bid	Invitation to Bid	✓	✓	✓	×	×
	Issue	Issue	✓	✓	✓	✓	×

1 2 3 4 5

Second Task

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



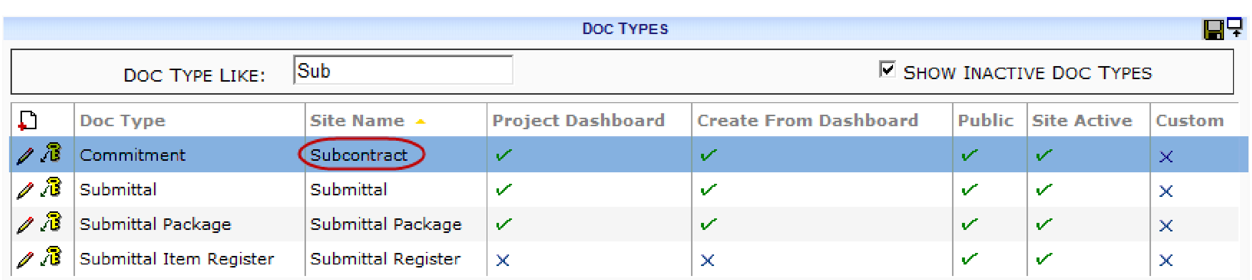
DOC TYPES

DOC TYPE LIKE: | ☑ SHOW INACTIVE DOC TYPES

	Doc Type	Site Name	Project Dashboard	Create From Dashboard	Plan Room	Site Active	Custom
	AP Scans	AP Scans	×	×	×	✓	×
✓ ×	AR Invoice	AR Invoice	☑	☐	☐	☑	×

Third Task

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



DOC TYPES

DOC TYPE LIKE: Sub | ☑ SHOW INACTIVE DOC TYPES

	Doc Type	Site Name	Project Dashboard	Create From Dashboard	Public	Site Active	Custom
	Commitment	Subcontract	✓	✓	✓	✓	×
	Submittal	Submittal	✓	✓	✓	✓	×
	Submittal Package	Submittal Package	✓	✓	✓	✓	×
	Submittal Item Register	Submittal Register	×	×	✓	✓	×

Customization

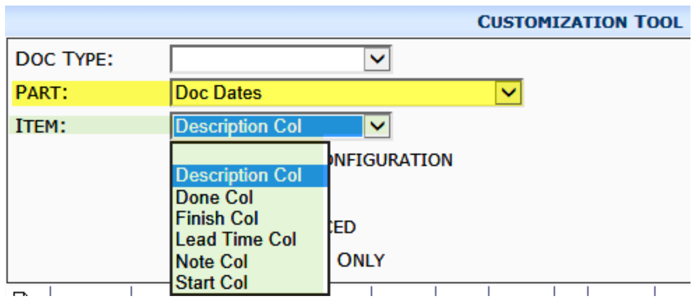
Much of what you see in sfPMS is customizable. The Customization tool allows you to display or hide fields, change field labels, and add or delete tabs on a Doc type.

Concepts

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

TIP

To see which Doc types use which Parts, see Appendix C on page 143.

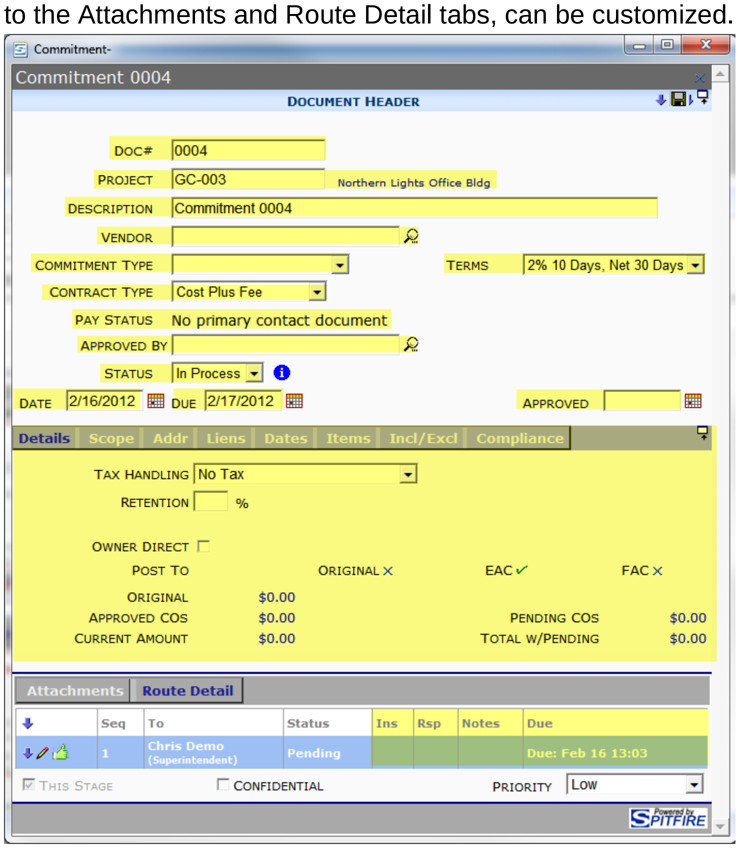


Where appropriate, customizations are made for specific Doc types.

After Setup

Documents

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



Inbox

The columns of the Inbox can be customized.

INBOX							
Description	DocNo	Type	Project	Due	Status	Company	Priority
Adjustments from 32 Ton Chiller/Evaporator	0001	Budget	GC-005		In Process	Spitfire Construction	Medium
Adjustments from Paving and Asphalt	0002	Budget	GC-005		In Process	Spitfire Construction	Medium
Adjustments from Electrical Work	0003	Budget	GC-005		In Process	Spitfire Construction	Medium
Initial Budget	0001	Budget	GC-010		Approved	Spitfire Construction	Medium

Project Dashboard

The columns of the document list can be customized.

RFQ							
	Doc No	Description	Date	Due	Company	Status	Priority
	327-0008	32 Ton Chiller/Evaporator	2/2/2010	2/5/2010	Spitfire Construction	In Process	FYI
	327-0007	32 Ton Chiller/Evaporator	2/16/2012	3/3/2012	Baldwin Construction	In Process	FYI
	327-0006	32 Ton Chiller/Evaporator	2/4/2012	3/3/2012	Able Electric Corp	In Process	FYI
	327-0005	32 Ton Chiller/Evaporator	2/4/2012	3/3/2012	Consolidated HVAC Supply	Bid Back	FYI

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

TEAM CONTACTS					
	Name	Company	Phone	Role	Contact's Project
	Jon Taffler	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 customized.

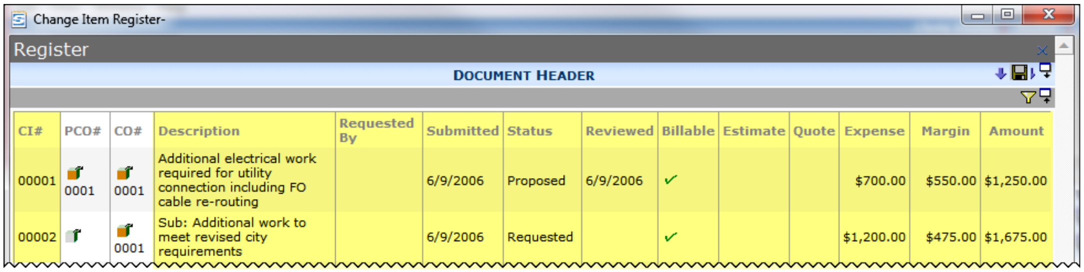
COST ANALYSIS DETAIL									
Account	EAC	U.CO	=Sum	Actual	Com Cost	=A+C	Spent	FAC	Variance
_EQ RENTAL	$5,125	$0	$5,125	$1,550	$0	$1,550	30.24 %	$5,125	$0
_LABOR	$169,000	$0	$169,000	$875	$0	$875	0.52 %	$169,000	$0
_MTRL PERM	$253,500	$0	$253,500	$31,939	$13,618	$45,557	17.97 %	$253,500	$0

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

KEY PERFORMANCE INDICATORS					
Contracts & Budgets		AR Summary		Project Cash Flow	
Original Contract	$750,000			Billed to Date	$15,500
Posted CO	$0	**AGED AR**		Less Open AR	$13,800
Current Contract	$750,000	Under 30	$0	Less Retention	$1,550
Unposted CO	$2,925	30 - 60 Days	$0	**CASH IN**	$150
Original Commitment	$46,354	60 - 90 Days	$0		
Approved CCO	$8,419	Over 90	$13,800	AP Cost to Date	$13,759
Current Commitment	$54,773	**TOTAL**	$13,800	Less Open AP	$13,118
Pending Commitment	$1,200			Less Retention	$325
Approved Pay Request	$5,350	**UNBILLED**		AP Cash Out	$316
Commitment Remaining	$36,153	Under 30	$0	Other Cash Out	$26,373
Original EAC	$575,000	30 - 60 Days	$0	**NET CASH FLOW**	($26,539)
Current EAC	$575,000	60 - 90 Days	$0		
Actual + Committed Cost	$74,800	Over 90	$3,053		
Current FAC	$575,000	**TOTAL**	$3,053	Cash Conversion	$52,196
Variance	$0			Cash Funding	$13,443
Percent Spent	13 %			**NET CASH DEMAND**	$38,753
Earned Value	$52,346				
Under Billed	$36,846				
Backlog	$122,654				

Change Item Register

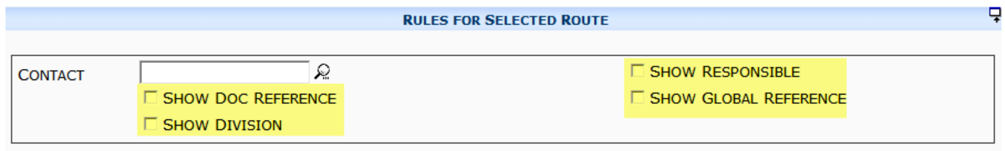
Most of the columns on the Change Item Register can be customized.



CI#	PCO#	CO#	Description	Requested By	Submitted	Status	Reviewed	Billable	Estimate	Quote	Expense	Margin	Amount
00001	0001	0001	Additional electrical work required for utility connection including FO cable re-routing		6/9/2006	Proposed	6/9/2006	✓			$700.00	$550.00	$1,250.00
00002		0001	Sub: Additional work to meet revised city requirements		6/9/2006	Requested		✓			$1,200.00	$475.00	$1,675.00

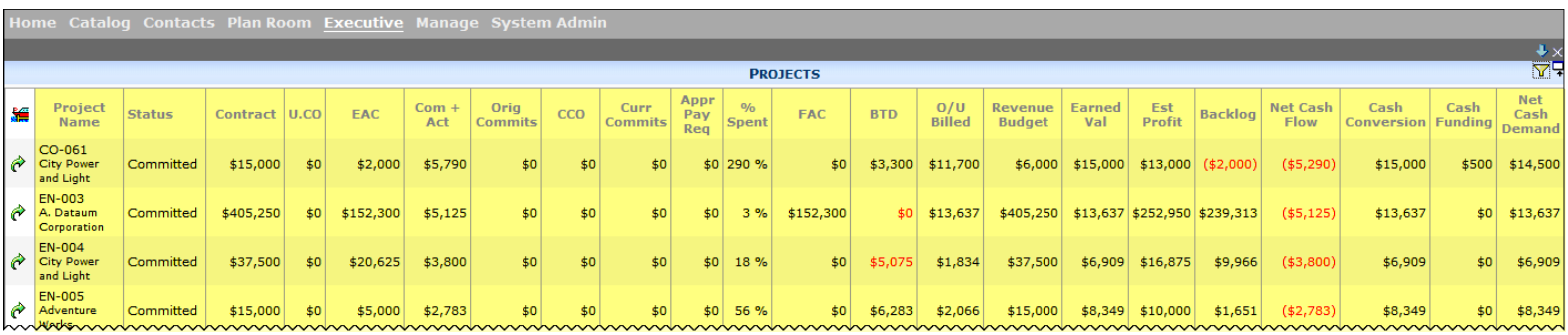
Routes Tool

The checkbox filters on the Routes tool on the Manage Dashboard can be customized.



Executive Dashboard

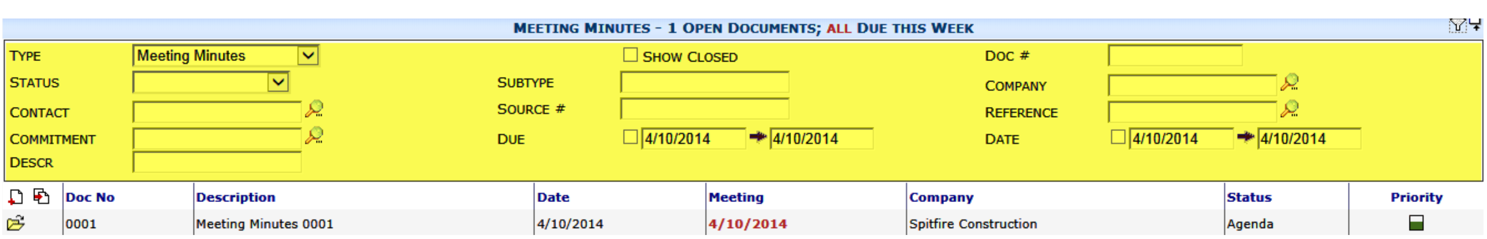
The columns of the project list on the Executive Dashboard can be customized.



Project Name	Status	Contract	U.CO	EAC	Com + Act	Orig Commits	CCO	Curr Commits	Appr Pay Req	% Spent	FAC	BTD	O/U Billed	Revenue Budget	Earned Val	Est Profit	Backlog	Net Cash Flow	Cash Conversion	Cash Funding	Net Cash Demand
CO-061 City Power and Light	Committed	$15,000	$0	$2,000	$5,790	$0	$0	$0	$0	290 %	$0	$3,300	$11,700	$6,000	$15,000	$13,000	($2,000)	($5,290)	$15,000	$500	$14,500
EN-003 A. Dataum Corporation	Committed	$405,250	$0	$152,300	$5,125	$0	$0	$0	$0	3 %	$152,300	$0	$13,637	$405,250	$13,637	$252,950	$239,313	($5,125)	$13,637	$0	$13,637
EN-004 City Power and Light	Committed	$37,500	$0	$20,625	$3,800	$0	$0	$0	$0	18 %	$0	$5,075	$1,834	$37,500	$6,909	$16,875	$9,966	($3,800)	$6,909	$0	$6,909
EN-005 Adventure Works	Committed	$15,000	$0	$5,000	$2,783	$0	$0	$0	$0	56 %	$0	$6,283	$2,066	$15,000	$8,349	$10,000	$1,651	($2,783)	$8,349	$0	$8,349

Filters*

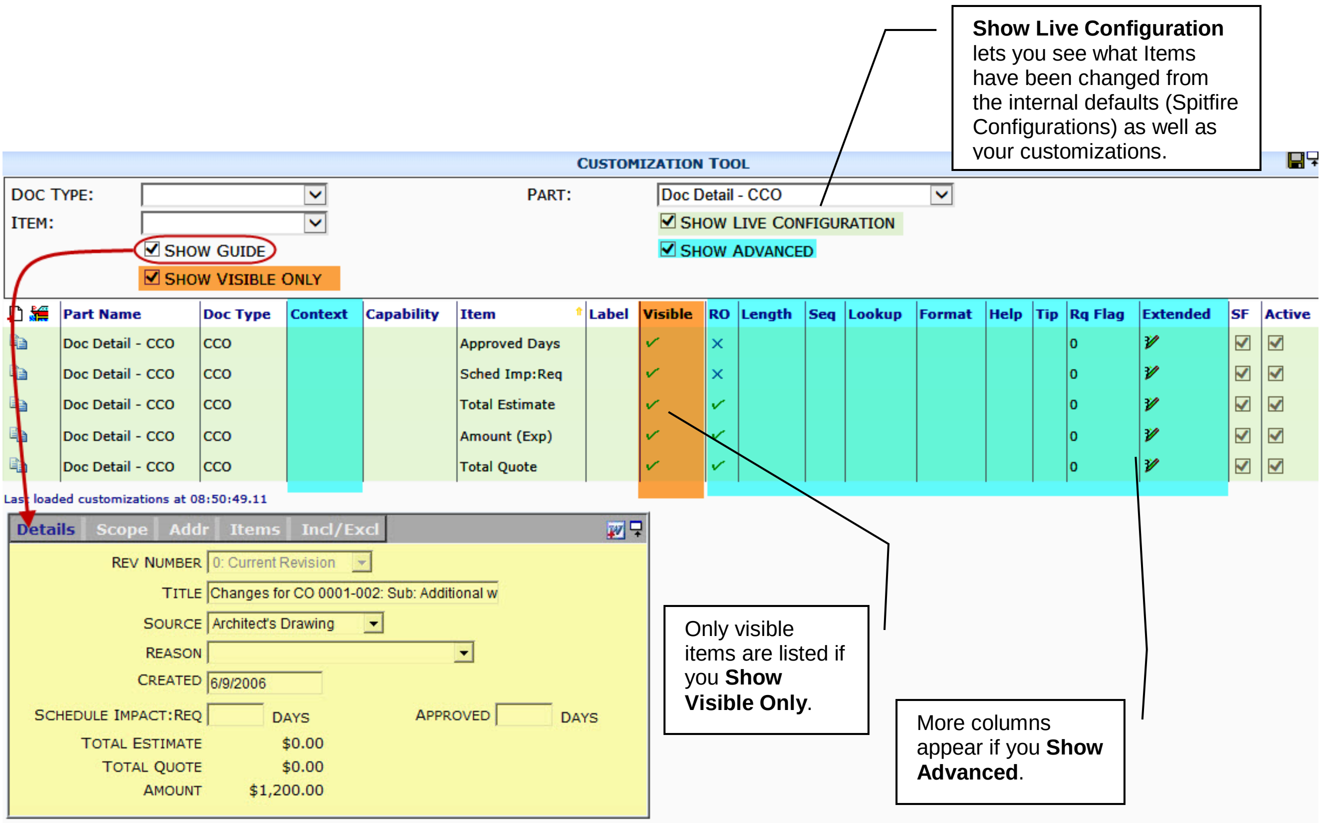
The filters on the Catalog Dashboard, Doc Items, Inbox, Change Item Register, Cost Analysis, Project Doc List, and Executive Dashboard can be customized.



Doc No	Description	Date	Meeting	Company	Status	Priority
0001	Meeting Minutes 0001	4/10/2014	4/10/2014	Spitfire Construction	Agenda	

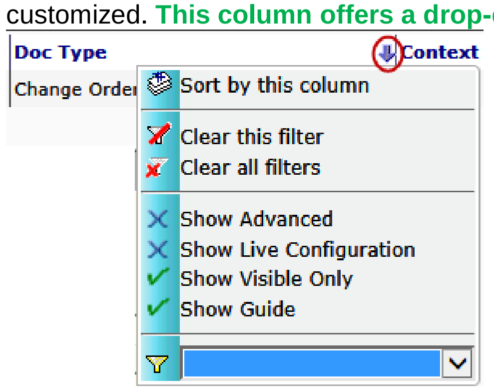
The Customization Tool Part

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



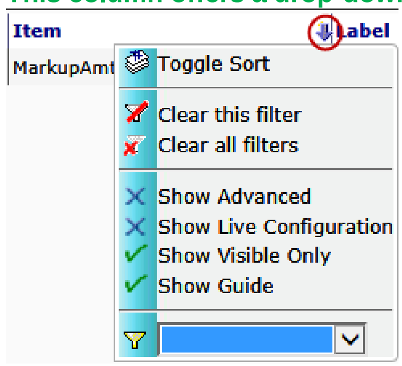
Columns

- **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:**



- **Capability**: the role capability by which you want to limit access to the customized item. When specified, this field overrides visible and read-only settings for this customization 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.**

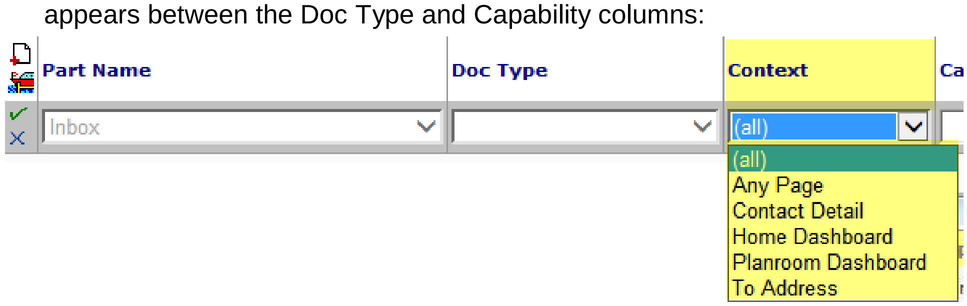
- **Visible**: whether or not the Item is visible on the specified Doc type. Making an Item not visible is the same as “removing” it from sight.

- **SF**: whether the row represents a Spitfire or user customization.
  ☑ indicates an underlying Spitfire internal default.
  ☑ indicates a Spitfire customization.
  ☐ indicates a user customization.

- **Active**: whether or not the customization in this row is to be used. Making a row inactive is a way to quickly remove a customization without deleting it.

Show Advanced

When the **Show Advanced** checkbox is checked, a new column appears between the Doc Type and Capability columns:



Additional columns also appear between the Visible and SF columns:

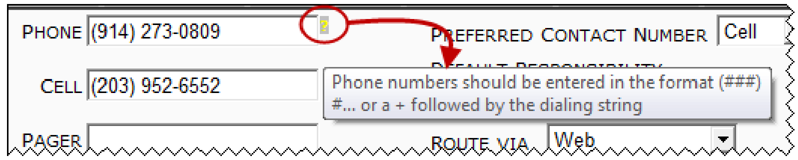
Visible	RO	Length	Seq	Lookup	Format	Help	Tip	Rq Flag	Extended	SF
✓	✕							0		☑
✕	✕							0		☑

- **Context**: exactly where this customization should apply. Most customizations do not need Context to be specified. Possible choices appear on the drop-down. **This column can be sorted by clicking on the header.**
- **RO**: whether or not the item is read-only.
  Note: 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

TIP

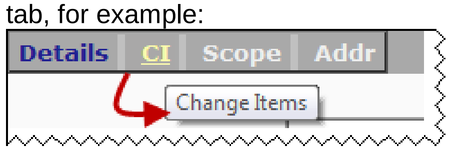
Indicate C2 as the Format for items in the Project KPI part if you want decimals to appear on the Key Performance Indicators.

- **Format**: a standard .NET format specification, such as F2 or C2. **This column can be sorted by clicking on the header.**
- **Help**: the text that appears when a user moves the mouse over the that appears next to the item, for example:



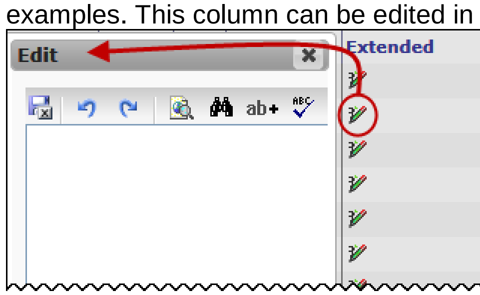
This column can be sorted by clicking on the header.

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



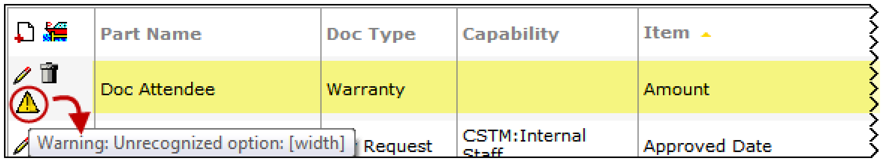
This column can be sorted by clicking on the header.

- **Rq Flag**: if and when a value is required in the field. **This column can be sorted by clicking on the header.**
    - o **0** – no value is required in the field
    - o **1** – a value is required in the field before the document can be saved, even on a brand new document
    - o **2** – a value is required in the field before the document can be saved, after the initial save (and creation) of the document
    - o **4** – a value is required in the field before the document can be saved into a pending state (e.g., status = Pending or Committed)
    - o **8** – a value is required in the field before expenses can be posted
    - o **16** – a value is required in the field before revenue can be posted
    - o **32** – a value is required in the field before the document can be set to any closed status
    - o **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 customization. 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. This column can be edited in grid view:



Warnings

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



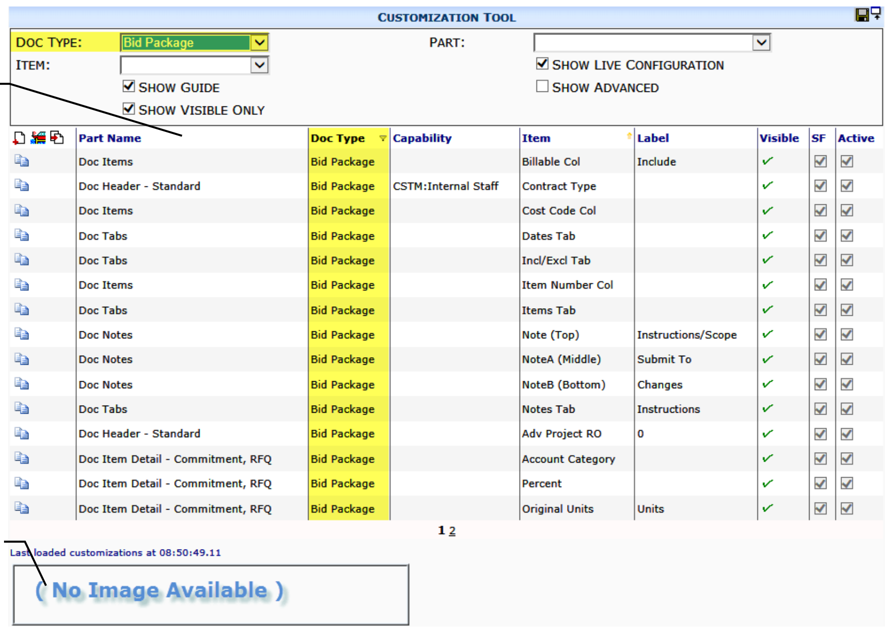
Filters

The filters in the Customization Tool work together to display different results.

Doc Type

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

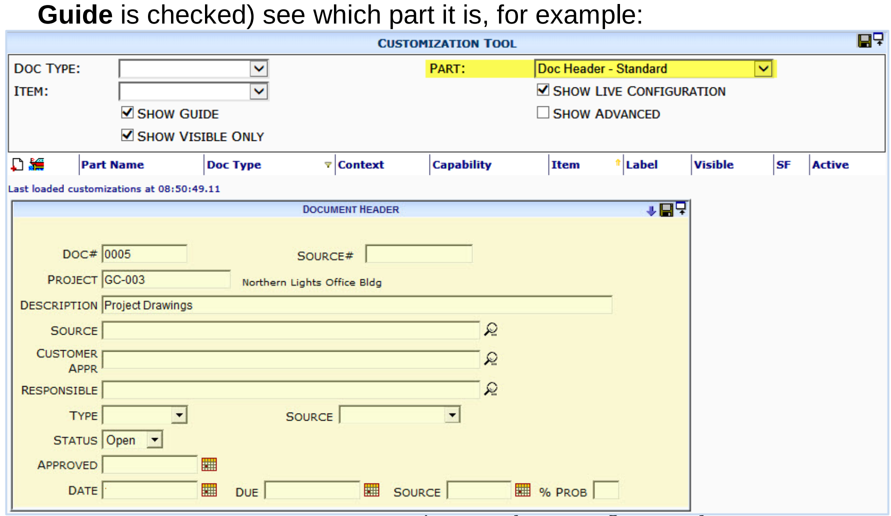
Items in Parts that you have customized for this Doc Type are listed here, especially if you **Show Live Configuration**.



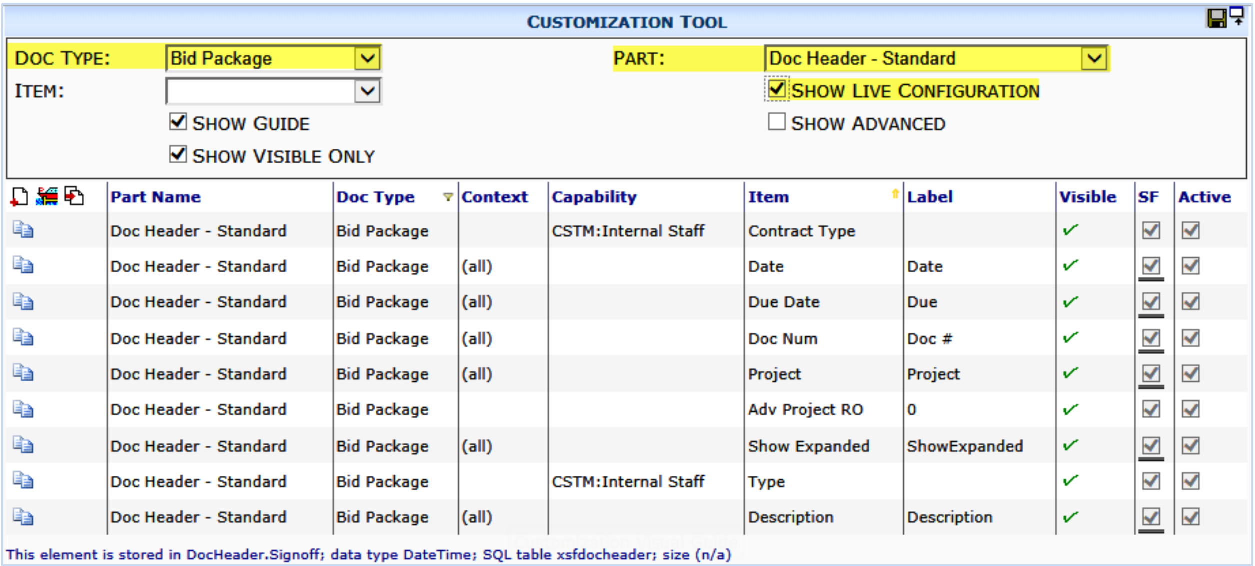
Guide images are not available when you filter only by Doc Type.

Part

- Select a Spitfire **Part** from the drop-down menu and (if **Show Guide** is checked) see which part it is, for example:

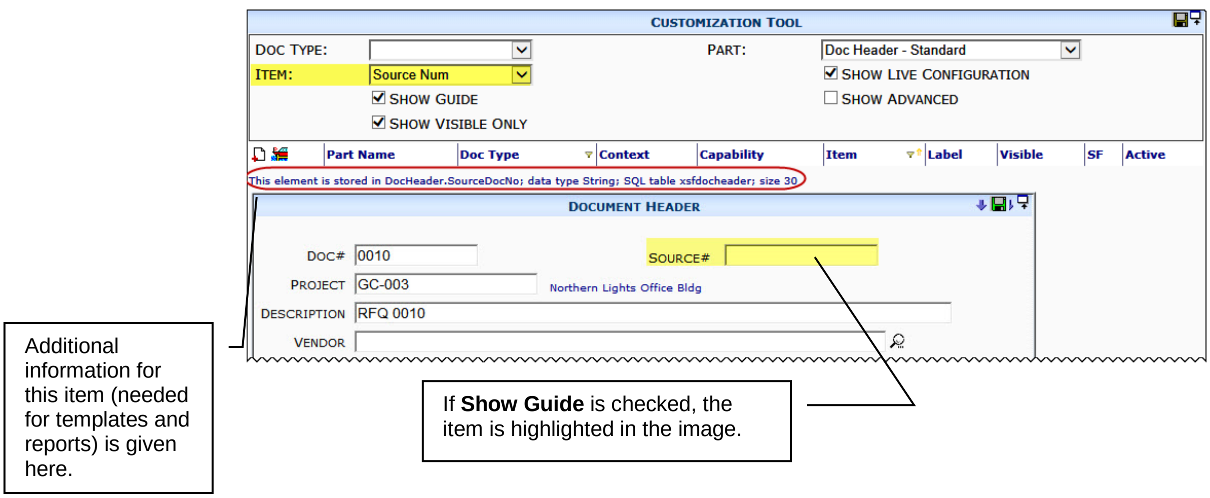


- If you also select a Doc Type (and perhaps **Show Live Configuration**), you will see a list of the customization on that part, for example:

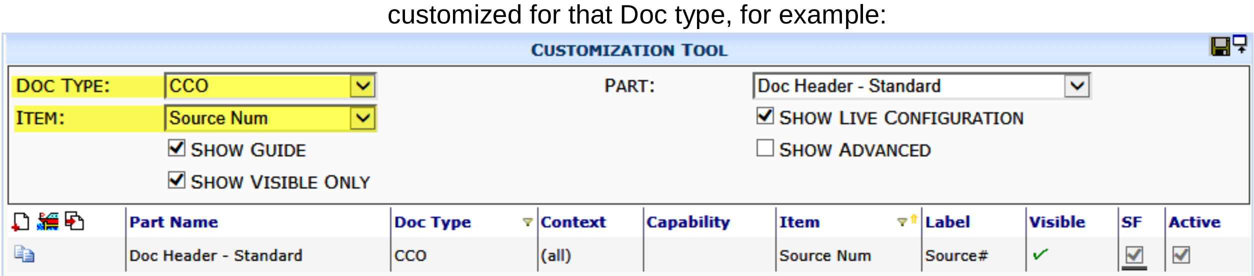


Item

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



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

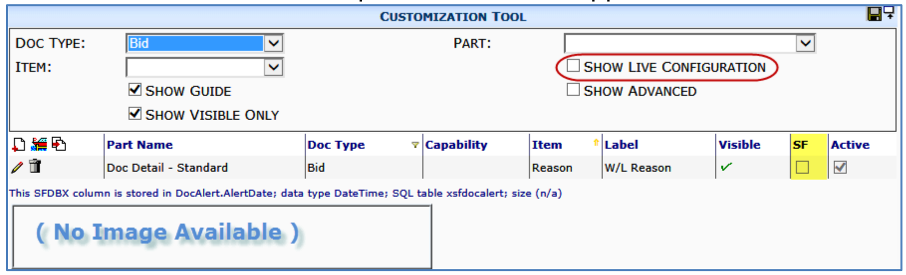


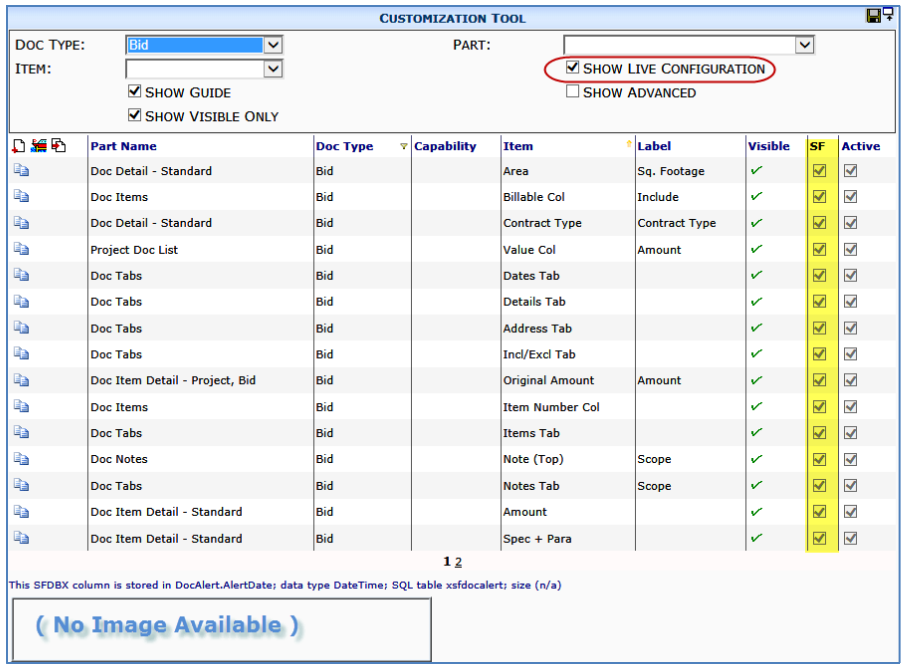
TIP

Check boxes work like toggles. To refresh data, uncheck then recheck a checkbox.

Show Live Configuration

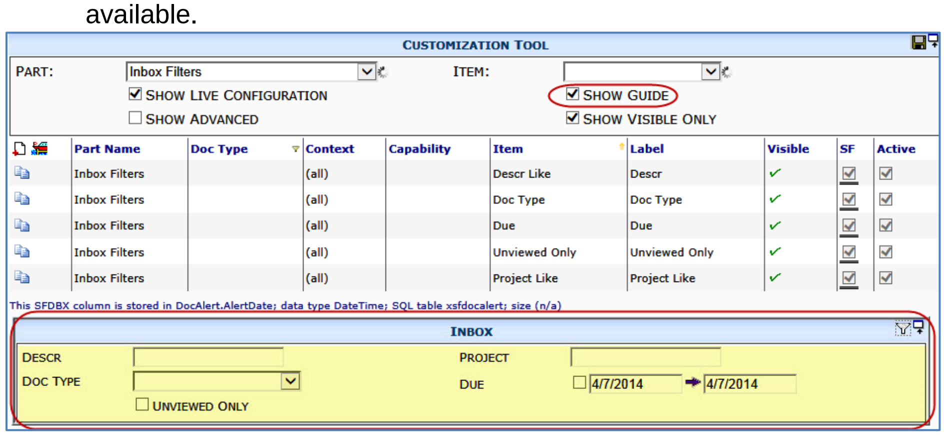
- Click the **Show Live Configuration** checkbox to see all configurations (customizations) for a Doc type (and, optionally, a specific Part and Item). If you do not check this option, only your own customizations and not Spitfire defaults will appear.





Show Guide*

- Click the **Show Guide** checkbox to display images where available.

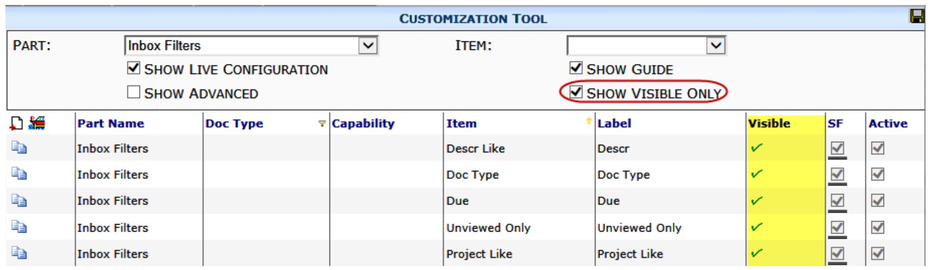


Show Advanced

- Click the **Show Advanced** checkbox to display additional columns. See page 37.

Show Visible Only*

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



Customizing Doc Types

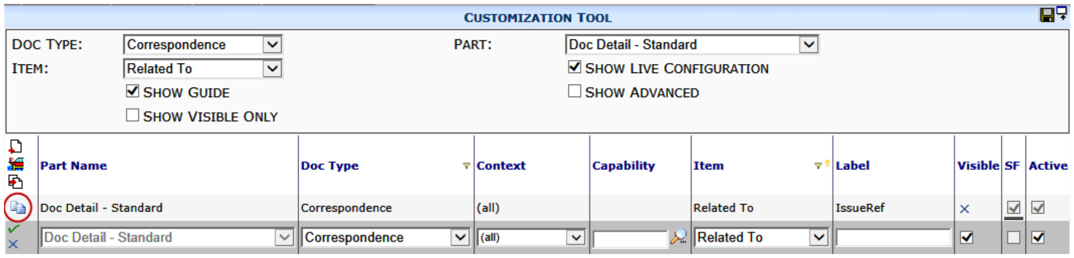
Adding Items

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.

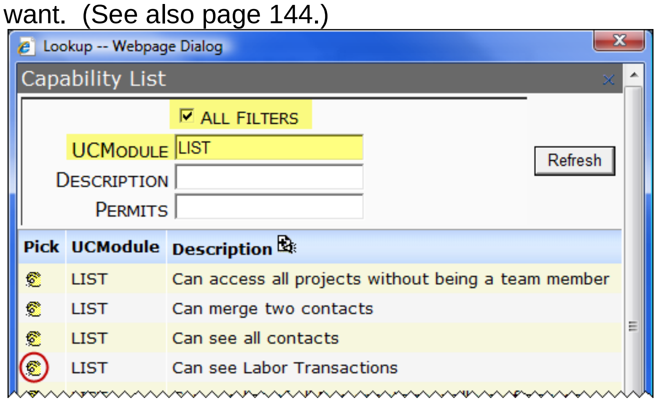
To add an item:

1. (*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.
2. Determine what part holds the item you want to add. Use Appendix C on page 143 for help.
3. (*optional*) Click **Show Guide** if it is unchecked and you want images.
4. Select the **Part** you want from the drop-down menu. The image that appears will show you the items that are in that part.
5. 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.
6. Click the **Show Visible Only** checkbox to uncheck it.
7. *(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.
8. (*optional*) If you want to add advanced options for this item, click the Show Advanced checkbox. See page 37.

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



10. (*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.)



11. (*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.

12. Assuming you want this item to be visible on documents and active (turned on), leave those checkboxes alone.

13. Click to accept your changes.

14. (*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.

15. 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 customization 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 customizations override the configurations and defaults of the document.

To edit a Spitfire-defined item:

1. (*optional*) On the Customization tool, click the **Show Guide** checkbox, if necessary.
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. Select the **Part** you want from the drop-down menu. The image that appears will show you the items that are in that part.
4. 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.
5. *(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.
6. (*optional*) If you want to add advanced options for this item, click the Show Advanced checkbox. See page 37.
7. Click to copy the row.
8. Make your changes on the row (e.g., change the label, make the item not visible, etc.)
9. Click to accept your changes.
10. Click to save all your changes.

Editing User Customizations

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

To edit a Customized 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. (*optional*) If you want to add advanced options for this item, click the Show Advanced checkbox. See page 37.
5. Click at the row you want to edit.
Note: if all you want to change is an Extended option, you can click to make your addition or change directly in grid view.
6. Make your changes then click .
7. Click to save all your changes.

Copying All Customized Items

You can copy the configurations and customizations (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 Customization tool between two dates. For more information, see the *Spitfire Reports* technical white paper.

To copy all configured and customized items:

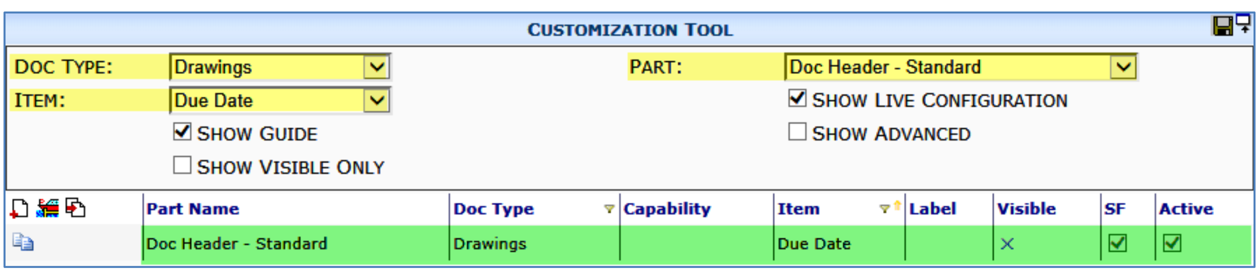
1. Select a **Doc Type** from the drop-down menu.
2. Click . A icon will appear next to it.
3. At the **Doc Type** filter, select another Doc type. This is the Doc type *to* which you want to copy.
4. Click . The customized Items will be listed in the Item Grid.
5. (*optional*) Click if you want to make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

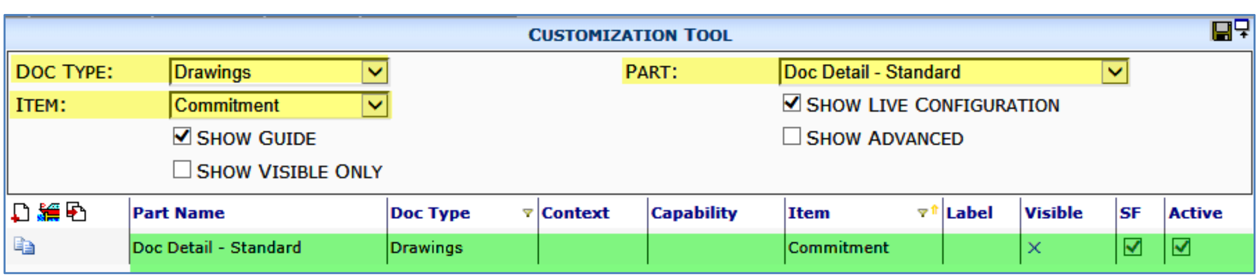
Example

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

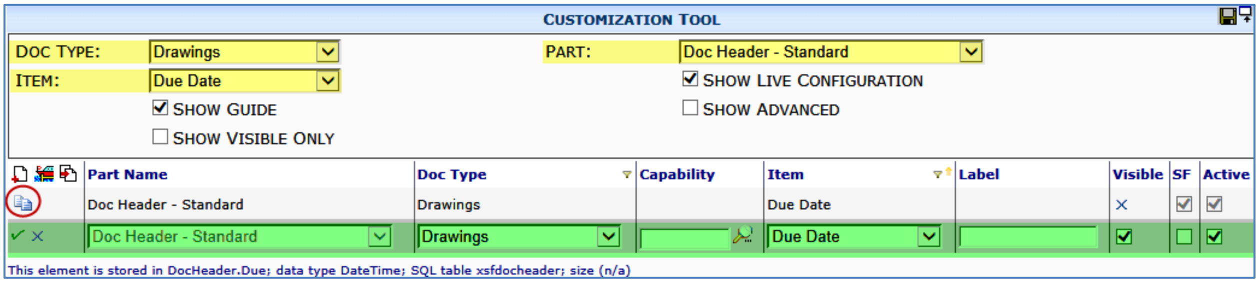
First, you use the filters (and uncheck **Show Visible**) to see how Drawings are configured and discover that **Due Date** on the **Doc Header – Standard** part is not currently visible. Also, **Commitment** on the **Doc Detail – Standard** part is not visible.

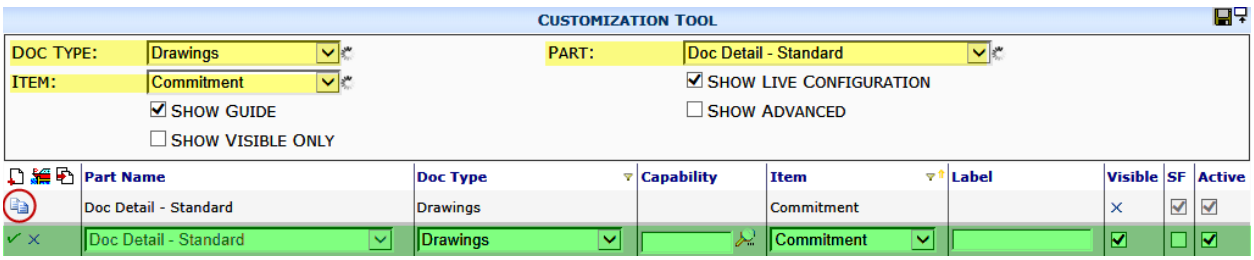




Second Task

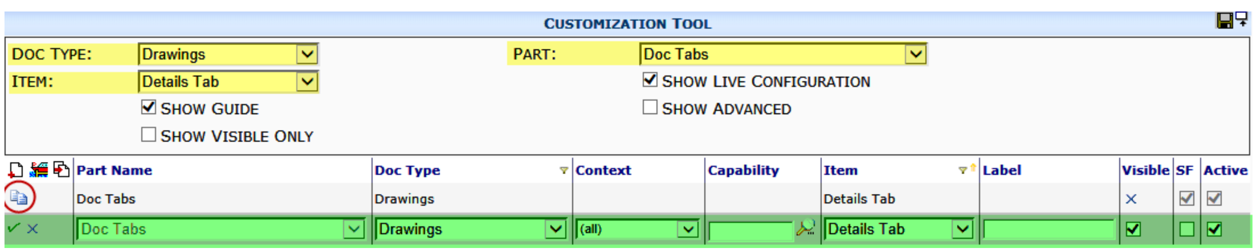
In order to make the Commitment and Due Date items visible on the Drawing Doc type, you uncheck **Show Visible** and use the filters to find those rows, then copy them to add your own customizations for these items and make them visible.



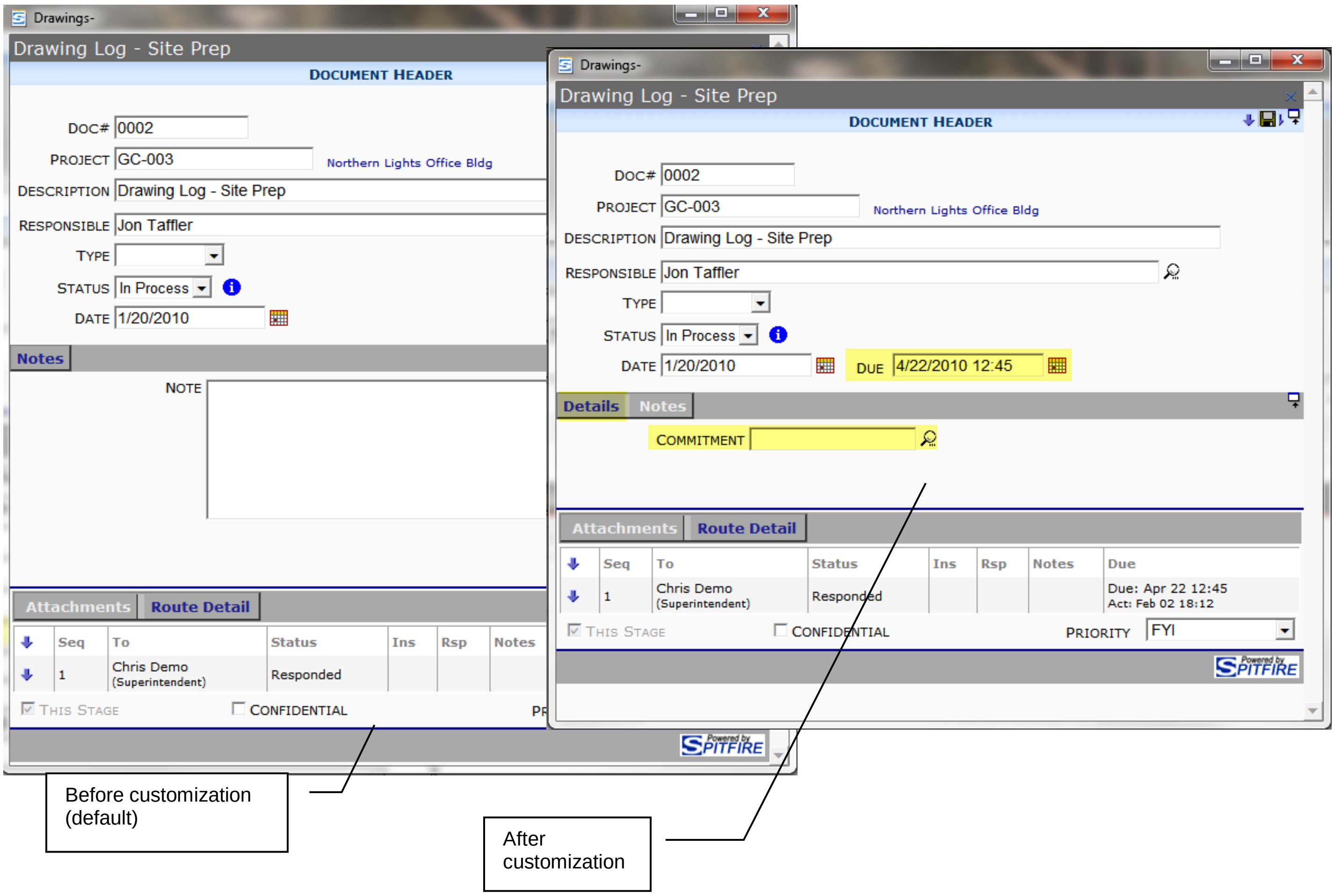


Third Task

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 customization (the **Details Tab** item on the **Doc Tabs** part) in order to see the Commitment field on the document:



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


Drawings-
Drawing Log - Site Prep
DOCUMENT HEADER
DOC# 0002
PROJECT GC-003
Northern Lights Office Bldg
DESCRIPTION Drawing Log - Site Prep
RESPONSIBLE Jon Taffler
TYPE
STATUS In Process
DATE 1/20/2010
Notes
NOTE
Attachments
Route Detail
Seq
To
Status
Ins
Rsp
Notes
1
Chris Demo (Superintendent)
Responded
THIS STAGE
CONFIDENTIAL
Drawings-
Drawing Log - Site Prep
DOCUMENT HEADER
DOC# 0002
PROJECT GC-003
Northern Lights Office Bldg
DESCRIPTION Drawing Log - Site Prep
RESPONSIBLE Jon Taffler
TYPE
STATUS In Process
DATE 1/20/2010
DUE 4/22/2010 12:45
Details
Notes
COMMITMENT
Attachments
Route Detail
Seq
To
Status
Ins
Rsp
Notes
Due
1
Chris Demo (Superintendent)
Responded
Due: Apr 22 12:45
Act: Feb 02 18:12
THIS STAGE
CONFIDENTIAL
PRIORITY
FYI
Before customization (default)
After customization

Code Maintenance

Throughout sfPMS, there are customizable drop-down menus on specific Doc types. For example, on the Change Order document, the Change Code field is a customizable 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:

	Permits	E	Electrical
	Permits	M	Mechanical
	Permits	R	Roadway and Easments

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

	Doc Type	Code	Description
	Permits	Ec	Cable Work
	Permits	Eh	Electric Hookup
	Permits	Eo	Optic Wiring
	Permits	Ma	Air Conditioner
	Permits	Mb	Boiler
	Permits	Mh	HVAC
	Permits	Rf	Fence
	Permits	Ro	Roadway Obstruction

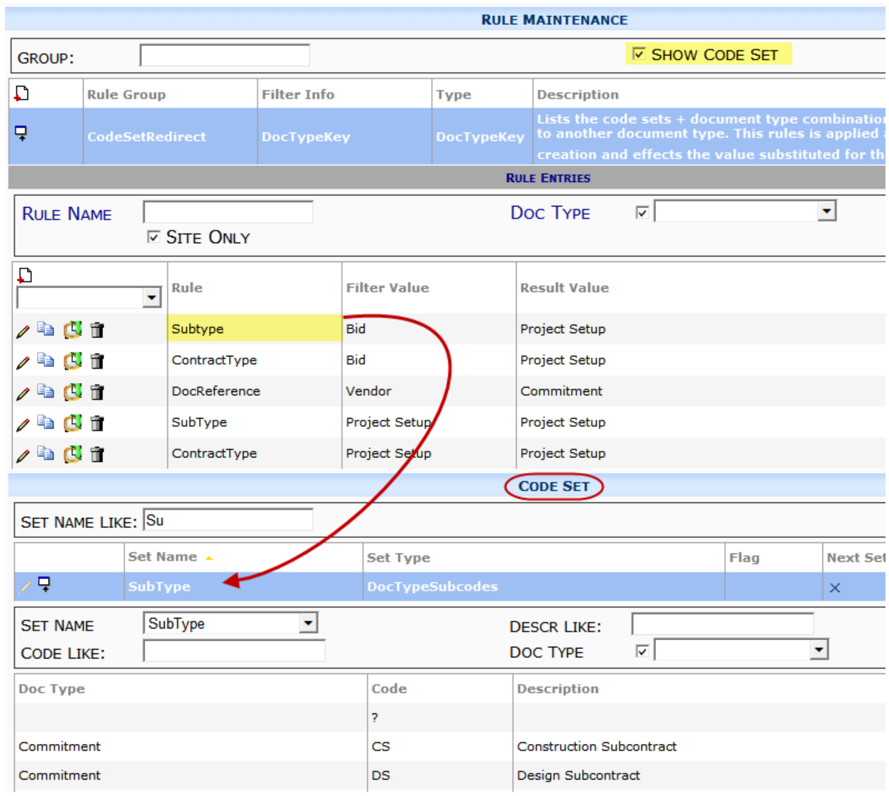
After Setup

Drop-Down Menus

Codes are used throughout the system in many drop-down menus. See [Appendix A](#) on page 105 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.

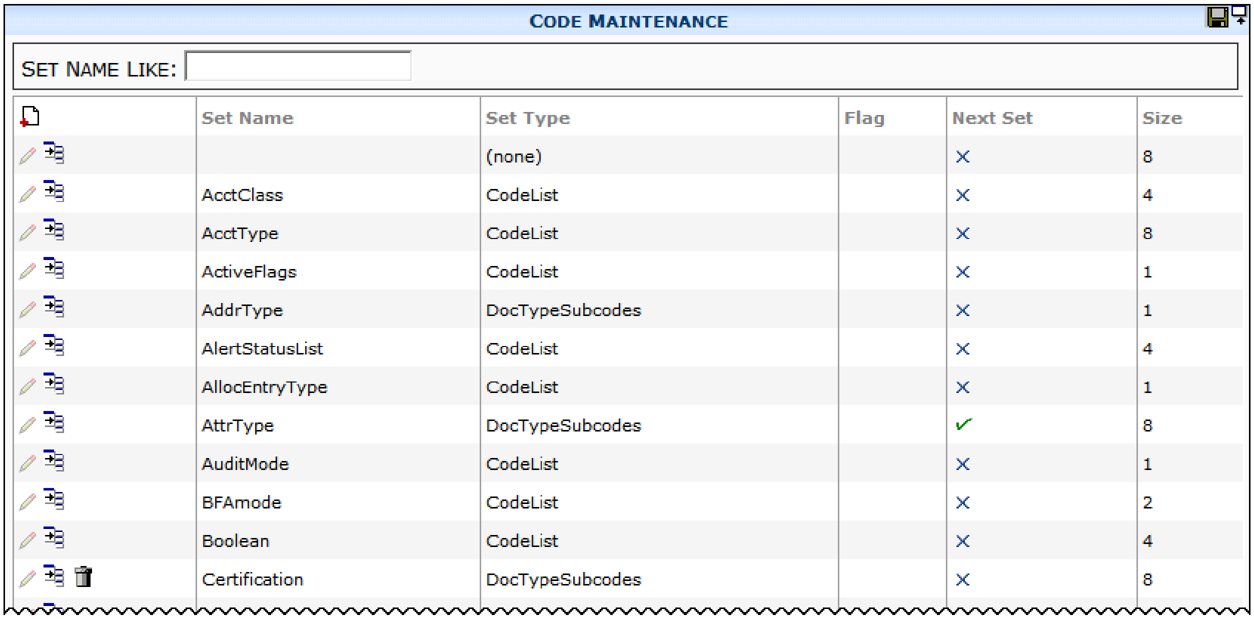


TIP

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:



	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

Columns

TIP

For a description of the available code sets, see Appendix A on page 105.

- **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.

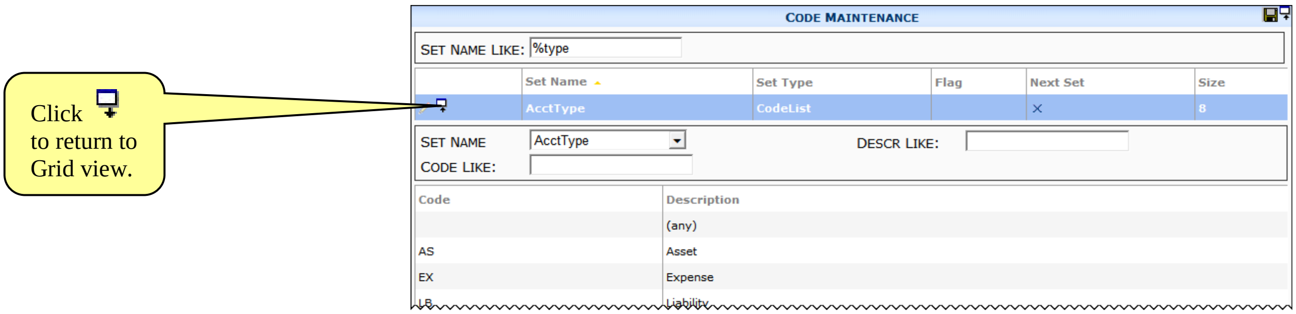
Filter

- **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



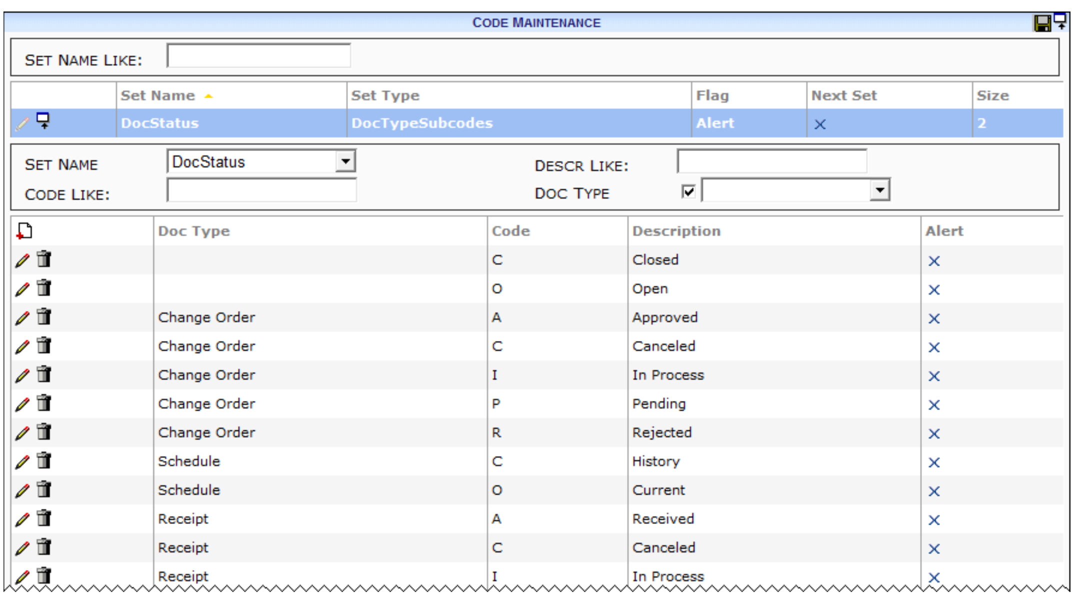
Columns

- **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



Columns

> **TIP**
> The Admin | Doc Type Code Sets report lists codes by Doc type. For more information, see the *Spitfire Reports* technical white paper.

- **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:

CODE MAINTENANCE

SET NAME LIKE: Doc

Set Name	Set Type	Flag	Next Set	Size
DocStatus	DocTypeSubcodes	Alert	×	2

SET NAME: DocStatus DESCRIPTION LIKE:
CODE LIKE: DOC TYPE ☑

Doc Type	Code	Description	Alert
	C	Closed	×
	O	Open	×
Change Order	A	Approved	×
Change Order	C	Canceled	×
Change Order	I	In Process	×
Change Order	L	Proposed	×
Change Order	M	Committed	×
Change Order	P	Pending	×
Change Order	R	Rejected	×
Schedule	C	History	×
Schedule	O	Current	×
Receipt	A	Received	×
Receipt	C	Canceled	×
Receipt	I	In Process	×

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

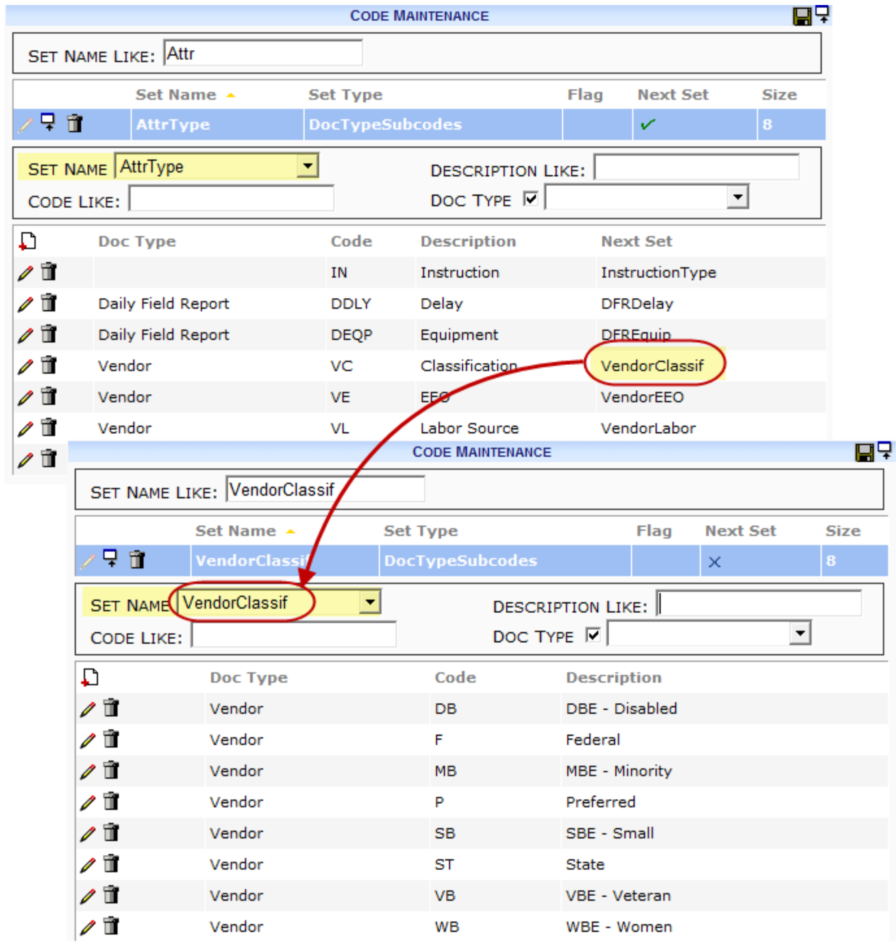
- **Description**: the label that appears on the drop-down menu for the corresponding code. Descriptions can be up to 30 characters long.
- (*optional flag*):
    - **Alert** (for DocStatus only)**:** whether or not the Alert type "Document Status Change" will apply to the specific code in the Doc type. 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	×
	O	Open	×
Change Order	A	Approved	✓
Change Order	C	Canceled	×
Change Order	I	In Process	×
Change Order	L	Potential	×
Change Order	M	Committed	×
Change Order	P	Pending	×
Change Order	R	Rejected	×

.

- o **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 (✗).

- (*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.



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.

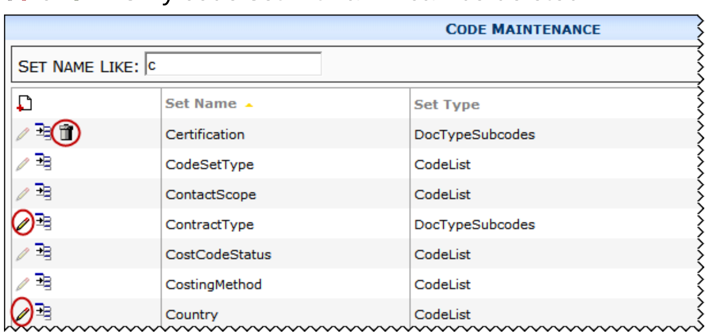
Adding Code Sets

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 or . Only code set with a can be deleted.



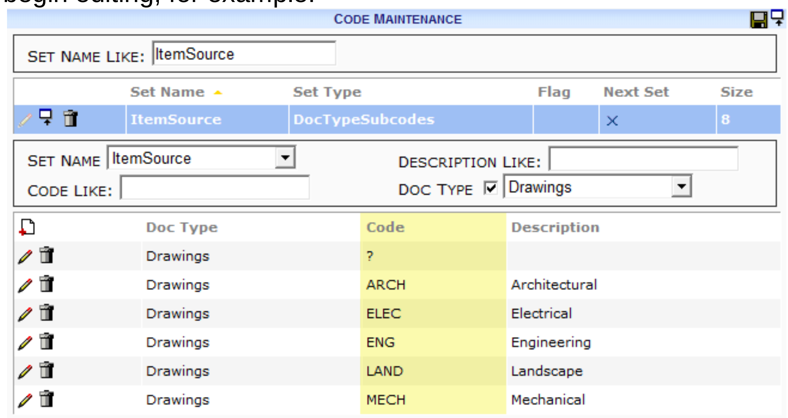
TIP
For a list of code sets that you cannot edit, see Appendix A on page 105.

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 click to get to Detail view.
2. Review the codes for the Doc type you selected before you begin editing, for example:



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.

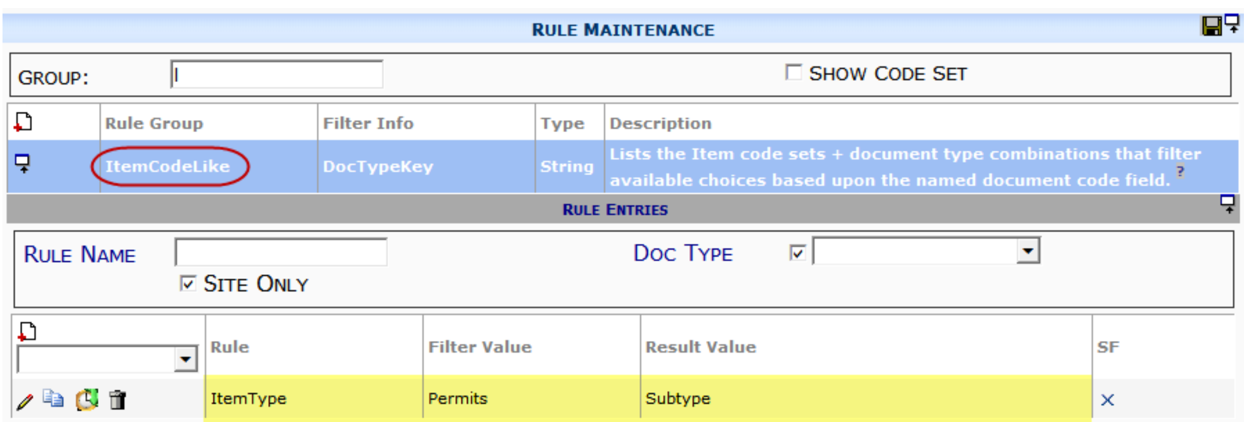
> **TIP**
> The Admin | Configuration Changes report indicates changes in the Code Maintenance tool between two dates. For more information, see the [Spitfire Reports](#) technical white paper.

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.

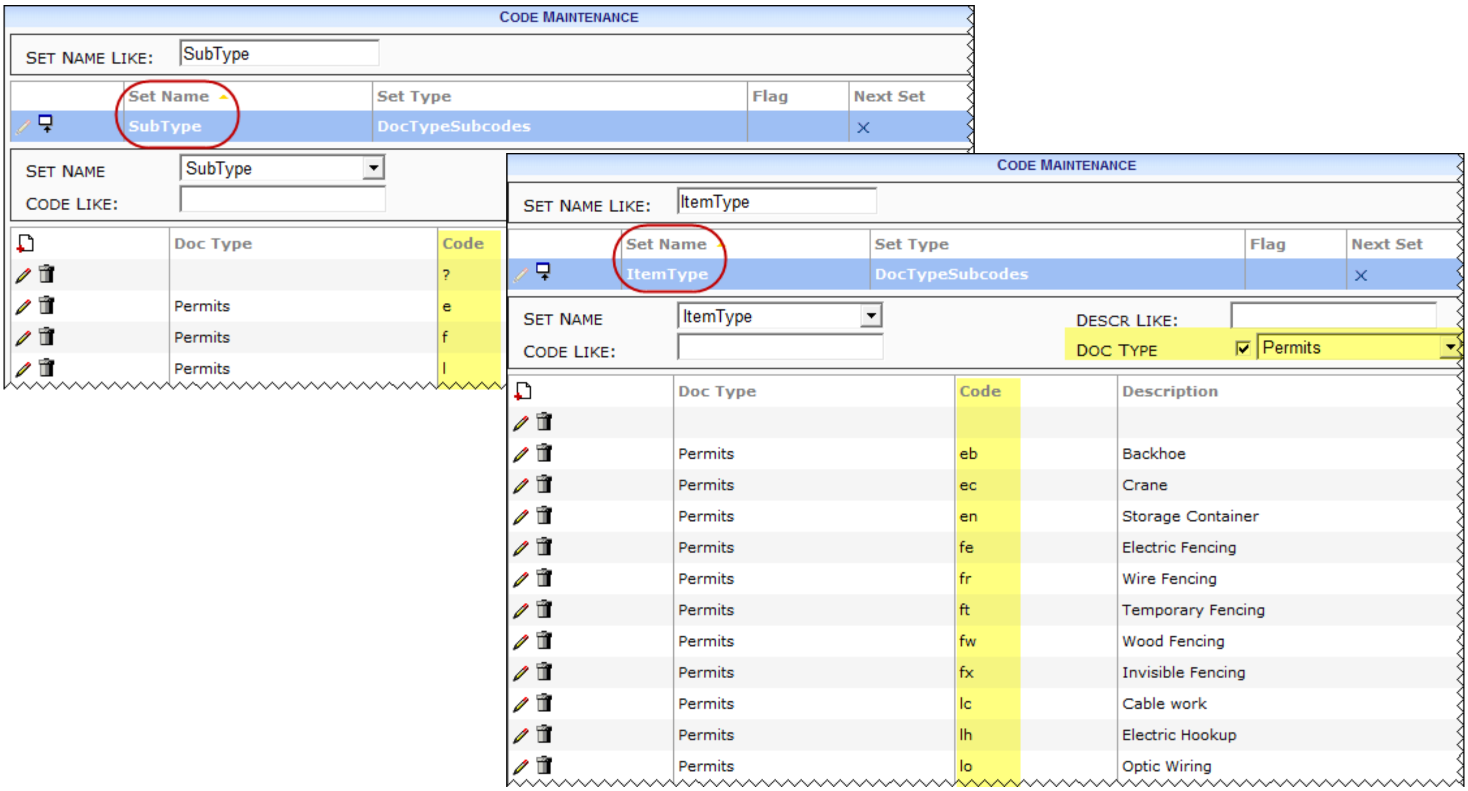
First Task

In order for the relationship between code sets to be recognized by sfPMS, you must use the **ItemCodeLike | ItemType** rule. (See page 95 for the chapter on the [Rules Maintenance tool](#).)

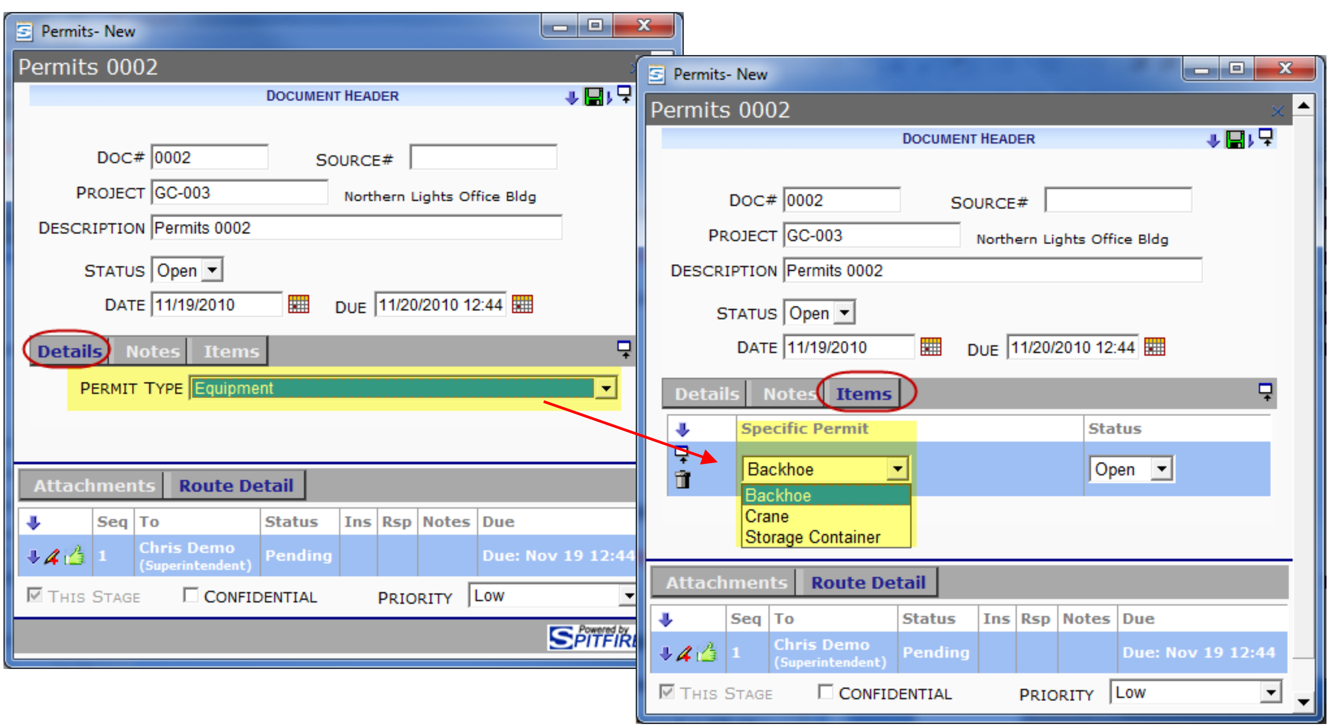


Second Task

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



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 134 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.

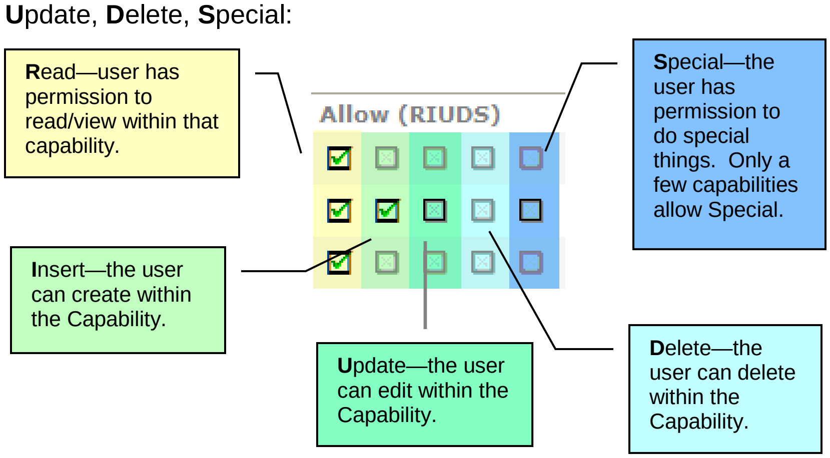
Module	***Description***	***Examples***
CSTM	Customization tool level	*See pages 37 and 144*
DOC	Spitfire document level	Submittal, Meeting Minutes, RFI, etc.
LIST	Spitfire list level	Accessing freeform mode (vs. Lookup list) to add members to the Meeting Attendees List
PAGE	Spitfire page level	Project 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)

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 **R**ead, **I**nsert, **U**pdate, **D**elete, **S**pecial:

TIP

See the technical white paper *Designing User Roles* for an explanation of available capabilities and permissions.

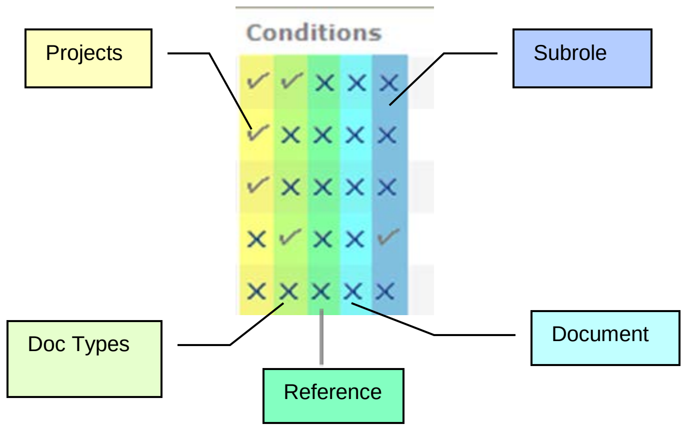


Note: Only the permission levels that apply will be available for edits. For example, only the **R** checkbox can be edited for the Executive Dashboard because users cannot Insert, Update, or Delete the Executive Dashboard; they simply have access or do not have access. Checkboxes that you cannot edit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

HVAC Subcontractor—specific capabilities plus those from:

Subcontractor—specific capabilities plus those from:

DocCreator—create only Pay Request documents

DocCreator—create only RFI documents

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.

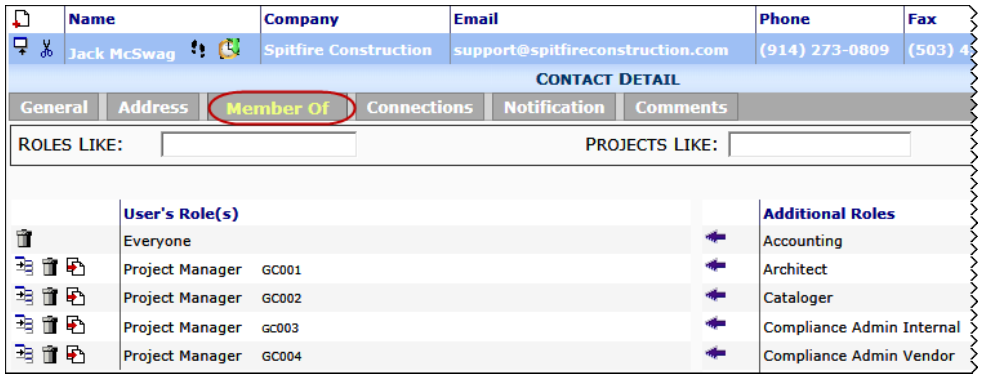
TIP

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

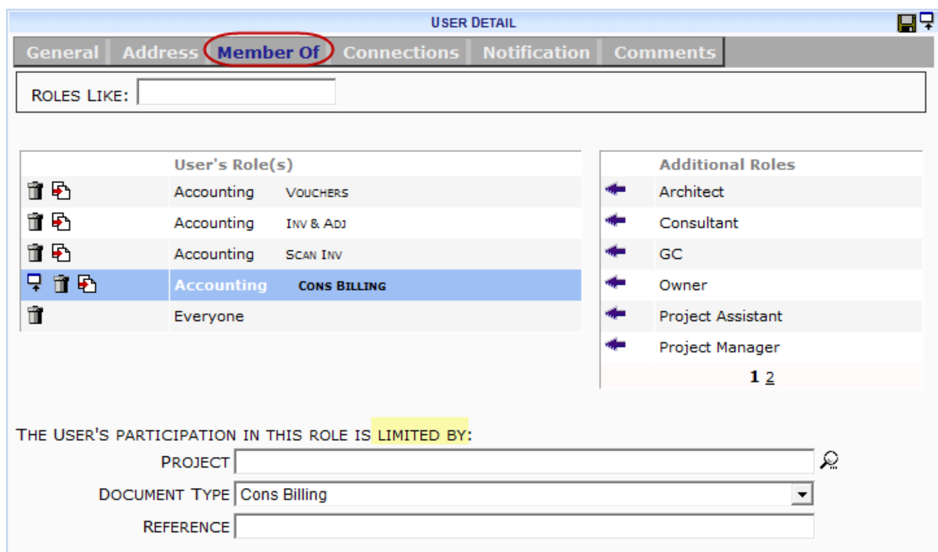
The Admin | Access Analysis report indicates the roles that give users access to documents and files.

For more information, see the *Spitfire Reports* technical white paper.

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.

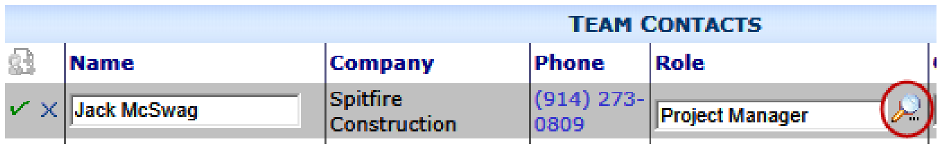


If your role is restricted according to one of the conditions (see page 59), then the Member Of tab will allow the role to be copied and restricted through a "limited by" field.



Project Team Contacts

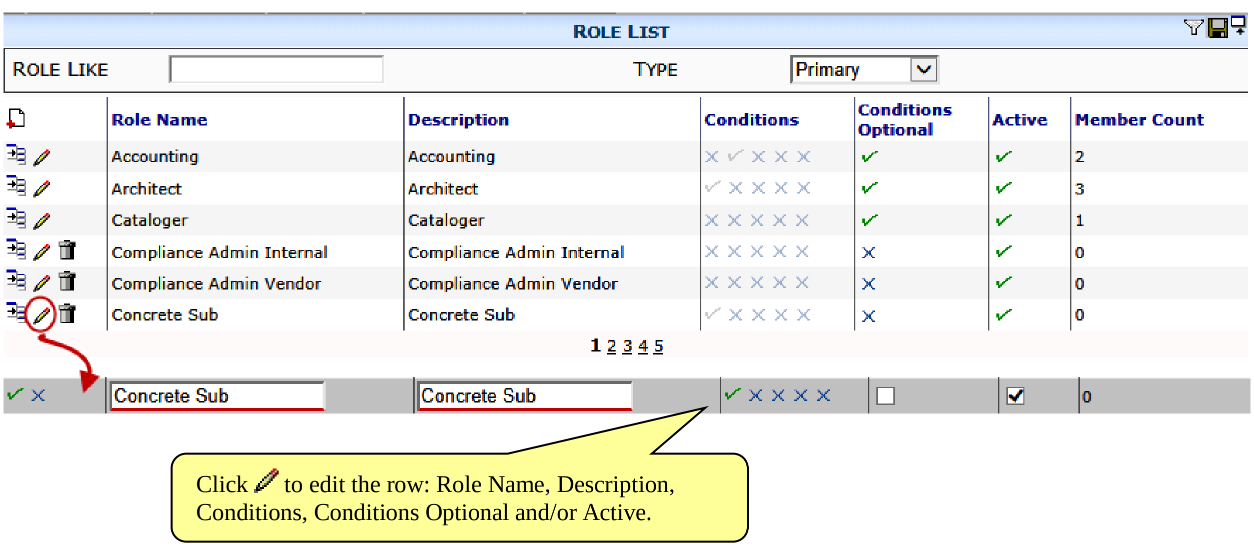
Once your Contacts have roles, and especially if a Contact has more than one role, you can look up the role that indicates that person's "role" on a project, on the Team Contacts part of the Project Dashboard.



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

The Role List Part

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



Columns

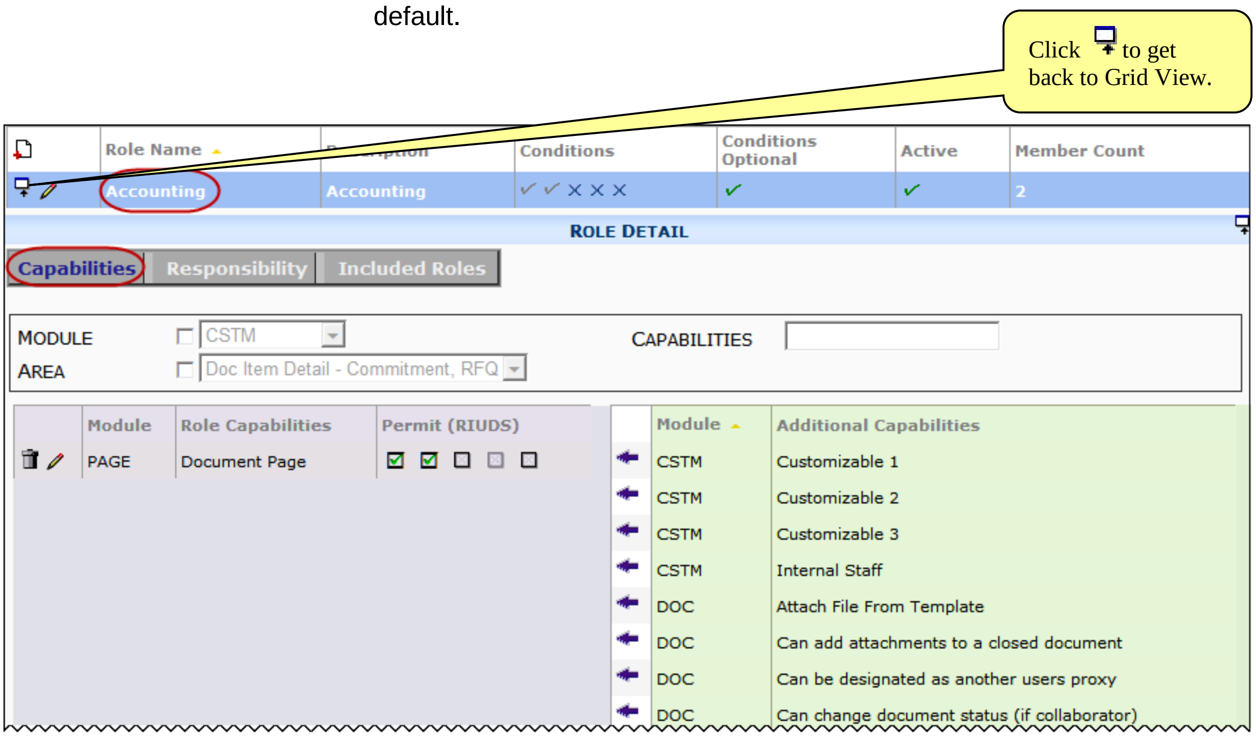
- **Role Name**: The name of the role. You can edit this name.
- **Description**: A description of the role. Often, the description is the same as the name, but it doesn't have to be. You can edit this description.
- **Conditions**: Which conditions (Project, Doc type, Reference, Document) have restrictions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

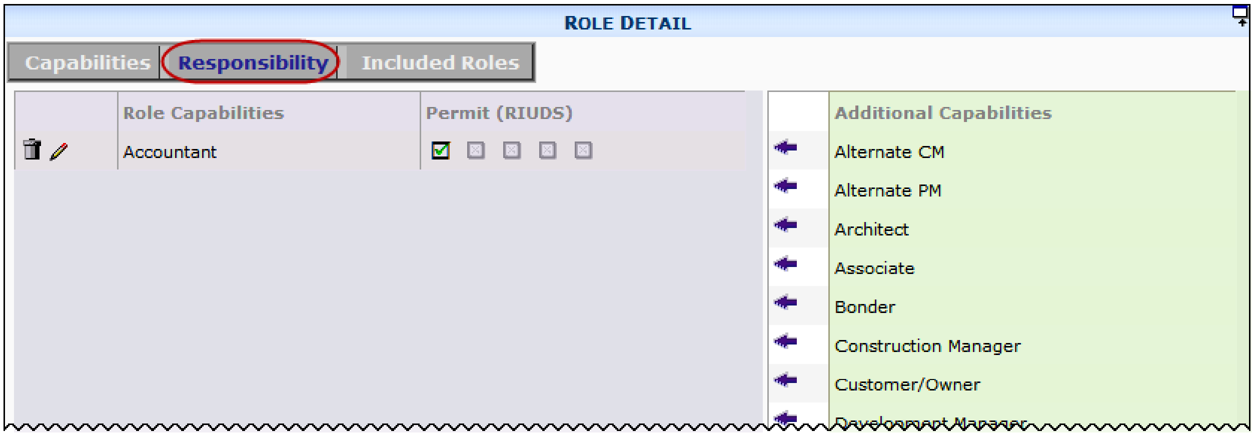
Filters

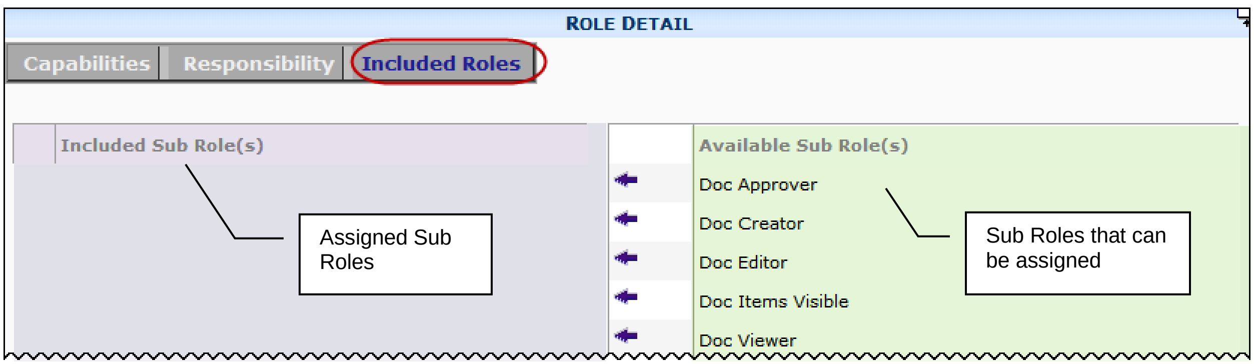
- **Role Like**: Type the first few characters or use the wildcard (%) to find one or more roles by name.
- **Type**: Select **Primary** or **Subordinate** (Sub role) roles.

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 Columns

- **Module**: the group to which the capability belongs (see page 58).
- **Role Capabilities**: the name of the capability.
- **Permit (RIUDS)**: the permissions on the capability assigned to the role (see page 58).
- **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 Columns

- **Role Capabilities**: the name of the capability.
- **Permit (RIUDS)**: the permissions on the capability assigned to the role (see page 58).
- **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 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.

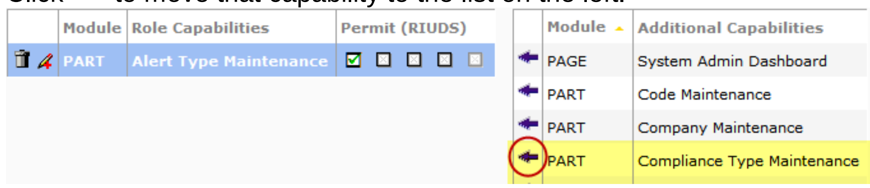
Capabilities

TIP

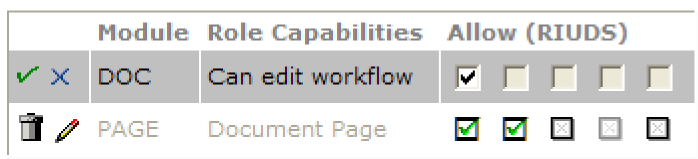
See the technical white paper [Designing User Roles]() for help in determining the capabilities you need and where to find them.

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.



4. (*optional*) Click to edit the newly assigned role capability.
5. If possible, click on the checkboxes depending on whether you want to give **R**ead, **I**nsert, **U**pdate, **D**elete (or **S**pecial) 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.



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.

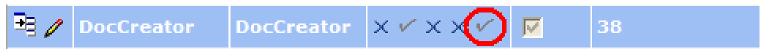
1. Click next to the role you want to edit.
2. Click on the Responsibility tab.
3. Click next to the responsibility you want to assign to the role. Just like Capabilities, the Responsibility will move to the left side and no longer be listed on the right side.
   Note: if you move a responsibility to 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

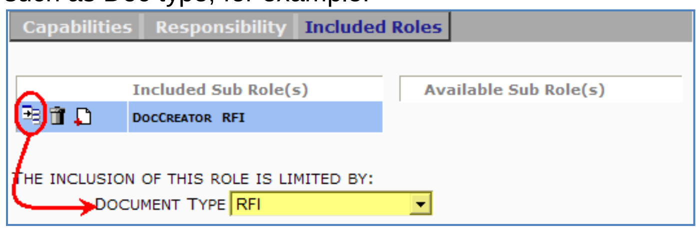
TIP
More information about the use of roles and SubRoles can be found in the technical white paper *Designing User Roles*.

To include (nest) a SubRole in a Role:

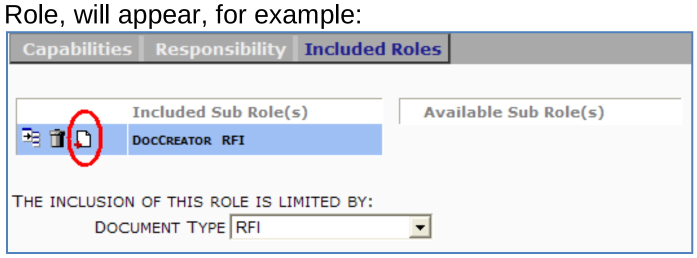
1. If necessary, first create the role that will become the SubRole (as described on page 65). Make sure to check the fifth Condition checkbox to designate it as a SubRole, for example:



2. Find the role that is to include the SubRole and click .
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, for example:



6. If the Sub Role can be copied, a new icon, used to copy the Sub Role, will appear, for example:

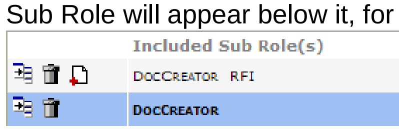


7. Click to save your role information then to get back to Item Grid view or to copy the Sub Role (see below).

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.

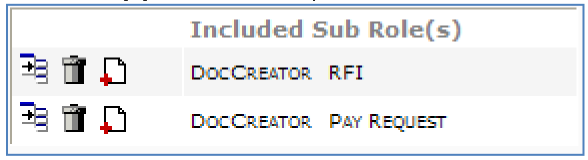
To copy a Sub Role:

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



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

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

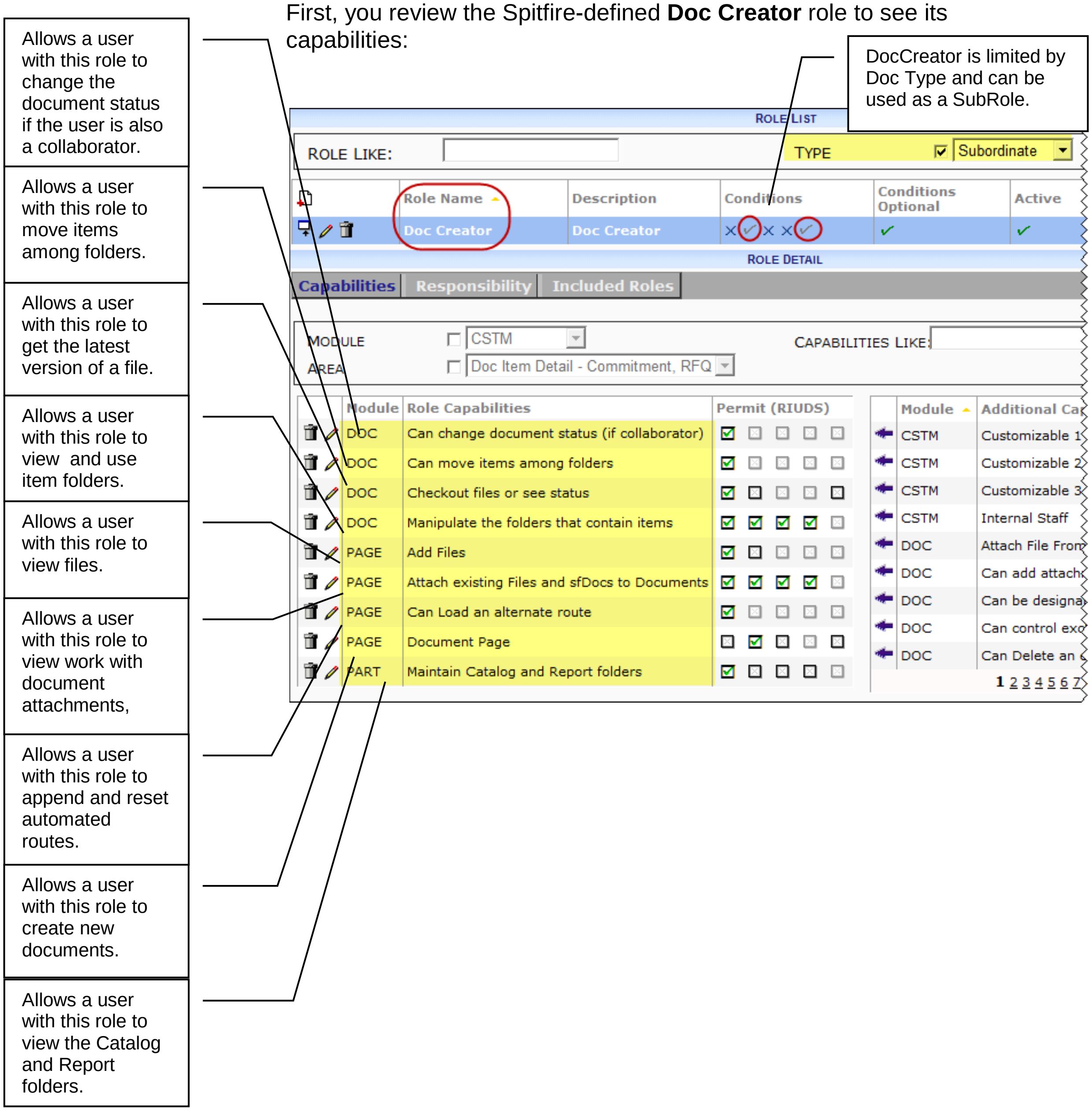


Example

Let us say that you want to [create roles]() for the situation described on page 59.

First Task

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

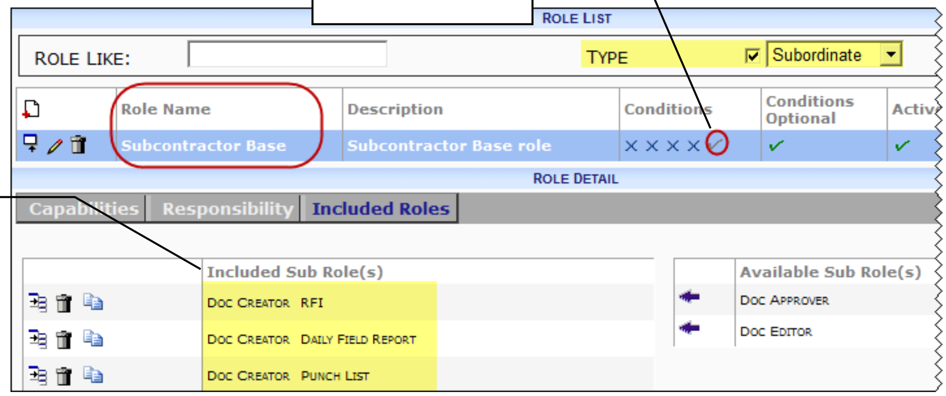


Second Task

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

Subcontractor Base can be used as a SubRole.

Subcontractor Base includes DocCreator but only for RFIs, Daily Field Report and Punch Lists Doc types



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

Allows a user with this role to catalog Doc Template printouts.

Allows a user with this role to access the Catalog and use the filters.

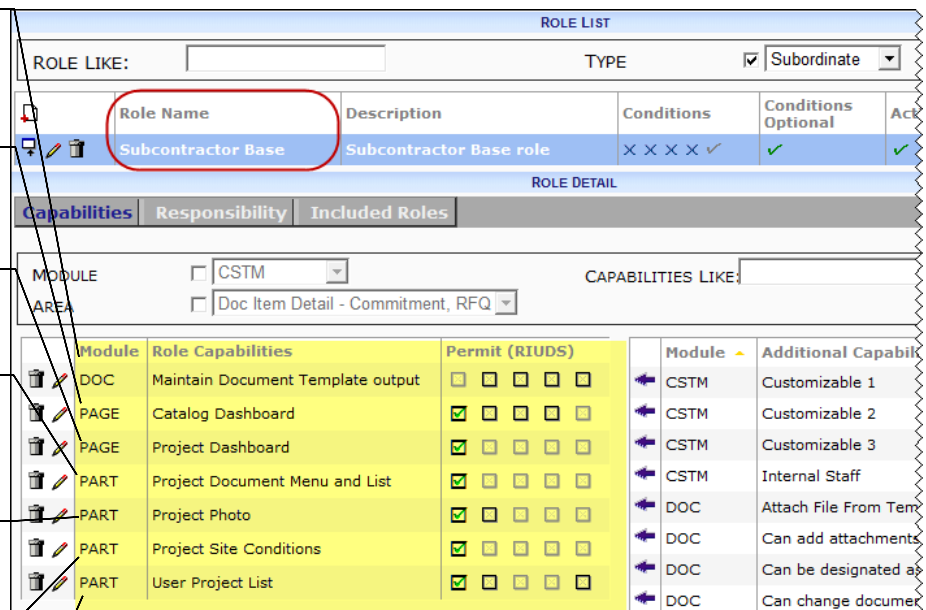
Allows a user with this role to access the Project Dashboard.

Allows a user with this role to access the Document Menu on the Project Dashboard.

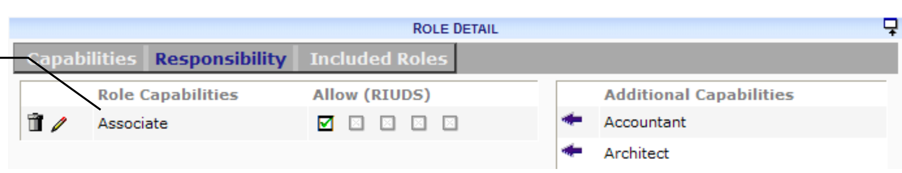
Allows a user with this role to view the project photo.

Allows a user with this role to view project site conditions (weather)

Allows a user with this role to view the Project List on the Home Dashboard.

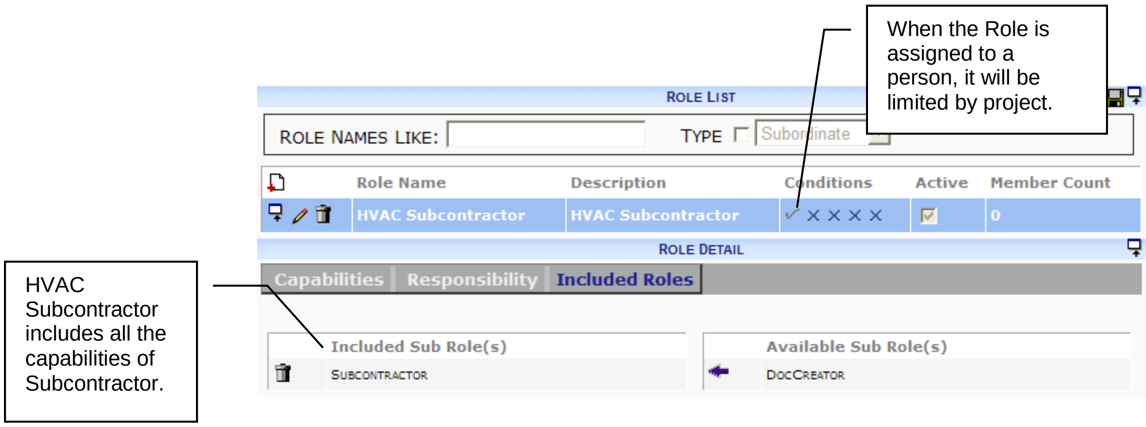


Subcontractor has the work responsibilities of an Associate.



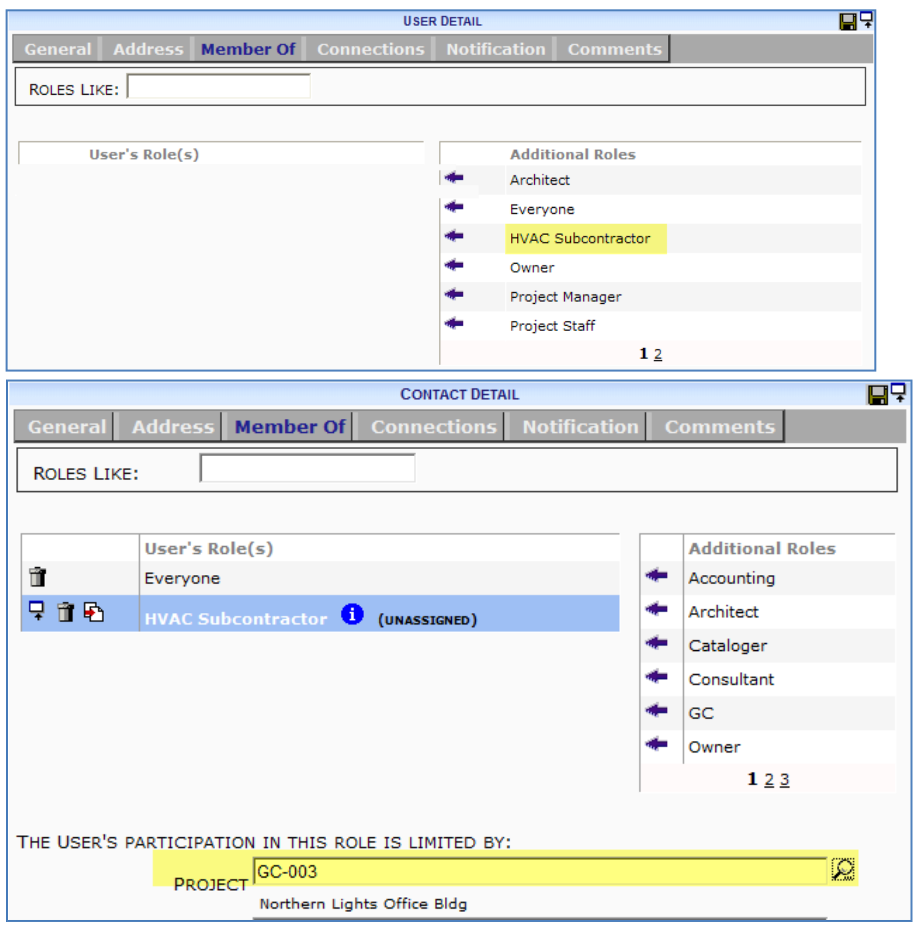
Third Task

Third, you create the role of “HVAC Subcontractor”, which is limited by Project and includes Subcontractor Base.



Fourth Task

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



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

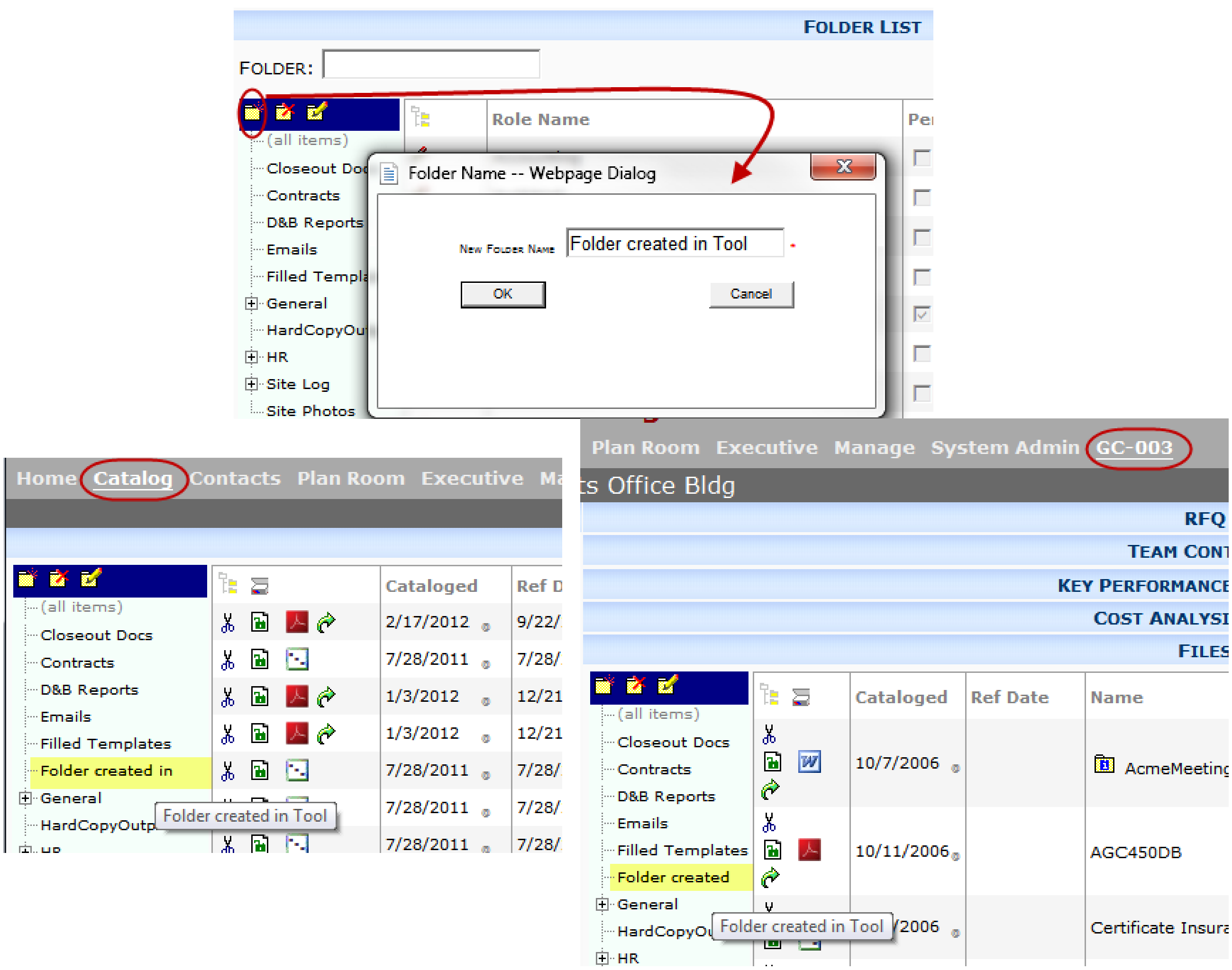
Folders

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.

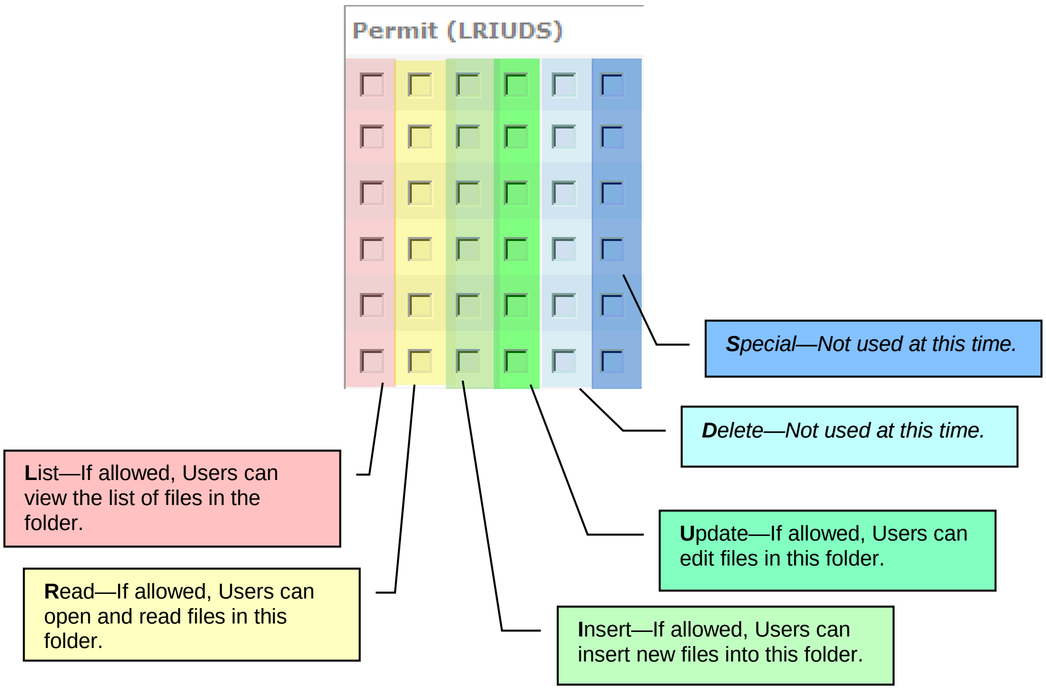
However, only users with permission to view or open folders can do so.



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 **L**ist, **R**ead, **I**nsert, **U**pdate, **D**elete, **S**pecial:



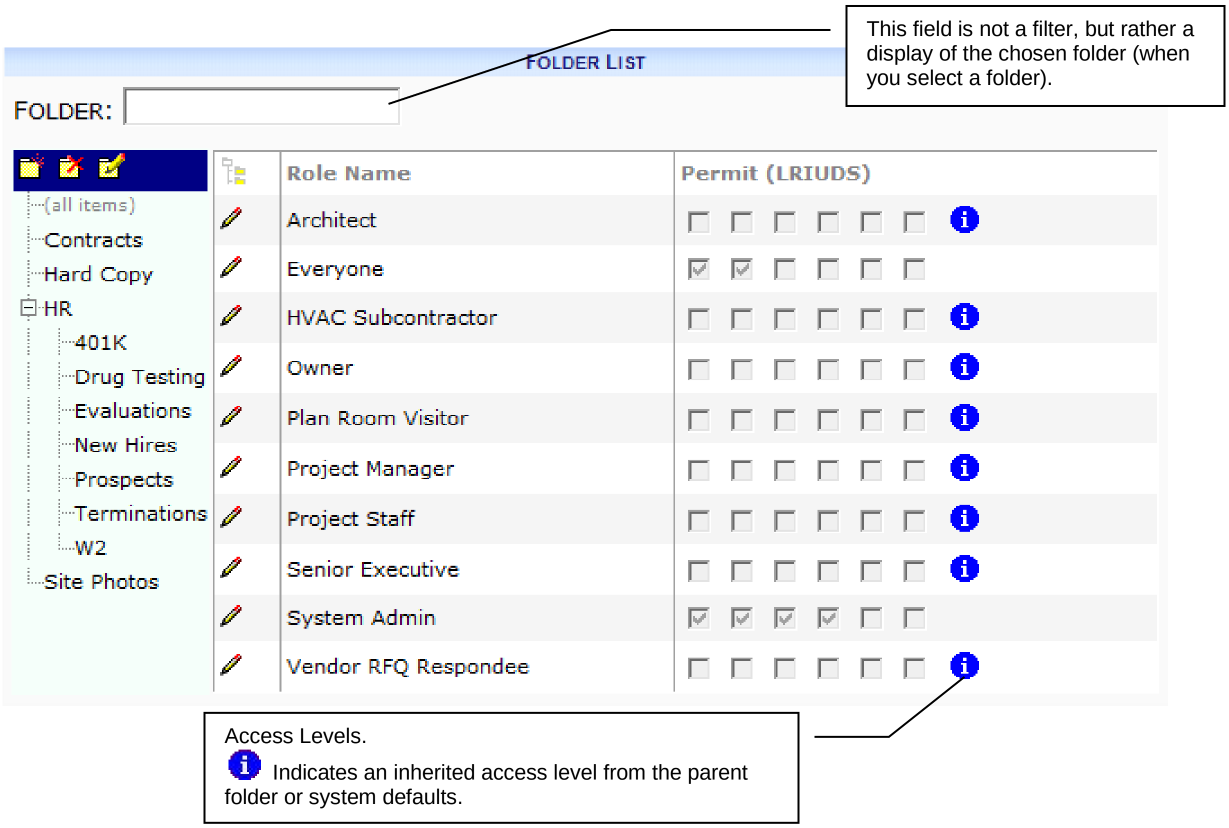
After Setup

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.

The Folder List Part

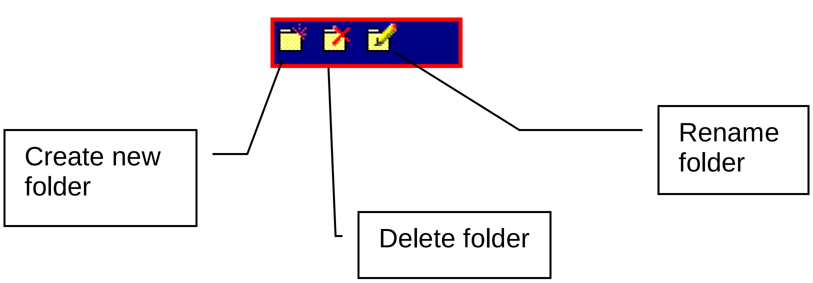
When you select the Catalog Folders tool, the corresponding part appears:



Columns

- **Role Name**: the roles as set up through the Roles Maintenance tool (see page 58).
  Note: only roles with no Doc Type, Reference, Document, or Sub Role conditions are shown (see page 63).
- **Permit (LRIUDS)**: the permission level for the role (see page 72).

The Folder Toolbar



Adding and Editing Folders

TIP

Users gain access to files attached to a document if they have access to the document.

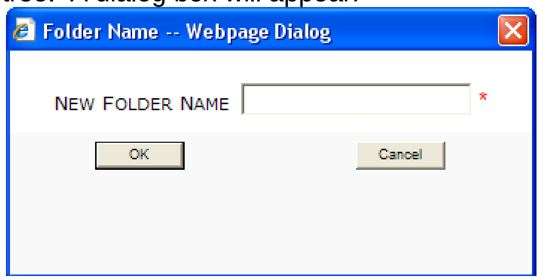
If users have read access to a folder, they can view all files in that folder – even if they don't have access to the project with which the file is associated…so it is beneficial to plan folder structures intelligently.

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:

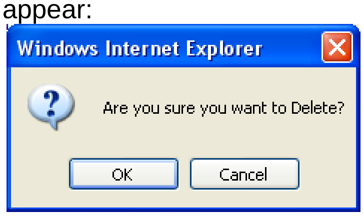


Note: you can nest a folder within an existing folder by selecting the folder and then clicking .

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

To delete a catalog folder:

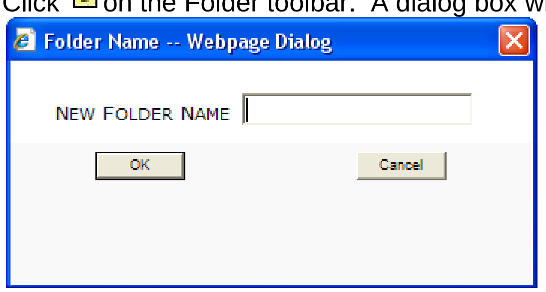
1. Click on the folder in the folder tree.
2. Click on the Folder toolbar. A confirmation dialog box will appear:



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:



3. Enter your new folder name and click .

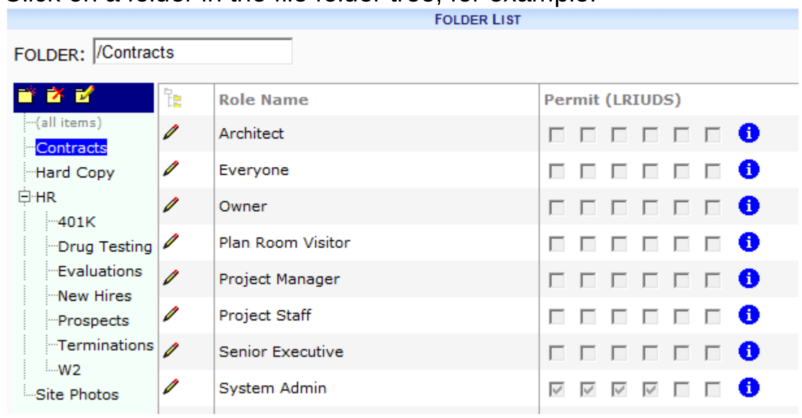
Assigning Access to Folders

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, for example:



   The folder name will appear in the Folder field at the top.

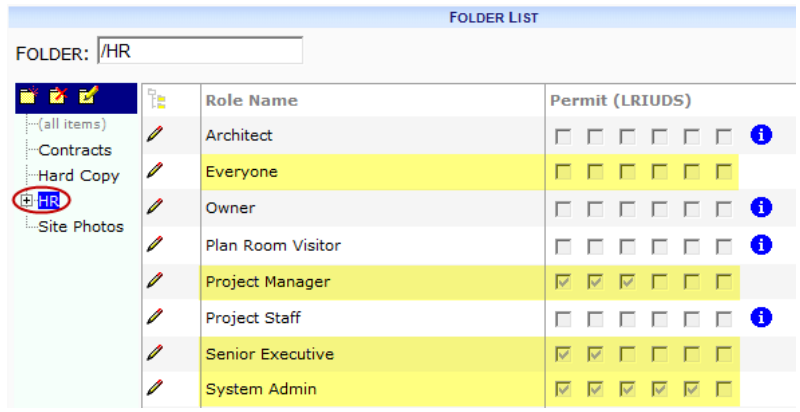
2. Look over the **Permit (LRIUDS)** checkboxes to see if access levels are what you want them to be for the different roles.
3. Click to edit the access level for a role.
4. Check or uncheck the LRIUDS checkboxes as desired. means “allow”; means “do not allow”.
5. Click to accept your changes.
6. Repeat 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 create a folder and subfolders for HR files, but give only a few people access to that folder and its subfolders using roles.

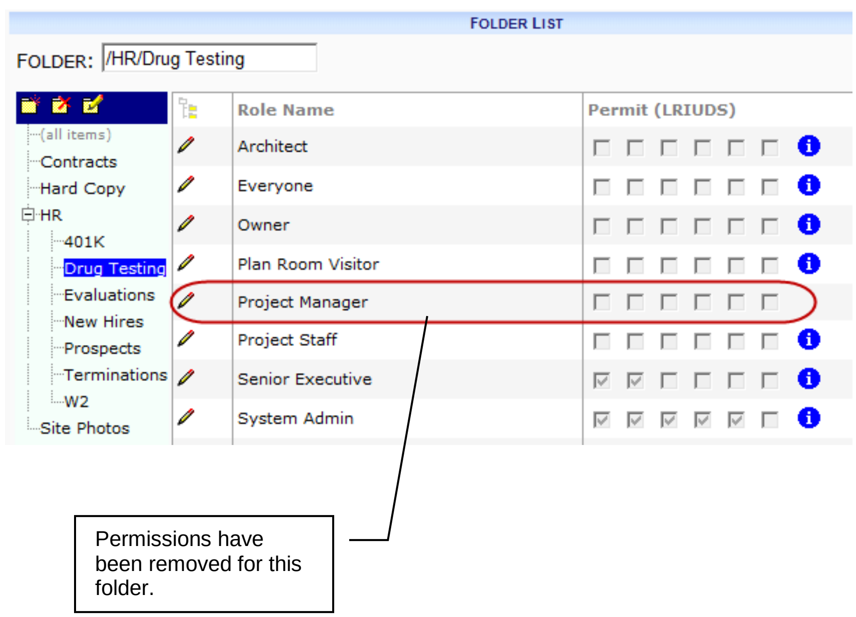
First Task

First, you create the folder and give permissions to a few roles for that folder and remove permission from the Everyone role.



Second Task

Second, you create a number of subfolders and change some of the permissions for some of the subfolders.



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.

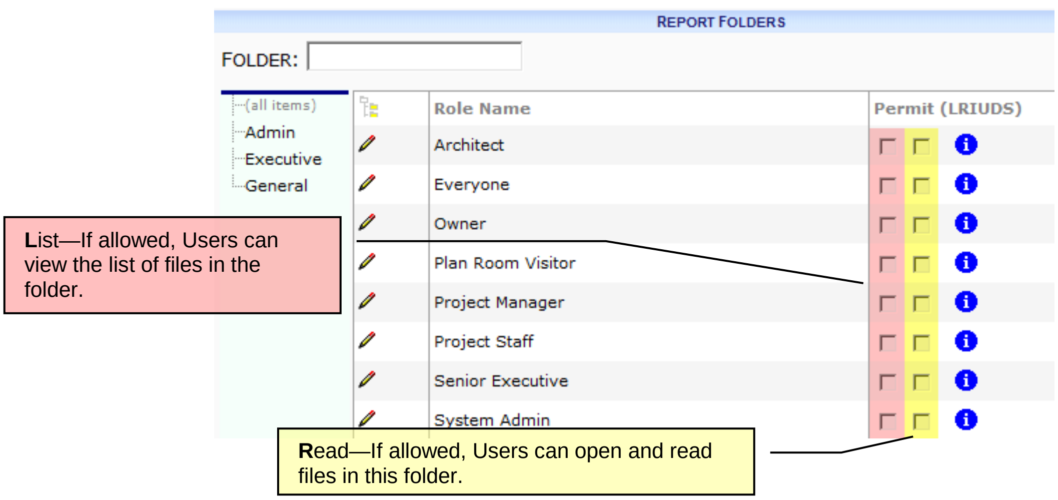
Concepts

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:

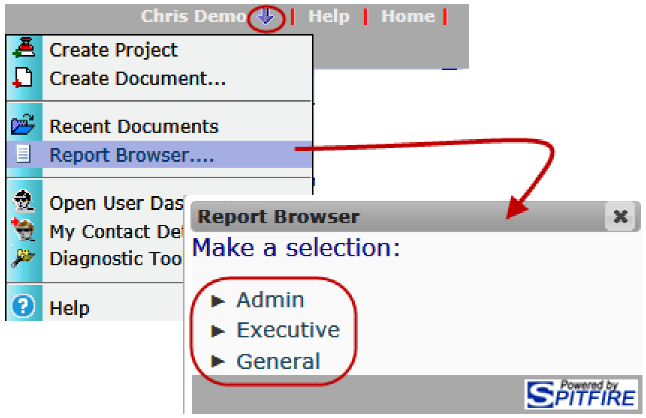
List/Read Access

Only **L**ist and **R**ead access is allowed for Report Folders.

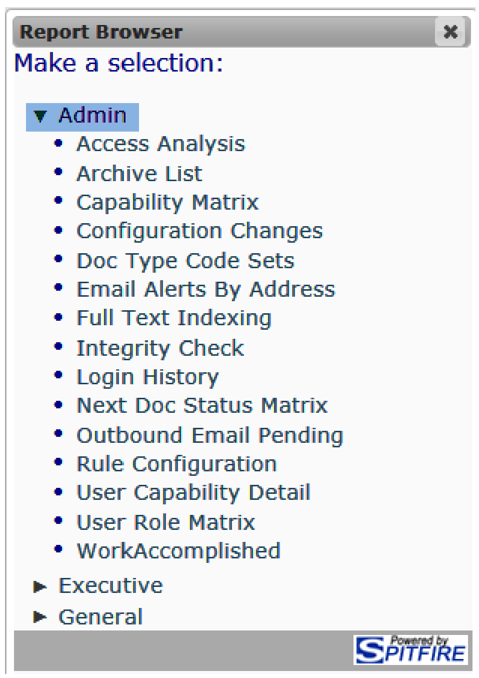


After Setup

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.

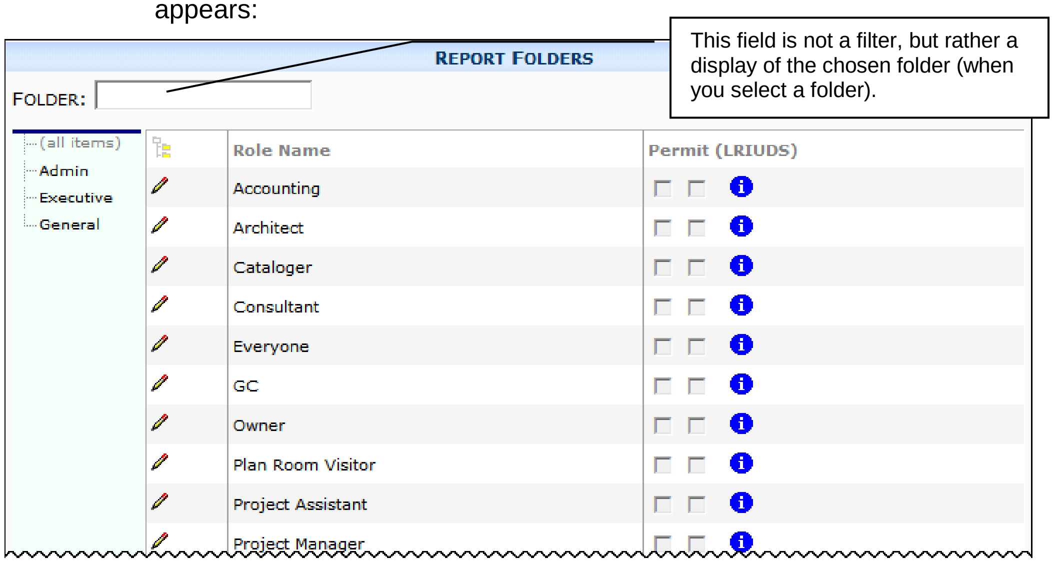
- **Email Alerts by Address**: indicates email routees whose emails have not been sent (due to no email address or email being bounced back, etc.)
- **Full Text Indexing**: indicates summary information about the SQL full text index.
- **Integrity Check**: indicates, and allows you to repair, issues 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.

For more information, see the *Spitfire Reports* technical white paper.

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:



Columns

- **Role Name**: the roles as set up through the Roles Maintenance tool (see page 58).
  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

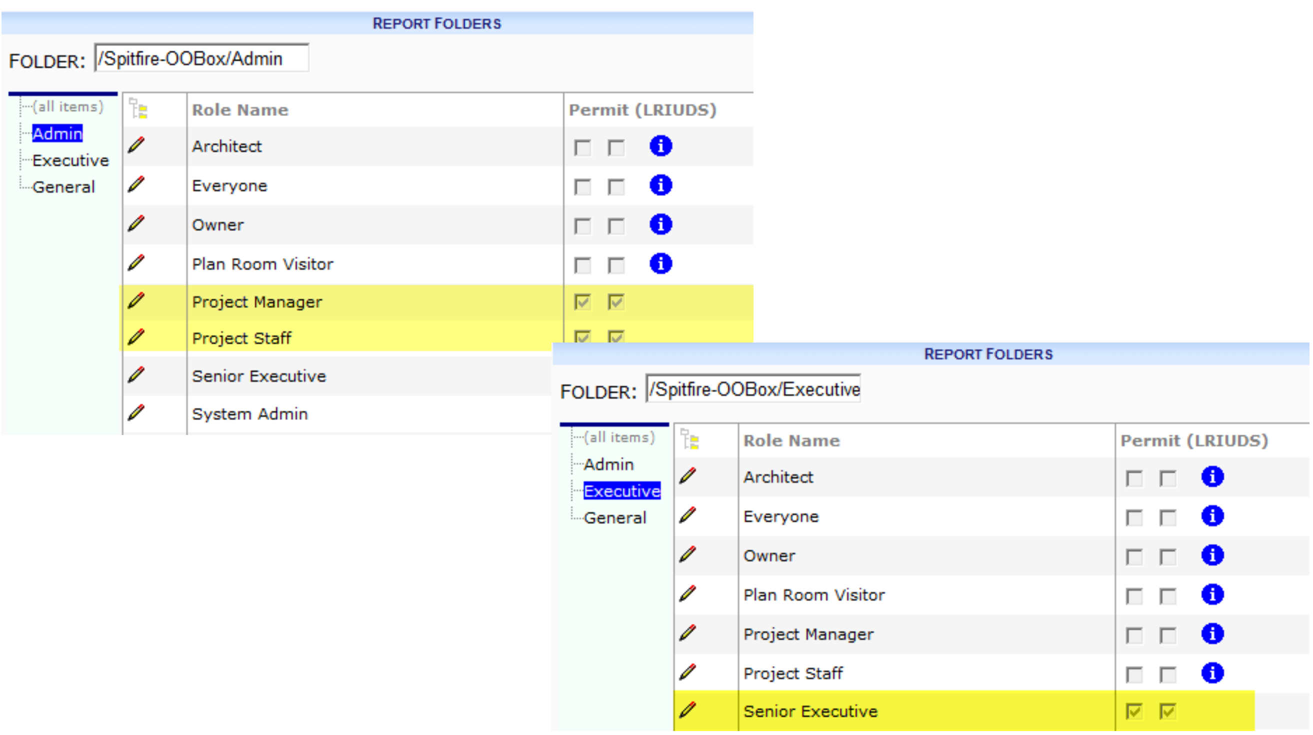
For a user to be granted access to a folder based upon a project-specific role, that user must be a global member of the role or be a member with project (unassigned). For more information, see the *Focus on Contacts* guide.

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 **L**ist and **R**ead 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 certain roles access to Admin and Executive folders.



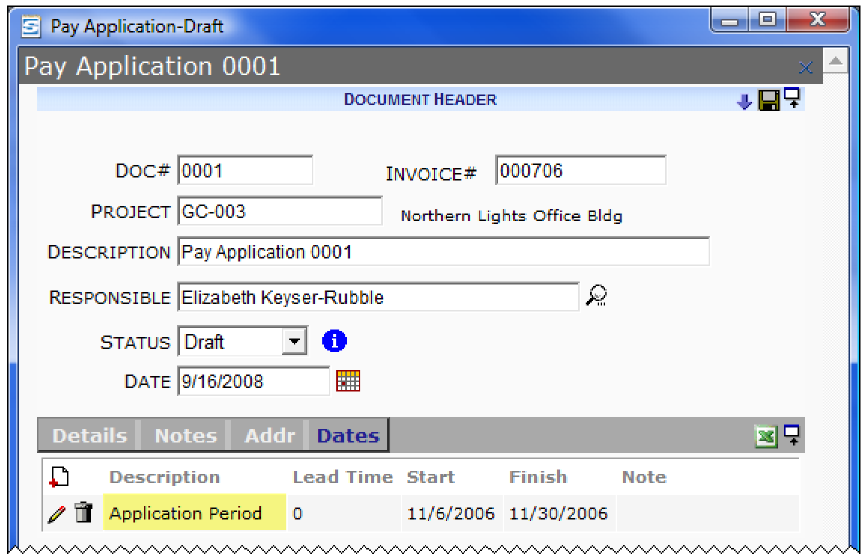
Date Types

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.



The Doc Date Types Part

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

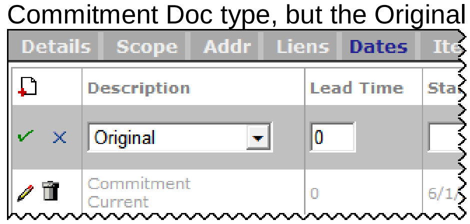
DOC DATE TYPES

DATE NAMES LIK | DOC TYPE:

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 (✗). For example, the Commitment Current date is required on the Commitment Doc type, but the Original date is optional.



- **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:

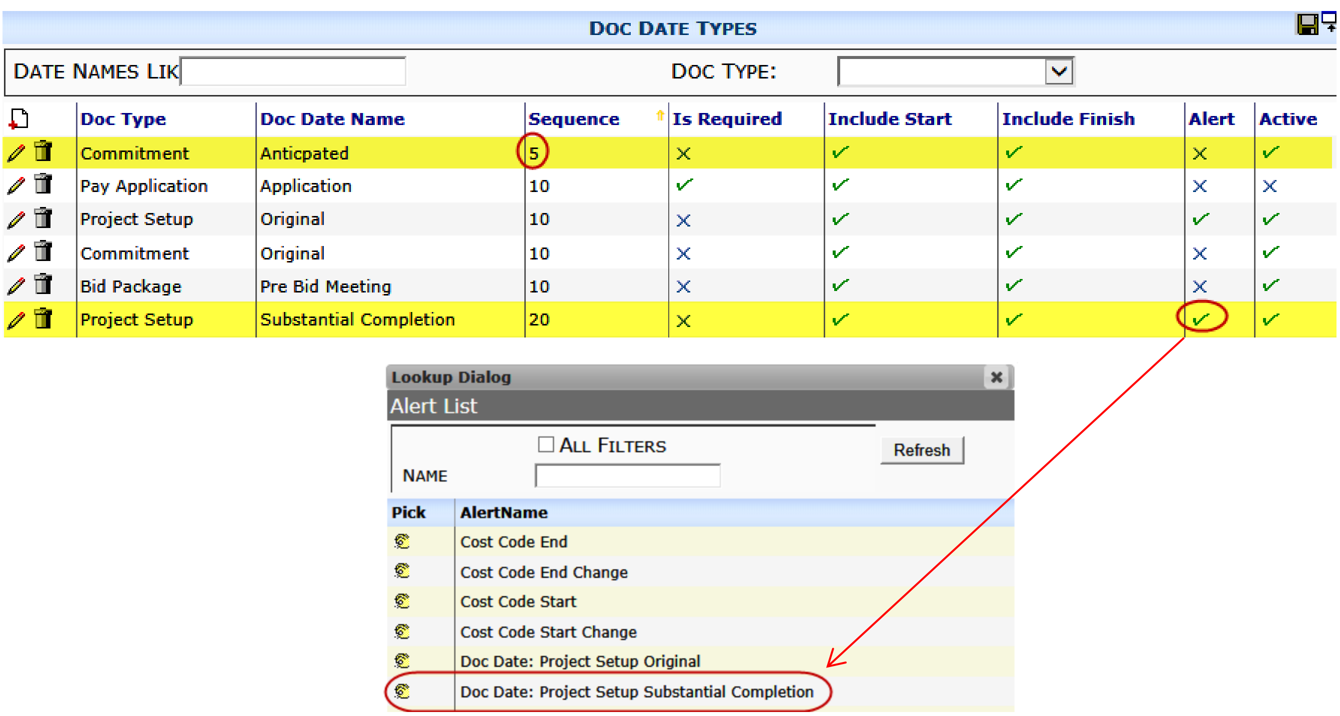
1. Click to add or to edit a date type.
2. (*optional*) If you want the date type to apply to just one Doc type, select it from the **Doc Type** drop-down.
3. Enter a descriptive name for the date type in the **Doc Date Name** field.
4. Enter a sequence number for the date type in the **Sequence** field.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



Alert Types

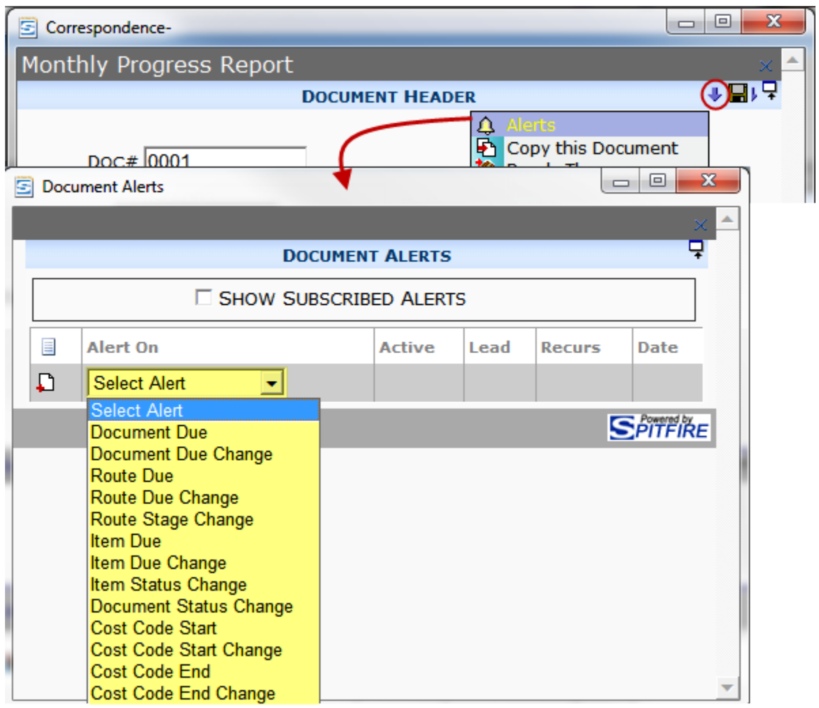
Using the Alert Type tool, you can control which Alert types are active (and available for selection) or inactive. You can also create a version of the "Other" Alert.

After Setup

Document's Alert Window

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

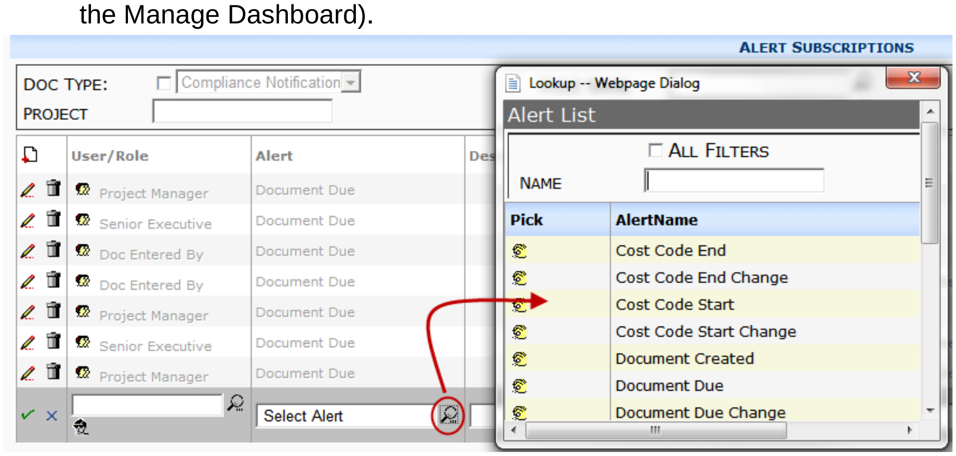
TIP
For more information about Alerts, see the *Focus on Alerts and Compliance* guide.



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 82) 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	✗	✗	✗	✗	✓
Item Created	NA	0	-1	✗	✗	✗	✗	✓
Out-of-Compliance	NA	0	-1	✗	✗	✗	✗	✓
Document Due	Daily	1	50	✗	✗	✓	✓	✓
Document Due Change	NA	0	55	✗	✗	✗	✓	✓
Route Due	Daily	1	60	✗	✗	✓	✓	✓
Route Due Change	NA	0	65	✗	✗	✗	✓	✓
Route Stage Change	NA	0	67	✗	✗	✗	✗	✓
Item Due	Daily	1	70	✗	✗	✓	✓	✓
Item Due Change	NA	0	75	✗	✗	✗	✓	✓
Item Status Change	NA	0	80	✗	✗	✗	✗	✓
Document Status Change	NA	0	90	✗	✗	✗	✗	✓
Cost Code Start	NA	0	110	✗	✗	✗	✓	✓
Cost Code Start Change	NA	0	115	✗	✗	✗	✓	✓
Cost Code End	NA	0	120	✗	✗	✗	✓	✓

1 2

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 88).
- **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.

- **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.

TIP
Options for the Recur column are set through the Recur code set in the Code Maintenance tool (see page 121).

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 and 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	Edit Name	Show Date	Allows Recur
Document Created	NA	0	-1	✗	✗	✗
Item Created	NA	0	-1	✗	✗	✗
Out-of-Compliance	NA	0	-1	✗	✗	✗
Document Status Change	NA	0	40	✗	✗	✗
Document Due	Daily	1	50	✗	✗	✓
Document Due Change	NA	0	55	✗	✗	✗
Route Due	Daily	1	60	✗	✗	✓
Route Due Change	NA	0	65	✗	✗	✗
Route Stage Change	NA	0	67	✗	✗	✗
Item Due	Daily	2	70	✗	✗	✓
Item Due Change	NA	0	75	✗	✗	✗
Item Status Change	NA	0	80	✗	✗	✗
FYI	NA	0	100	✓	✓	✓

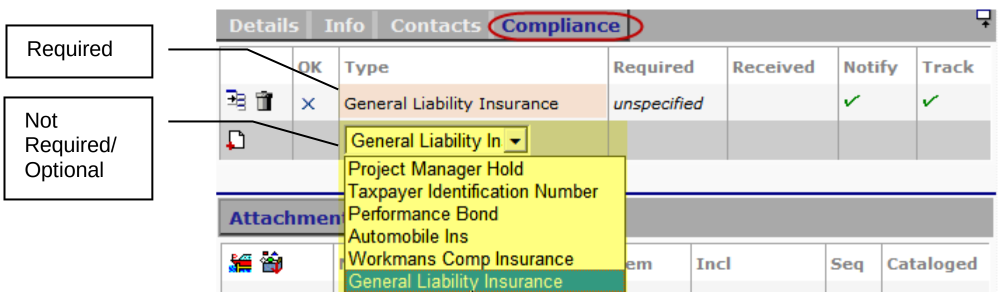
Compliance Types

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: ☐ FOR VENDORS ☐ 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.
- **Recurs:** 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).

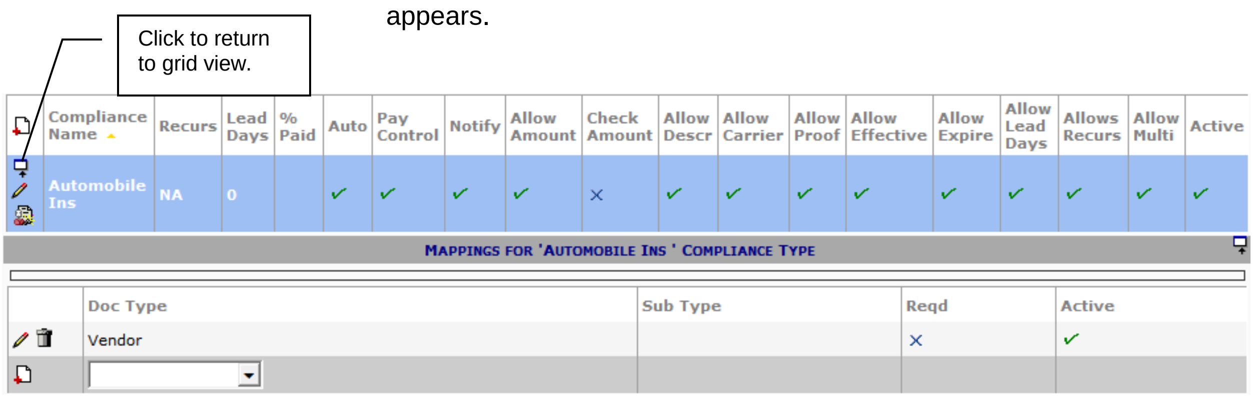
- **Allow Descr**: whether (✓) or not (✗) users are able to enter and edit the Description field on Compliance rows on the Compliance tab.
- **Allow Carrier**: whether (✓) or not (✗) users are able to enter and edit the Carrier field on Compliance rows on the Compliance tab.
- **Allow Proof:** whether (✓) 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.



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.

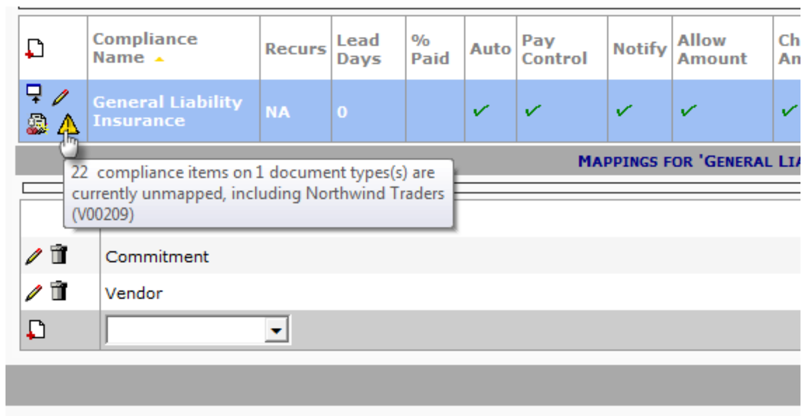
To map a Compliance type to a Doc type:

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 [save icon] to save your mapping.

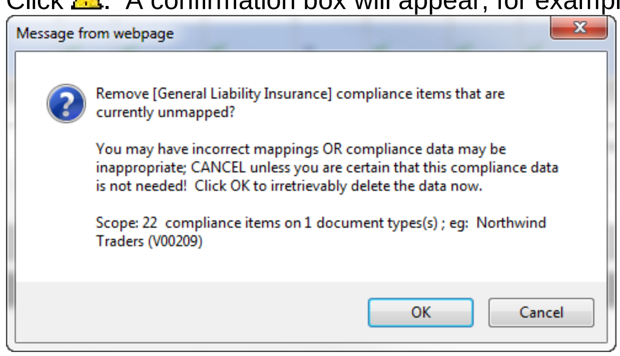
Warnings

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.



To delete unmapped compliance items from documents:

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



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

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.

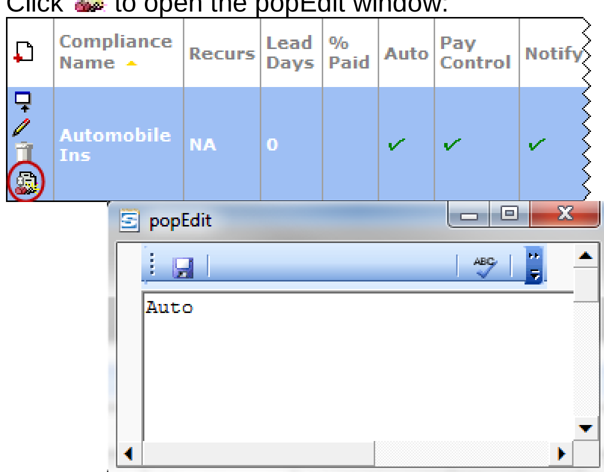
Automatic Workflow

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 popEdit window:



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

TIP

Commands that you can use in the popEdit window if you want to change the Auto workflow are described in the ATC Scripts and Automatic Workflow technical white paper.

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.

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."

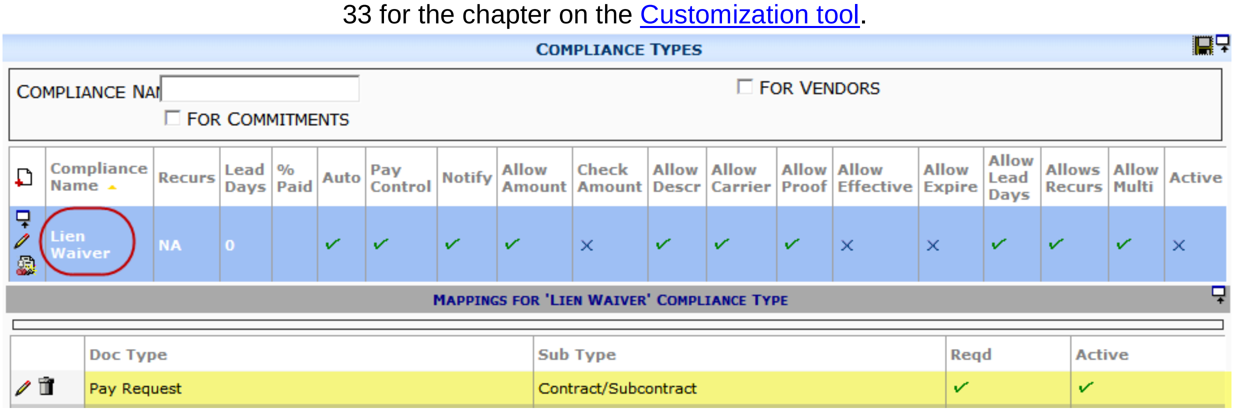
Note: The ATC: ROUTE AUTO command can be customized using the **ComplianceNotificationText | WorkflowRouting** rule. See KBA-01200.

3. If you want a different set of commands, delete the word **Auto** and type your new commands, then click to save.
4. If you saved the popEdit window, 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 Customization tool.



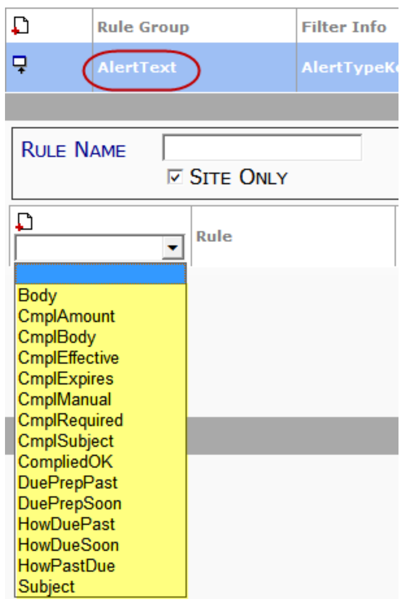
Rules Maintenance

A variety of rules govern the logic for how sfPMS behaves. These rules allow you to customize 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

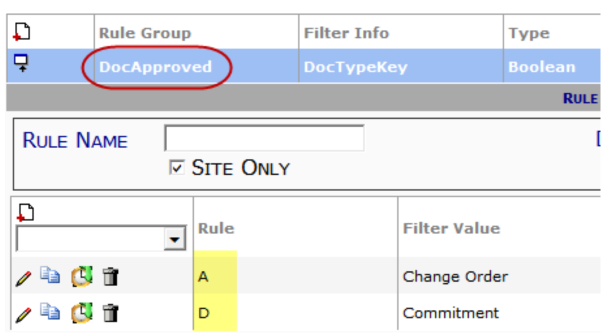
Rules are organized into rule groups. Each rule has a rule name and a result value. Many rules also take a filter value (such as Doc type). Some rule groups require specific rule names. For example, the AlertText rule group allows only the following rules:



TIP

For information about all rule groups and rule, filter and result values, see the technical white paper *Rules and Rule Values*.

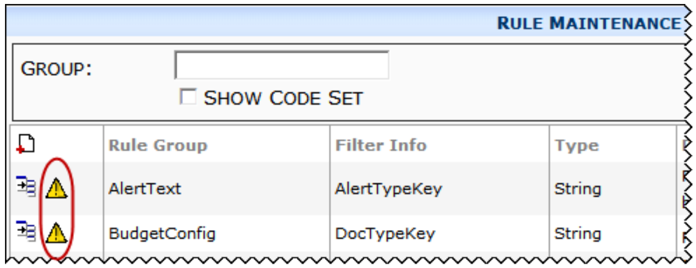
Other rule groups create rules from codes, as set up in your Code Maintenance tool. For example, the DocApproved rule group allows any DocStatus code to be used as a rule:



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

Rule Validation

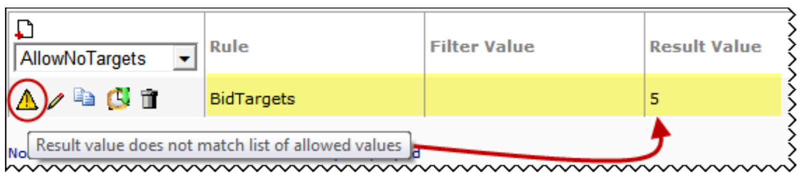
Because rule groups accept specific rule values and those rules often accept very specific result values, the Rules Maintenance tool indicates rule groups that have invalid values.



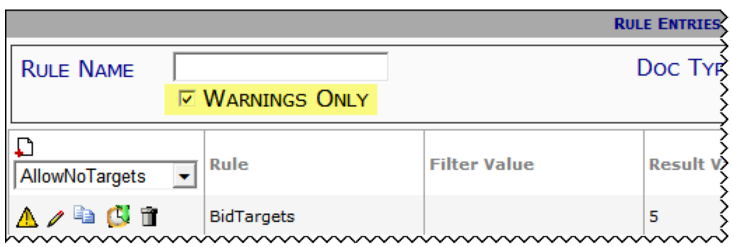
The ⚠ icon indicates that a rule group contains an invalid rule or value. When you expand the rule group, the ⚠ icon indicates which rule contains the invalid value. When you mouse over the icon, a message tells you where or what the problem is.

TIP

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



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:



Once you correct the rule and save, the ⚠ icon will disappear. (Consult the technical white paper *Rules and Rule Values* for correct values).

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: ☐ SHOW CODE SET

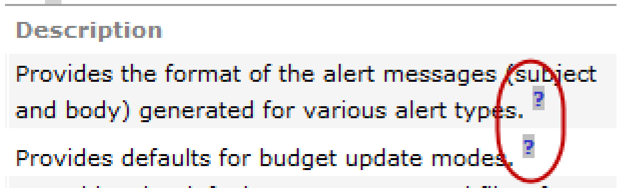
	Rule Group	Filter Info	Type	Description
	AlertText	AlertTypeKey	String	Provides the format of the alert messages (subject and body) generated for various alert types.
	BudgetConfig	DocTypeKey	String	Provides defaults for budget update modes.
	CodeSetFilterOverride	DocTypeKey	String	Overrides the default 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 rules 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
	DocItemConfig	DocTypeKey	String	Allows customization of document items, including the "Get Existing Item" dialog and lookup
	DocItemStatusIsApproved	DocTypeKey	Boolean	Lists the statuses that classify a document item as approved
	DocItemStatusIsClosed	DocTypeKey	Boolean	Lists the statuses that classify a document item as closed

1 2 3 4 5

Columns

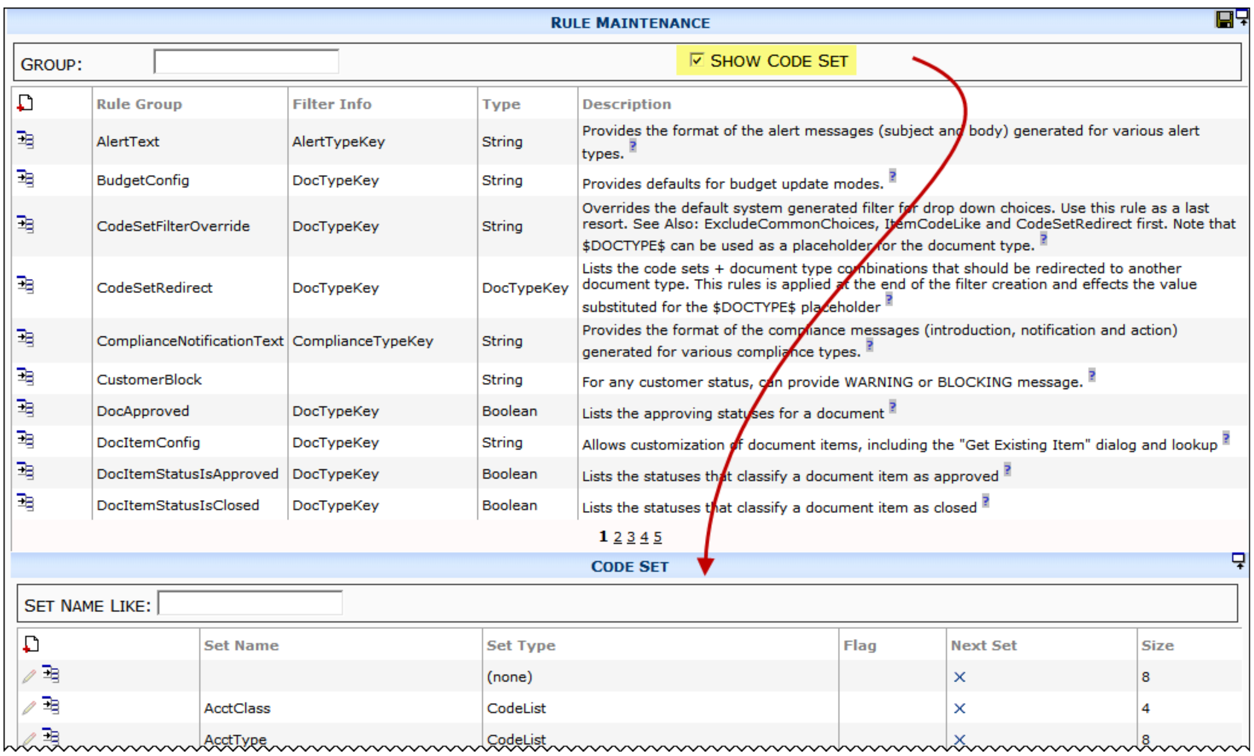
- **Rule Group**: the name of the rule group.
- **Filter Info**: the type of data (if any) that can be used to segregate different rule results. The most common filter is Doc type; others include Vendor ID, Alert type, etc.

- **Type**: the type of result for the rule. String is the most common and is totally freeform; Boolean indicates the rule must indicate true or false (0 or 1, ✓ or ✕) and DocTypeKey indicates the result value must be a Doc type GUID.
- **Description**: what the rule governs or does. The Spitfire Knowledgebase contains articles for many of the rules. These KB Articles can be opened directly from the rule by clicking on the ? icon.



Filters

- **Group**: Type the first few characters or use the wildcard (%) to find one or more rule groups by name.
- **Show Code Set**: Click the checkbox to display code sets at the bottom of the rules grid. (For information about code sets, see Appendix A on page 105.)



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.
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 rules 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
DocItemConfig	DocTypeKey	String	Allows customization of document items, including the "Get Existing Item" dialog and lookup
DocItemStatusIsApproved	DocTypeKey	Boolean	Lists the statuses that classify a document item as approved
DocItemStatusIsClosed	DocTypeKey	Boolean	Lists the statuses that classify a document item as closed

1 2 3 4 5

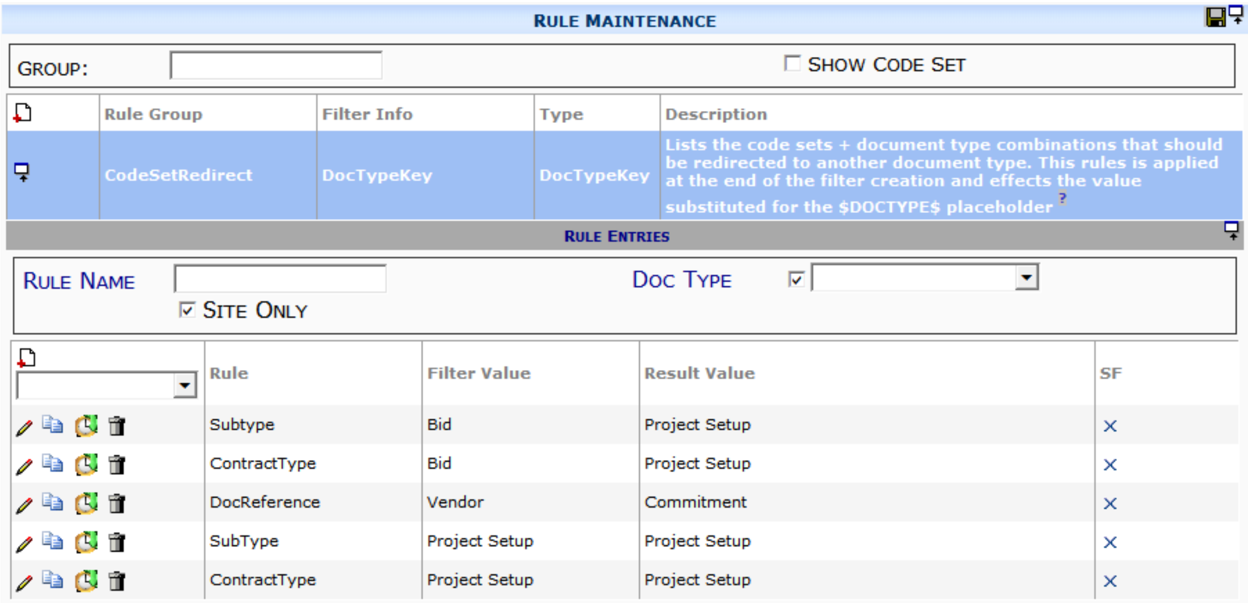
CODE SET

SET NAME LIKE:

Set Name	Set Type	Flag	Next Set	Size
	(none)		✕	8
AcctClass	CodeList		✕	4
AcctType	CodeList		✕	8

Rule Entries

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



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: the technical white paper *Rules and Rule Values* lists all available rules and describes each possible test value and corresponding result and filter values.

Filters

TIP

The Admin | **Rule Configuration** report lists your rule values. For more information, see the *Spitfire Reports* technical white paper.

- **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.

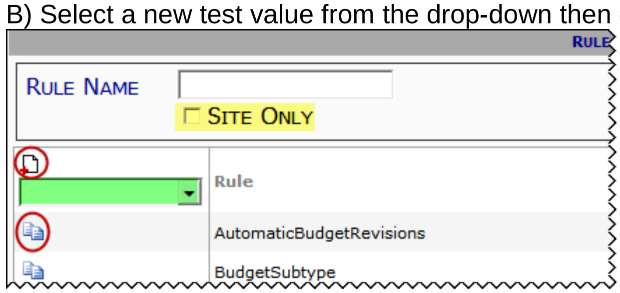
TIP

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.

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 test value from the drop-down then click .



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

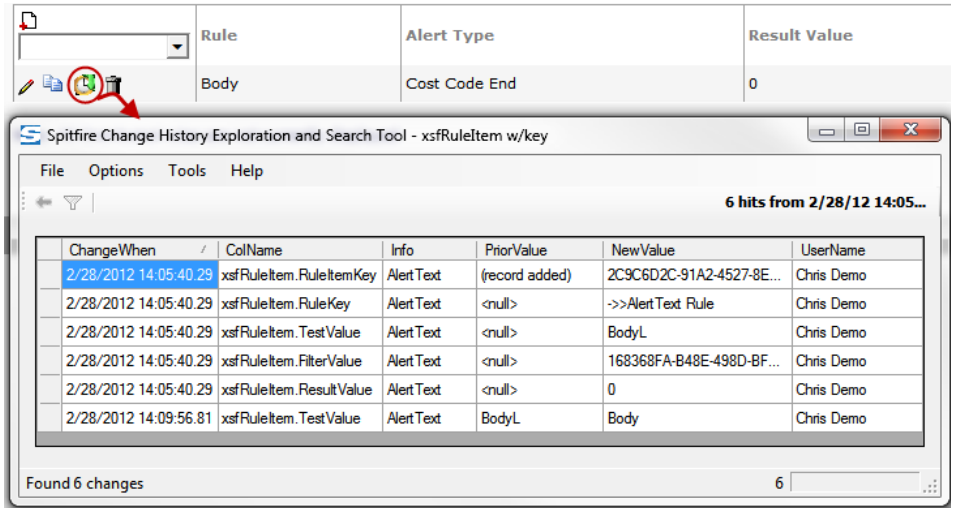
Note: Spitfire-distributed rules cannot be edited directly. Such rules must be copied first (as described above). The copy can then be edited.

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

View Changes to a Rule

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

- Click to open sfCHEST for a rule.



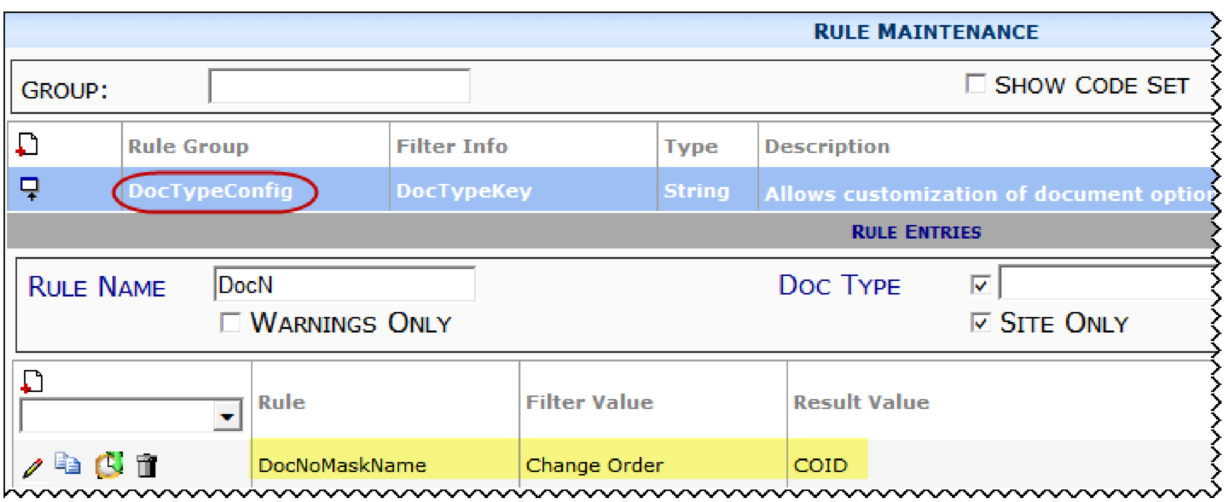
TIP

The Admin | Configuration Changes report indicates changes in the Rules Maintenance tool between two dates. For more information, see the *Spitfire Reports* technical white paper.

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.)



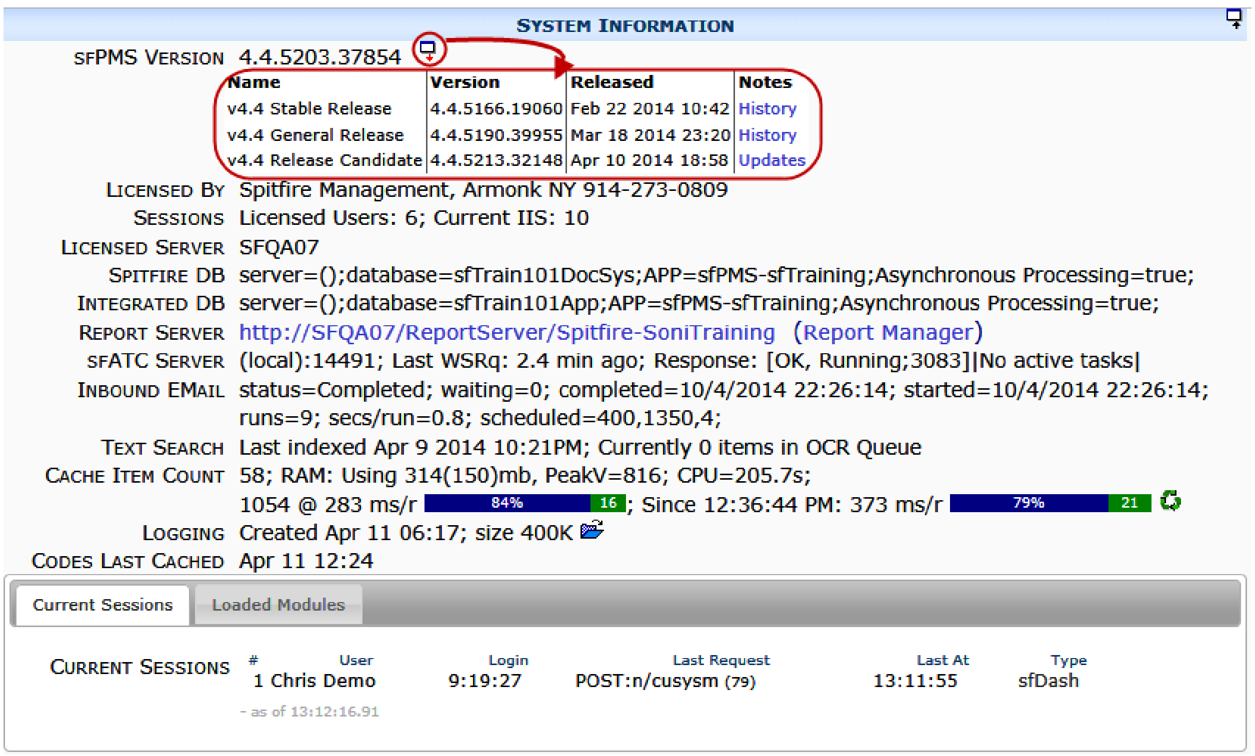
For another example of the Rules Maintenance tool (ItemCodeLike rule group), see page 56.

System Information

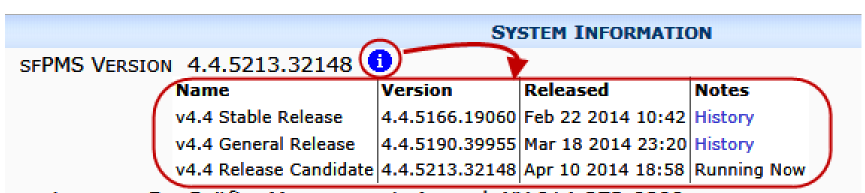
The System Information tool displays relevant information for your system including the version of sfPMS you are running (and the version available), your Spitfire and Microsoft Dynamics SL databases, and even your current sessions.

The System Information Part

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



Build Releases

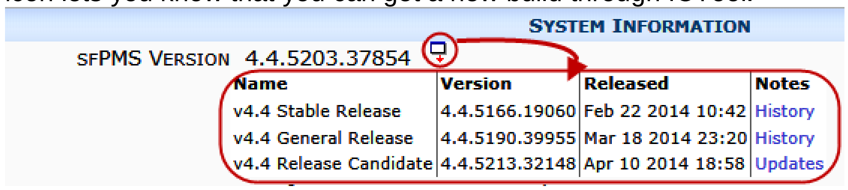


To view information about different builds:

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

Updates

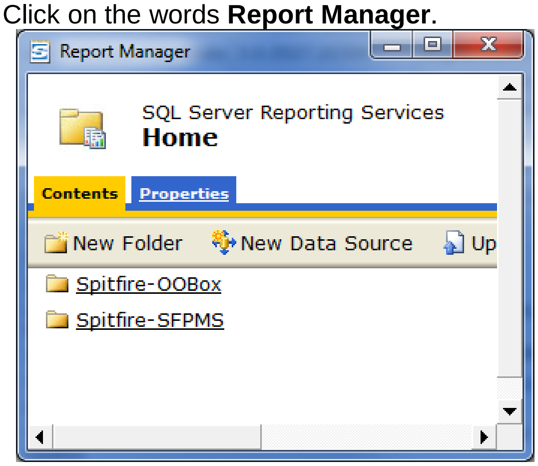
When a new update is available, the ℹ icon is replaced by an animated icon. You can click on this icon to get the same list as above, but this icon lets you know that you can get a new build through ICTool.



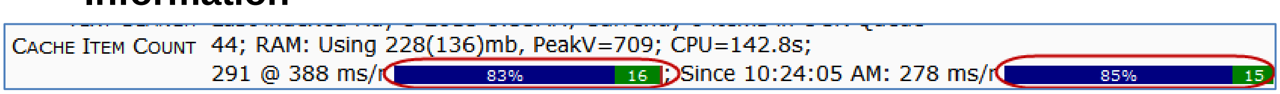
Report Manager

To open Report Manager in SQL Server Reporting Services:

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

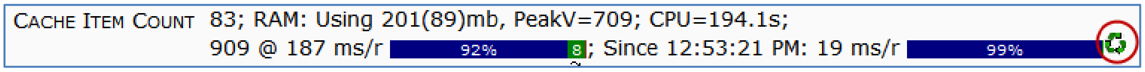


Performance Information



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%.

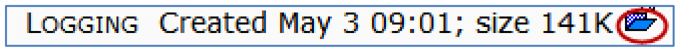
Recycle the System



To recycle sfPMS for all users:

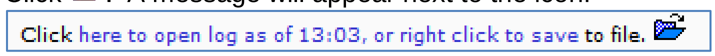
- Click . •

Server Log



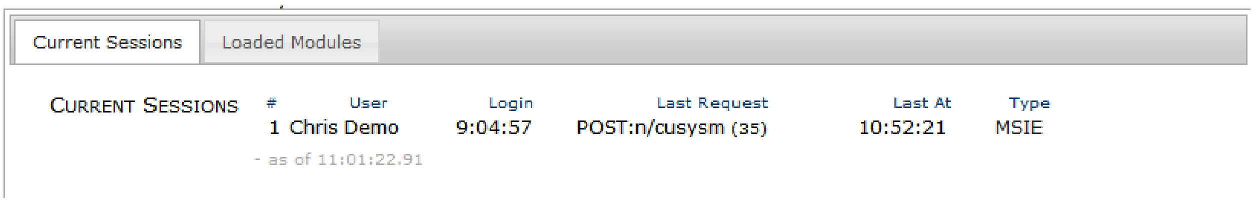
To open or save the server log:

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



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

Current Sessions



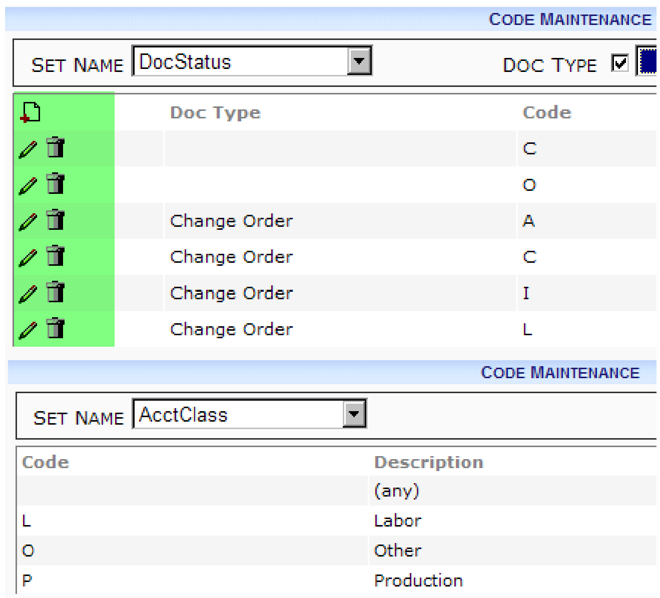
The tab section at the bottom gives you information about the current session.

- **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.



Non-editable Code Sets

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

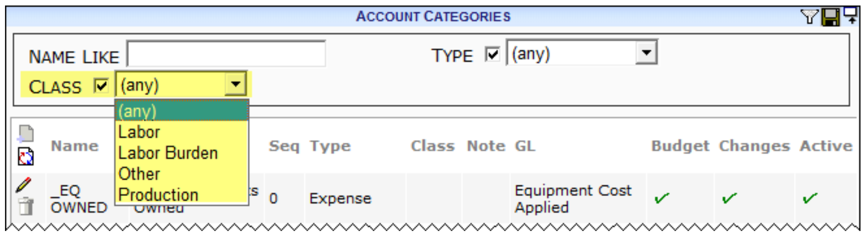
- Acct Class
- Acct Type
- ActiveFlag
- AlertStatusList
- AllocEntryType
- AuditMode
- BFAmode
- Boolean
- CodeSetType
- ContactScope
- CostingMethod
- EventItemType
- InclusionType
- MailRoute
- MaskType
- PayControlList
- PrimarySource
- Priority
- RoleType
- RouteAccess
- RouteViaList
- RuleResultType
- 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 customization or internal defaults.

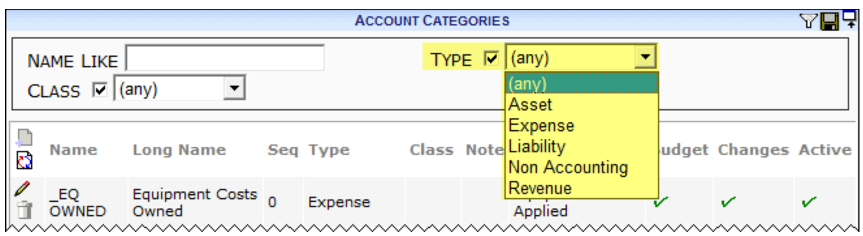
AcctClass

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



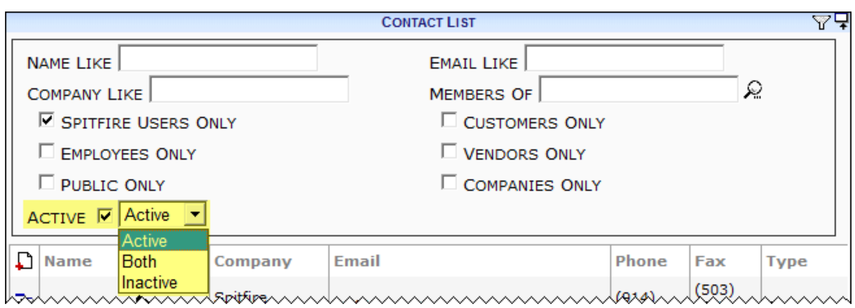
AcctType

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



ActiveFlags

Appears on the filters of the Contacts Dashboard:

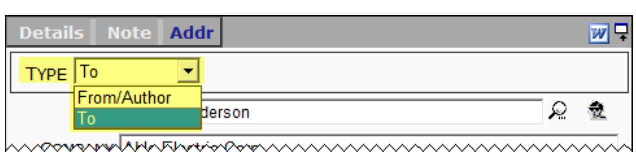


AddrType

TIP
The letter “P” is reserved for the AddrType code set so should not be used.

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

[*Customization Part* = Doc Tabs, *Item* = Address Tab]

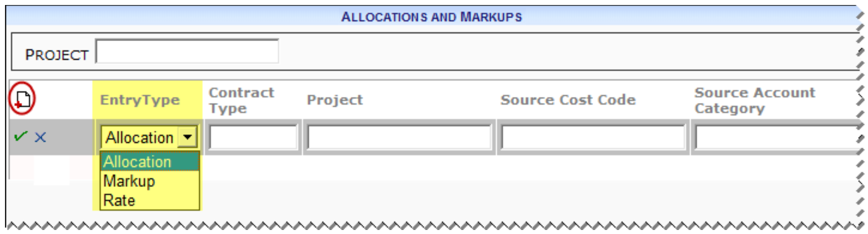


AlertStatusList

Not currently used.

AllocEntryType

Appears on the Allocations tool on the Manage Dashboard:

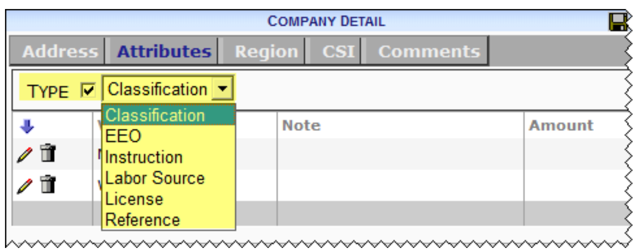


AttrType

TIP
For Vendor documents, see also the VendorClassif, VendorEEO, VendorLabor, VendorLicense, and VendorReference code sets.

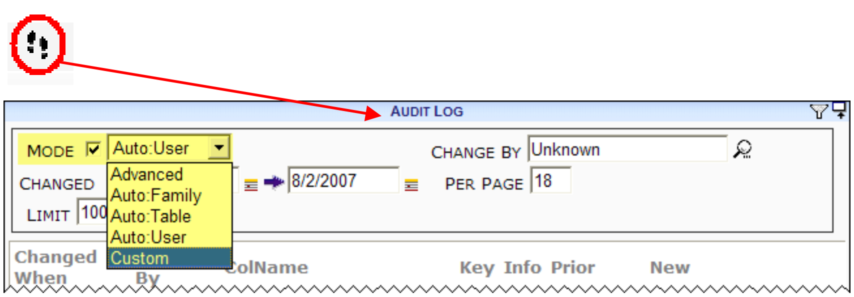
Appears on Spitfire documents with an Attributes tab, such as Daily Field Report or Vendor.
Note: when the Attributes tab is added to the Vendor Doc type, it actually appears on the Company Contact Detail window for the Vendor (and not on the Vendor document).

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



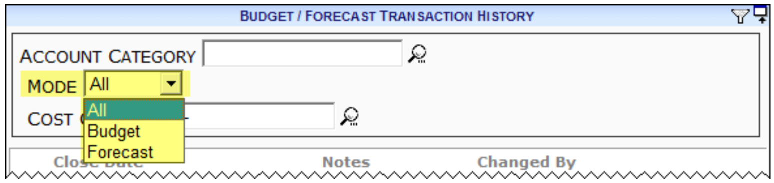
AuditMode

Appears on the Audit Log, accessed from the Contact list or a document's Options menu (on generic browsers only):



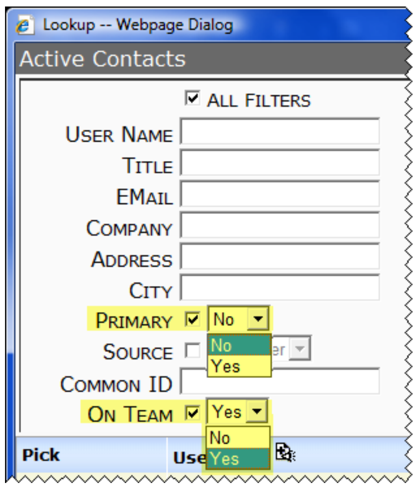
BFAmode

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



Boolean

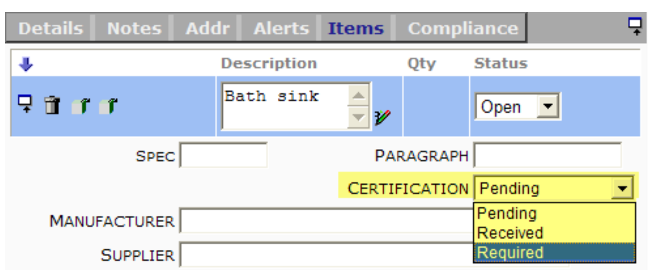
Appears on filters that require a Yes/No option, such as on a lookup:



Certification

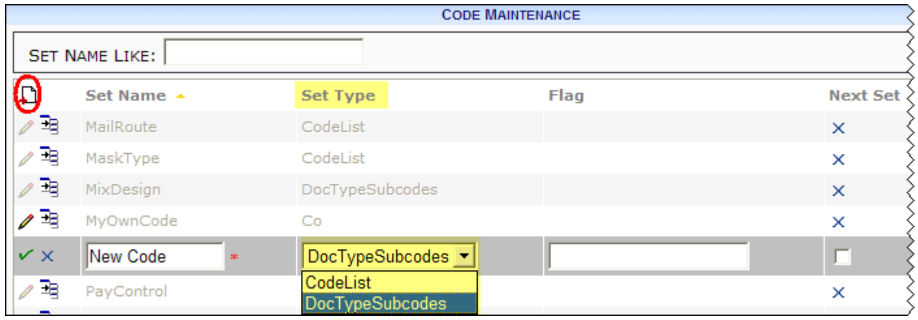
Appears on Spitfire documents that have been customized to include this field on the Items tab, such as Submittal:

[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail, *Item* = Certification]



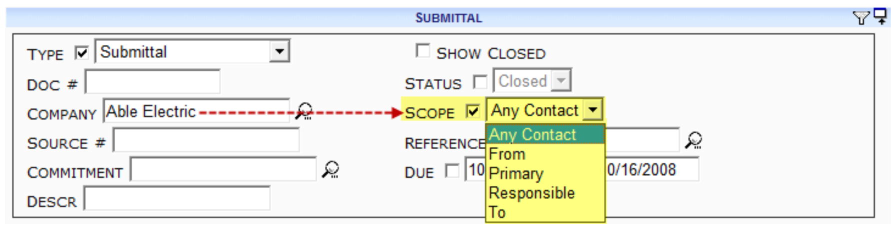
CodeSetType

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



ContactScope

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



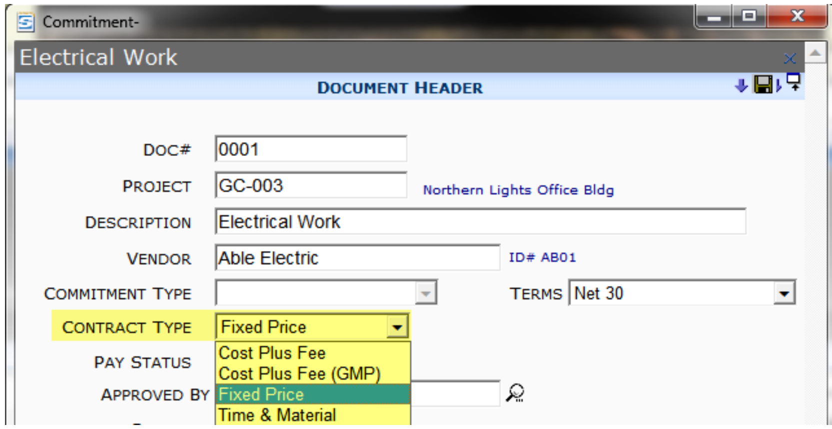
ContractType

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

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

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

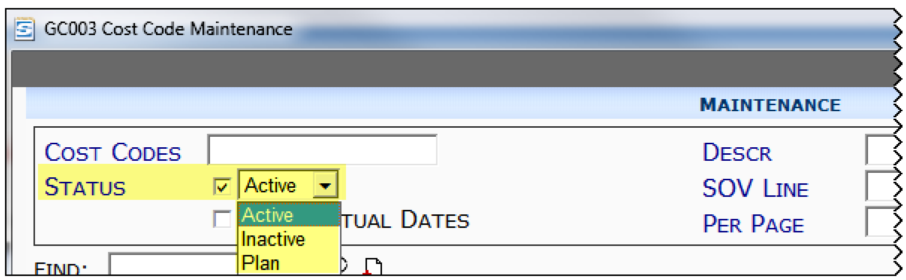
[*Customization Part* = Doc Header – Commitment, *Item* ContractType]



Note: this drop-down menu should not be confused with the document's Subtype (see page 127).

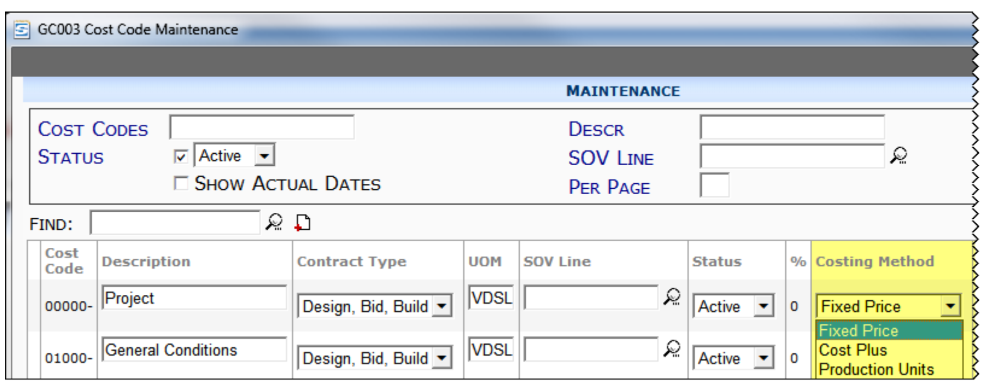
CostCodeStatus

Appears on the Cost Code Maintenance window:



CostingMethod

Appears on the Cost Code Maintenance window:



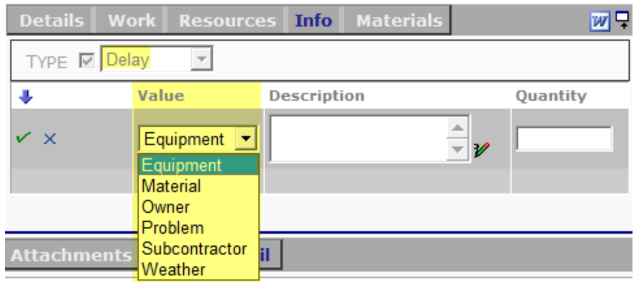
Country

Not currently used.

DFRDelay

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

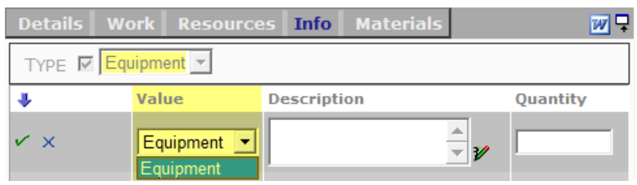
[*Customization Part* = Doc Tabs, *Item* = Attributes Tab (for Info tab); also *Part* = Doc Attributes, *Item* = ValueCol]



DFREquip

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

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



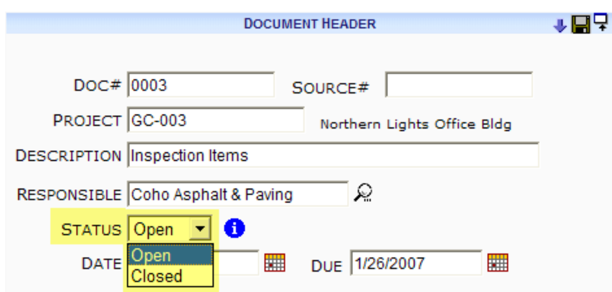
DocStatus

TIP

The Admin | Next Doc Status Matrix report indicates which statuses follow each Doc status. For more information, see the *Spitfire Reports* technical white paper.

Appears on the Document Header of many Spitfire documents:

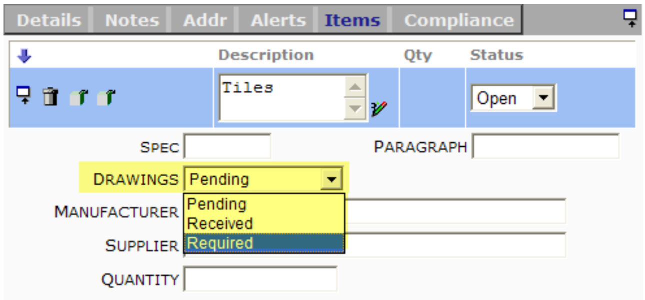
[*Customization Part* = Doc Header – Standard, *Item* = Status]



Drawings

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

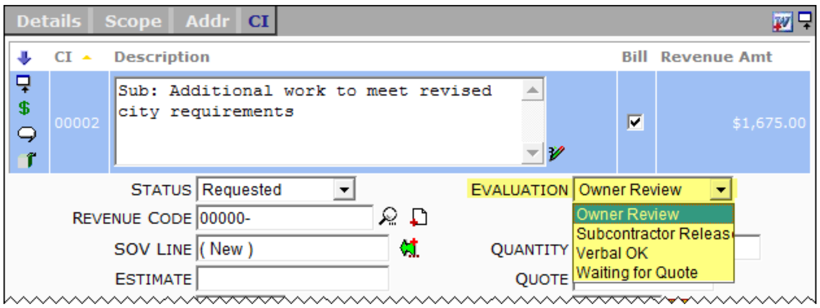
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail, *Item* = Drawings]



Evaluation

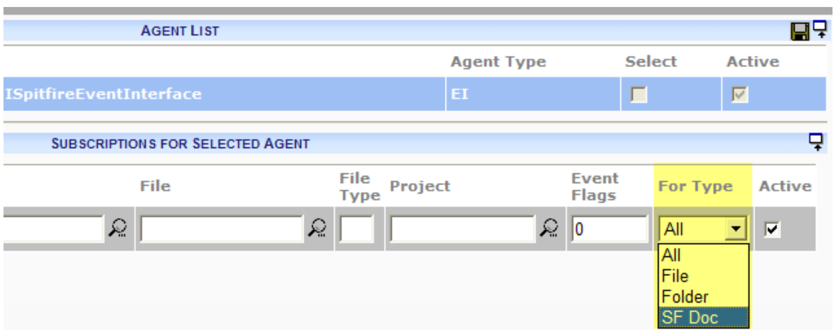
Appears on Spitfire documents that have been customized to include this field on the Items (or CI) tab, such as Change Order:

[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for CI tab); also *Part* = Doc Item Detail, *Item* = Evaluation]



EventItemType

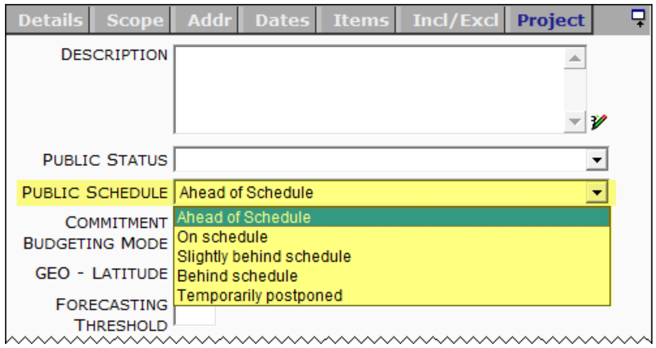
Appears on the Event Subscriptions tool on the System Admin Dashboard:



ExternalSchedule

Appears on Project Setup documents that have been customized to include this field on the Project tab:

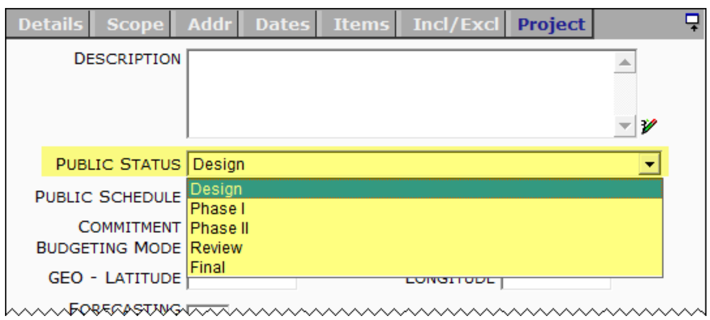
[*Customization Part* = Doc Tabs, *Item* =Project Setup tab (for Project tab); also *Part* = Project Setup, *Item* = External Schedule]



ExternalStatus

Appears on Project Setup documents that have been customized to include this field on the Project tab:

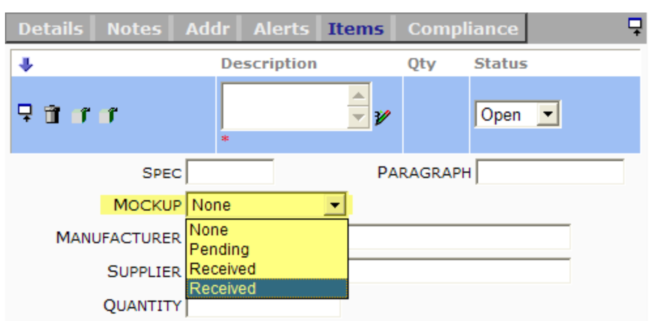
[*Customization Part* = Doc Tabs, *Item* =Project Setup tab (for Project tab); also *Part* = Project Setup, *Item* = External Status]



FieldMockup

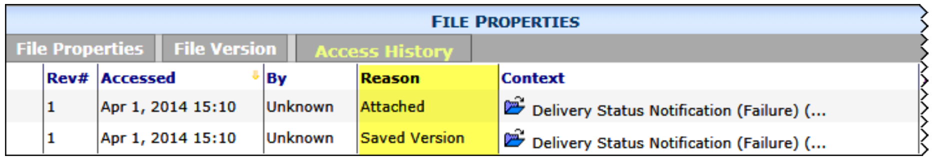
Appears on Spitfire documents that have been customized to include this field on the Items tab, such as Submittal:

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



FileAccessType*

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



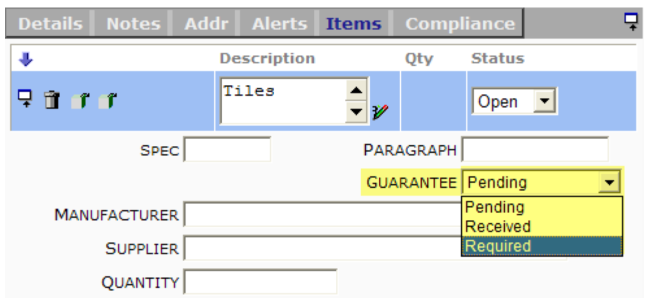
FilterAny

Internal use only.

Guarantee

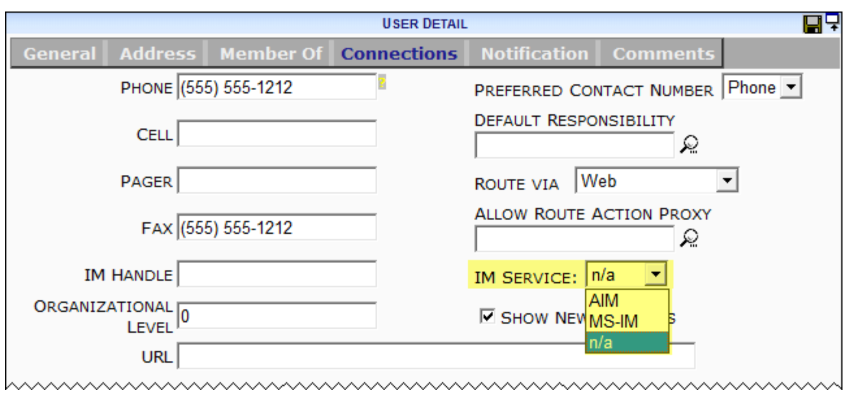
Appears on Spitfire documents that have been customized to include this field on the Items tab, such as Submittal:

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



IMTypeList

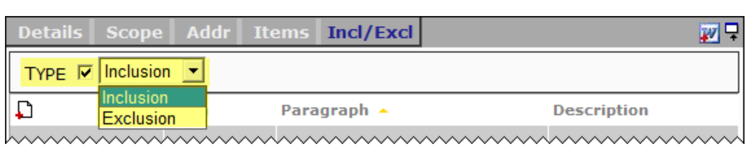
Appears on the Connections tab of a Contact Detail window:



InclusionType

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

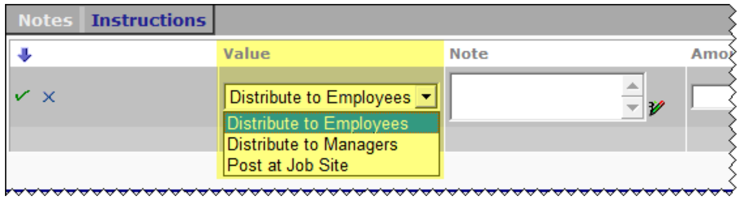
[*Customization Part* = Doc Tabs, *Item* = InclusionTab]



InstructionType

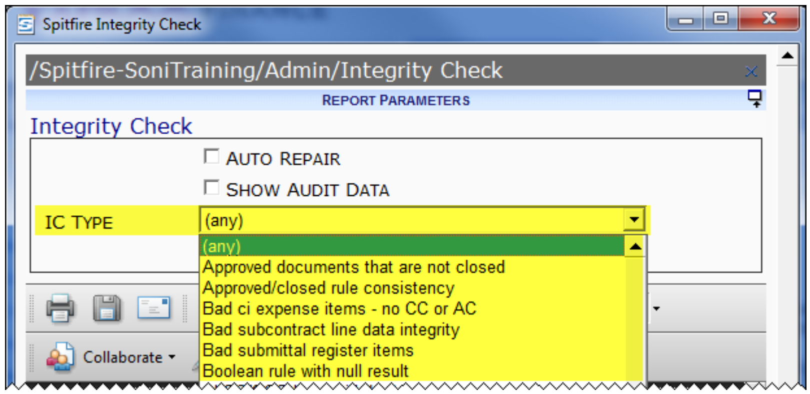
Appears on Spitfire documents with an Instruction tab, such as Safety:

[*Customization Part* = Doc Tabs, *Item* = Attributes Tab (for Instruction tab); also *Part* = Doc Attributes, *Item* = ValueCol]



IntegrityCheck

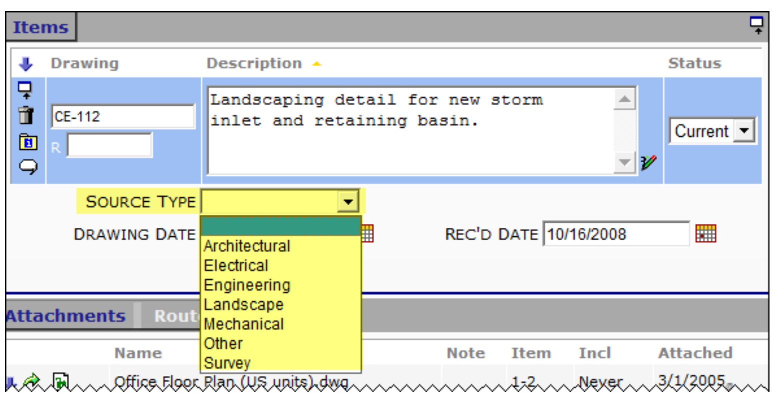
Appears on the Integrity Check report (found on the Admin folder):



ItemSource

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

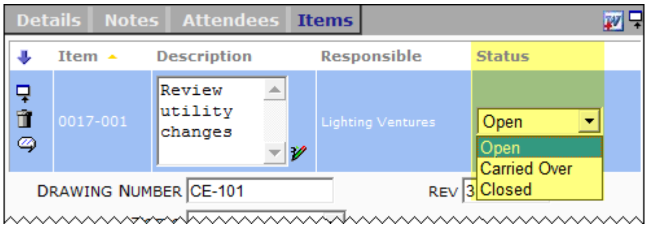
[*Customization Part* = Doc Tabs, *Item* = Items Tab (for Item tab)*;* also *Part* = Doc Item Detail – Standard, *Item* = ItemSource]



ItemStatus

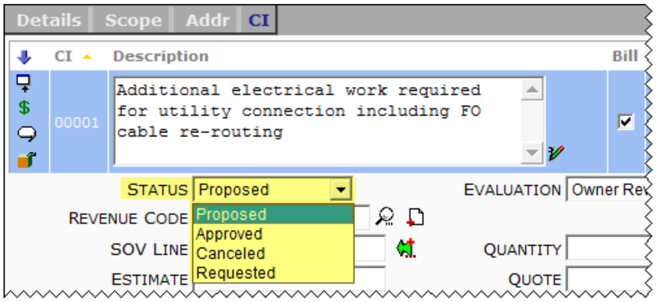
Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Meeting Minutes:

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



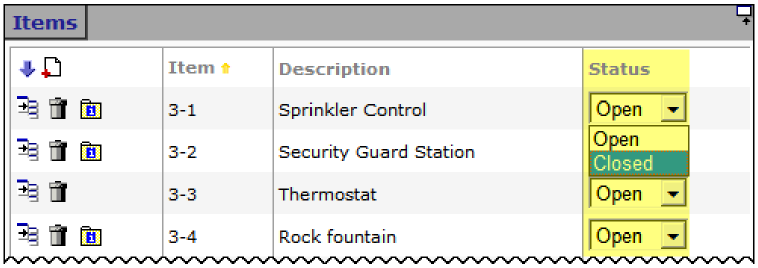
Another example: Change Order document:

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



Another example, Punch List document:

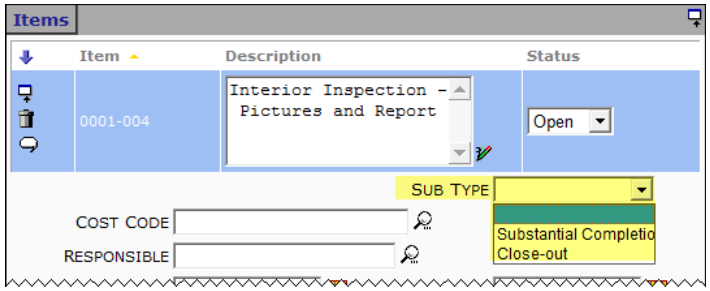
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Items, *Item* = QuickEditMode]



ItemSubtype

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

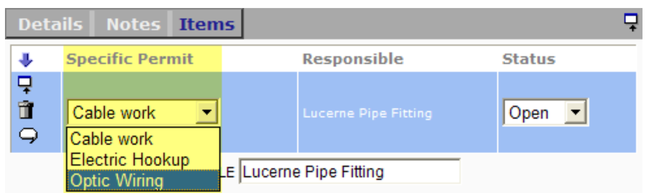
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = DocItemDetail – Standard, *Item* = ItemSubtype]



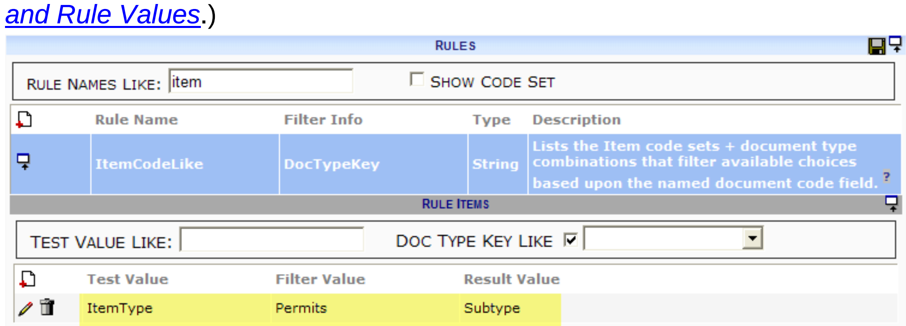
ItemType

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

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



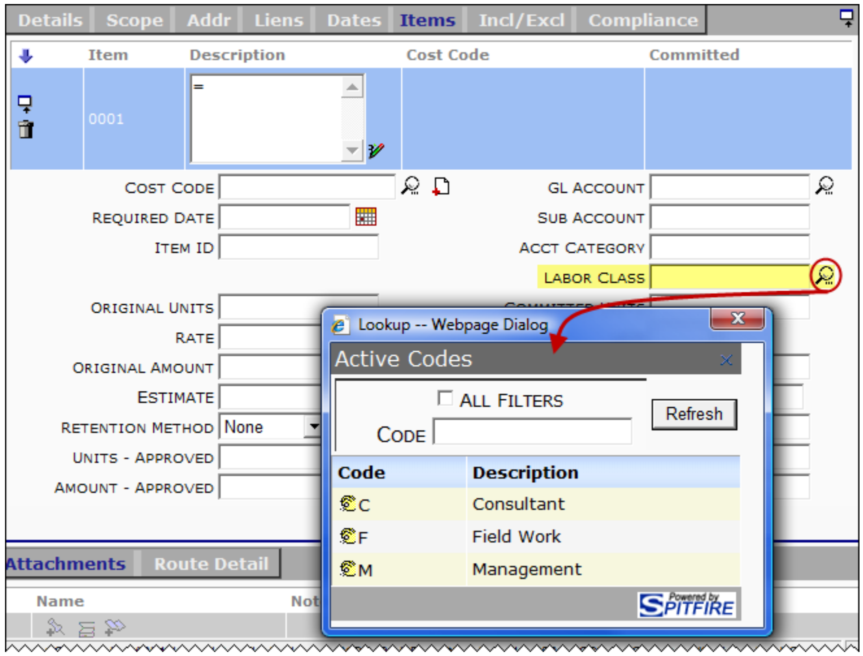
Note: ItemType is often used as a subset of another code set, such as Subtype (see page 127). Be sure to add to the ItemCodeLike rule through the Rules Maintenance tool if your ItemType field is to be filtered by your Subtype field choice. (See also the technical white paper *Rules and Rule Values*.)



LaborClass

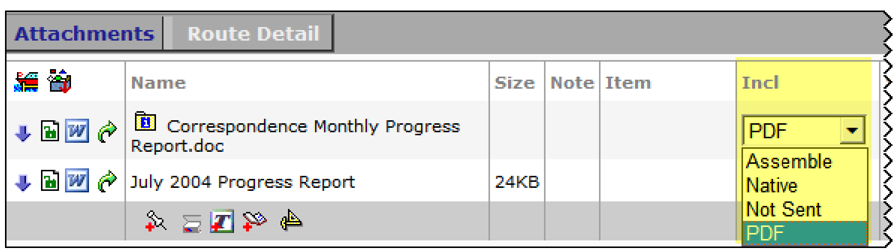
Appears on Spitfire documents that have been configured to include this lookup on the Items tab, such as Commitment:

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



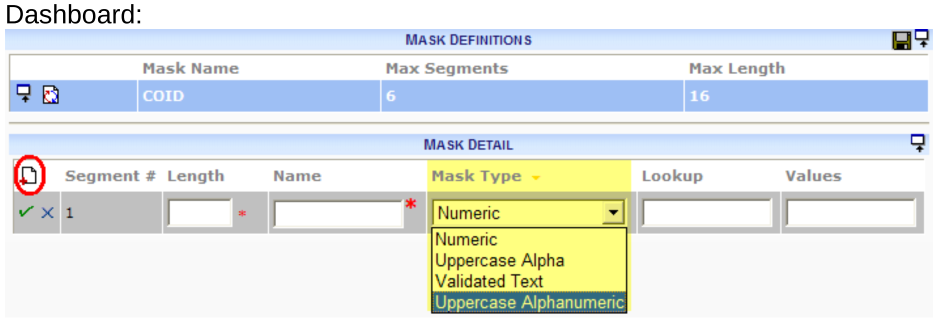
MailRoute

Appears on the Attachment tab on Spitfire documents:



MaskType

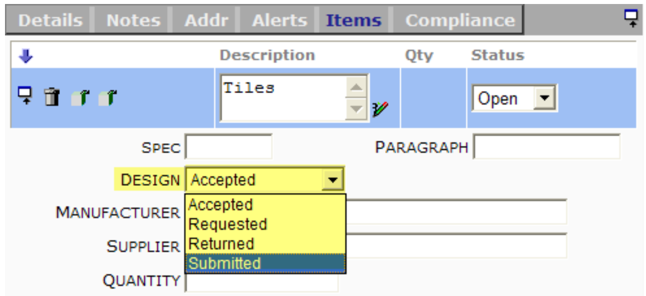
Appears on the Mask Maintenance tool on the System Admin Dashboard:



MixDesign

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

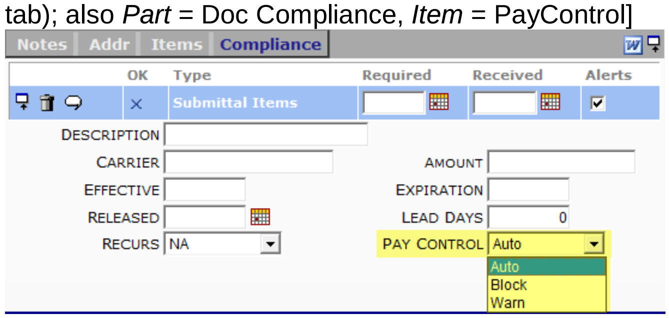
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail - Standard, *Item* = MixDesign]



PayControl

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

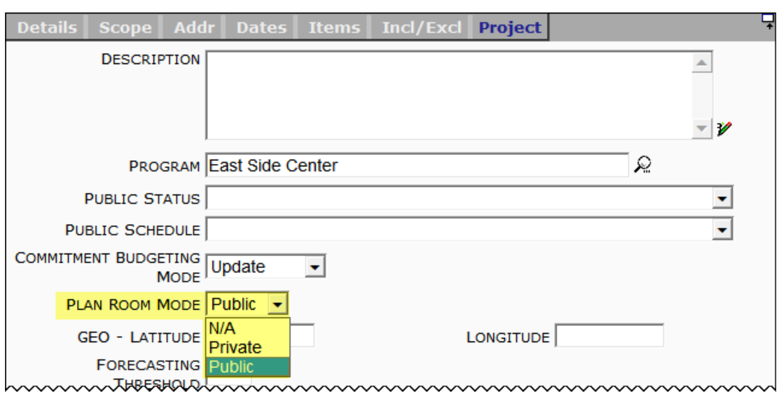
[*Customization Part* = Doc Tabs, *Item* = ComplianceTab (for Compliance tab); also *Part* = Doc Compliance, *Item* = PayControl]



PlanRoomMode

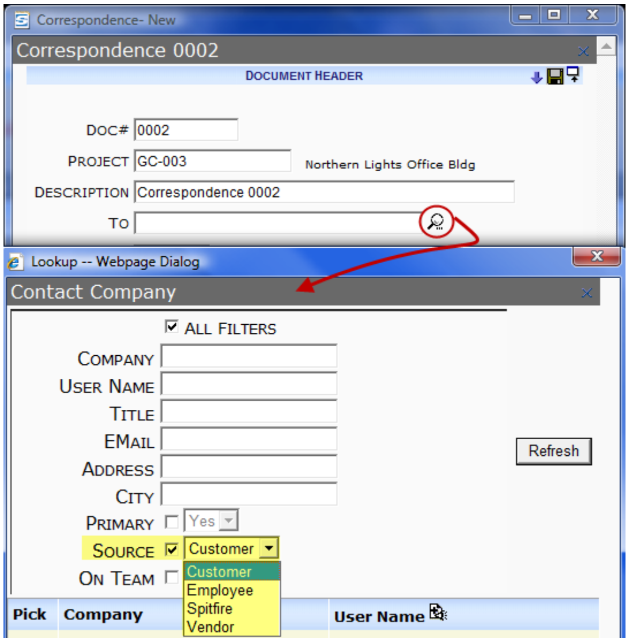
Appears on the Project tab on Project Setup documents:

[*Customization Part* =Doc Project Setup, *Item* = Plan Room Mode]



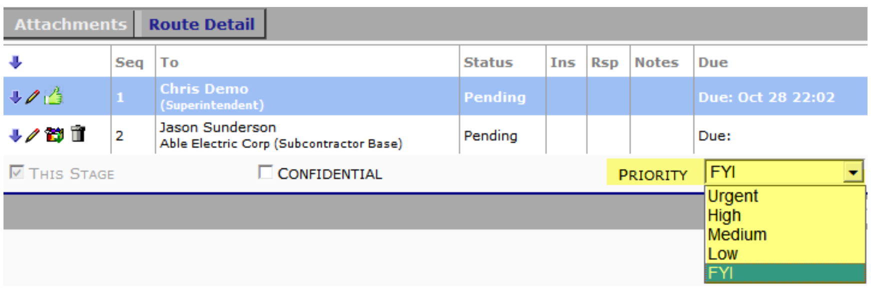
PrimarySource

Appears on certain lookups, such as Contact Company:



Priority

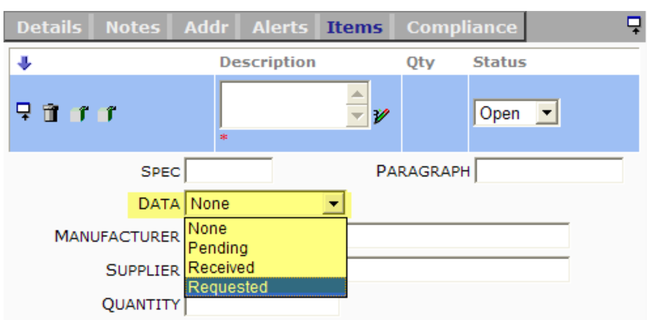
Appears on the Route Detail tab on Spitfire documents:



ProductData

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

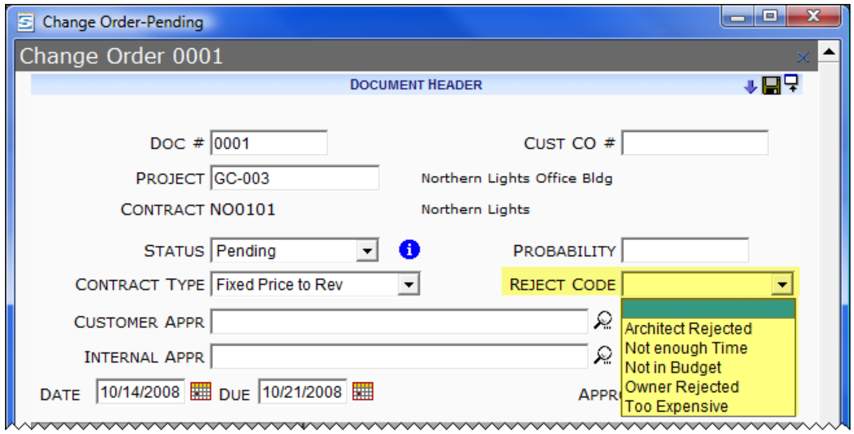
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail, *Item* = Data]



Reason

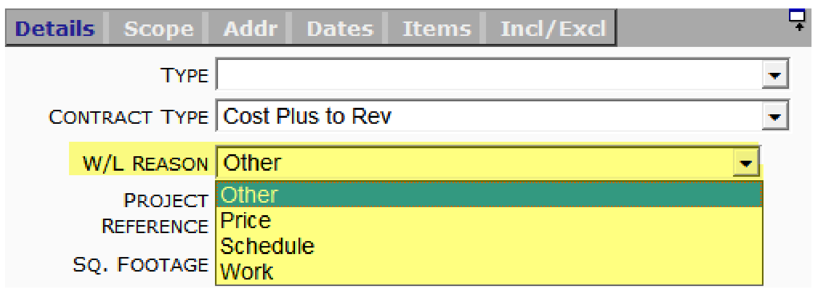
Appears on the Document Header of some Spitfire documents, such as Change Order:

[*Customization Part* = Doc Header – CO/CCO, *Item* = ReasonCode]



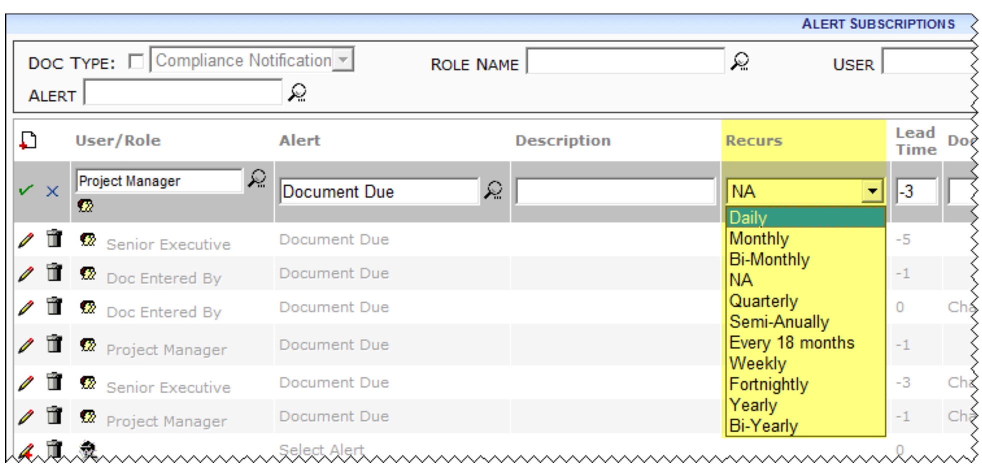
Also found on the Details tab of some Spitfire documents, such as Bid document:

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



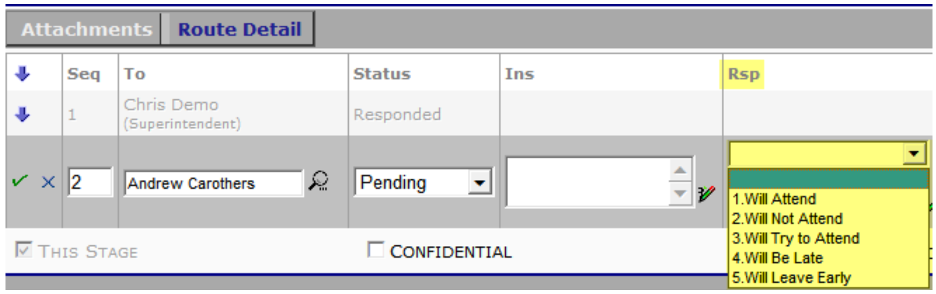
Recur

Appears on the Alert Subscriptions tool on the Manage Dashboard:



ResponseCode

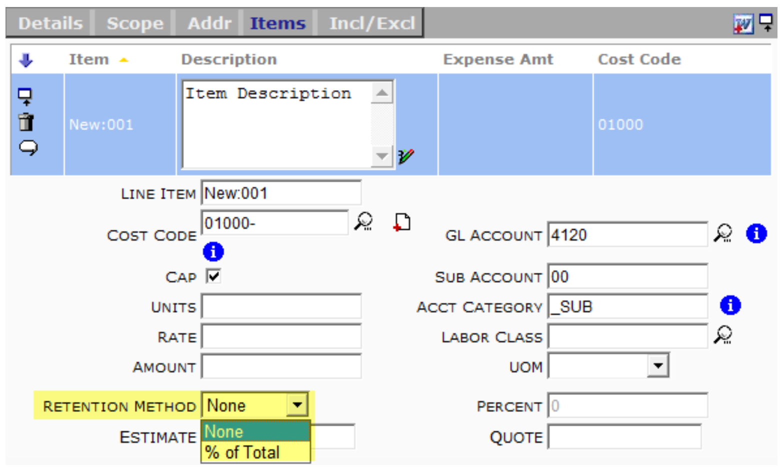
Appears on a document's Route Detail tab:



RetentionMethod

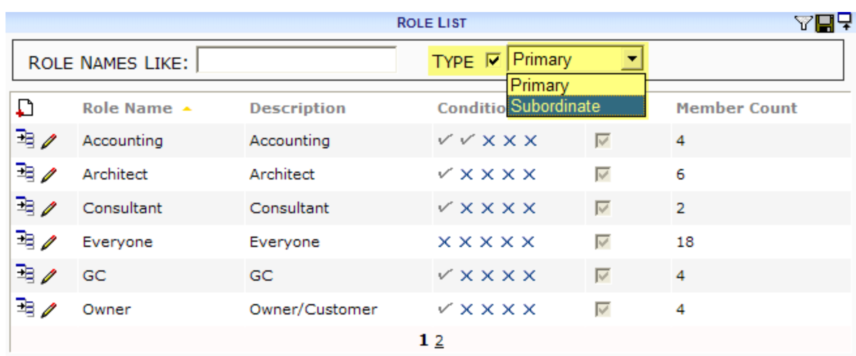
Appears on Spitfire documents that have been configured to include this field on the Items tab, such as CCO:

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



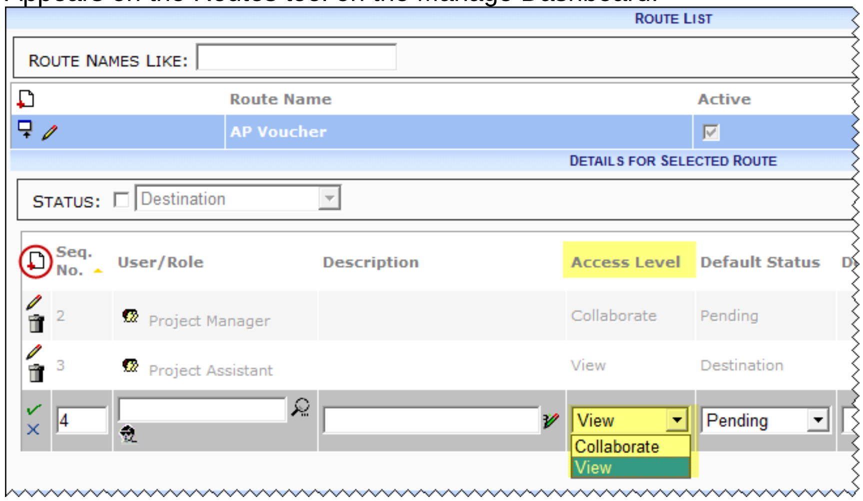
RoleType

Appears on the Roles tool on the System Admin Dashboard:



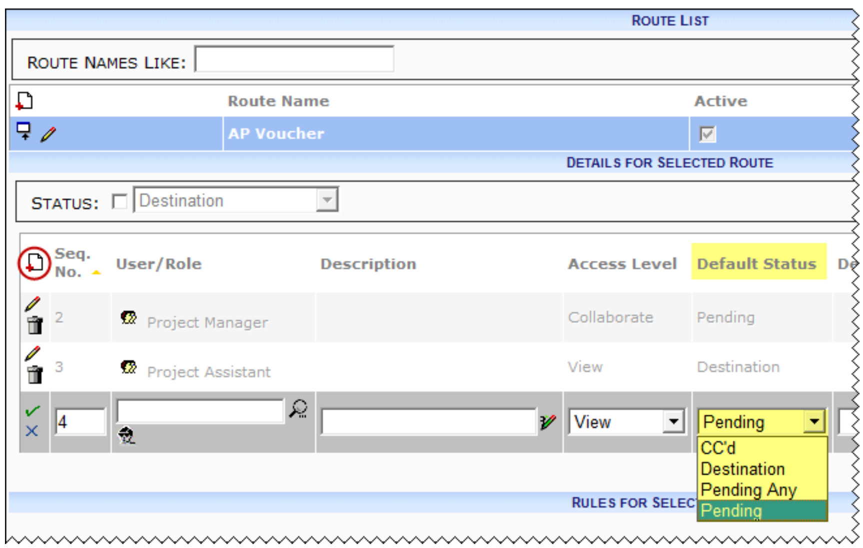
RouteAcess

Appears on the Routes tool on the Manage Dashboard:



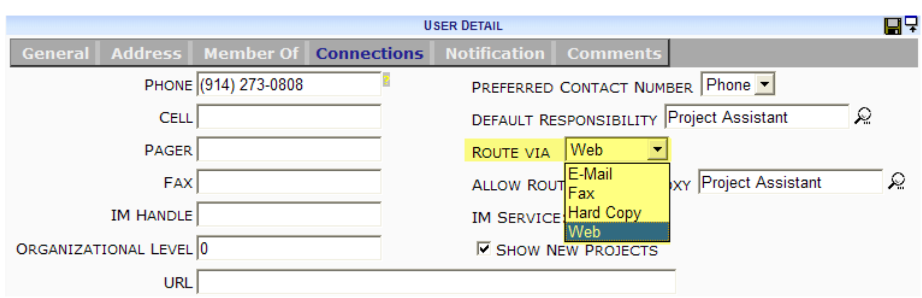
RouteStatus

Appears on the Routes tool on the Manage Dashboard:



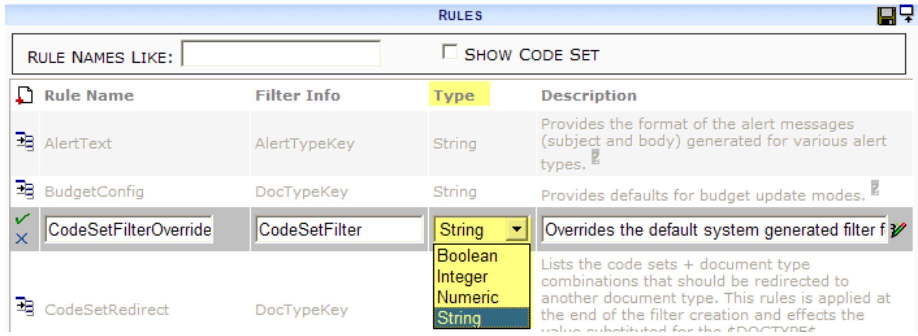
RouteViaList

Appears on the Connections tab of the Contact Detail window:



RuleResultType

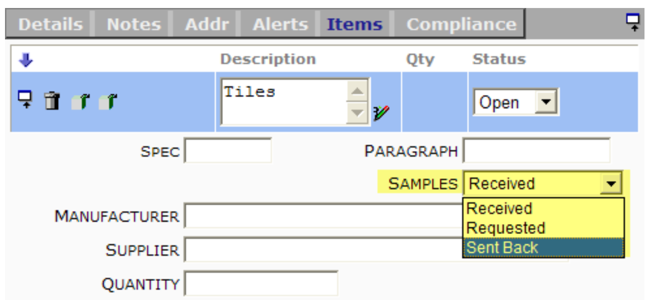
Appears on the Rules Maintenance tool on the System Admin Dashboard:



Samples

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

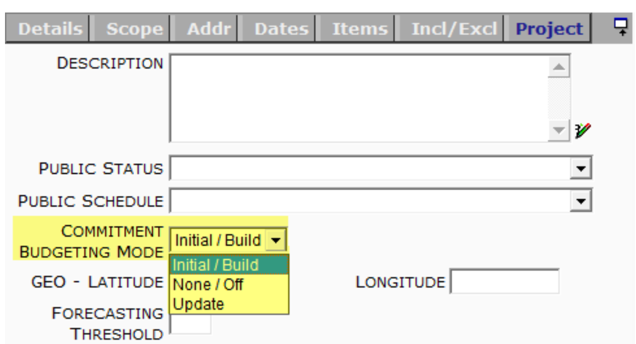
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail – Standard, *Item* = Samples]



SCBudgetMode

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

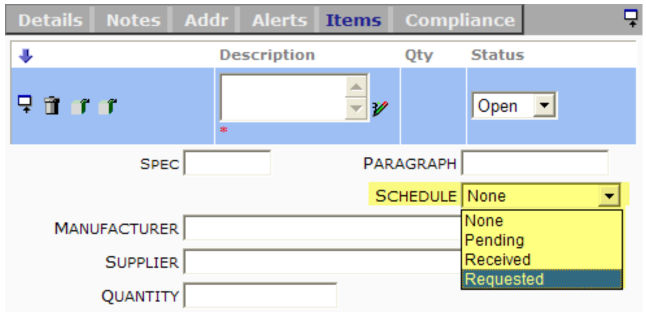
[*Customization Part* = Doc Tabs, *Item* = Project Setup Tab (for Project tab); also *Part* = Project Setup, *Item* = Commitment Budgeting Mode]



Schedule

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

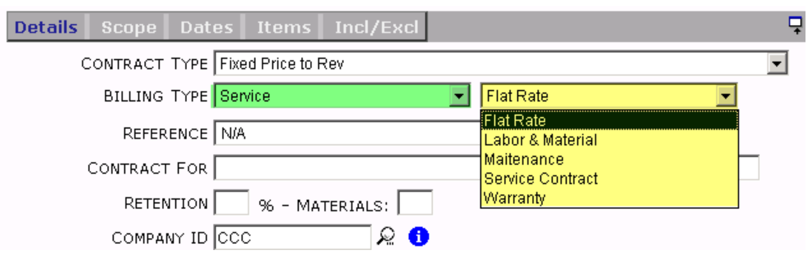
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail – Standard, *Item* = Schedule]



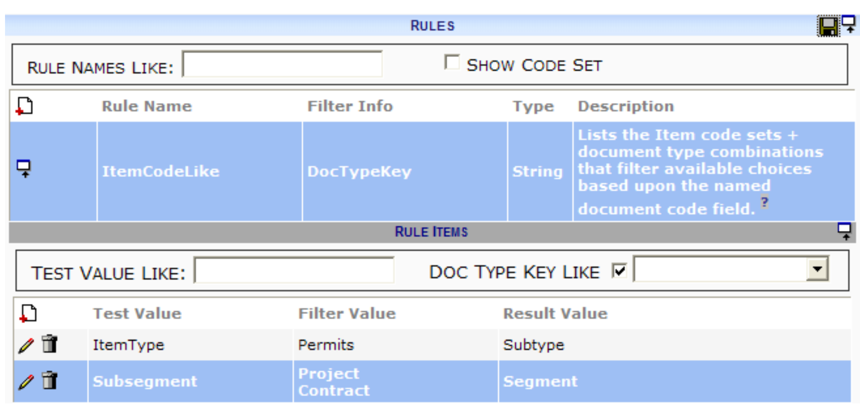
Segment and Subsegment

Appears on Spitfire documents that have been customized to include both of these fields on the Details tab, such as Project Setup.
Note: The Segment and Subsegment fields are designed to work as a team (Subsegment being filtered by the choice in Segment), so are added together.

[*Customization Part* = Doc Tabs, *Item* = DetailsTab (for Details tab); also *Part* = Doc Detail – Standard, *Item* = Segment]



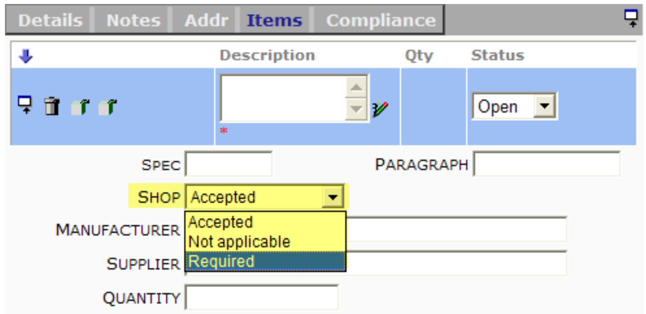
Add the ItemCodeLike rule through the Rules Maintenance tool (see pages 56 and 95) if your Subsegment field is to be filtered by your Segment field choice.



Shop

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

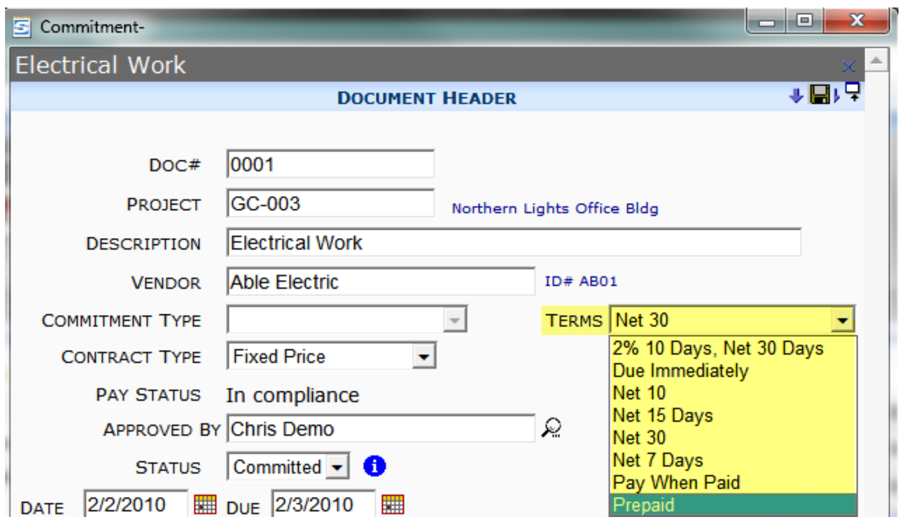
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail - Standard, *Item* = Shop]



Source

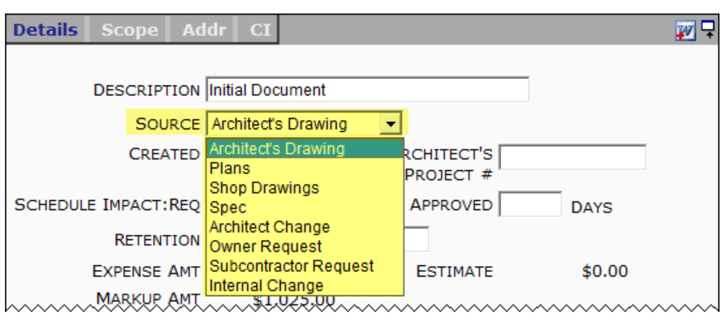
Appears on Spitfire documents that have been configured to include the Terms field on the Document Header, such as Commitment:

[*Customization 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:

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



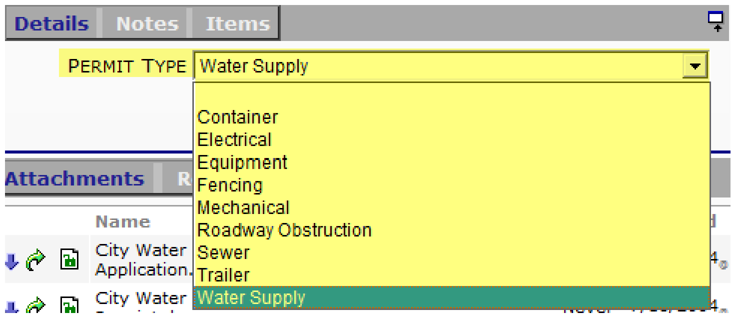
StopTypeList

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:

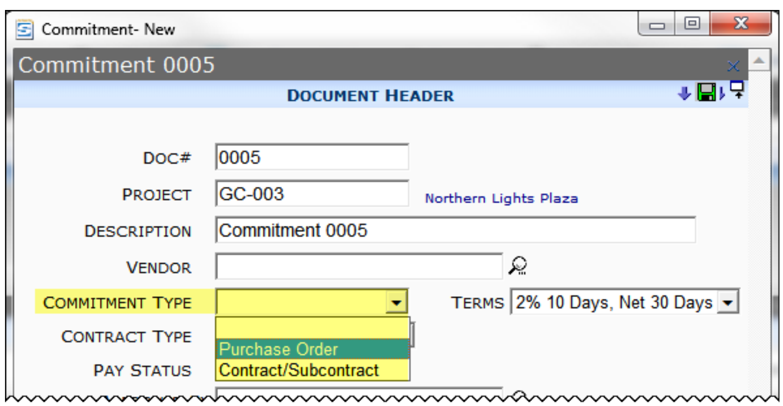
[*Customization Part* = DocTabs, *Item* = DetailsTab (for Details tab); also *Part* = Doc Details – Standard, *Item* = Subtype]



Note: See also ItemType on page 117.

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

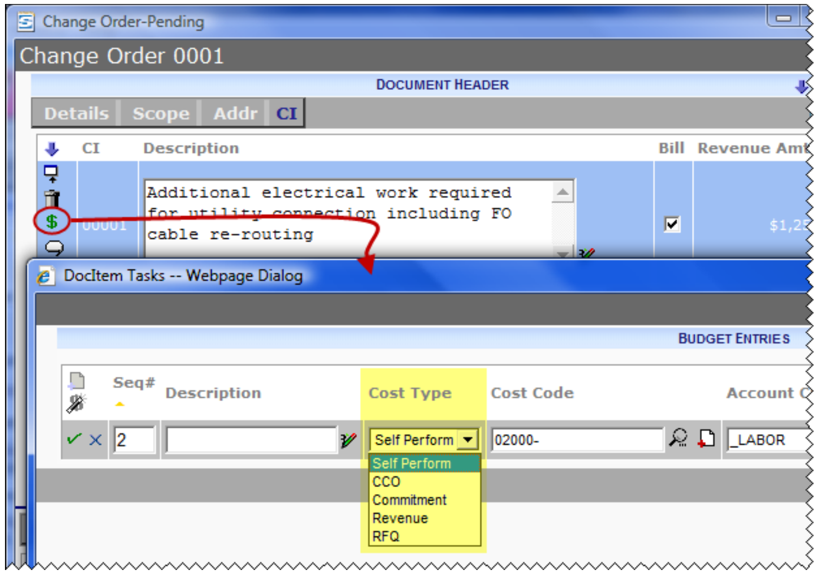
[*Customization Part* = Doc Header – Commitment, *Item* = Commitment Type]



Note: this drop-down menu should not be confused with Contract Type (see page 109).

TaskCostType

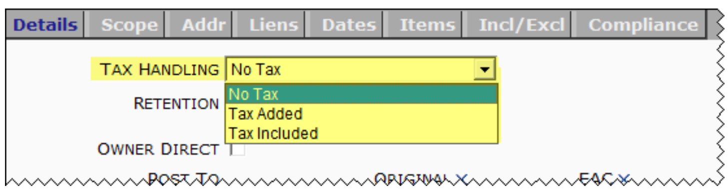
Appears on the Budget Entries window accessed from the CI tab:



TaxHandling

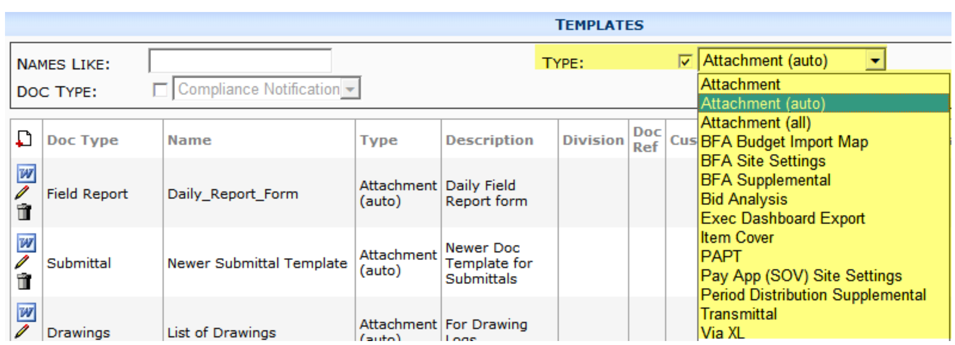
Appears on Spitfire documents that have been configured to include this field on the Details tab, such as Commitments:

[*Customization Part* = Doc Detail - Standard, *Item* = Tax Handling]



TemplateType

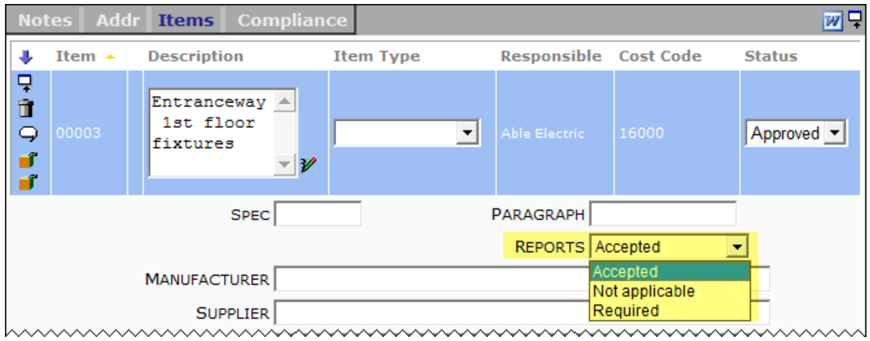
Appears on the Templates tool on the Manage or System Admin Dashboard:



TestReport

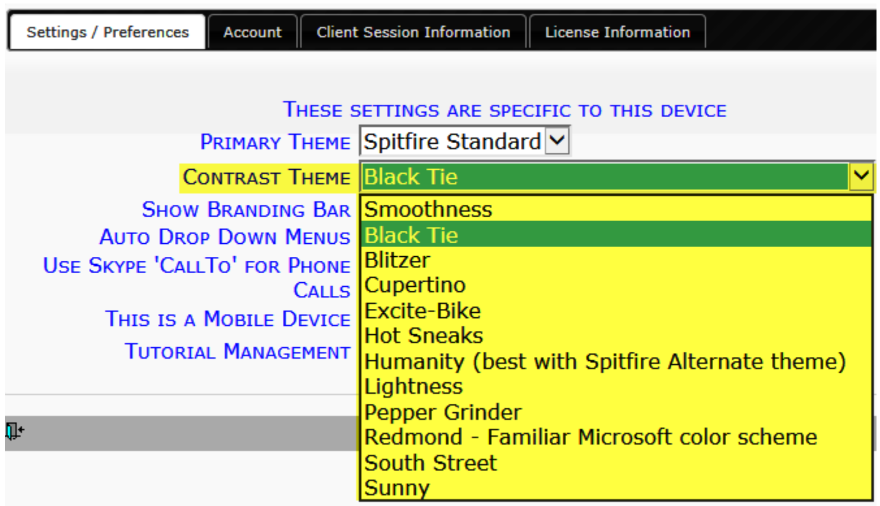
Appears on Spitfire documents that have been customized to include this field on the Items tab, such as Submittal:

[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail, *Item* = Reports]



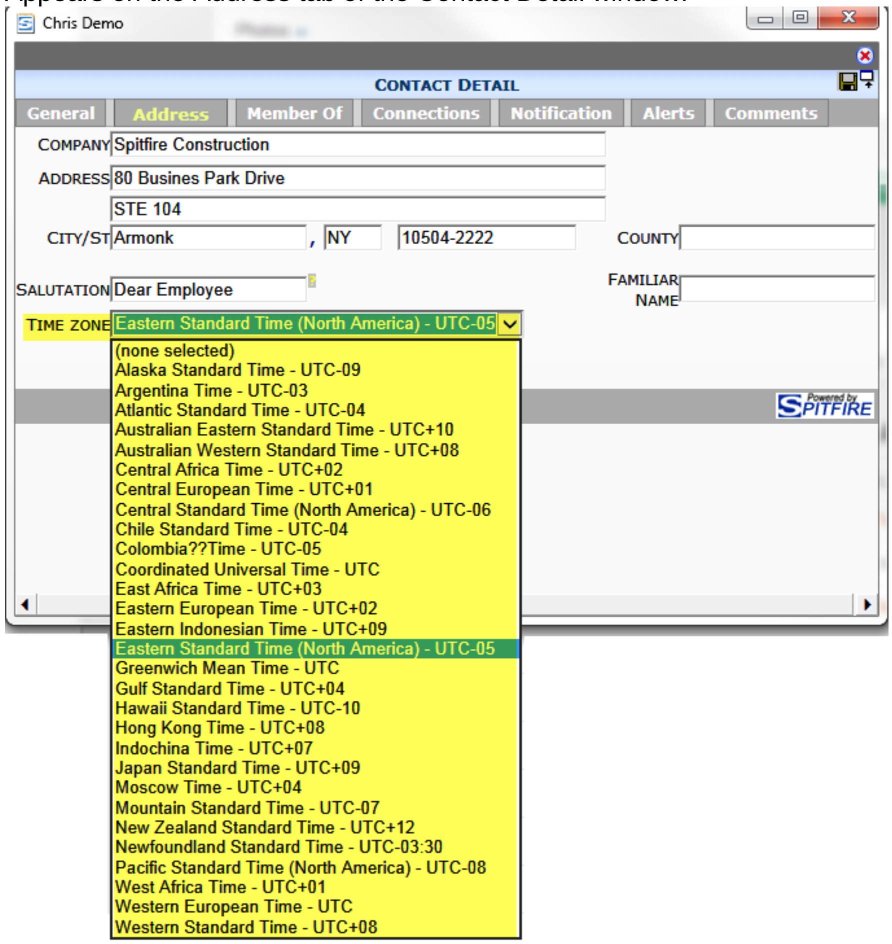
ThemeVariant*

Appears on the Settings/Preferences tab on the User Settings page:



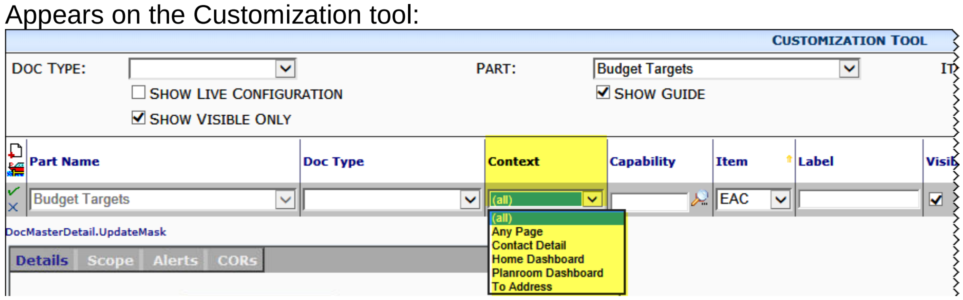
TimeZone*

Appears on the Address tab of the Contact Detail window:



UIPartContext*

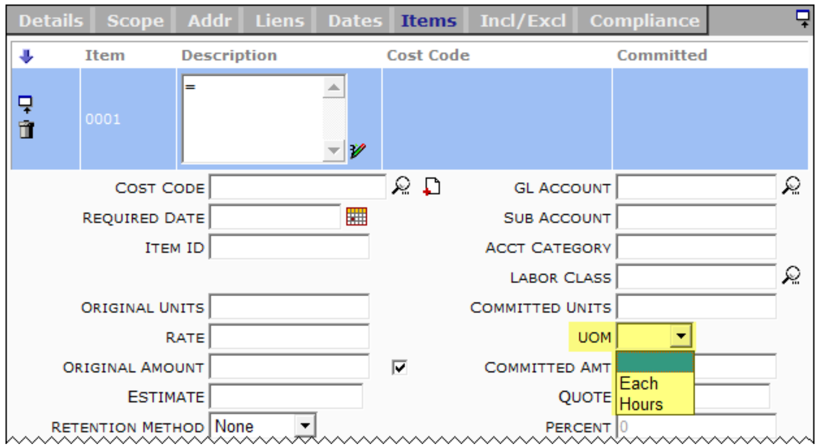
Appears on the Customization tool:



UOM

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

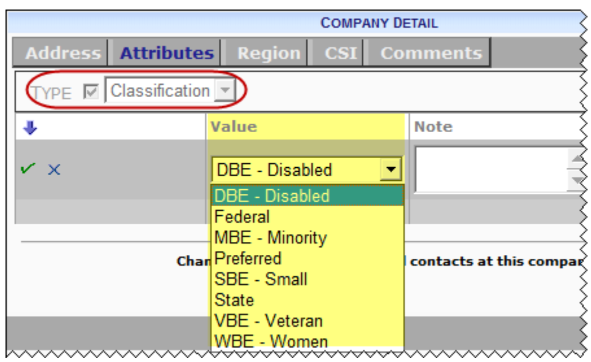
[*Customization Part* = Doc Tabs, *Item* = ItemsTab (for Items tab); also *Part* = Doc Item Detail- Commitment, *Item* = Commitment – UOM Caption]



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:

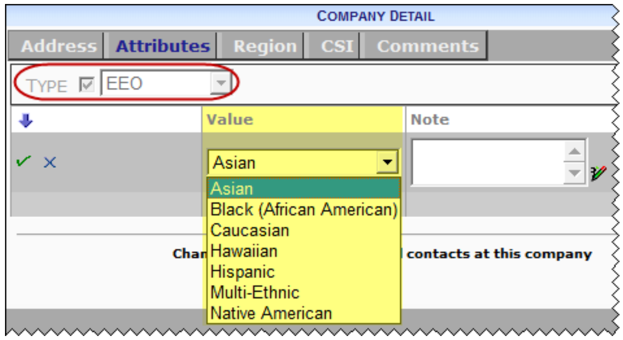
[*Customization Part* = Doc Tabs, *Item* = Attributes Tab (for Attributes tab); also *Part* = Doc Attributes, *Item* = ValueCol]



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:

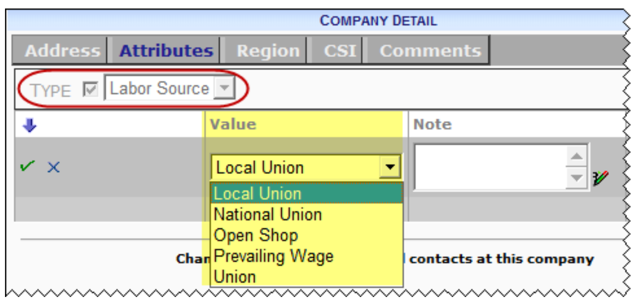
[Customization Part = *Doc Tabs*, Item = *Attributes Tab* (for Attributes tab); also Part = *Doc Attributes*, Item = *ValueCol*]



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:

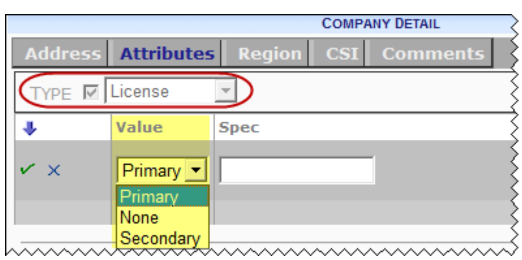
[*Customization Part* = Doc Tabs, *Item* = Attributes Tab (for Attributes tab); also *Part* = Doc Attributes, *Item* = ValueCol]



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.

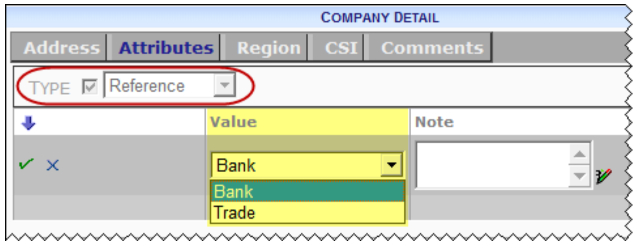
[*Customization Part* = Doc Tabs, *Item* = Attributes Tab (for Attributes tab); also *Part* = Doc Attributes, *Item* = ValueCol]



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.

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



Appendix B

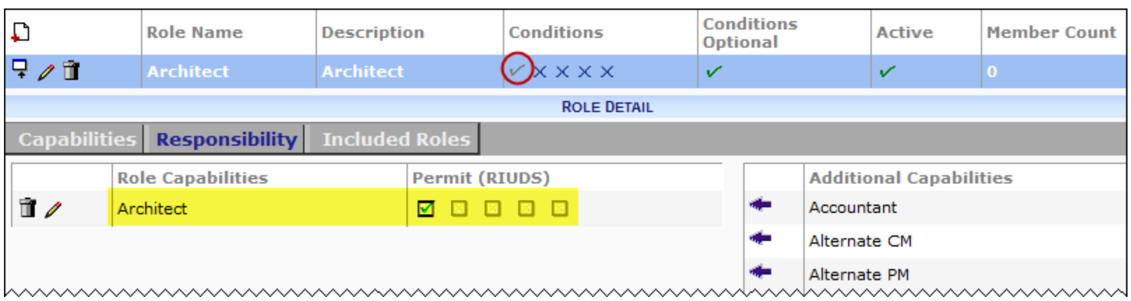
Default Roles and Their Capabilities

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).
- This role is given the Responsibility of “Architect.”
- There are no default Capabilities for this role.
- There are no default Included Roles for this role.



Everyone

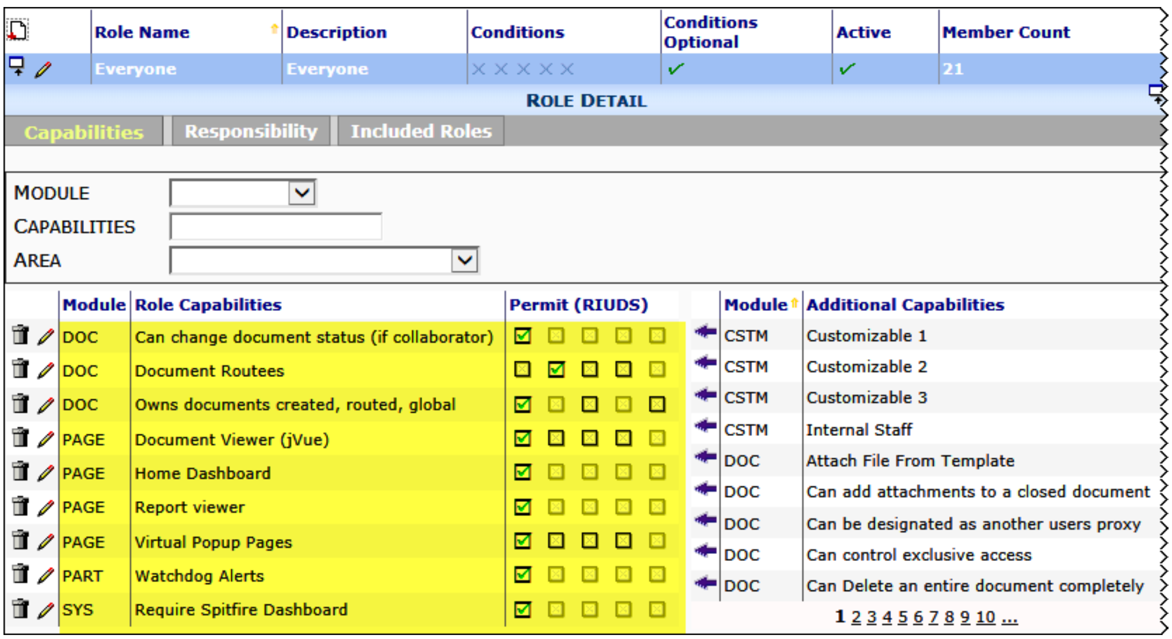
Use the role of **Everyone** as your base or foundation. You may, however, need to modify the default capabilities if you want Everyone to be a more limited role. Once your Everyone role is as you want it, you can assign this role to all or most of your users and then add supplemental capabilities by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

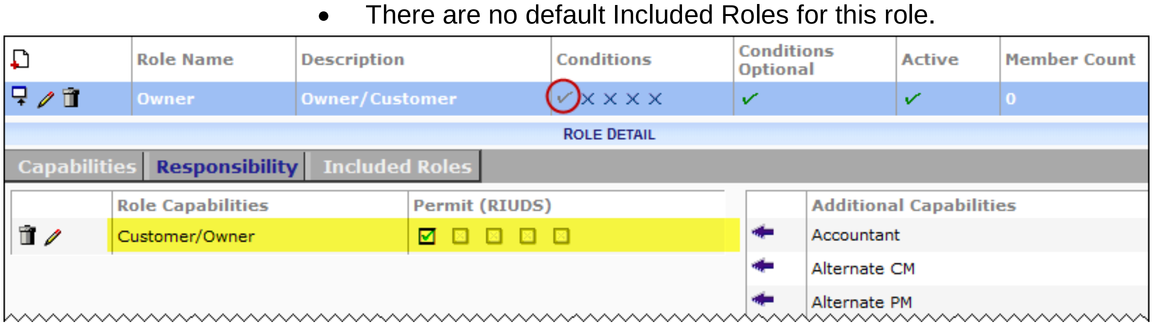


Owner

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).

- The role is given a Responsibility of “Customer/Owner.”
- There are no default Capabilities for this role.
- There are no default Included Roles for this role.



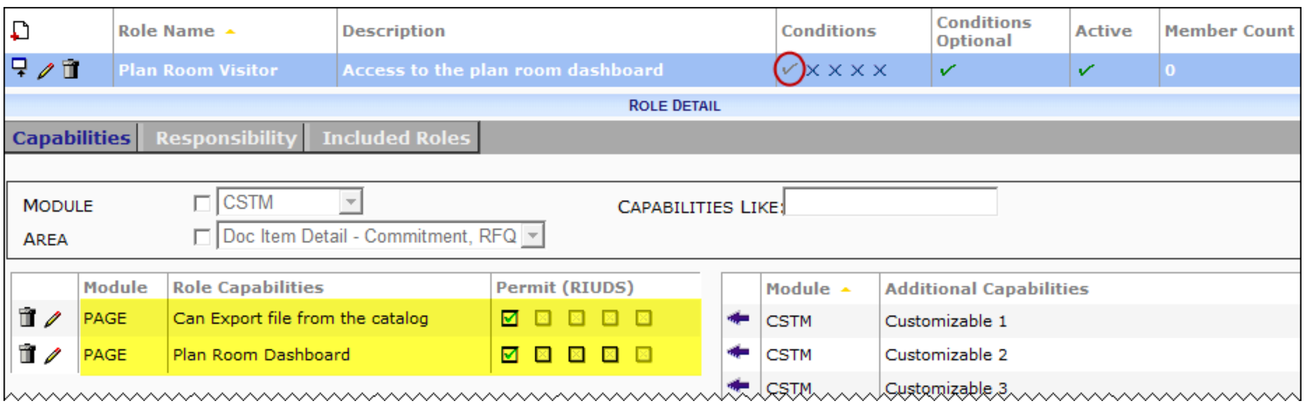
Plan Room Visitor

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).
- There is no default Responsibility for this role.
- The default Included Role for this role is **Doc Viewer** (for Bid Package and Bid Package Addendum documents).

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).
- The role is given the Responsibility of “Project Manager.”
- There is no default Included Role for the role.

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

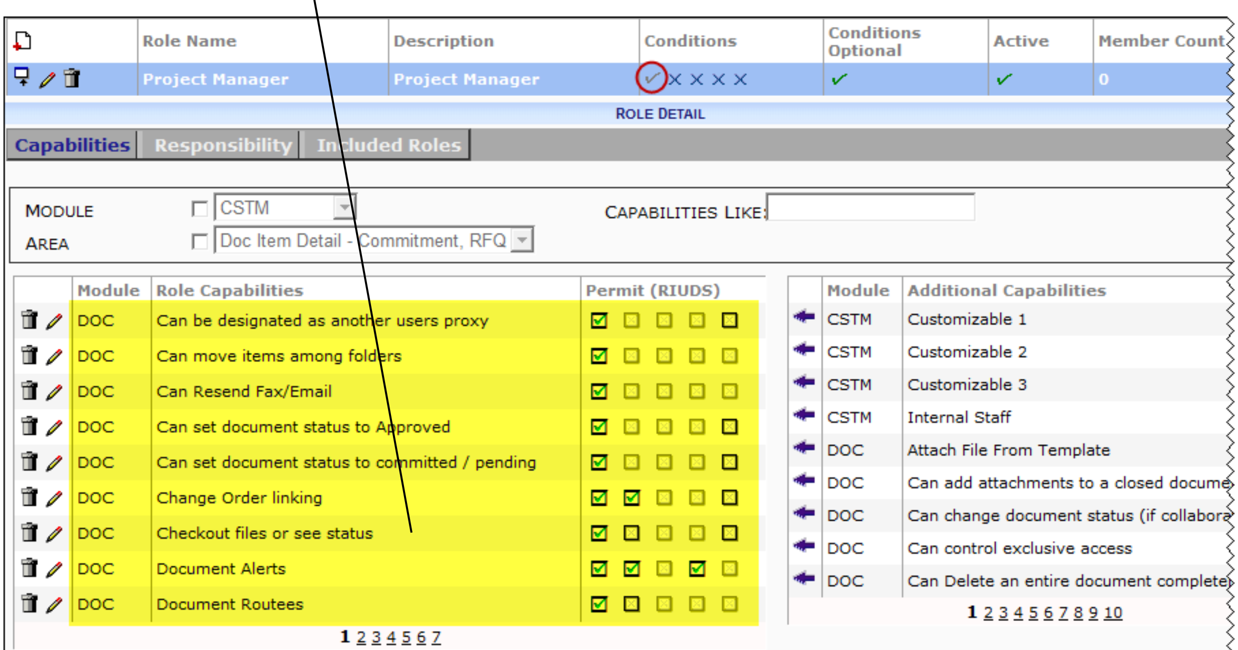
- Add Attachments to a document that is read-only closed
  DOC | Can add attachments to a closed document
- Be designated as someone else’s proxy
  DOC | Can be designated as another users proxy
- Change a document’s status if not the owner of the document, but as a collaborator
  DOC | Can change document 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

Click on other pages to see all the Capabilities.



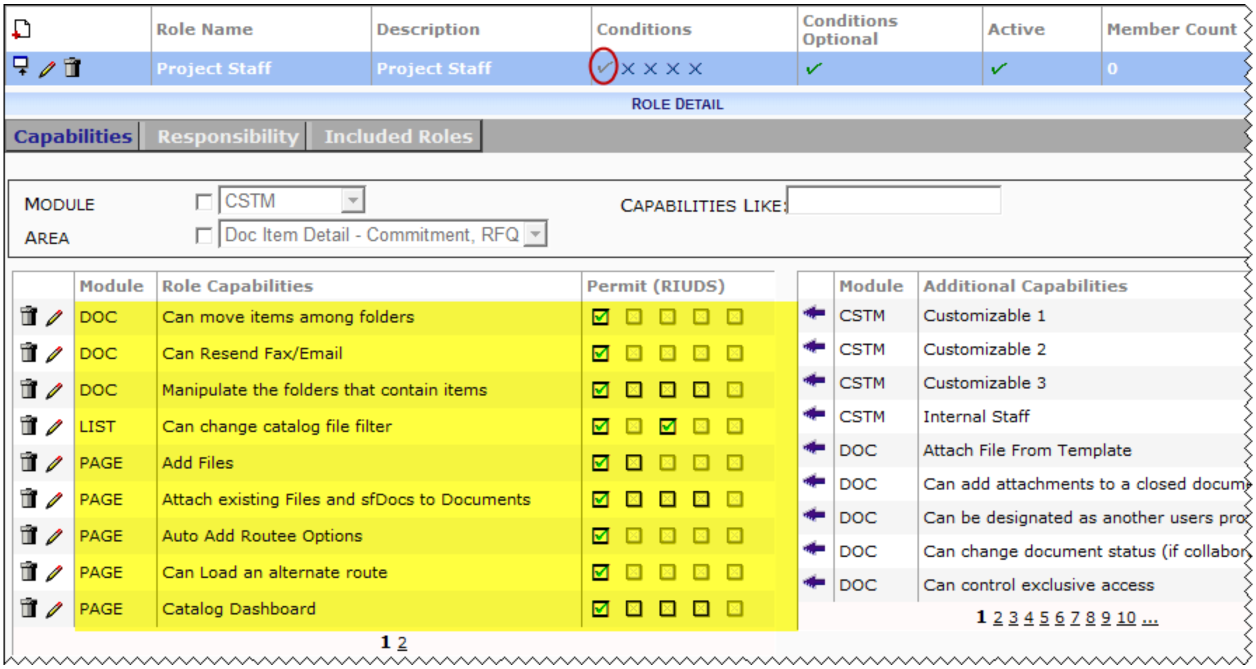
Project Staff

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



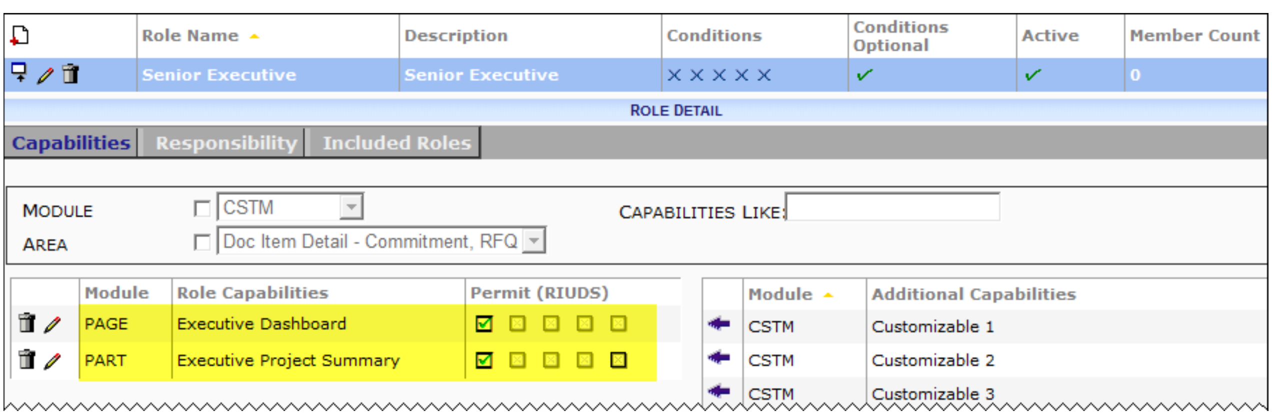
Senior Executive

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.”
- 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.

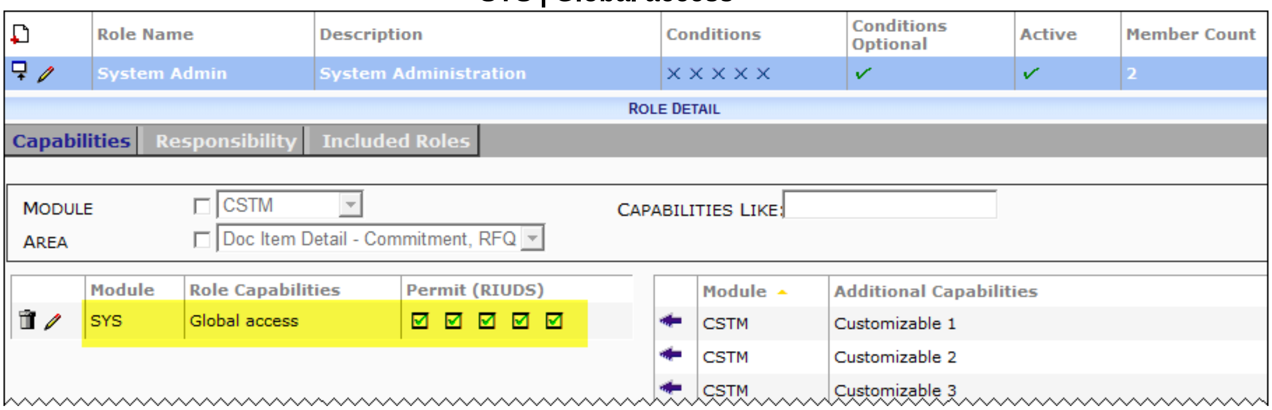
The System Admin role has only one capability: Global access. This Global access capability gives the System Admin access to all pages and parts in the system. Use this role for the person who has control over sfPMS at your site.

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.

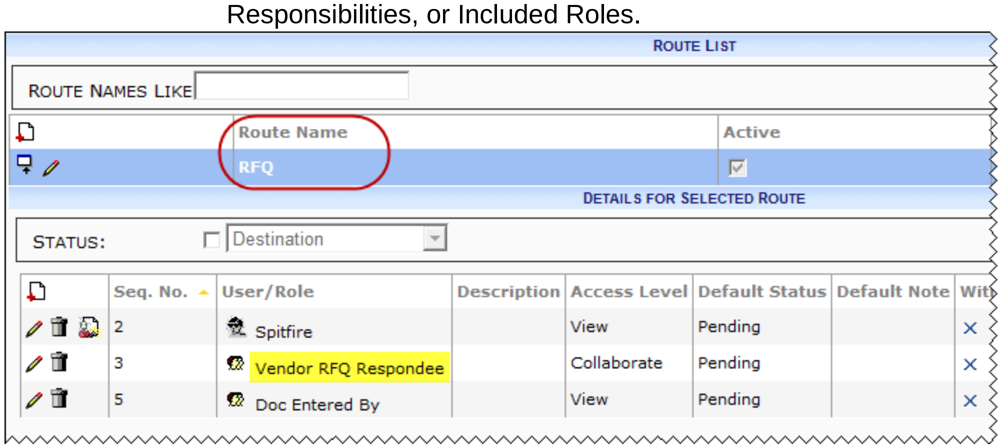
- **SYS | Global access**



Vendor RFQ Respondee

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

- The role has no restrictive conditions, Capabilities, Responsibilities, or Included Roles.



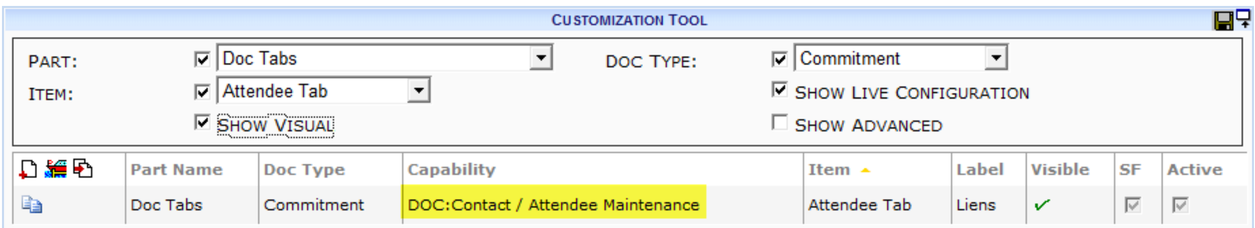
Appendix C

Part	***Area covered***	***Is used by***
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

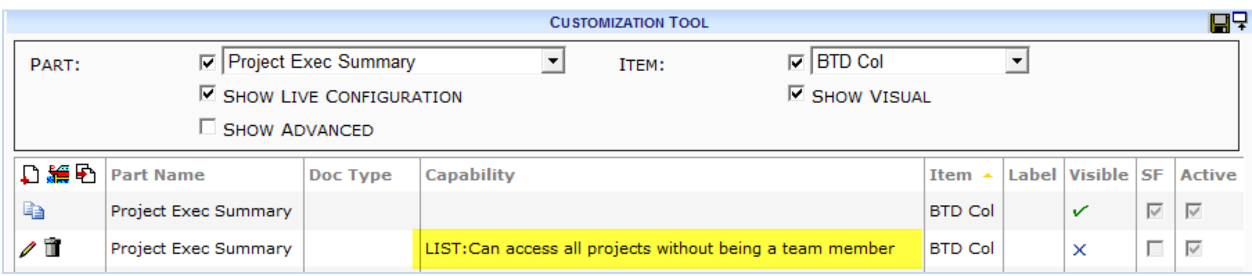
Capabilities Used In Customization

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 customization of the item. (For more on Role capabilities, see the section on page 58.)

For example, the customization 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.



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



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	