

System Administration



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

Revision Number: 4.4.04.15.2014

© Copyright 2007-14 Spitfire Management, LLC. All Rights Reserved.
No part of this document may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means electronic or mechanical, photocopying, recording, or otherwise without written permission of Spitfire Management, LLC.

© 2002-14 Microsoft, Microsoft Business Solutions (MBS), and Microsoft Dynamics SL are either registered trademarks or trademarks of Microsoft Corporation, Great Plains Software, Inc. or Microsoft Business Solutions Corporation in the United States and/or other countries. FRx are either trademarks or registered trademarks of FRx Software Corporation. Microsoft Business Solutions Corporation is a wholly-owned subsidiaries of Microsoft Corporation.

The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Spitfire Management, LLC.
7 Skyline Drive, Suite 350
Hawthorne, NY 10532
ph. 914.273.0809
fax: 914.273.4208
www.spitfiremanagement.com

Table of Contents

About Our Documentation	9
Guides	9
The Knowledgebase	10
White Papers.....	10
Introduction to This Guide	11
System Admin Dashboard	12
System Admin Tools	13
Company Divisions.....	15
After Setup	15
Project Setup Details Tab.....	15
Reports	15
Executive Dashboard	16
The Company Division Detail Part.....	16
Columns	16
Adding Company Divisions	17
Example	17
Mask Maintenance	18
After Setup	18
The Mask Definitions Part.....	19
Columns	19
Mask Detail	19
Columns	19
Adding a Mask	20
Editing Mask Segments	21
Example	22
Account Categories	23
After Setup	23
BFA Workbook	23
Document Items Tab	23
SOV Workbook.....	24
Cost Analysis Detail.....	24
The Account Categories Part.....	24
Columns	25
Filters.....	25
Adding/Editing Account Categories	25
Example	26
Doc Types	27
After Setup	27
Inbox	27
Project Documents Menu	27
Catalog	27
Routes Tool	28
Alert Subscriptions Tool	28
Compliance Types Tool.....	28
Date Types Tool	28
Reference Tool.....	29
Templates	29
Customization Tool.....	29
Rules Maintenance Tool.....	29
The Doc Types Part.....	30

Columns	30
Filters	31
Adding Doc Types.....	31
Editing Doc Types.....	31
Copying a Doc Type's GUID.....	31
Example	32
Customization	33
Concepts	33
After Setup	33
Documents	33
Inbox	34
Project Dashboard.....	34
Change Item Register	35
Routes Tool	35
Executive Dashboard	35
Filters	35
The Customization Tool Part	36
Columns	36
Show Advanced.....	37
Filters.....	40
Customizing Doc Types	43
Adding Items.....	43
Editing Spitfire-Defined Items.....	44
Editing User Customizations	45
Copying All Customized Items	46
Example	46
Code Maintenance	49
Concepts	49
Relationship between Code Sets	49
After Setup	50
Drop-Down Menus.....	50
Rules	50
The Code Maintenance Part.....	51
Columns	51
Filter.....	51
Detail View	51
Non-Editable Code Set	52
Columns	52
Filters.....	52
Editable Code Set Columns.....	52
Columns	53
Filters.....	54
Adding Code Sets	55
Editing Code Sets	55
Example	56
Roles	58
Concepts	58
Capability Modules	58
Permissions - Allow (RIUDS)	58
Conditions.....	59
Responsibilities.....	60
After Setup	61
Contact Member Of Tab.....	61
Project Team Contacts.....	62

The Role List Part	62
Columns	63
Filters	63
Role Detail Tabs	63
Capabilities Columns	64
Capabilities Filters	64
Responsibility Columns	65
Included Roles Columns	65
Adding Roles	65
Building or Editing Roles	65
Conditions	65
Capabilities	66
Responsibilities	66
Included Roles	67
Example	68
Catalog Folders	71
Concepts	71
Folders	71
Access Levels by Roles	72
After Setup	72
The Folder List Part	73
Columns	73
The Folder Toolbar	73
Adding and Editing Folders	74
Assigning Access to Folders	75
Example	76
Report Folders	77
Concepts	77
Custom Report Folders	77
List/Read Access	77
After Setup	78
The Report Folders Part	79
Columns	80
Assigning Access Levels	80
Example	80
Date Types	81
After Setup	81
Dates Tab	81
The Doc Date Types Part	81
Columns	82
Filters	82
Adding and Editing Date Types	83
Example	83
Alert Types	84
After Setup	84
Document's Alert Window	84
Alert Subscription Tool	84
The Alert Types Part	85
Columns	85
Adding Alert Types	86
Editing Alert Types	86
Example	87
Compliance Types	88

After Setup	88
Document Compliance Tab	88
The Compliance Types Part	88
Column	89
Filters	90
Mappings.....	90
Columns	91
Adding Compliance Types	91
Mapping Compliance Types to Doc Types	91
Warnings	92
Editing Compliance Types	93
Automatic Workflow	93
Example	94
Rules Maintenance	95
Concepts	95
Rule Groups and Values	95
Rule Validation	96
After Setup	96
The Rule Maintenance Tool.....	97
Columns	97
Filters.....	98
Rule Entries.....	99
Columns	99
Filters.....	99
Adding a Rule Group	100
Editing Rule Groups / Adding Rules	100
Editing Rules.....	100
View Changes to a Rule	101
Example	101
System Information	102
The System Information Part	102
Build Releases	102
Updates	103
Report Manager	103
Performance Information	103
Recycle the System	104
Server Log.....	104
Current Sessions	104
Appendix A: Code Sets	105
Non-editable Code Sets.....	105
The Code Set List	106
AcctClass.....	106
AcctType.....	106
ActiveFlags	106
AddrType	106
AlertStatusList	107
AllocEntryType	107
AttrType	107
AuditMode	107
BFAMode.....	108
Boolean	108
Certification.....	108
CodeSetType.....	109
ContactScope	109

ContractType	109
CostCodeStatus	110
CostingMethod	110
Country	110
DFRDelay	111
DFREquip	111
DocStatus	111
Drawings.....	112
Evaluation.....	112
EventItemType	112
ExternalSchedule	113
ExternalStatus	113
FieldMockup	113
FileAccessType*	114
FilterAny	114
Guarantee.....	114
IMTypeList.....	114
InclusionType	114
InstructionType	115
IntegrityCheck.....	115
ItemSource	115
ItemStatus	116
ItemSubtype	117
ItemType.....	117
LaborClass	118
MailRoute	118
MaskType	118
MixDesign.....	119
PayControl.....	119
PlanRoomMode.....	119
PrimarySource.....	120
Priority	120
ProductData.....	120
Reason	121
Recur.....	121
ResponseCode.....	122
RetentionMethod	122
RoleType	122
RouteAccess	123
RouteStatus.....	123
RouteViaList	123
RuleResultType	124
Samples.....	124
SCBudgetMode	124
Schedule.....	125
Segment and Subsegment.....	125
Shop	126
Source	126
StopTypeList.....	127
SubType	127
TaskCostType	128
TaxHandling	128
TemplateType.....	128
TestReport.....	129
ThemeVariant*.....	129
TimeZone*	130

UIPartContext*	130
UOM	131
VendorClassif	131
VendorEEO	132
VendorLabor	132
VendorLicense	132
VendorReference	133
Appendix B	134
Default Roles and Their Capabilities	134
Architect	134
Everyone	134
Owner	135
Plan Room Visitor	136
Project Manager	136
Project Staff	140
Senior Executive	141
System Admin	142
Vendor RFQ Respondee	142
Appendix C	143
Capabilities Used In Customization	144

About Our Documentation

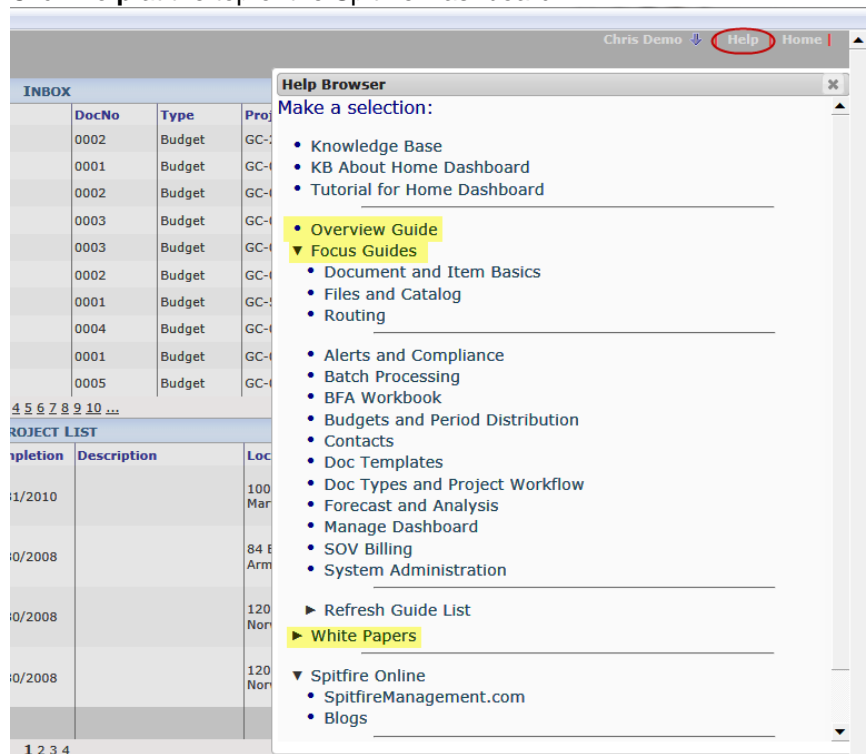
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

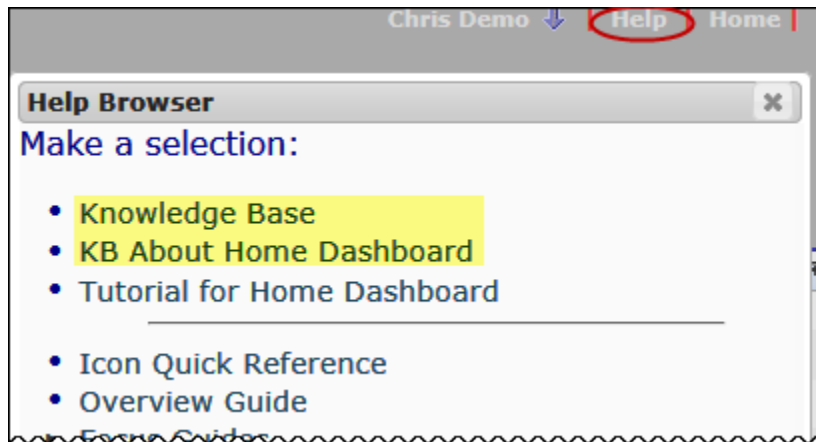


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

The guide will appear as a PDF file

The Knowledgebase

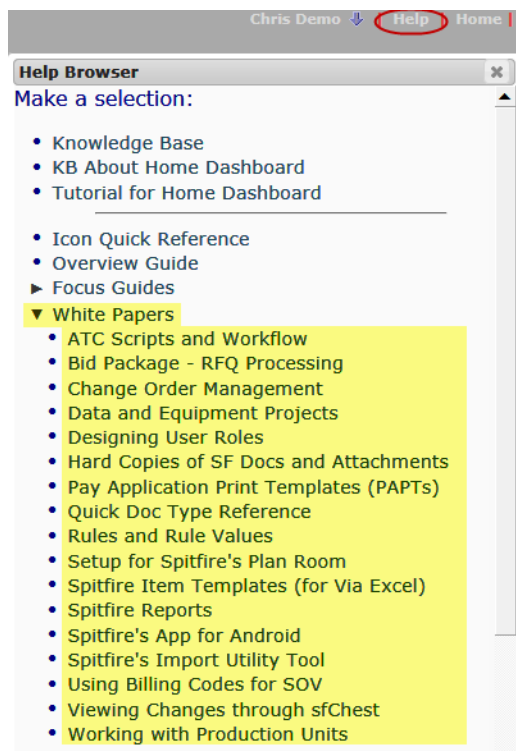
The Knowledgebase contains articles that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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.

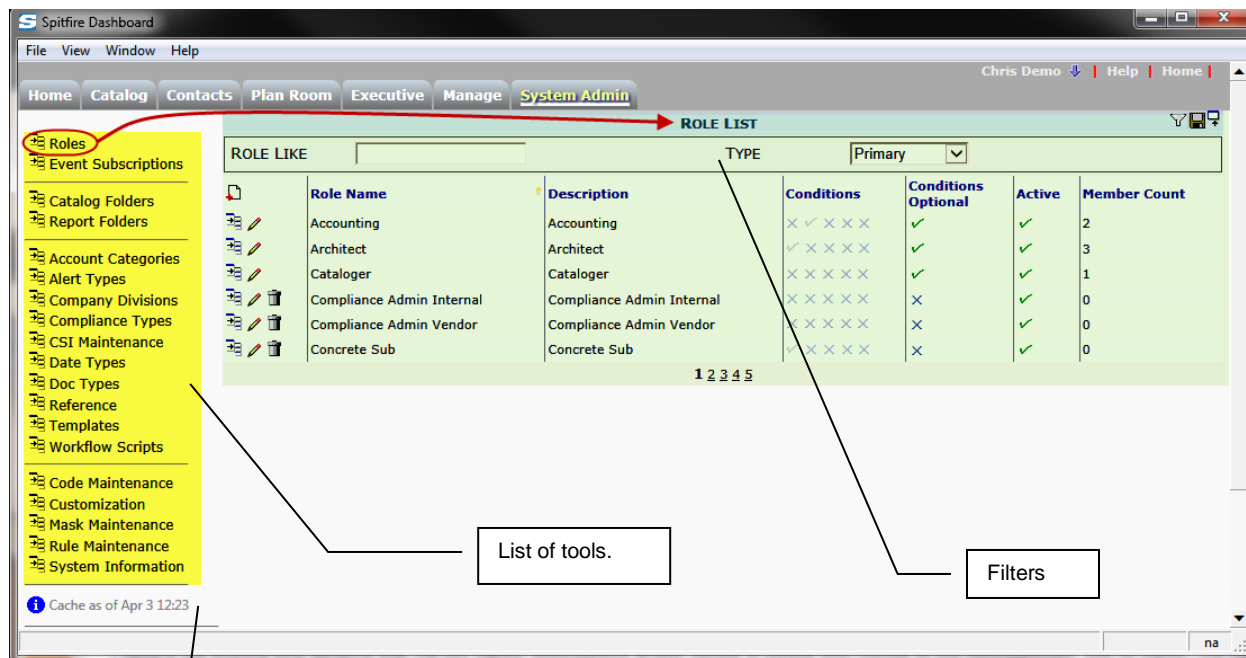
Note: Because sfPMS is configurable and because different users have different levels of access rights and permissions, the screens shown and the fields described in this guide may not be the same as those in your system.

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



Current cache date/time stamp.

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	<i>The Developers Primer</i>
All other tools on the System Admin Dashboard	This guide

System Admin Tools

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

- **[Company Division](#)**: Provide basic information for your company or for company divisions within your organization or corporation. (See page 15.)
- **[Mask Maintenance](#)**: Set up Cost Code and Project ID parameters by specifying segment, length and type. (See page 18.)
- **[Account Categories](#)**: Describe the general ledger accounts in words rather than numbers and group these accounts for reporting and analysis purposes. (See page 23.)
- **[Doc Types](#)**: Deactivate or rename Doc types and create new Doc types. (See page 27.)
- **[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

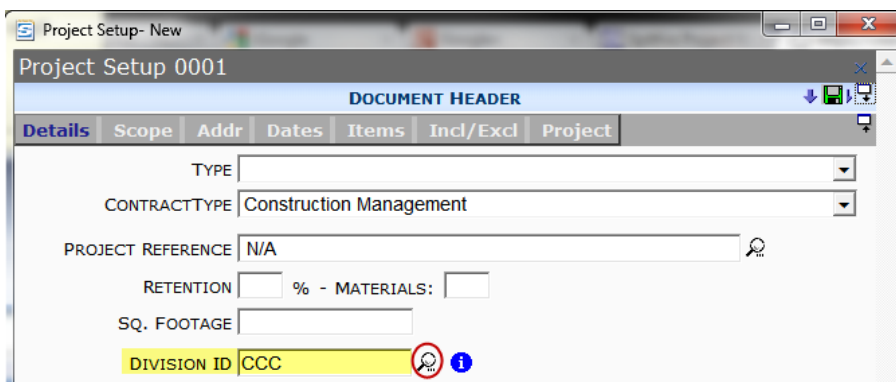
The Company Division tool lists some basic information about your company. If your organization or corporation comprises several companies or offices, you can list information for all of them through the Companies tool.

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.

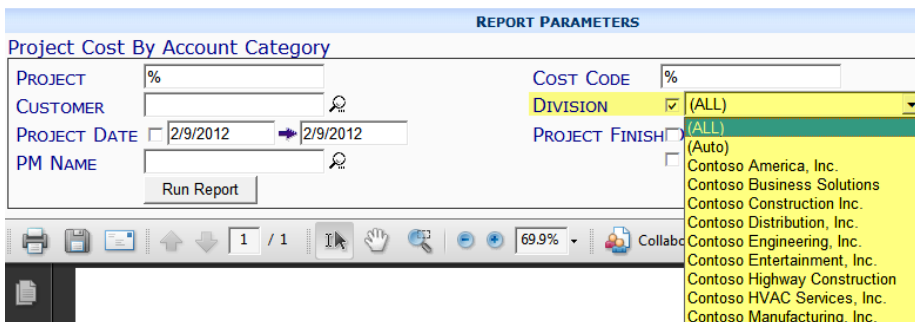
Note: because this is a required field, you should have at least one company division in the Company Division tool. If your organization is not divided into divisions, then the name, address and phone numbers of your organization should make up the one division record.



Reports

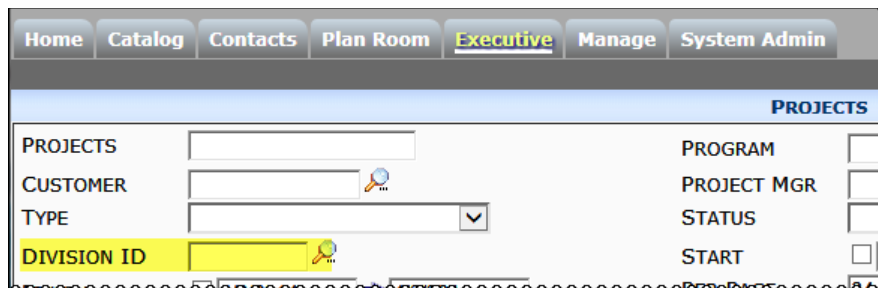
Company divisions can be used as filters on the following reports:

- 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:

If you are integrated, click  to refresh data from Microsoft Dynamics SL.

COMPANY DIVISION DETAIL													
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		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CBS	Contoso Business Solutions	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CCC	Contoso Construction Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CDI	Contoso Distribution, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CEC	Contoso Engineering, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CEI	Contoso Entertainment, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CHC	Contoso Highway Construction	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CHS	Contoso HVAC Services, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
CMI	Contoso Manufacturing, Inc.	10260 SW Greenburg Road	Suite 200	Portland	OR	97223		5034526981	5034526990		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	ASO	Acme Satellite Office	1000 Market St.		San Francisco	CA	94102	US	415-555-2000	415-555-2188		<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

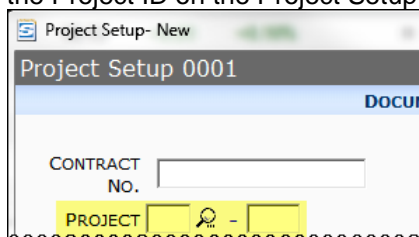
In addition to the masks that ship with sfPMS, you can add your own mask for a specific Doc type.

After Setup

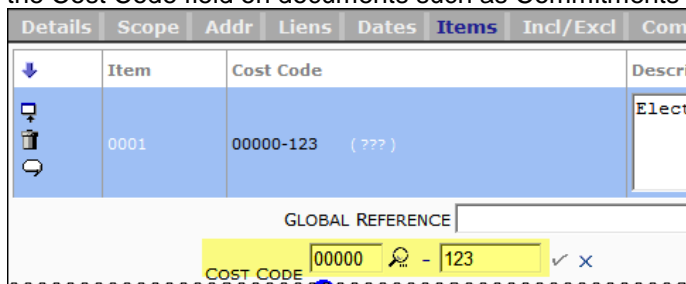
If you create masks for IDs on specific Doc types, the Doc # field will reflect your mask segments (as shown in the [example on page 22](#)).

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](#).

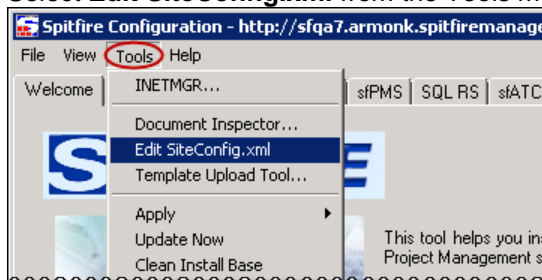
- **Mask Type:** the type for the segment. Choices are:
 - **Numeric** = 0, 1, 2, 3, 4, 5, 6, 7, 8, 9
 - **Uppercase Alpha** = A – Z
 - **Validated Text** = choices from lookups or drop-downs
 - **Uppercase Alphanumeric** = 0 – 9, A – Z
- **Lookup:** the name of a lookup such as “PJCODE” from Microsoft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

```

</Container>
<Filter>C213B0E6-29B3-4B8D-A057-FAC4AABAB9AC<
<ItemName>ItemStatusCol</ItemName>
<Visible>true</Visible>
<Label>Status</Label>
</PartConfig>
<FileviewerConfig>
<FileType>gif</FileType>
<viahtml>The GIF image is displayed below&lt;br&
</FileviewerConfig>
<FileviewerConfig>
<FileType>jpg</FileType>
<viahtml>The JPG image is displayed below&lt;br&
</FileviewerConfig>

<FlexkeyItem>
<FlexKeyName>COID</FlexKeyName>
<MaxSegments>6</MaxSegments>
<MaxLength>16</MaxLength>
<AllowEdit>true</AllowEdit>
</FlexkeyItem>







</PageConfig>

```

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,

Details	Instructions	Address	Items	Incl/Excl	RFQs
↓	Item ▲	Cost Code	Description	Include	
☰	0329-001	16000- Electrical	Pursuant to Bid Package	<input checked="" type="checkbox"/>	
	COST CODE	16000-	ACCT CATEGORY	SUB	

SOV Workbook

The SOV Workbook includes an Account Category column.

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.

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

The Account Categories Part

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

Click  to refresh data from Microsoft Dynamics SL.

Integrated site:

ACCOUNT CATEGORIES


NAME: TYPE: (any)
 CLAS:

Name	Long Name	Seq	Type	Class	Note	GL	Budget	Changes	Active
_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			Material-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:

ACCOUNT CATEGORIES									
NAME LIKE	<input type="text"/>	TYPE	<input checked="" type="checkbox"/>	(any)					
CLASS	<input checked="" type="checkbox"/>	(any)							
	Name	Long Name	Seq	Type	Class	Note	Budget	Changes	Active

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 <input type="text"/>		TYPE <input checked="" type="checkbox"/> (any)							
CLASS <input checked="" type="checkbox"/> (any)									
	Name	Long Name	Seq	Type	Class	Note	Budget	Changes	Active
	BURDEN	Burden	25	Expense	Labor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	CONTRACT VALUE	Contract Value	0	Non Accounting	Other		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	EQUIPMENT	Equipment	30	Expense	Other		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	LABOR	Labor	20	Expense	Labor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	MATERIALS	Materials	50	Expense	Other		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	REVENUE	Revenue	10	Revenue			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	SUBCONTRACT	Subcontractor Expenses	40	Expense	Labor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

Home Catalog Contacts Plan Room Executive Manage System			
INBOX			
Description	DocNo	Type	Project
16000 Electrical Bids	0001	Bid Package	GC-500
Submittal 0001	0001	Submittal	GC-202
Electrical Work	0001	Commitment	GC-005
Paving and Asphalt	0002	Commitment	GC-005
32 Ton Chiller/Evaporator	0003	Commitment	GC-005
AP Voucher: Able Electric	000964	Vouchers	GC-005

Project Documents Menu

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

GC-003 - Northern Light		
DOCUMENTS 		
Type	O	C
Bid	1	0
Bid Package	3	0
Bid Package Addendum	0	0
Budget	1	1
CCO	1	1
Cert & Appr	4	0

Catalog

Doc type is a filter in the Catalog.

Home <u>Catalog</u> Contacts Plan Room Executive Manage System Admin		
SEARCH		
<input checked="" type="checkbox"/> INCLUDE DOCUMENTS		
TYPE	Bid Package	SUBTYPE
REFERENCE	Bid Package	RESPONSIBLE
COMPANY	Bid Package Addendum	CONTACT
DOC #	Budget	SOURCE #
	Catalog File Route	

Routes Tool

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

RULES FOR SELECTED ROUTE						
CONTACT	<input type="text"/>					
	<input type="checkbox"/>	SHOW DOC REFERENCE				
	<input type="checkbox"/>	SHOW DIVISION				
Doc Type	Source Contact	Project	Priority	Status	Sub	
Compliance Notification						

Alert Subscriptions Tool

Alert Subscriptions can be set up for specific Doc types.

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

Compliance Types Tool

Compliance types can be mapped to specific Doc types.

COMPLIANCE TYPES										
COMPLIANCE NAME	<input type="text"/>									
	<input type="checkbox"/> FOR COMMITMENTS									
Compliance Name	Recurs	Lead Days	% Paid	Auto	Pay Control	Notify	Allow Amount	Check Amount	Allow Desc	
Automobile Ins	NA	0		✓	✓	✓	✓	X	✓	
MAPPINGS FOR 'AUTOMOBILE INS' COM										
Doc Type										Sub Type
Commitment										
Vendor										

Date Types Tool

Date types can be set up for specific Doc types.

DATE TYPES				
DATE NAMES LIKE	<input type="text"/>			DOC TYPE
Doc Type	Doc Date Name	Sequence	Is	
Pay Application	Application	10	✓	
Project Setup	Original	10	X	
Commitment	Original	10	X	

Reference Tool

References can be set up for specific Doc types.

REFERENCE LIST		
REFERENCE LIKE	<input type="text"/>	DOC TYPE:
	Doc Type	Reference
	Bid	N/A
	Commitment	Commercial
	Commitment	Concrete/Masonry
	Commitment	Designer

Templates

Templates can be uploaded for a specific Doc type.

TEMPLATES				
NAMES LIKE:	<input type="text"/>	TYPE:	<input checked="" type="checkbox"/> Attachment (auto)	
DOC TYPE:	<input type="checkbox"/> Compliance Notification			
	Doc Type	Name	Type	Description
	Daily Field Report	Daily_Report_Form	Attachment (auto)	Daily Field Report form
	Submittal	Newer Submittal Template	Attachment (auto)	Newer Doc Template for Submittals
	Drawings	List of Drawings	Attachment (auto)	For Drawing Logs
	Bid	Bid	Attachment (auto)	Bid

Customization Tool

Documents are customized through Doc type.

CUSTOMIZATION TOOL					
PART:	<input type="checkbox"/> Doc Item Detail - Commitment Receipt	DOC TYPE:	<input checked="" type="checkbox"/> Field Directive		
ITEM:	<input type="checkbox"/> Commitment - Inclusive		<input type="checkbox"/> SHOW LIVE CONFIGURATIONS		<input type="checkbox"/> SHOW ADVANCED
	<input checked="" type="checkbox"/> SHOW VISUAL				
	Part Name	Doc Type	Capability	Item	Label
	Doc Attributes	Field Directive		Amount Col	
	Doc Tabs	Field Directive		Instr/Attribute Tab	Follow-up
	Doc Attributes	Field Directive		Note Col	



















Rules Maintenance Tool

Many rules use Doc type as a filter.

RULE MAINTENANCE				
GROUP:	<input type="text"/>		<input type="checkbox"/> SHOW CODE SET	
	Rule Group	Filter Info	Type	Description
	DocApproved	DocTypeKey	Boolean	Lists the approving statuses for a document
RULE ENTRIES				
RULE NAME	<input type="text"/>	DOC TYPE	<input checked="" type="checkbox"/> CCO	
	<input type="checkbox"/> SITE ONLY			
	Rule	Filter Value		Result Value
	A	CCO		✓
	M	CCO		✓

The Doc Types Part

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

DOC TYPES 							
DOC TYPE LIKE: <input type="text"/>		<input type="checkbox"/> SHOW INACTIVE DOC TYPES					
	Doc Type	Site Name 	Project Dashboard	Create From Dashboard	Plan Room	Site Active	Custom
	AP Scans	AP Scans	X	X	X	✓	X
	Bid	Bid	✓	✓	X	✓	X
	Bid Package	Bid Package	✓	✓	✓	✓	X
	Bid Package Addendum	Bid Package Addendum	✓	✓	✓	✓	X
	Budget	Budget	✓	✓	X	✓	X
	Catalog File Router	Catalog File Route	X	X	X	✓	X
	CCO	CCO	✓	✓	X	✓	X
	Certificates and Approval	Cert & Appr	✓	✓	X	✓	X
	Change Item Register	Change Item Register	X	X	X	✓	X
	Change Order	Change Order	✓	✓	X	✓	X
	Commitment	Commitment	✓	✓	X	✓	X
	Compliance Notification	Compliance Notification	✓	X	X	✓	X
	Correspondence	Correspondence	✓	✓	X	✓	X
	Customer	Customer	X	X	X	✓	X
	Daily Field Report	Daily Field Report	✓	✓	X	✓	X

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 (X) 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 (X) users can create a document of this type from the Project Dashboard.
- **Plan Room:** whether (✓) or not (X) the Doc type can be included on the Plan Room Dashboard.
- **Site Active:** whether (✓) or not (X) the Doc type can be used and selected in sfPMS.
- **Custom:** whether the Doc type was created at the site (✓) or by Spitfire (X).

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: <input type="text"/>			<input checked="" type="checkbox"/> 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	✓	✓	✓	✓	✗	

Second Task

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

DOC TYPES							
DOC TYPE LIKE: <input type="text"/>			<input checked="" type="checkbox"/> 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: <input type="text" value="Sub"/>			<input checked="" type="checkbox"/> 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	✗	✗	✓	✓	✗	

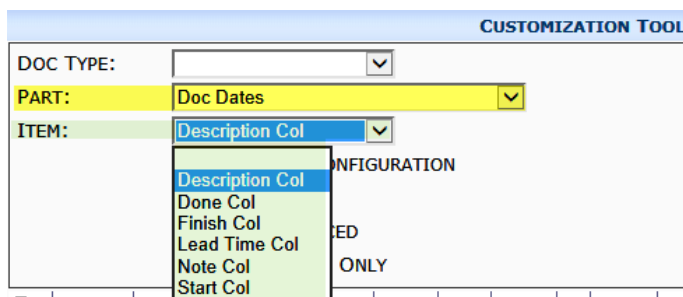
Customization

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.

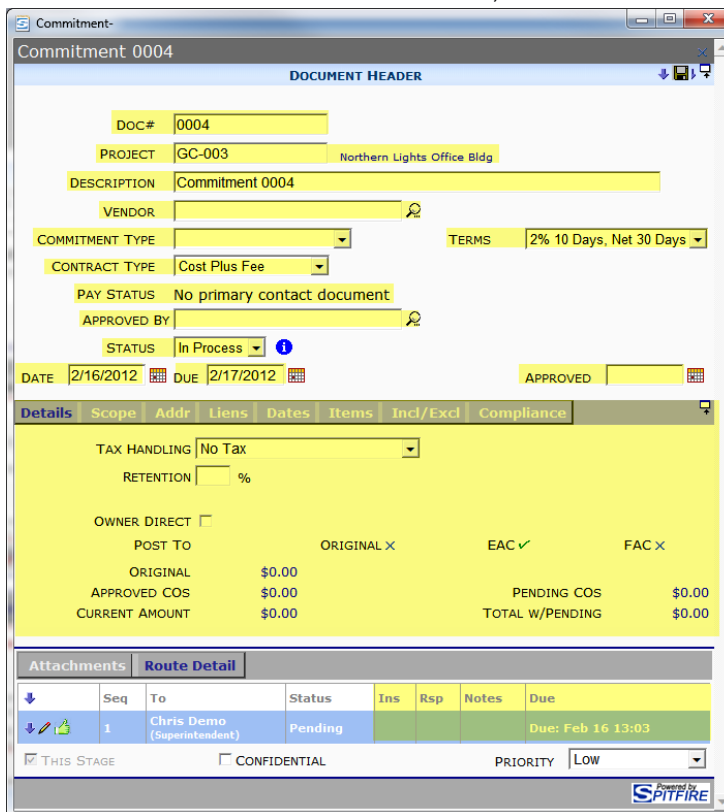


Where appropriate, customizations are made for specific Doc types.

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

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

RULES FOR SELECTED ROUTE

CONTACT: [Text Field]

SHOW RESPONSIBLE

SHOW DOC REFERENCE

SHOW DIVISION

SHOW GLOBAL REFERENCE

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	CCD	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.

MEETING MINUTES - 1 OPEN DOCUMENTS; ALL DUE THIS WEEK

TYPE: Meeting Minutes

STATUS: [Dropdown]

CONTACT: [Text Field]

COMMITMENT: [Text Field]

DESCR: [Text Field]

SUBTYPE: [Text Field]

SOURCE #: [Text Field]

DUE: 4/10/2014 4/10/2014

SHOW CLOSED:

DOC #: [Text Field]

COMPANY: [Text Field]

REFERENCE: [Text Field]

DATE: 4/10/2014 4/10/2014

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

The Customization Tool Part

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

SHOW LIVE CONFIGURATION lets you see what Items have been changed from the internal defaults (Spitfire Configurations) as well as your customizations.

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

Only visible items are listed if you **Show Visible Only**.

More columns appear if you **Show Advanced**.

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:**

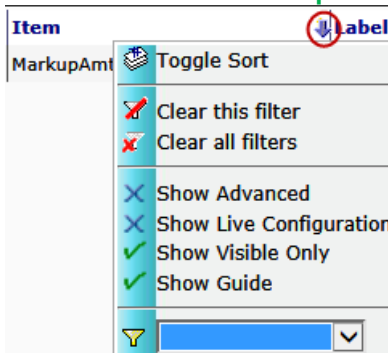
Doc Type Context

Change Order: [icon] Sort by this column

- ✗ Clear this filter
- ✗ Clear all filters
- ✗ Show Advanced
- ✗ Show Live Configuration
- ✓ Show Visible Only
- ✓ Show Guide

[icon] [dropdown]

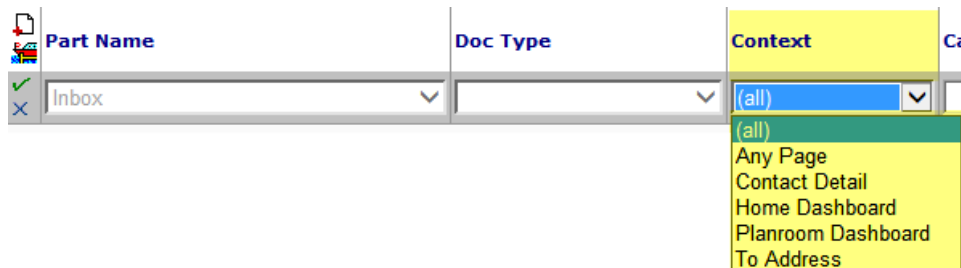
- Capability:** the role capability by which you want to limit access to the customized item. When specified, this field overrides visible and read-only settings for this customization and only users with this particular capability will be able to see and use the item (depending on the permissions given 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:



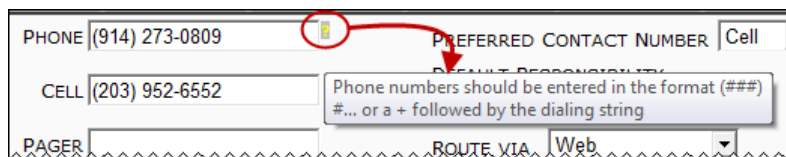
Additional columns also appear between the Visible and SF columns:

Visible	RO	Length	Seq	Lookup	Format	Help	Tip	Rq Flag	Extended	SF
✓	X							0		<input checked="" type="checkbox"/>
X	X							0		<input checked="" type="checkbox"/>

- **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
- **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:

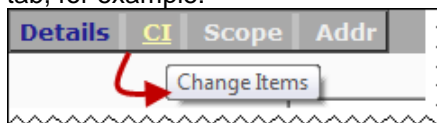
TIP

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



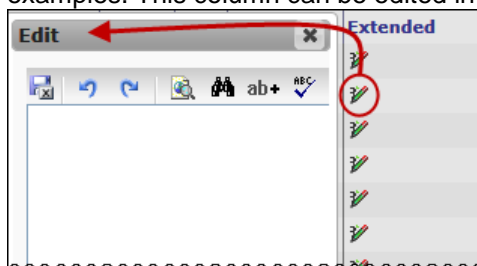
This column can be sorted by clicking on the header.

- **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.
 - **0** – no value is required in the field
 - **1** – a value is required in the field before the document can be saved, even on a brand new document
 - **2** – a value is required in the field before the document can be saved, after the initial save (and creation) of the document
 - **4** – a value is required in the field before the document can be saved into a pending state (e.g., status = Pending or Committed)
 - **8** – a value is required in the field before expenses can be posted
 - **16** – a value is required in the field before revenue can be posted
 - **32** – a value is required in the field before the document can be set to any closed status
 - **64** – a value is required in the field before the document can be saved into an approved state (e.g., status = Approved)
- **Extended:** one or more of the advanced options available for 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:

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

Filters

The filters in the 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**.

CUSTOMIZATION TOOL

DOC TYPE: Bid Package PART: []

ITEM: []

SHOW LIVE CONFIGURATION
 SHOW GUIDE
 SHOW VISIBLE ONLY
 SHOW ADVANCED

Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active
Doc Items	Bid Package		Billable Col	Include	✓	✓	✓
Doc Header - Standard	Bid Package	CSTM:Internal Staff	Contract Type		✓	✓	✓
Doc Items	Bid Package		Cost Code Col		✓	✓	✓
Doc Tabs	Bid Package		Dates Tab		✓	✓	✓
Doc Tabs	Bid Package		Incl/Excl Tab		✓	✓	✓
Doc Items	Bid Package		Item Number Col		✓	✓	✓
Doc Tabs	Bid Package		Items Tab		✓	✓	✓
Doc Notes	Bid Package		Note (Top)	Instructions/Scope	✓	✓	✓
Doc Notes	Bid Package		NoteA (Middle)	Submit To	✓	✓	✓
Doc Notes	Bid Package		NoteB (Bottom)	Changes	✓	✓	✓
Doc Tabs	Bid Package		Notes Tab	Instructions	✓	✓	✓
Doc Header - Standard	Bid Package		Adv Project RO	0	✓	✓	✓
Doc Item Detail - Commitment, RFQ	Bid Package		Account Category		✓	✓	✓
Doc Item Detail - Commitment, RFQ	Bid Package		Percent		✓	✓	✓
Doc Item Detail - Commitment, RFQ	Bid Package		Original Units	Units	✓	✓	✓

1 2

Last loaded customizations at 08:50:49.11

(No Image Available)

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:

CUSTOMIZATION TOOL

DOC TYPE: [] PART: Doc Header - Standard

ITEM: []

SHOW LIVE CONFIGURATION
 SHOW GUIDE
 SHOW VISIBLE ONLY
 SHOW ADVANCED

Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
DOCUMENT HEADER								
DOC#	0005	SOURCE#	[]					
PROJECT	GC-003	Northern Lights Office Bldg						
DESCRIPTION	Project Drawings							
SOURCE	[]							
CUSTOMER APPR	[]							
RESPONSIBLE	[]							
TYPE	[]	SOURCE	[]					
STATUS	Open							
APPROVED	[]							
DATE	[]	DUE	[]	SOURCE	[]	% PROB	[]	

- 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:

CUSTOMIZATION TOOL

DOC TYPE: Bid Package PART: Doc Header - Standard

ITEM:
 SHOW GUIDE SHOW LIVE CONFIGURATION
 SHOW VISIBLE ONLY SHOW ADVANCED

Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
Doc Header - Standard	Bid Package		CSTM:Internal Staff	Contract Type		✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package	(all)		Date	Date	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package	(all)		Due Date	Due	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package	(all)		Doc Num	Doc #	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package	(all)		Project	Project	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package			Adv Project RO	0	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package	(all)		Show Expanded	ShowExpanded	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package		CSTM:Internal Staff	Type		✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Bid Package	(all)		Description	Description	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

This element is stored in DocHeader.Signoff; data type DateTime; SQL table xsfdoheader; size (n/a)

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.

CUSTOMIZATION TOOL

DOC TYPE:
ITEM: Source Num PART: Doc Header - Standard

SHOW GUIDE SHOW LIVE CONFIGURATION
 SHOW VISIBLE ONLY SHOW ADVANCED

Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
<small>This element is stored in DocHeader.SourceDocNo; data type String; SQL table xsfdoheader; size 30</small>								

DOCUMENT HEADER

Doc# 0010 SOURCE# **Source Num**

PROJECT GC-003 Northern Lights Office Bldg

DESCRIPTION RFQ 0010

VENDOR

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

If **Show Guide** is checked, the item is highlighted in the image.

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

CUSTOMIZATION TOOL

DOC TYPE: CCO PART: Doc Header - Standard

ITEM: Source Num SHOW LIVE CONFIGURATION
 SHOW GUIDE SHOW ADVANCED
 SHOW VISIBLE ONLY

Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
Doc Header - Standard	CCO	(all)		Source Num	Source#	✓	<input checked="" type="checkbox"/>	<input checked="" type="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.

Tip

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

The screenshot shows the 'CUSTOMIZATION TOOL' window. At the top, 'DOC TYPE:' is set to 'Bid' and 'PART:' is empty. Below these, 'ITEM:' is also empty. There are three checkboxes: 'SHOW LIVE CONFIGURATION' (unchecked and circled in red), 'SHOW GUIDE' (checked), and 'SHOW ADVANCED' (unchecked). Below the checkboxes is a table with columns: Part Name, Doc Type, Capability, Item, Label, Visible, SF, and Active. The first row shows 'Doc Detail - Standard' with 'Bid' as the Doc Type and 'Reason' as the Item. Below the table, there is a note: 'This SFDBX column is stored in DocAlert.AlertDate; data type DateTime; SQL table xsfdocalert; size (n/a)'. At the bottom, there is a placeholder '(No Image Available)'.

The screenshot shows the 'CUSTOMIZATION TOOL' window with 'SHOW LIVE CONFIGURATION' checked (circled in red). The table below now contains 15 rows of configurations. The columns are: Part Name, Doc Type, Capability, Item, Label, Visible, SF, and Active. The rows include configurations for 'Doc Detail - Standard', 'Doc Items', 'Project Doc List', 'Doc Tabs', 'Doc Item Detail - Project, Bid', and 'Doc Item Detail - Standard'. Each row has a 'Visible' checkbox checked, an 'SF' checkbox checked, and an 'Active' checkbox checked. Below the table, there is a note: 'This SFDBX column is stored in DocAlert.AlertDate; data type DateTime; SQL table xsfdocalert; size (n/a)'. At the bottom, there is a placeholder '(No Image Available)'.

Show Guide*

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

The screenshot shows the 'CUSTOMIZATION TOOL' window with 'SHOW GUIDE' checked (circled in red). The table below contains 5 rows of configurations for 'Inbox Filters'. The columns are: Part Name, Doc Type, Context, Capability, Item, Label, Visible, SF, and Active. The rows include configurations for 'Descr Like', 'Doc Type', 'Due', 'Unviewed Only', and 'Project Like'. Below the table, there is a note: 'This SFDBX column is stored in DocAlert.AlertDate; data type DateTime; SQL table xsfdocalert; size (n/a)'. At the bottom, there is a detailed view of an 'INBOX' configuration with fields for 'DESCR', 'DOC TYPE', 'PROJECT', and 'DUE' (with a date range from 4/7/2014 to 4/7/2014). There is also an 'UNVIEWED ONLY' checkbox.

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).

CUSTOMIZATION TOOL									
PART: <input type="text" value="Inbox Filters"/>		ITEM: <input type="text"/>							
<input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION		<input checked="" type="checkbox"/> SHOW GUIDE							
<input type="checkbox"/> SHOW ADVANCED		<input checked="" type="checkbox"/> SHOW VISIBLE ONLY							
Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active		
Inbox Filters			Descr Like	Descr	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Inbox Filters			Doc Type	Doc Type	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Inbox Filters			Due	Due	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Inbox Filters			Unviewed Only	Unviewed Only	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Inbox Filters			Project Like	Project Like	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		


Customizing Doc Types

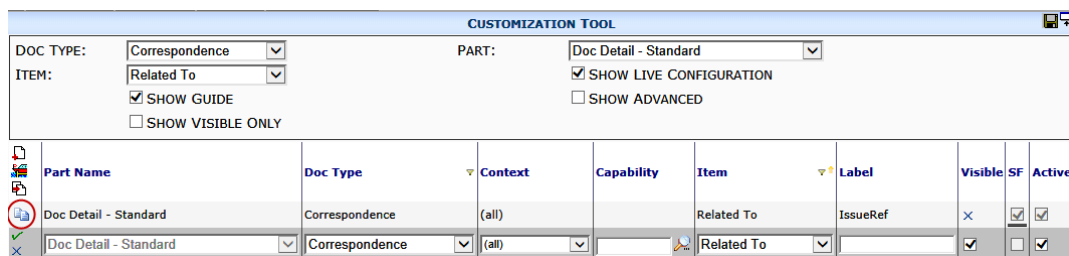
Adding Items

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:

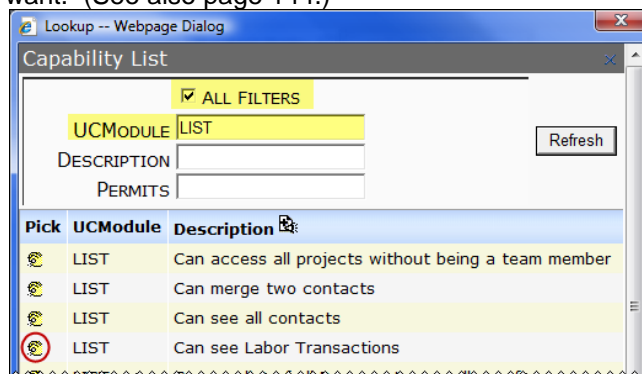
- (if applicable)* Select a **Doc Type** from the drop-down menu.
Note: some parts refer to areas in Spitfire, such as the Executive Summary, and not to Doc types.
- Determine what part holds the item you want to add. Use [Appendix C](#) on page 143 for help.
- (optional)* Click **Show Guide** if it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






Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
Doc Detail - Standard	Correspondence	(all)		Related To	IssueRef	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Detail - Standard	Correspondence	(all)		Related To		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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.)






Pick	UCModule	Description
<input checked="" type="checkbox"/>	LIST	Can access all projects without being a team member
<input type="checkbox"/>	LIST	Can merge two contacts
<input type="checkbox"/>	LIST	Can see all contacts
<input type="checkbox"/>	LIST	Can see Labor Transactions

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.

CUSTOMIZATION TOOL								
DOC TYPE:	Drawings	PART:	Doc Header - Standard					
ITEM:	Due Date			<input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION <input type="checkbox"/> SHOW ADVANCED <input checked="" type="checkbox"/> SHOW GUIDE <input type="checkbox"/> SHOW VISIBLE ONLY				
	Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active
	Doc Header - Standard	Drawings		Due Date		×	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

CUSTOMIZATION TOOL									
DOC TYPE:	Drawings	PART:	Doc Detail - Standard						
ITEM:	Commitment			<input checked="" type="checkbox"/> SHOW LIVE CONFIGURATION <input type="checkbox"/> SHOW ADVANCED <input checked="" type="checkbox"/> SHOW GUIDE <input type="checkbox"/> SHOW VISIBLE ONLY					
	Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
	Doc Detail - Standard	Drawings			Commitment		×	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

CUSTOMIZATION TOOL

DOC TYPE: Drawings PART: Doc Header - Standard

ITEM: Due Date

SHOW LIVE CONFIGURATION
 SHOW GUIDE SHOW ADVANCED
 SHOW VISIBLE ONLY

Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active
Doc Header - Standard	Drawings		Due Date		X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Header - Standard	Drawings		Due Date		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

This element is stored in DocHeader.Due; data type DateTime; SQL table xsfdocheader; size (n/a)

CUSTOMIZATION TOOL

DOC TYPE: Drawings PART: Doc Detail - Standard

ITEM: Commitment

SHOW LIVE CONFIGURATION
 SHOW GUIDE SHOW ADVANCED
 SHOW VISIBLE ONLY

Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active
Doc Detail - Standard	Drawings		Commitment		X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Detail - Standard	Drawings		Commitment		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Third Task

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

CUSTOMIZATION TOOL

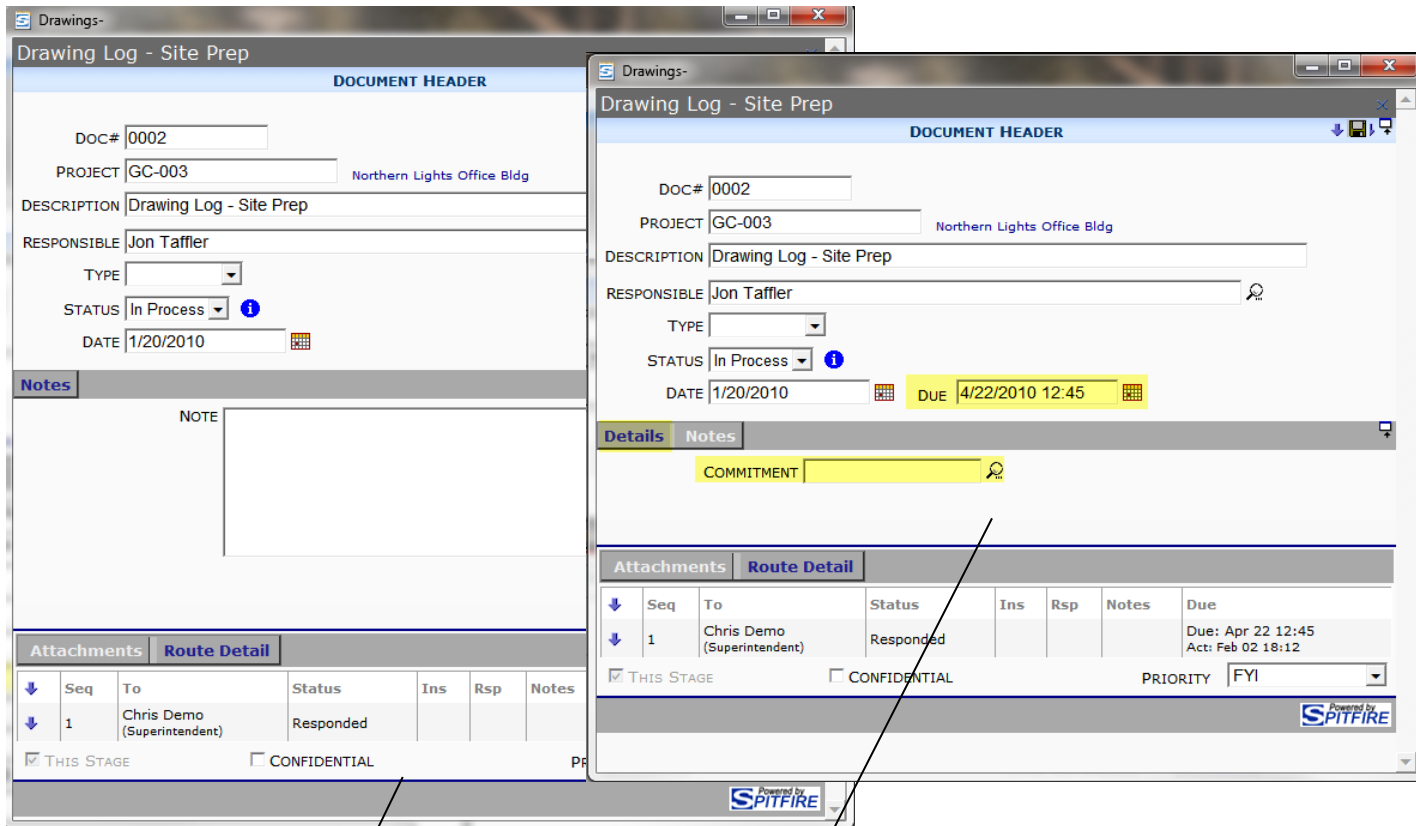
DOC TYPE: Drawings PART: Doc Tabs

ITEM: Details Tab

SHOW LIVE CONFIGURATION
 SHOW GUIDE SHOW ADVANCED
 SHOW VISIBLE ONLY

Part Name	Doc Type	Context	Capability	Item	Label	Visible	SF	Active
Doc Tabs	Drawings			Details Tab		X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Doc Tabs	Drawings	(all)		Details Tab		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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



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 Easements

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.

RULE MAINTENANCE

GROUP: SHOW CODE SET

Rule Group	Filter Info	Type	Description
CodeSetRedirect	DocTypeKey	DocTypeKey	Lists the code sets + document type combination to another document type. This rules is applied creation and effects the value substituted for th

RULE ENTRIES

RULE NAME: SITE ONLY

DOC TYPE:

Rule	Filter Value	Result Value
Subtype	Bid	Project Setup
ContractType	Bid	Project Setup
DocReference	Vendor	Commitment
SubType	Project Setup	Project Setup
ContractType	Project Setup	Project Setup

CODE SET

SET NAME LIKE: Su

Set Name	Set Type	Flag	Next Set
SubType	DocTypeSubcodes		X

SET NAME: SubType

DESCR LIKE:

CODE LIKE:

DOC TYPE:

Doc Type	Code	Description
	?	
Commitment	CS	Construction Subcontract
Commitment	DS	Design Subcontract

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

The Code Maintenance Part

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

CODE MAINTENANCE					
SET NAME LIKE: <input type="text"/>					
	Set Name	Set Type	Flag	Next Set	Size
		(none)		X	8
	AcctClass	CodeList		X	4
	AcctType	CodeList		X	8
	ActiveFlags	CodeList		X	1
	AddrType	DocTypeSubcodes		X	1
	AlertStatusList	CodeList		X	4
	AllocEntryType	CodeList		X	1
	AttrType	DocTypeSubcodes		✓	8
	AuditMode	CodeList		X	1
	BFAmode	CodeList		X	2
	Boolean	CodeList		X	4
	Certification	DocTypeSubcodes		X	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

Click  to return to Grid view.

CODE MAINTENANCE

SET NAME LIKE: %type

Set Name	Set Type	Flag	Next Set	Size
AcctType	CodeList		X	8

SET NAME: AcctType DESCR LIKE:

CODE LIKE:

Code	Description
	(any)
AS	Asset
EX	Expense

Columns

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

Filters

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

Editable Code Set Columns

CODE MAINTENANCE

SET NAME LIKE:

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

SET NAME: DocStatus DESCR LIKE:

CODE LIKE: DOC TYPE:

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

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:

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.

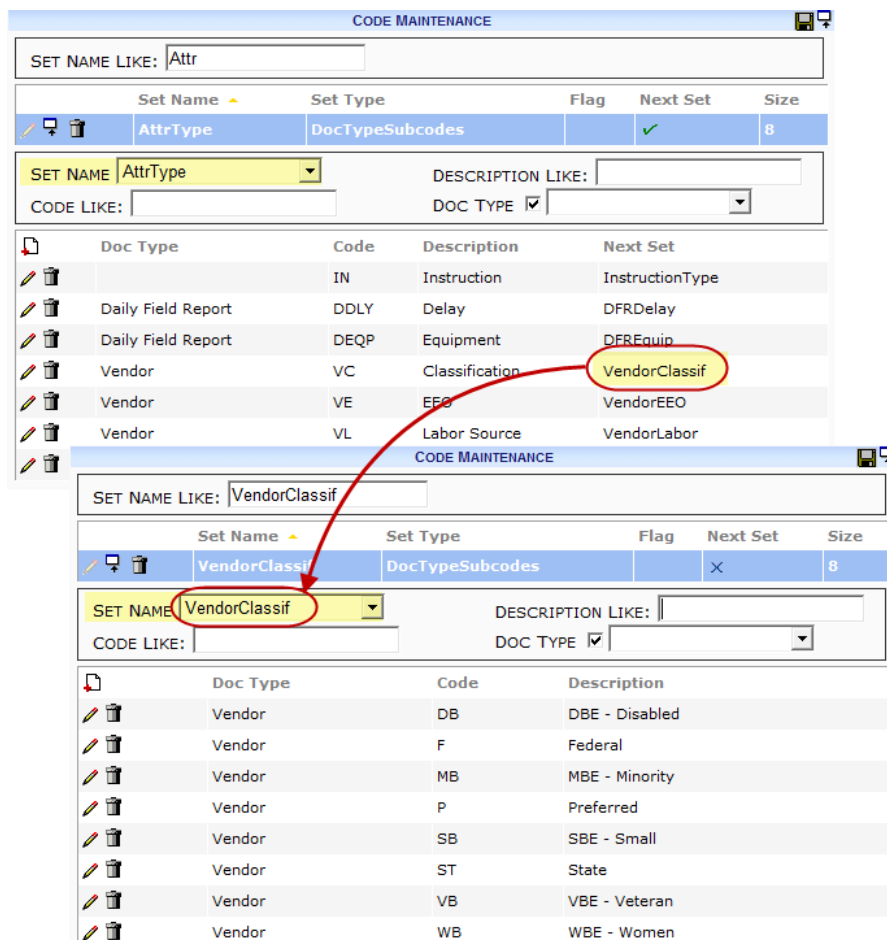
Set Name	Set Type	Flag	Next Set	Size
DocStatus	DocTypeSubcodes	Alert	X	2

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

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

Doc Type	Code	Description	Alert
	C	Closed	X
	O	Open	X
Change Order	A	Approved	✓
Change Order	C	Canceled	X
Change Order	I	In Process	X
Change Order	L	Potential	X
Change Order	M	Committed	X
Change Order	P	Pending	X
Change Order	R	Rejected	X

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

CODE MAINTENANCE		
SET NAME LIKE: c		
	Set Name	Set Type
 	Certification	DocTypeSubcodes
	CodeSetType	CodeList
	ContactScope	CodeList
 	ContractType	DocTypeSubcodes
	CostCodeStatus	CodeList
	CostingMethod	CodeList
 	Country	CodeList

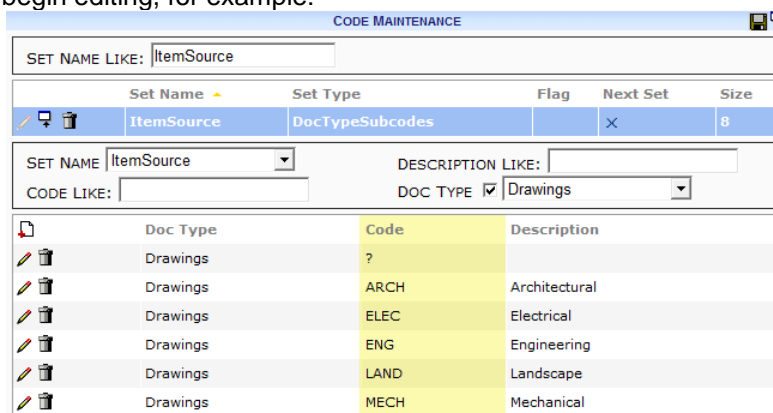
To edit a code set row:





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

To edit codes in a set:

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

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



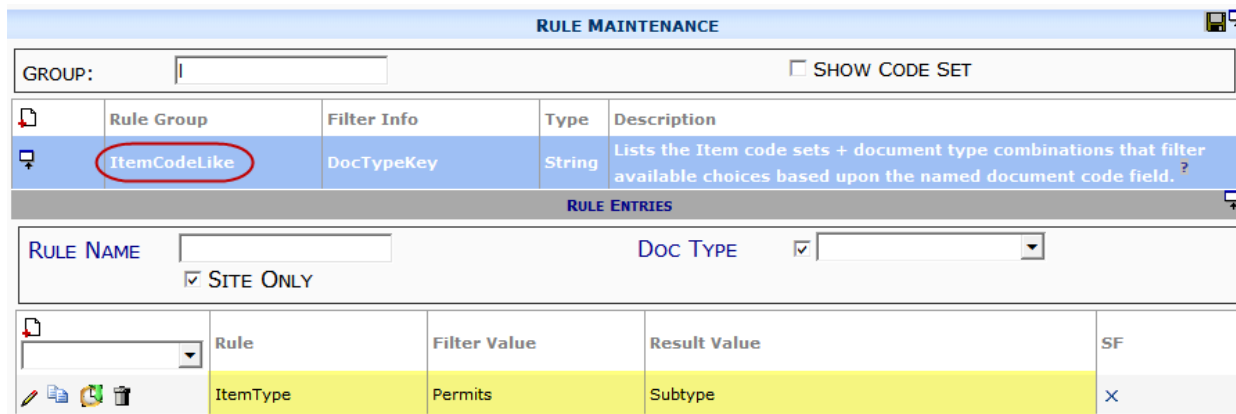
3. Click  to add a new code to the set or  to edit one of the existing codes.
4. Click  to save.
5. Click  to return to Grid view.

Example

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

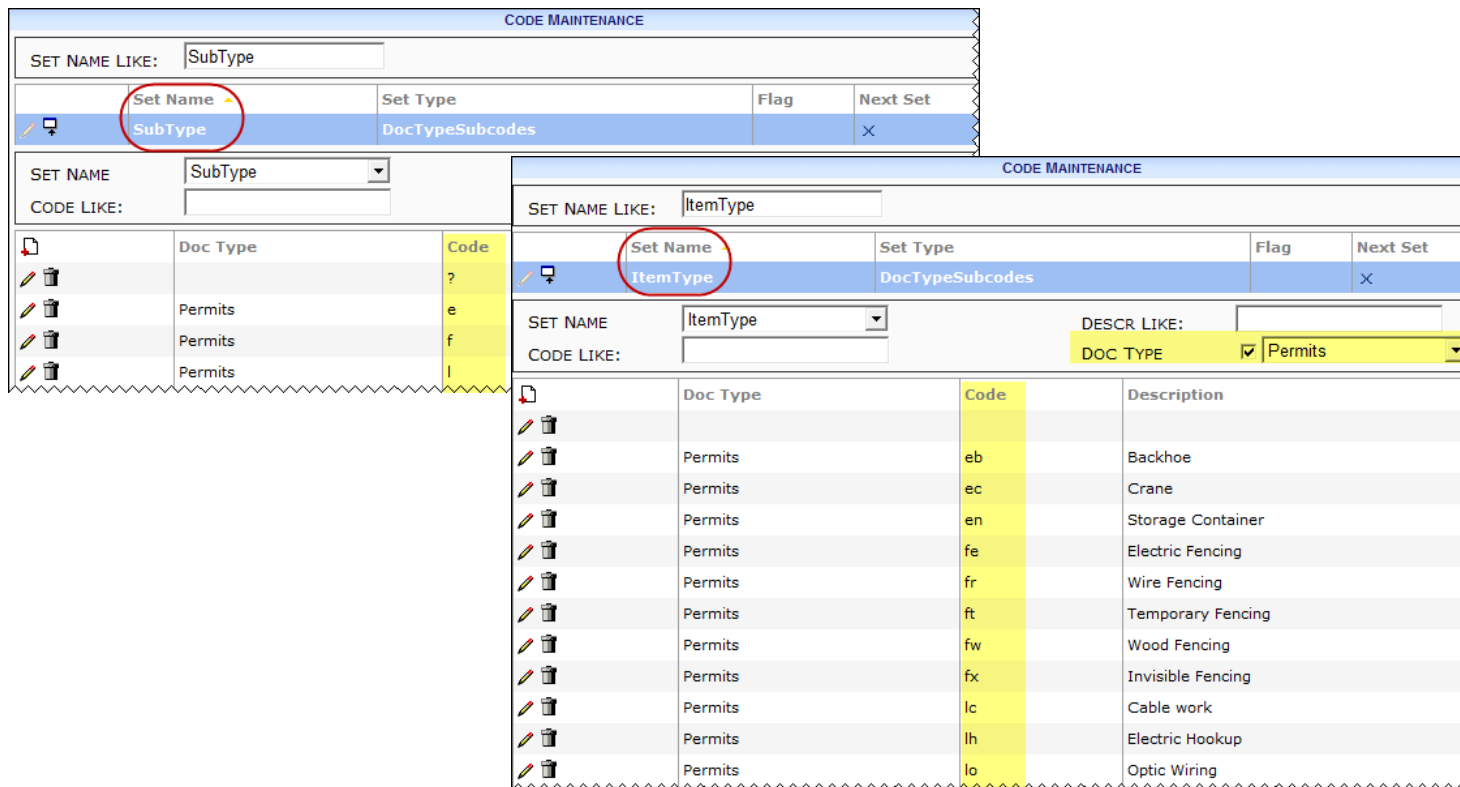
First Task

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

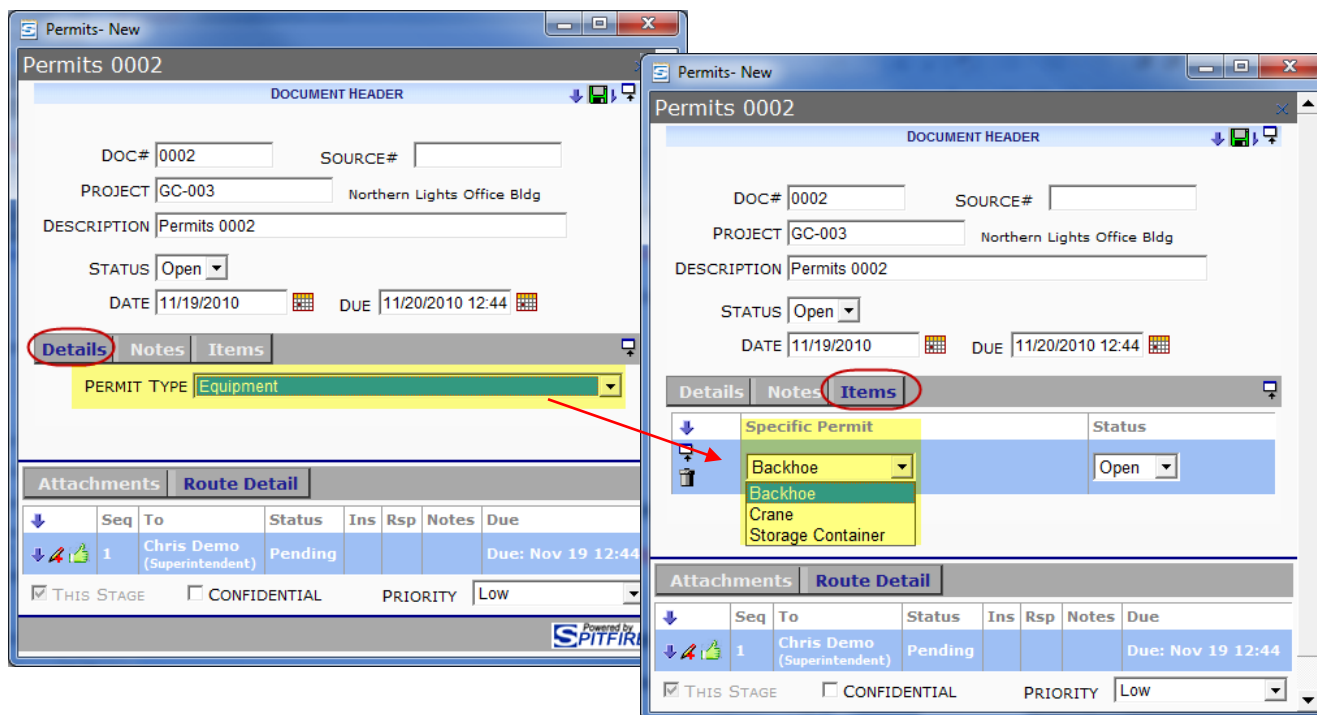


Second Task

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.

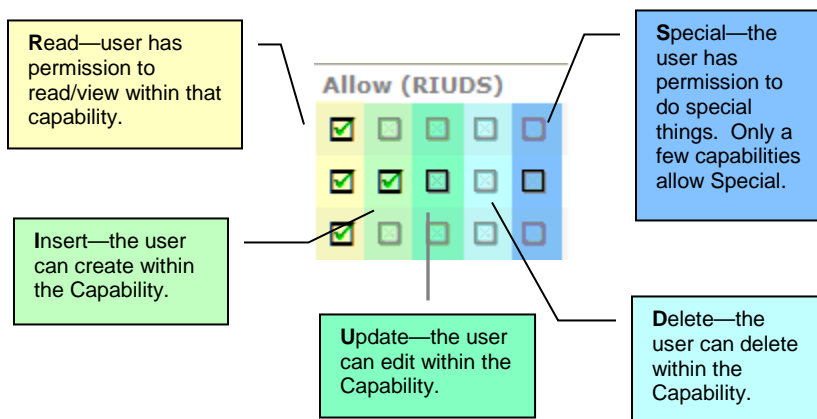
Module	Description	Examples
CSTM	Customization tool level	See pages 37 and 144
DOC	Spitfire document level	Submittal, Meeting Minutes, RFI, etc.
LIST	Spitfire list level	Accessing freeform mode (vs. Lookup list) to add members to the Meeting Attendees List
PAGE	Spitfire page level	Project Dashboard,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

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.

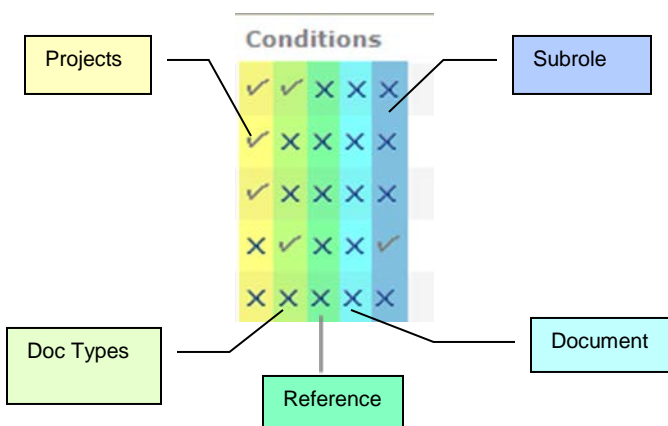
When the **R** checkbox is the only one that can be edited, the checkbox means **Allow**.

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.

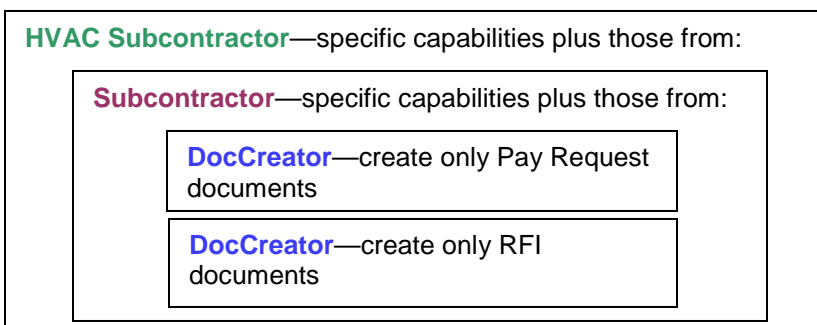
TIP

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).



Responsibilities

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

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

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

After Setup

Contact Member Of Tab

TIP

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

TIP

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

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

For more information, 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.

Name	Company	Email	Phone	Fax
Jack McSwag	Spitfire Construction	support@spitfireconstruction.com	(914) 273-0809	(503) 4

CONTACT DETAIL					
General	Address	Member Of	Connections	Notification	Comments
ROLES LIKE: <input type="text"/>		PROJECTS LIKE: <input type="text"/>			
User's Role(s)			Additional Roles		
	Everyone			Accounting	
	Project Manager GC001			Architect	
	Project Manager GC002			Cataloger	
	Project Manager GC003			Compliance Admin Internal	
	Project Manager GC004			Compliance Admin Vendor	

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

USER DETAIL					
General	Address	Member Of	Connections	Notification	Comments
ROLES LIKE: <input type="text"/>					
User's Role(s)			Additional Roles		
	Accounting VOUCHERS			Architect	
	Accounting INV & ADJ			Consultant	
	Accounting SCAN INV			GC	
	Accounting CONS BILLING			Owner	
	Everyone			Project Assistant	
				Project Manager	
1 2					
THE USER'S PARTICIPATION IN THIS ROLE IS LIMITED BY:					
PROJECT	<input type="text"/>				
DOCUMENT TYPE	Cons Billing				
REFERENCE	<input type="text"/>				

Project Team Contacts

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

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


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

TEAM CONTACTS				
	Name	Company	Phone	Role
	Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager
	Jason Sunderson	Able Electric Corp	(555) 555-1212	Subcontractor Base
		Construction	(203) 952-6552	Superintendent
			(203) 952-6552	Project Manager
		HVAC	(914) 273-7263	Subcontractor Base
		s	(555) 555-1212	Owner

The Role List Part

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

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

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

Columns


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

Click  to get back to Grid View.

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

ROLE DETAIL

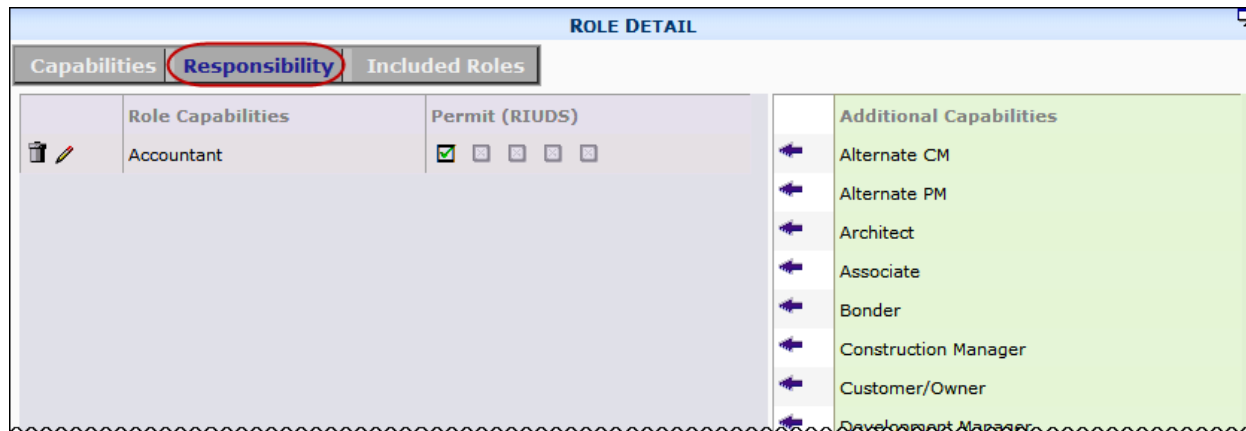
Capabilities | Responsibility | Included Roles

MODULE CSTM

AREA Doc Item Detail - Commitment, RFQ

CAPABILITIES

Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities
PAGE	Document Page	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1
			CSTM	Customizable 2
			CSTM	Customizable 3
			CSTM	Internal Staff
			DOC	Attach File From Template
			DOC	Can add attachments to a closed document
			DOC	Can be designated as another users proxy
			DOC	Can change document status (if collaborator)



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.

	Module	Role Capabilities	Permit (RIUDS)		Module	Additional Capabilities
	PART	Alert Type Maintenance	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		PAGE	System Admin Dashboard
					PART	Code Maintenance
					PART	Company Maintenance
					PART	Compliance Type Maintenance

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




	Module	Role Capabilities	Allow (RIUDS)
<input checked="" type="checkbox"/> 	DOC	Can edit workflow	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	PAGE	Document Page	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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

Responsibilities

To add a responsibility to a role:

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

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

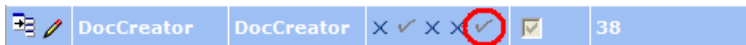
Included Roles




TIP

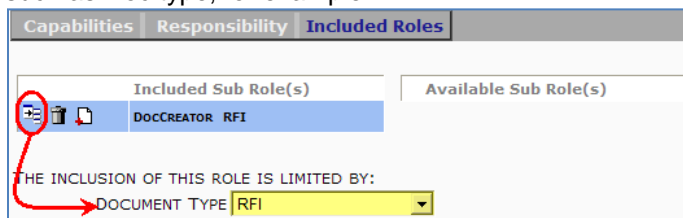
More information about the use of roles and SubRoles can be found in the technical white paper [Designing User Roles](#).

To include (nest) a SubRole in a Role:

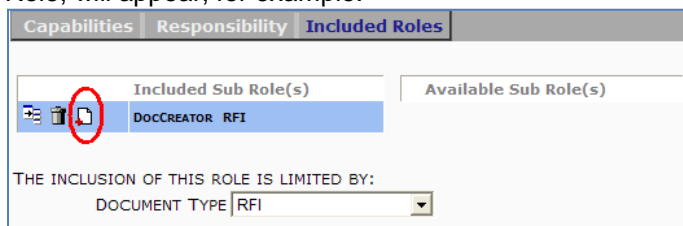
1. If necessary, first [create the role](#) that will become the SubRole (as described on page 65). Make sure to check the fifth Condition checkbox to designate it as a SubRole, for example:






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:




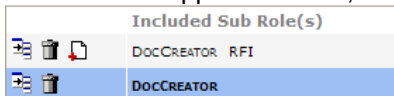
6. If the Sub Role can be copied, a new icon, used to copy the Sub Role, will appear, for example:




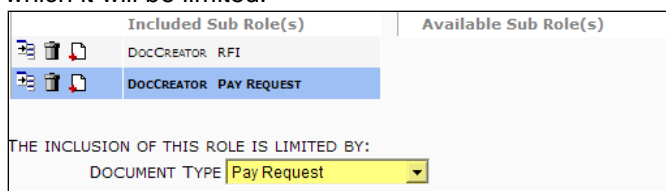
7. Click  to save your role information then  to get back to Item Grid view or  to copy the Sub Role (see below).


To copy a Sub Role:

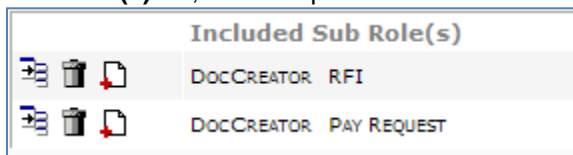
1. Click  next to the Sub Role you want to copy. A copy of the Sub Role will appear below it, for example:



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



- 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:

Allows a user with this role to change the document status if the user is also a collaborator.

Allows a user with this role to move items among folders.

Allows a user with this role to get the latest version of a file.

Allows a user with this role to view and use item folders.

Allows a user with this role to view files.

Allows a user with this role to view work with document attachments,

Allows a user with this role to append and reset automated routes.

Allows a user with this role to create new documents.

Allows a user with this role to view the Catalog and Report folders.

ROLE LIST

ROLE LIKE: TYPE Subordinate

Role Name	Description	Conditions	Conditions Optional	Active
Doc Creator	Doc Creator	X ✓ X ✓	✓	✓

ROLE DETAIL

Capabilities | Responsibility | Included Roles

MODULE CSTM CAPABILITIES LIKE:

AREA Doc Item Detail - Commitment, RFQ

Module	Role Capabilities	Permit (RIUDS)	Module	Additional Ca
DOC	Can change document status (if collaborator)	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1
DOC	Can move items among folders	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 2
DOC	Checkout files or see status	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 3
DOC	Manipulate the folders that contain items	✓ ✓ ✓ ✓ <input type="checkbox"/>	CSTM	Internal Staff
PAGE	Add Files	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Attach File From
PAGE	Attach existing Files and sfDocs to Documents	✓ ✓ ✓ ✓ <input type="checkbox"/>	DOC	Can add attach
PAGE	Can Load an alternate route	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can be designa
PAGE	Document Page	<input type="checkbox"/> ✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can control ex
PART	Maintain Catalog and Report folders	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can Delete an

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.

Role Name	Description	Conditions	Conditions Optional	Active
Subcontractor Base	Subcontractor Base role	X X X X	✓	✓

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.

Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities
DOC	Maintain Document Template output	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1
PAGE	Catalog Dashboard	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 2
PAGE	Project Dashboard	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 3
PART	Project Document Menu and List	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Internal Staff
PART	Project Photo	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Attach File From Tem
PART	Project Site Conditions	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can add attachments
PART	User Project List	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can be designated as
			DOC	Can change documen

Role Capabilities	Allow (RIUDS)	Additional Capabilities
Associate	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Accountant Architect

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.

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

Role Name	Description	Conditions	Active	Member Count
HVAC Subcontractor	HVAC Subcontractor	✓ X X X X	✓	0

Capabilities Responsibility **Included Roles**

Included Sub Role(s): SUBCONTRACTOR

Available Sub Role(s): DOCCREATOR

HVAC Subcontractor includes all the capabilities of Subcontractor.

Fourth Task

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

USER DETAIL

General Address **Member Of** Connections Notification Comments

ROLES LIKE: []

User's Role(s):

- Architect
- Everyone
- HVAC Subcontractor**
- Owner
- Project Manager
- Project Staff

1 2

CONTACT DETAIL

General Address **Member Of** Connections Notification Comments

ROLES LIKE: []

User's Role(s):

- Everyone
- HVAC Subcontractor (UNASSIGNED)**

Additional Roles:

- Accounting
- Architect
- Cataloger
- Consultant
- GC
- Owner

1 2 3

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

PROJECT GC-003 Northern Lights Office Bldg

Catalog Folders

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

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

Concepts

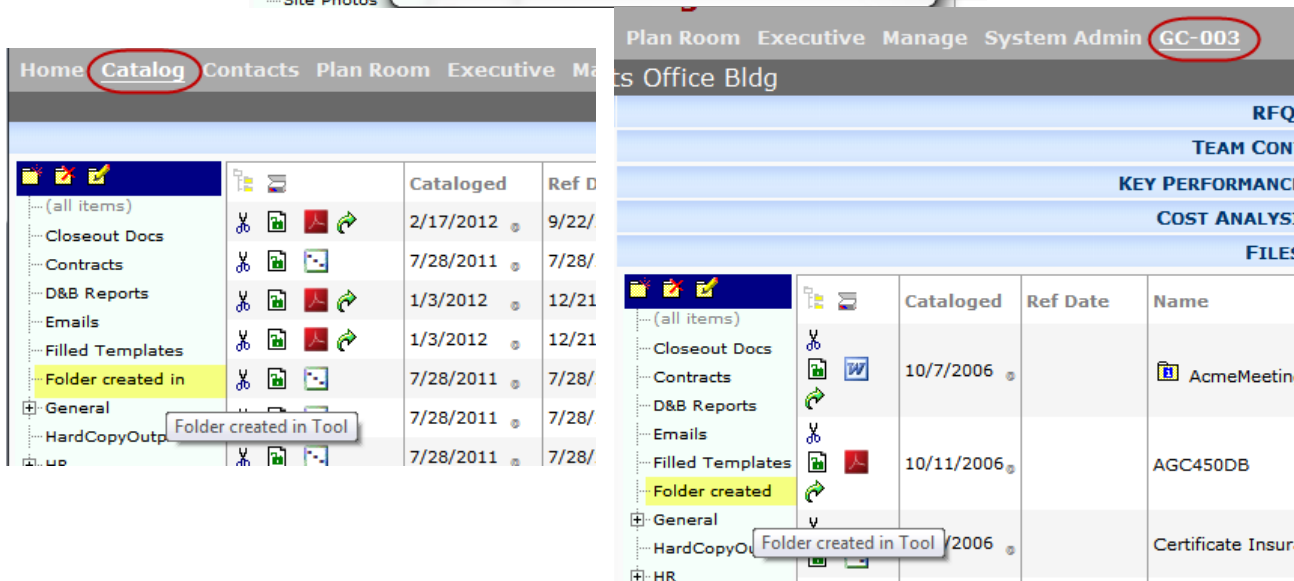
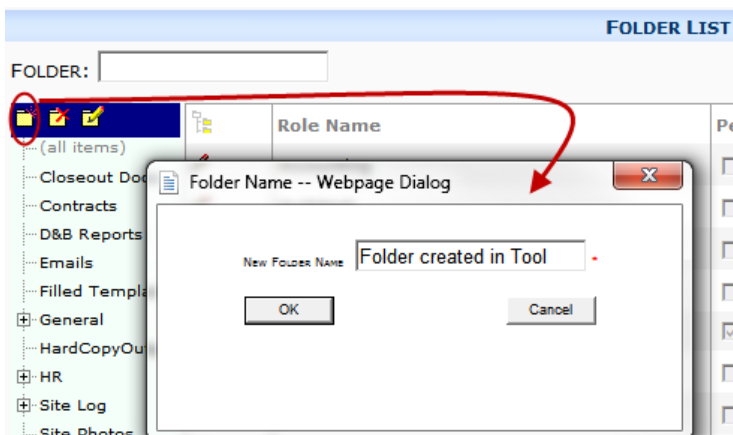
Folders

TIP

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

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

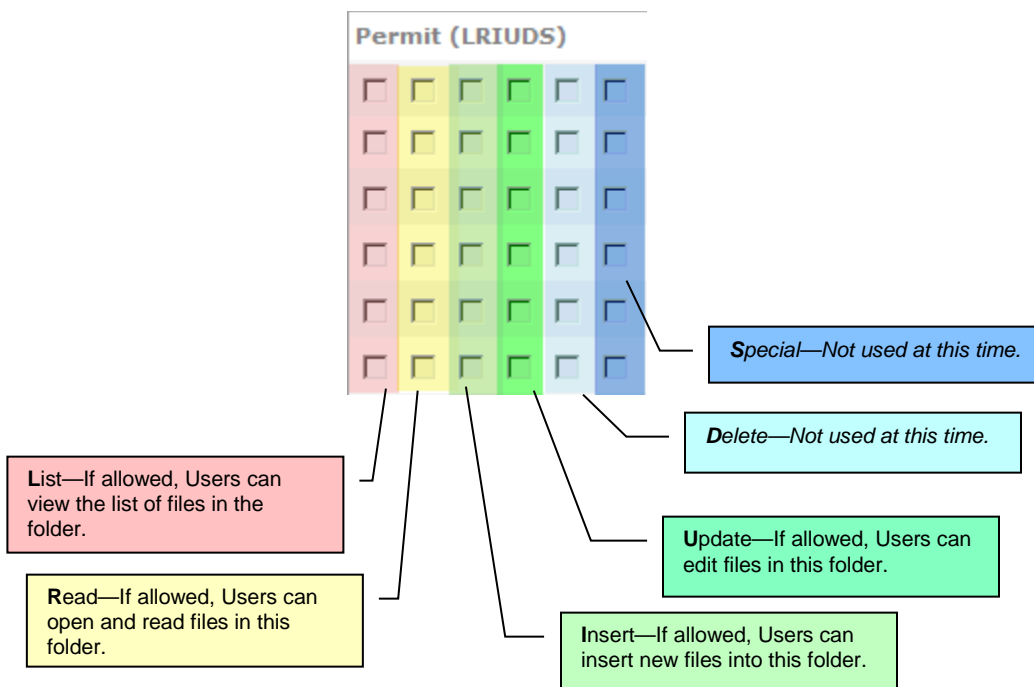
However, only users with permission to view or open folders can do so.



Access Levels by Roles

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

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



After Setup

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

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

The Folder List Part

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

FOLDER LIST

FOLDER:

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

	Role Name	Permit (LRIUDS)
	Architect	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Everyone	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	HVAC Subcontractor	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Owner	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Plan Room Visitor	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Project Manager	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Project Staff	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Senior Executive	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	System Admin	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Vendor RFQ Respondee	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Access Levels.
 Indicates an inherited access level from the parent folder or system defaults.

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

Create new folder

Delete folder

Rename folder

Adding and Editing Folders

TIP


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

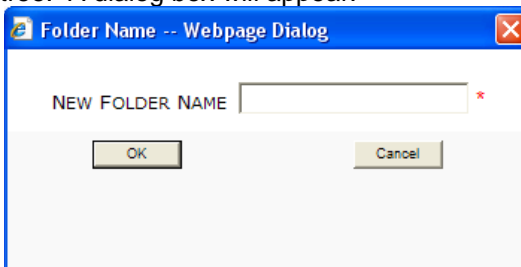
If users have read access to a folder, they can view all files in that folder – even if they don't have access to the project with which the file is associated...so it is beneficial to plan folder structures intelligently.


TIP

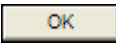
Remember that any folder created here appears in the Catalog Dashboard as well as all project dashboards. Any folder deleted here is deleted from the Catalog Dashboard and all project dashboards.

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:

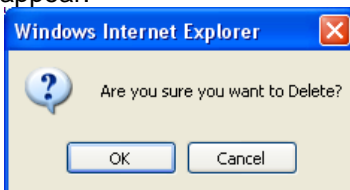


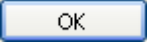
Note: you can nest a folder within an existing folder by selecting the folder and then clicking .

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:

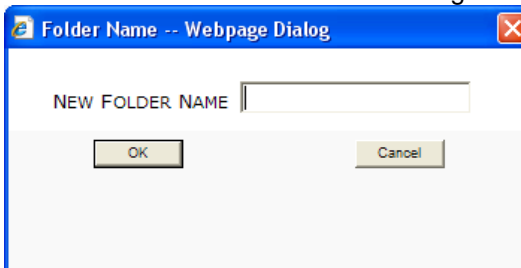


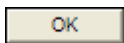
3. Click . The folder will be removed from the folder tree.

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:

FOLDER LIST		FOLDER: /Contracts							
	Role Name	Permit (LRIUDS)							
	Architect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Plan Room Visitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Project Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Project Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Senior Executive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	System Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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.

FOLDER LIST										
FOLDER: /HR										
<ul style="list-style-type: none"> -(all items) Contracts Hard Copy HR Site Photos 	Role Name	Permit (LRIUDS)								
	Architect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Plan Room Visitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Project Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Project Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Senior Executive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	System Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Second Task

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

FOLDER LIST										
FOLDER: /HR/Drug Testing										
<ul style="list-style-type: none"> -(all items) Contracts Hard Copy HR <ul style="list-style-type: none"> 401K Drug Testing Evaluations New Hires Prospects Terminations W2 Site Photos 	Role Name	Permit (LRIUDS)								
	Architect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Plan Room Visitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Project Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Project Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Senior Executive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	System Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permissions have been removed for this folder.

Report Folders

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

Concepts

Custom Report Folders

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

List/Read Access

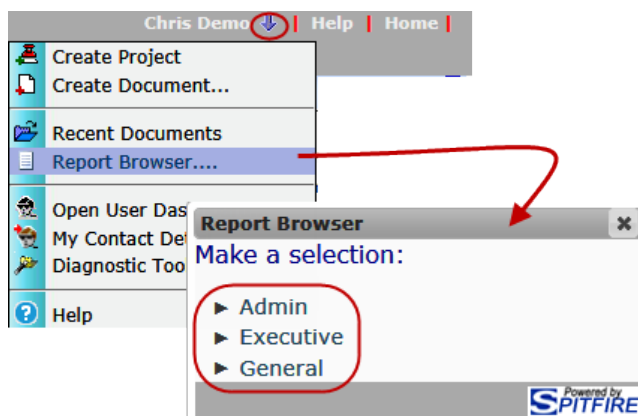
Only List and Read access is allowed for Report Folders.

The screenshot shows the 'REPORT FOLDERS' tool interface. On the left, there is a tree view with folders: (all items), Admin, Executive, and General. The main area is a table with columns: Role Name, and Permit (LRIUDS). The Permit column contains checkboxes for List (L) and Read (R) permissions, along with an information icon (i). A red callout box points to the 'List' checkbox for the 'Plan Room Visitor' role, stating: 'List—If allowed, Users can view the list of files in the folder.' A yellow callout box points to the 'Read' checkbox for the 'System Admin' role, stating: 'Read—If allowed, Users can open and read files in this folder.'

Role Name	Permit (LRIUDS)
Architect	[List] [Read] [Info]
Everyone	[List] [Read] [Info]
Owner	[List] [Read] [Info]
Plan Room Visitor	[List] [Read] [Info]
Project Manager	[List] [Read] [Info]
Project Staff	[List] [Read] [Info]
Senior Executive	[List] [Read] [Info]
System Admin	[List] [Read] [Info]

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:

REPORT FOLDERS

FOLDER:

- ... (all items)
- ... Admin
- ... Executive
- ... General

	Role Name			Permit (LRIUDS)
	Accounting	<input type="checkbox"/>	<input type="checkbox"/>	i
	Architect	<input type="checkbox"/>	<input type="checkbox"/>	i
	Cataloger	<input type="checkbox"/>	<input type="checkbox"/>	i
	Consultant	<input type="checkbox"/>	<input type="checkbox"/>	i
	Everyone	<input type="checkbox"/>	<input type="checkbox"/>	i
	GC	<input type="checkbox"/>	<input type="checkbox"/>	i
	Owner	<input type="checkbox"/>	<input type="checkbox"/>	i
	Plan Room Visitor	<input type="checkbox"/>	<input type="checkbox"/>	i
	Project Assistant	<input type="checkbox"/>	<input type="checkbox"/>	i
	Project Manager	<input type="checkbox"/>	<input type="checkbox"/>	i

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

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:

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

REPORT FOLDERS
FOLDER: /Spitfire-OOBox/Admin

Role Name	Permit (LRIUDS)
Architect	<input type="checkbox"/> <input type="checkbox"/>
Everyone	<input type="checkbox"/> <input type="checkbox"/>
Owner	<input type="checkbox"/> <input type="checkbox"/>
Plan Room Visitor	<input type="checkbox"/> <input type="checkbox"/>
Project Manager	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Project Staff	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Senior Executive	<input type="checkbox"/> <input type="checkbox"/>
System Admin	<input type="checkbox"/> <input type="checkbox"/>

REPORT FOLDERS
FOLDER: /Spitfire-OOBox/Executive

Role Name	Permit (LRIUDS)
Architect	<input type="checkbox"/> <input type="checkbox"/>
Everyone	<input type="checkbox"/> <input type="checkbox"/>
Owner	<input type="checkbox"/> <input type="checkbox"/>
Plan Room Visitor	<input type="checkbox"/> <input type="checkbox"/>
Project Manager	<input type="checkbox"/> <input type="checkbox"/>
Project Staff	<input type="checkbox"/> <input type="checkbox"/>
Senior Executive	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

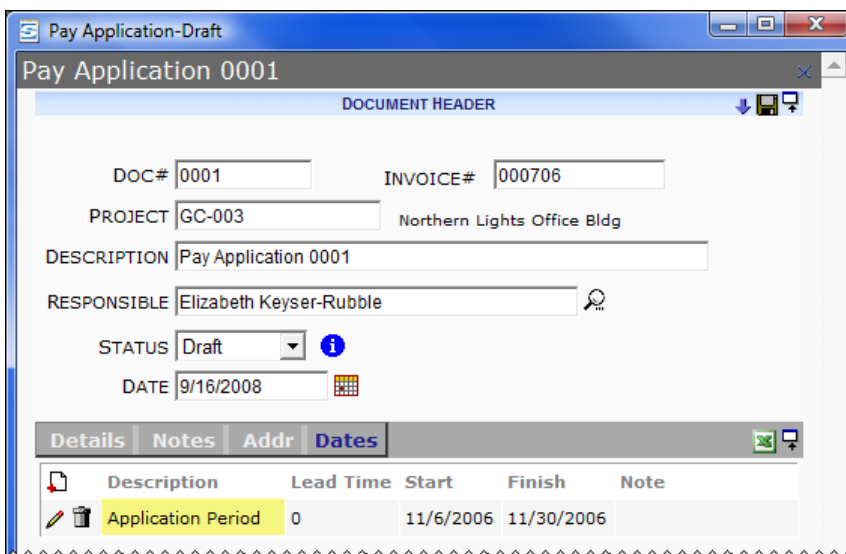
Date Types

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

After Setup

Dates Tab

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



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.

Details	Scope	Addr	Liens	Dates	It...
	Description	Lead Time	Sta		
✓ ✗	Original	0			
	Commitment Current	0	6/1		

- **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**.

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

Lookup Dialog

Alert List

ALL FILTERS Refresh

NAME

Pick	AlertName
	Cost Code End
	Cost Code End Change
	Cost Code Start
	Cost Code Start Change
	Doc Date: Project Setup Original
	Doc Date: Project Setup Substantial Completion

Alert Types

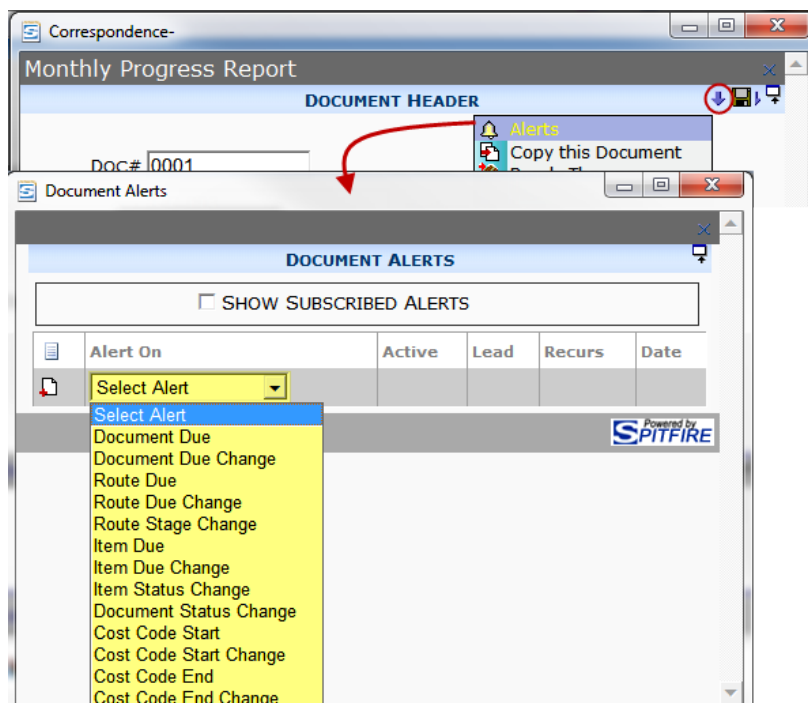
Using the Alert Type tool, you can control which Alert types are active (and available for selection) or inactive. You can also create a version of the "Other" Alert.

After Setup

Document's Alert Window

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

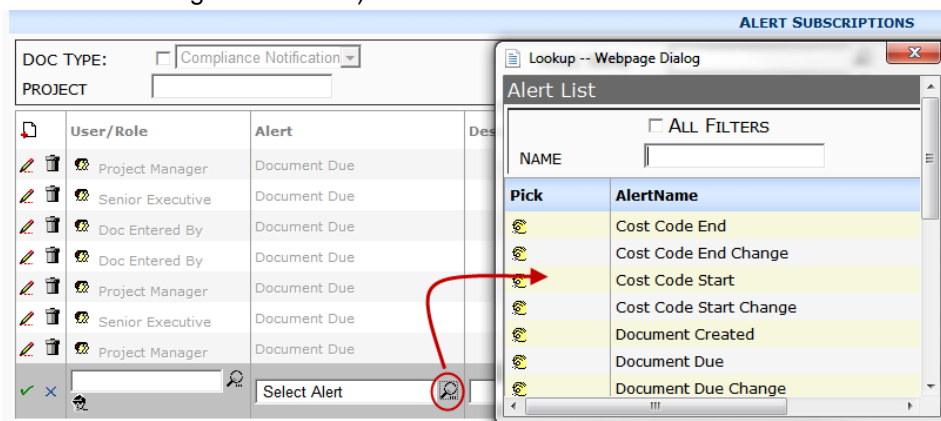
TIP
For more information about Alerts, see the [Focus on Alerts and Compliance](#) guide.



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

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	X	X	X
	Item Created	NA	0	-1	X	X	X
	Out-of-Compliance	NA	0	-1	X	X	X
	Document Status Change	NA	0	40	X	X	X
	Document Due	Daily	1	50	X	X	
	Document Due Change	NA	0	55	X	X	X
	Route Due	Daily	1	60	X	X	
	Route Due Change	NA	0	65	X	X	X
	Route Stage Change	NA	0	67	X	X	X
	Item Due	Daily	2	70	X	X	
	Item Due Change	NA	0	75	X	X	X
	Item Status Change	NA	0	80	X	X	X
	FYI	NA	0	100			

Compliance Types

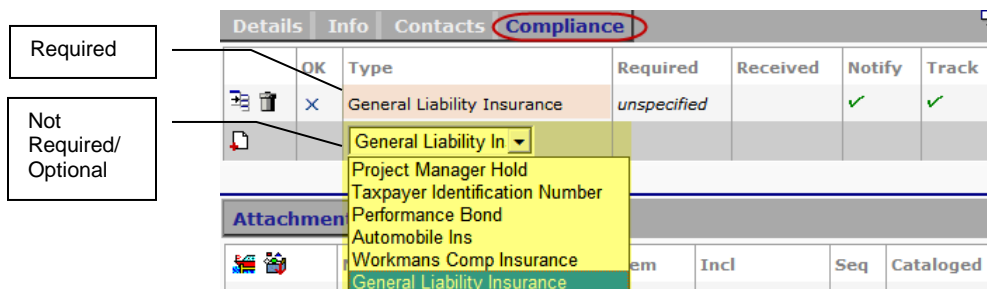
The Compliance Types tool allows you to set up the Compliance types for use in your system on the Commitment and Vendor levels.

Compliance types are mapped to specific Doc types either as required or optional compliance items. For more information about compliance, see the [Focus on Alerts and Compliance](#) guide.

After Setup

Document Compliance Tab

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



The Compliance Types Part

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

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

Column

TIP

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

TIP

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

TIP

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

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

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

Filters

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

Mappings

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

Click to return to grid view.

Compliance Name	Recurs	Lead Days	% Paid	Auto	Pay Control	Notify	Allow Amount	Check Amount	Allow Descr	Allow Carrier	Allow Proof	Allow Effective	Allow Expire	Allow Lead Days	Allows Recurs	Allow Multi	Active
Automobile Ins	NA	0		✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓

MAPPINGS FOR 'AUTOMOBILE INS ' COMPLIANCE TYPE



Doc Type	Sub Type	Reqd	Active
Vendor		✗	✓
<div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> ▼ </div>			

Columns

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

Adding Compliance Types



To add a Compliance type:


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

Mapping Compliance Types to Doc Types

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






To map a Compliance type to a Doc type:

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


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

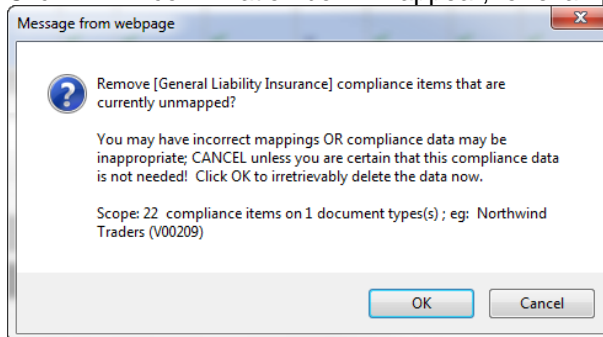
Warnings

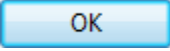
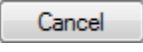
A warning icon appears on the Compliance type row if compliance items exist but are no longer mapped. When not mapped, they are ignored by the system.

	Compliance Name	Rekurs	Lead Days	% Paid	Auto	Pay Control	Notify	Allow Amount	Ch An
	General Liability Insurance	NA	0		✓	✓	✓	✓	✓
MAPPINGS FOR 'GENERAL LI...									
<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> 22 compliance items on 1 document types(s) are currently unmapped, including Northwind Traders (V00209) </div>									
	Commitment								
	Vendor								
									

To delete unmapped compliance items from documents:






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




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

Editing Compliance Types

To edit an existing Compliance type:

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

To delete a Compliance type:



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

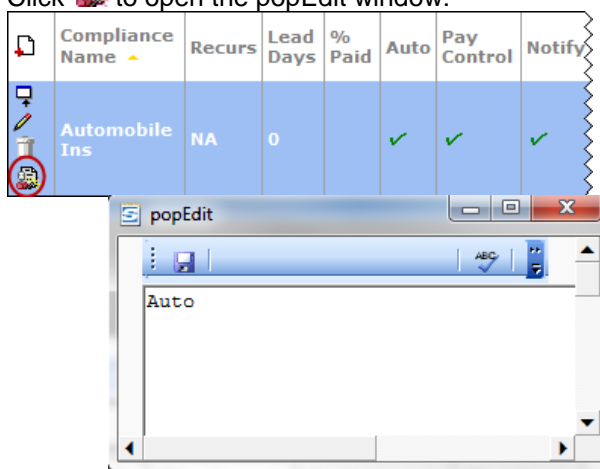
Automatic Workflow

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

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

To create your own automatic workflow for a Compliance type:

1. Click  to expand the Compliance type.
2. Click  to open the 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](#).

COMPLIANCE TYPES																	
COMPLIANCE NAME <input type="text"/>																	
<input type="checkbox"/> FOR VENDORS																	
<input type="checkbox"/> FOR COMMITMENTS																	
Compliance Name	Rekurs	Lead Days	% Paid	Auto	Pay Control	Notify	Allow Amount	Check Amount	Allow Descr	Allow Carrier	Allow Proof	Allow Effective	Allow Expire	Allow Lead Days	Allows Recurs	Allow Multi	Active
Lien Waiver	NA	0		✓	✓	✓	✓	×	✓	✓	✓	×	×	✓	✓	✓	×

MAPPINGS FOR 'LIEN WAIVER' COMPLIANCE TYPE			
Doc Type	Sub Type	Reqd	Active
Pay Request	Contract/Subcontract	✓	✓

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.

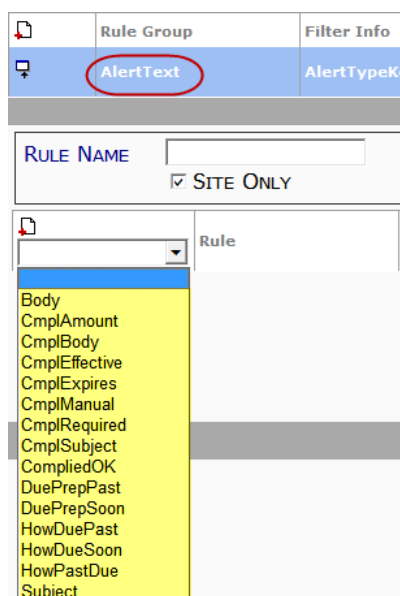
Concepts

Rule Groups and Values

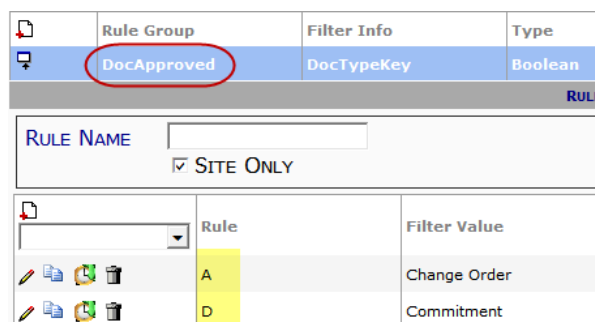
Rules are organized into rule groups. Each rule has a rule name and a result value. Many rules also take a filter value (such as Doc type). Some rule groups require specific rule names. For example, the AlertText rule group allows only the following rules:

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.

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

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

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

	Rule	Filter Value	Result Value
	BidTargets		5

Result value does not match list of allowed values

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

RULE ENTRIES			
RULE NAME <input type="text"/>		Doc Typ <input type="text"/>	
<input checked="" type="checkbox"/> WARNINGS ONLY			
	Rule	Filter Value	Result Value
	BidTargets		5

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:

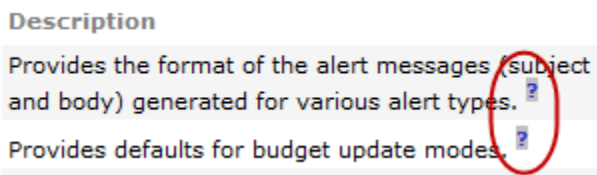
RULE MAINTENANCE				
GROUP: <input type="text"/>		<input type="checkbox"/> SHOW CODE SET		
	Rule Group	Filter Info	Type	Description
	AlertText	AlertTypeKey	String	Provides the format of the alert messages (subject and body) generated for various alert types.
	BudgetConfig	DocTypeKey	String	Provides defaults for budget update modes.
	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 MAINTENANCE

GROUP: SHOW CODE SET

Icon	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:

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

Rule Entries

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

RULE MAINTENANCE				
GROUP: <input type="text"/>		<input type="checkbox"/> SHOW CODE SET		
Rule Group	Filter Info	Type	Description	
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 ?	
RULE ENTRIES				
RULE NAME <input type="text"/>		DOC TYPE <input checked="" type="checkbox"/> <input type="text"/>		
<input checked="" type="checkbox"/> SITE ONLY				
Rule	Filter Value	Result Value	SF	
Subtype	Bid	Project Setup	X	
ContractType	Bid	Project Setup	X	
DocReference	Vendor	Commitment	X	
SubType	Project Setup	Project Setup	X	
ContractType	Project Setup	Project Setup	X	

Columns

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

Note: 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

TP

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

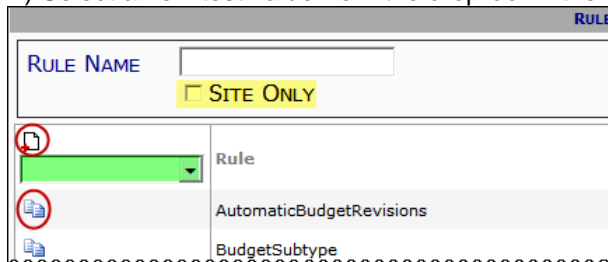
It is possible to add rule groups to the system. However, adding a rule group is an advanced topic, usually of interest to programmers and report designers only. Contact Spitfire Sales (sales@spitfiremanagement.com) to purchase a consulting session with one of our developers.




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.

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 .





RULE	
RULE NAME	<input type="text"/>
	<input type="checkbox"/> SITE ONLY
	Rule
	AutomaticBudgetRevisions
	BudgetSubtype

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

Editing Rules

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


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

TIP

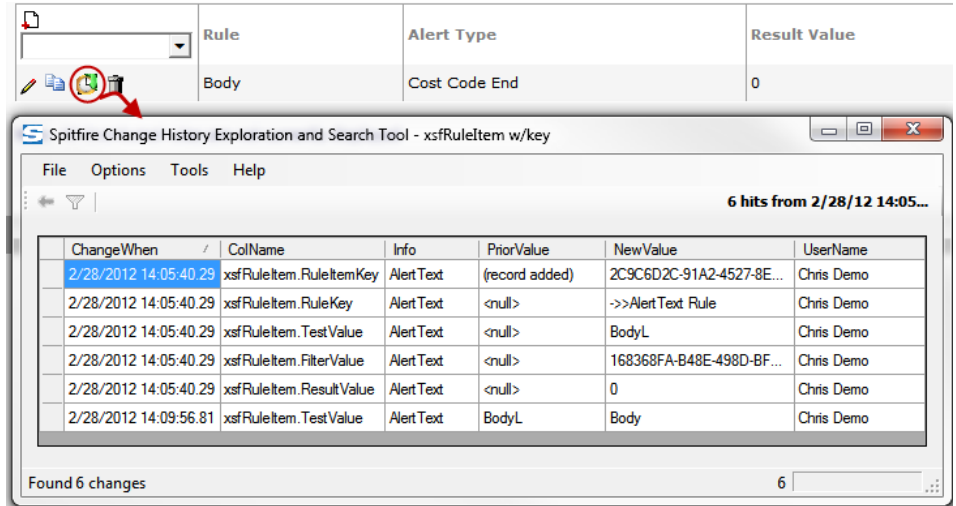
We recommend that you use caution when you make changes to the default rules since changes to the rules affect the entire system. Working in your test system before applying your changes in the live system is highly recommended.

View Changes to a Rule

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

- Click  to open sfCHEST for a rule.

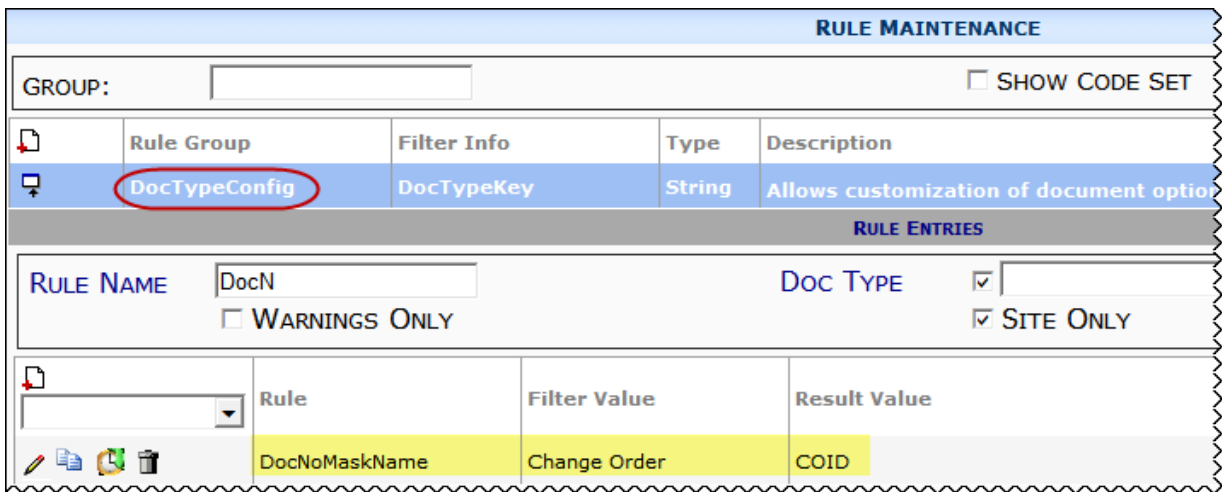
TIP
The Admin | Configuration Changes report indicates changes in the Rules Maintenance tool between two dates. For more information, see the [Spitfire Reports](#) technical white paper.



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:

SYSTEM INFORMATION

SFPMS VERSION 4.4.5203.37854

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

LICENSED BY Spitfire Management, Armonk NY 914-273-0809

SESSIONS Licensed Users: 6; Current IIS: 10

LICENSED SERVER SFQA07

SPITFIRE DB server=();database=sfTrain101DocSys;APP=sfPMS-sfTraining;Asynchronous Processing=true;

INTEGRATED DB server=();database=sfTrain101App;APP=sfPMS-sfTraining;Asynchronous Processing=true;

REPORT SERVER <http://SFQA07/ReportServer/Spitfire-SoniTraining> (Report Manager)

SFATC SERVER (local):14491; Last WSRq: 2.4 min ago; Response: [OK, Running;3083]|No active tasks

INBOUND EMAIL status=Completed; waiting=0; completed=10/4/2014 22:26:14; started=10/4/2014 22:26:14; runs=9; secs/run=0.8; scheduled=400,1350,4;

TEXT SEARCH Last indexed Apr 9 2014 10:21PM; Currently 0 items in OCR Queue

CACHE ITEM COUNT 58; RAM: Using 314(150)mb, PeakV=816; CPU=205.7s;
1054 @ 283 ms/r 84% 16; Since 12:36:44 PM: 373 ms/r 79% 21

LOGGING Created Apr 11 06:17; size 400K

CODES LAST CACHED Apr 11 12:24

Current Sessions | Loaded Modules

CURRENT SESSIONS	#	User	Login	Last Request	Last At	Type
	1	Chris Demo	9:19:27	POST:/cusysm (79)	13:11:55	sfDash
- as of 13:12:16.91						


Build Releases

SYSTEM INFORMATION

SFPMS VERSION 4.4.5213.32148


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

To view information about different builds:

1. Click  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.

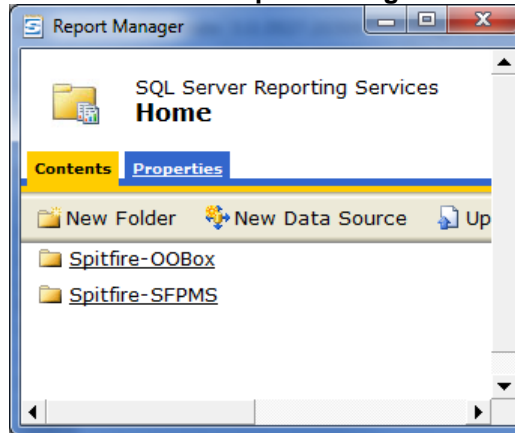
SYSTEM INFORMATION			
SFPMs VERSION 4.4.5203.37854 			
Name	Version	Released	Notes
v4.4 Stable Release	4.4.5166.19060	Feb 22 2014 10:42	History
v4.4 General Release	4.4.5190.39955	Mar 18 2014 23:20	History
v4.4 Release Candidate	4.4.5213.32148	Apr 10 2014 18:58	Updates

Report Manager





REPORT SERVER <http://SFQA07/ReportServer/Spitfire-SoniTraining> **Report Manager**

To open Report Manager in SQL Server Reporting Services:

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

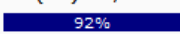




Performance Information

CACHE ITEM COUNT 44; RAM: Using 228(136)mb, PeakV=709; CPU=142.8s;
 291 @ 388 ms/r   Since 10:24:05 AM: 278 ms/r  

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


Recycle the System

CACHE ITEM COUNT 83; RAM: Using 201(89)mb, PeakV=709; CPU=194.1s;
 909 @ 187 ms/r  92%; Since 12:53:21 PM: 19 ms/r  99% 


To recycle sfPMS for all users:


- Click  .

Server Log

LOGGING Created May 3 09:01; size 141K 

To open or save the server log:

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

[Click here to open log as of 13:03, or right click to save to file.](#) 
2. Click on the message to open the log file or right-click to save the file.

Current Sessions




Current Sessions		Loaded Modules				
CURRENT SESSIONS	#	User	Login	Last Request	Last At	Type
	1	Chris Demo	9:04:57	POST:n/cusysm (35)	10:52:21	MSIE
- as of 11:01:22.91						

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.

CODE MAINTENANCE

SET NAME DOC TYPE

	Doc Type	Code
		C
 		O
 	Change Order	A
 	Change Order	C
 	Change Order	I
 	Change Order	L

CODE MAINTENANCE

SET NAME

Code	Description
	(any)
L	Labor
O	Other
P	Production

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
- PayControllList
- 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:

The screenshot shows the 'ACCOUNT CATEGORIES' tool. At the top, there are search filters for 'NAME LIKE' and 'TYPE' (set to '(any)'). Below these is a 'CLASS' dropdown menu currently set to '(any)'. The dropdown menu is open, showing the following options: (any), Labor, Labor Burden, Other, and Production. Below the dropdown is a table with columns: Name, Seq, Type, Class, Note, GL, Budget, Changes, and Active. The first row in the table is: EQ OWNED, Equipment Costs Owned, 0, Expense, Applied, Equipment Cost Applied, with checkmarks in the Budget, Changes, and Active columns.

AcctType

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

The screenshot shows the 'ACCOUNT CATEGORIES' tool. At the top, there are search filters for 'NAME LIKE' and 'TYPE' (set to '(any)'). Below these is a 'CLASS' dropdown menu currently set to '(any)'. The dropdown menu is open, showing the following options: (any), Asset, Expense, Liability, Non Accounting, Revenue, and Applied. Below the dropdown is a table with columns: Name, Long Name, Seq, Type, Class, Note, GL, Budget, Changes, and Active. The first row in the table is: EQ OWNED, Equipment Costs Owned, 0, Expense, Applied, Equipment Cost Applied, with checkmarks in the Budget, Changes, and Active columns.

ActiveFlags

Appears on the filters of the Contacts Dashboard:

The screenshot shows the 'CONTACT LIST' tool. It has several search filters: 'NAME LIKE', 'EMAIL LIKE', 'COMPANY LIKE', and 'MEMBERS OF'. There are also checkboxes for 'SPITFIRE USERS ONLY', 'EMPLOYEES ONLY', 'PUBLIC ONLY', 'CUSTOMERS ONLY', 'VENDORS ONLY', and 'COMPANIES ONLY'. Below these is an 'ACTIVE' dropdown menu currently set to 'Active'. The dropdown menu is open, showing the following options: Active, Both, and Inactive. Below the dropdown is a table with columns: Name, Company, Email, Phone, Fax, and Type. The first row in the table is: Spiff, Spiff, Spiff, (503), (503), Spiff.

AddrType

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

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

The screenshot shows a document's 'Addr' tab. At the top, there are tabs for 'Details', 'Note', and 'Addr'. Below these is a 'TYPE' dropdown menu currently set to 'To'. The dropdown menu is open, showing the following options: To, From/Author, and To. Below the dropdown is a text input field containing the word 'person'.

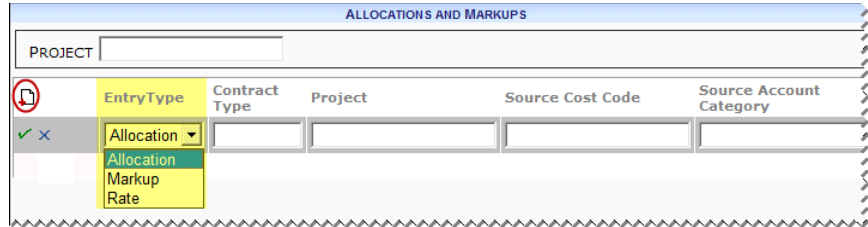
TIP
The letter "P" is reserved for the AddrType code set so should not be used.

AlertStatusList

Not currently used.

AllocEntryType

Appears on the Allocations tool on the Manage Dashboard:



AttrType

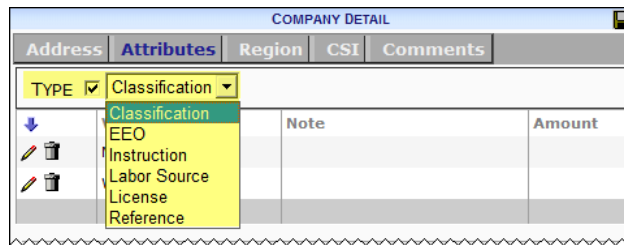
TIP

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.

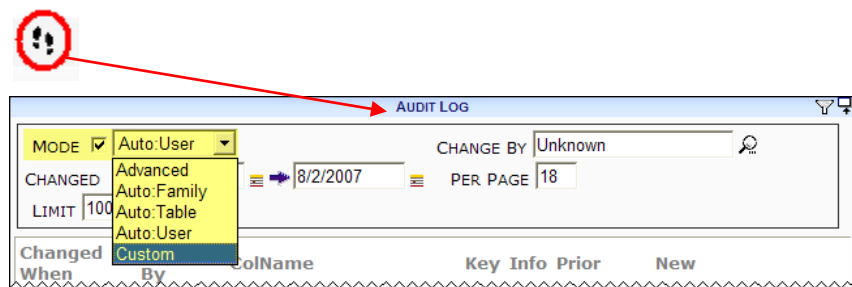
Note: when the Attributes tab is added to the Vendor Doc type, it actually appears on the Company Contact Detail window for the Vendor (and not on the Vendor document).

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



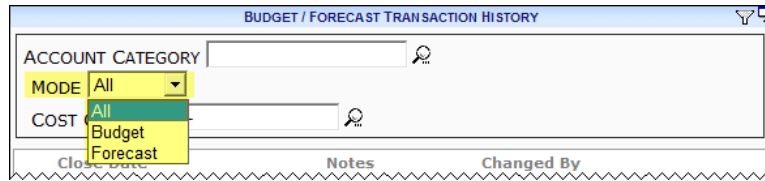
AuditMode

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



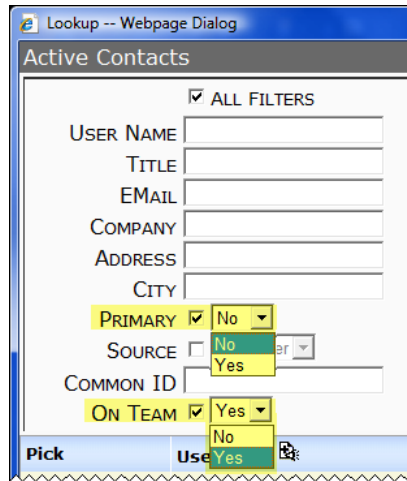
BFAmode

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



Boolean

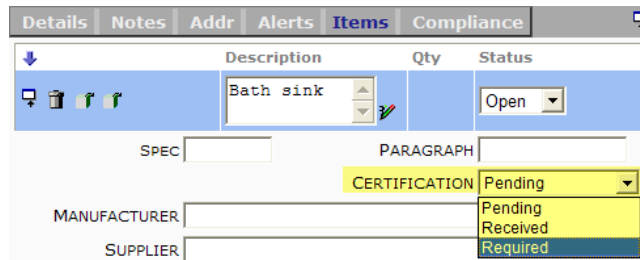
Appears on filters that require a Yes/No option, such as on a lookup:



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:

CODE MAINTENANCE				
SET NAME LIKE: <input type="text"/>				
	Set Name	Set Type	Flag	Next Set
	MailRoute	CodeList		X
	MaskType	CodeList		X
	MixDesign	DocTypeSubcodes		X
	MyOwnCode	Co		X
	New Code *	DocTypeSubcodes	<input type="text"/>	<input type="checkbox"/>
	PayControl	CodeList		X
		DocTypeSubcodes		

ContactScope

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

SUBMITTAL	
TYPE <input checked="" type="checkbox"/> Submittal	<input type="checkbox"/> SHOW CLOSED
DOC # <input type="text"/>	STATUS <input type="checkbox"/> Closed
COMPANY Able Electric	SCOPE <input checked="" type="checkbox"/> Any Contact
SOURCE # <input type="text"/>	REFERENCE <input type="text"/>
COMMITMENT <input type="text"/>	DUE <input type="checkbox"/> 10/16/2008
DESCR <input type="text"/>	

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]

Details	
TYPE	General Contractor
CONTRACTTYPE	Fixed Price
PROJECT REFERENCE	Cost Plus
RETENTION	Fixed Price
SQ. FOOTAGE	Guaranteed Maximum
DIVISION ID	Internal
	Time & Material
	Unit Price

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]

Commitment - Electrical Work

DOCUMENT HEADER

DOC# 0001

PROJECT GC-003 Northern Lights Office Bldg

DESCRIPTION Electrical Work

VENDOR Able Electric ID# AB01

COMMITMENT TYPE [] TERMS Net 30

CONTRACT TYPE Fixed Price

PAY STATUS Cost Plus Fee

APPROVED BY Fixed Price

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:

GC003 Cost Code Maintenance

MAINTENANCE

COST CODES [] DESCR []

STATUS Active Inactive Plan

ACTUAL DATES [] SOV LINE []

PER PAGE []

FIND: []

CostingMethod

Appears on the Cost Code Maintenance window:

GC003 Cost Code Maintenance

MAINTENANCE

COST CODES [] DESCR []

STATUS Active SHOW ACTUAL DATES

SOV LINE []

PER PAGE []

FIND: []

Cost Code	Description	Contract Type	UOM	SOV Line	Status	%	Costing Method
00000-	Project	Design, Bid, Build	VDSL	[]	Active	0	Fixed Price
01000-	General Conditions	Design, Bid, Build	VDSL	[]	Active	0	Cost Plus Production Units

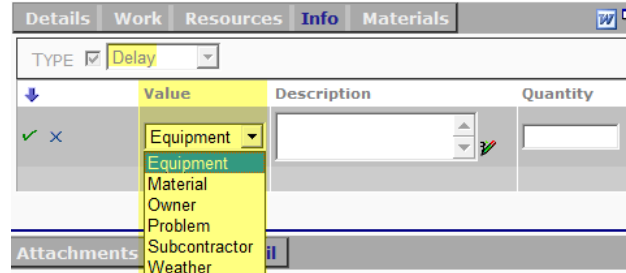
Country

Not currently used.

DFRDelay

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

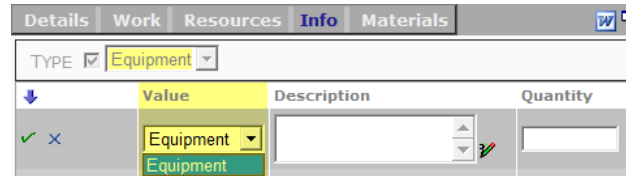
[Customization Part = Doc Tabs, Item = Attributes Tab (for Info tab); also Part = Doc Attributes, Item = ValueCol]



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]

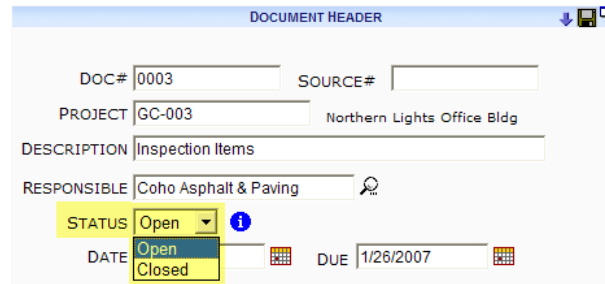


DocStatus

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:

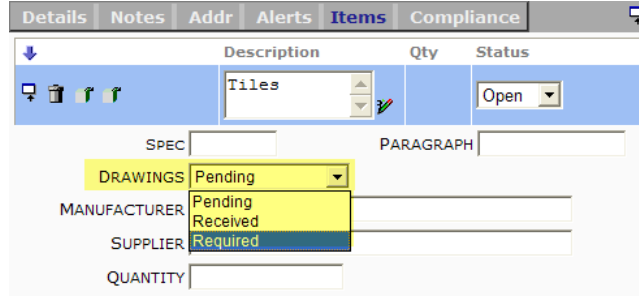
[Customization Part = Doc Header – Standard, Item = Status]



Drawings

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

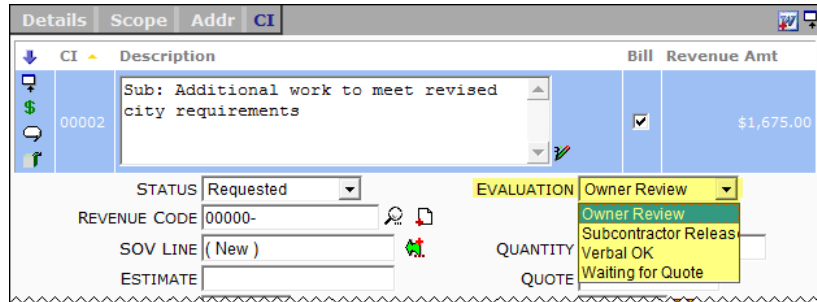
[Customization Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail, Item = Drawings]



Evaluation

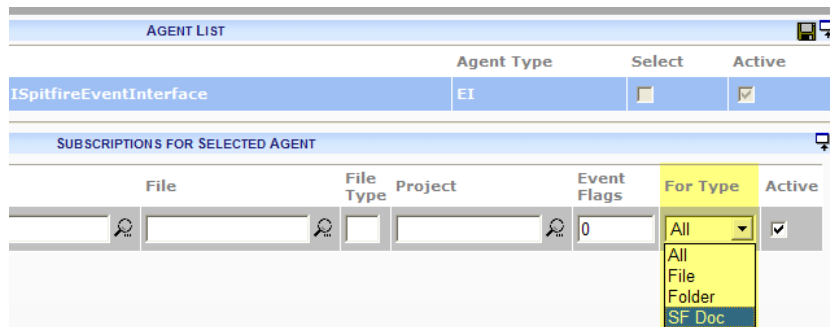
Appears on Spitfire documents that have been customized to include this field on the Items (or CI) tab, such as Change Order:

[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]

The screenshot shows the 'Project' tab in the Spitfire interface. The 'PUBLIC SCHEDULE' dropdown menu is open, displaying the following options: Ahead of Schedule, On schedule, Slightly behind schedule, Behind schedule, and Temporarily postponed. The 'Ahead of Schedule' option is currently selected.

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]

The screenshot shows the 'Project' tab in the Spitfire interface. The 'PUBLIC STATUS' dropdown menu is open, displaying the following options: Design, Phase I, Phase II, Review, and Final. The 'Design' option is currently selected.

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]

The screenshot shows the 'Items' tab in the Spitfire interface. The 'MOCKUP' dropdown menu is open, displaying the following options: None, Pending, Received, and Received. The 'None' option is currently selected.

FileAccessType*

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

FILE PROPERTIES					
File Properties	File Version	Access History		Context	
Rev#	Accessed	By	Reason		
1	Apr 1, 2014 15:10	Unknown	Attached	Delivery Status Notification (Failure) (...)	
1	Apr 1, 2014 15:10	Unknown	Saved Version	Delivery Status Notification (Failure) (...)	

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:

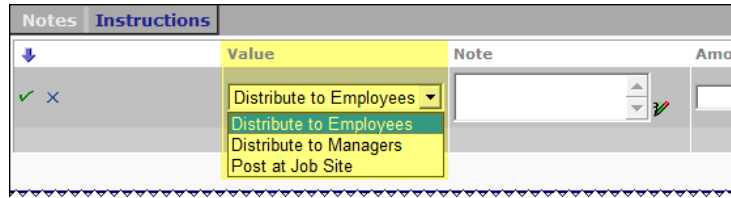
InclusionType

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

[Customization Part = Doc Tabs, Item = InclusionTab]

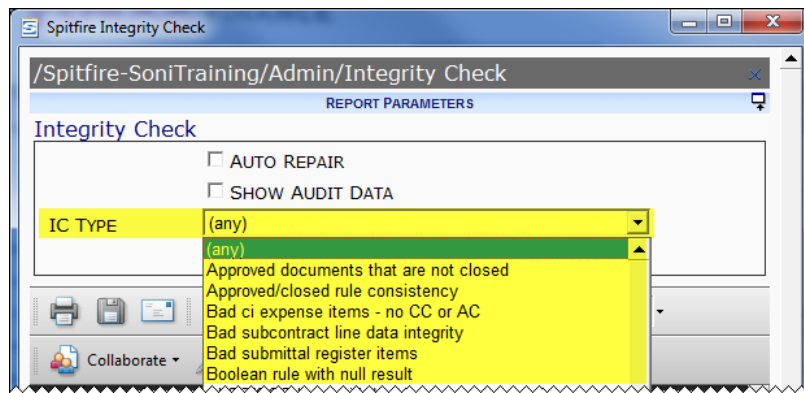
InstructionType

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

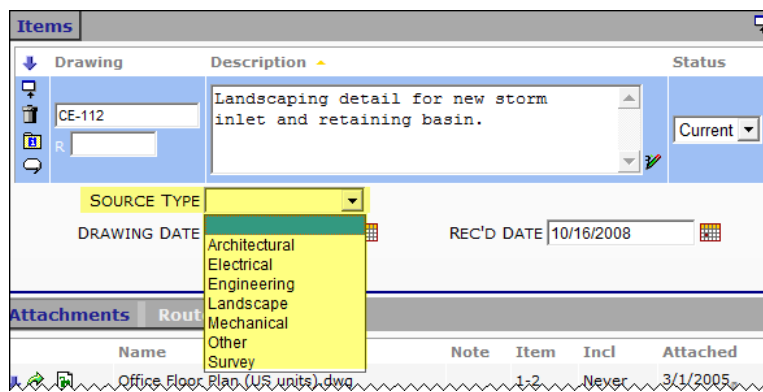
Appears on the Integrity Check report (found on the Admin folder):



ItemSource

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

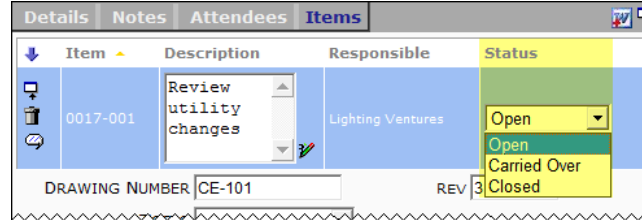
[Customization Part = Doc Tabs, Item = Items Tab (for Item tab); also Part = Doc Item Detail – Standard, Item = ItemSource]



ItemStatus

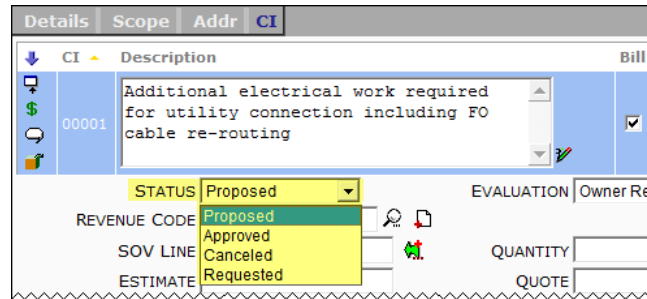
Appears on Spitfire documents that have been configured to include this field on the Items tab, such as Meeting Minutes:

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



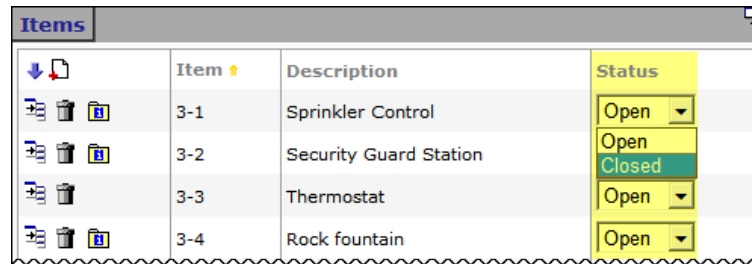
Another example: Change Order document:

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



Another example, Punch List document:

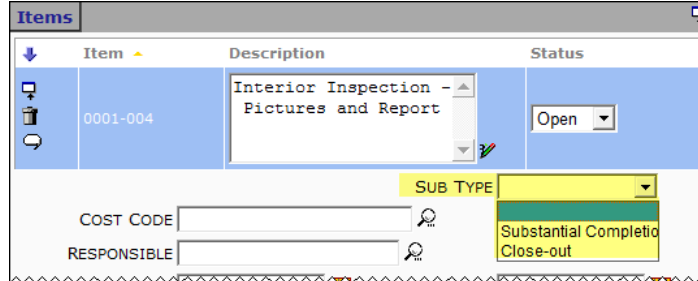
[Customization Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Items, Item = QuickEditMode]



ItemSubType

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

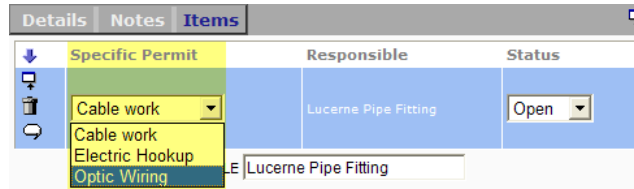
[Customization Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = DocItemDetail – Standard, Item = ItemSubtype]



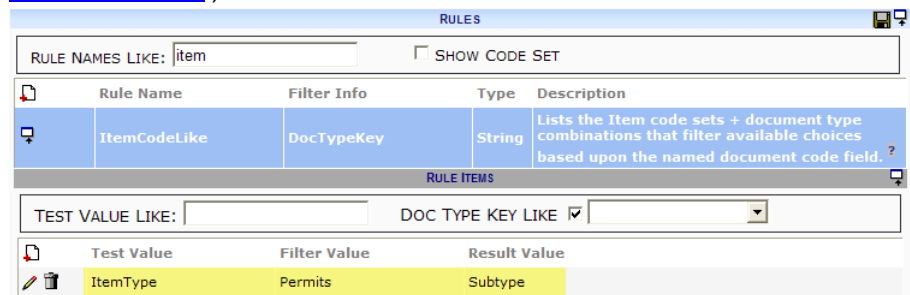
ItemType

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]



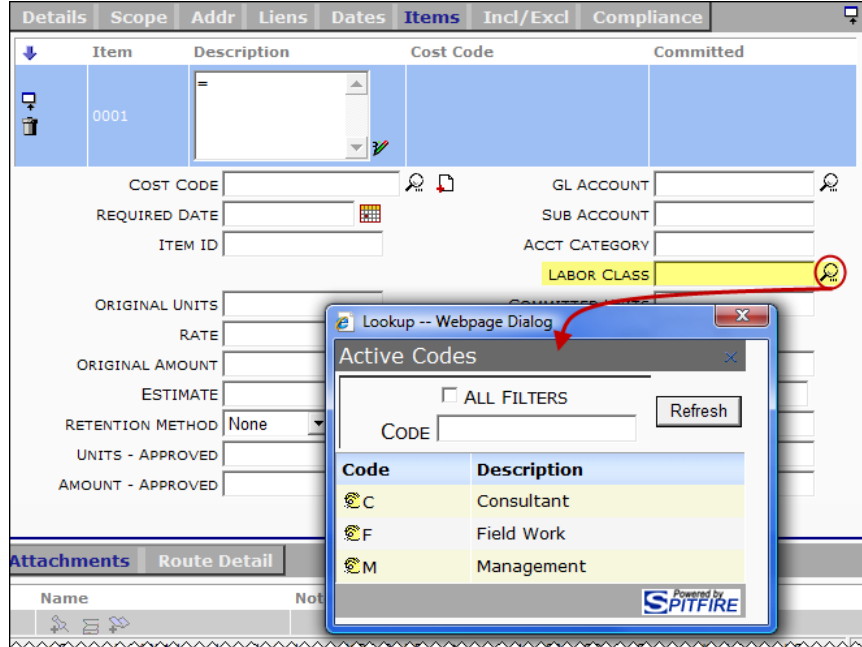
Note: ItemType is often used as a subset of another code set, such as [Subtype](#) (see page 127). Be sure to add to the [ItemCodeLike](#) rule through the Rules Maintenance tool if your ItemType field is to be filtered by your Subtype field choice. (See also the technical white paper [Rules and Rule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



LaborClass

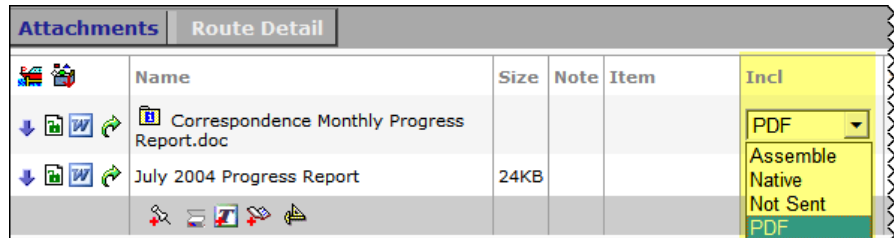
Appears on Spitfire documents that have been configured to include this lookup on the Items tab, such as Commitment:

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



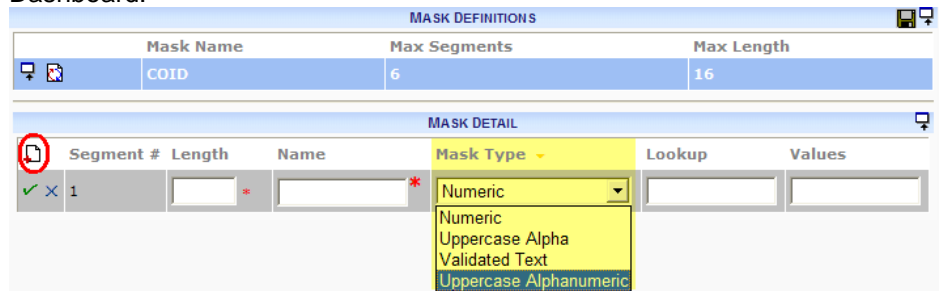
MailRoute

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]

The screenshot shows the 'Items' tab in the Spitfire software. A dropdown menu for the 'DESIGN' field is open, displaying four options: 'Accepted', 'Requested', 'Returned', and 'Submitted'. The 'Submitted' option is currently selected and highlighted in blue. Other fields visible include 'Description' (containing 'Files'), 'Qty', 'Status' (set to 'Open'), 'SPEC', and 'PARAGRAPH'.

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]

The screenshot shows the 'Compliance' tab in the Spitfire software. A dropdown menu for the 'PAY CONTROL' field is open, displaying three options: 'Auto', 'Block', and 'Warn'. The 'Auto' option is currently selected and highlighted in green. Other fields visible include 'Submittal Items', 'DESCRIPTION', 'CARRIER', 'EFFECTIVE', 'RELEASED', 'RECURS', 'AMOUNT', 'EXPIRATION', and 'LEAD DAYS'.

PlanRoomMode

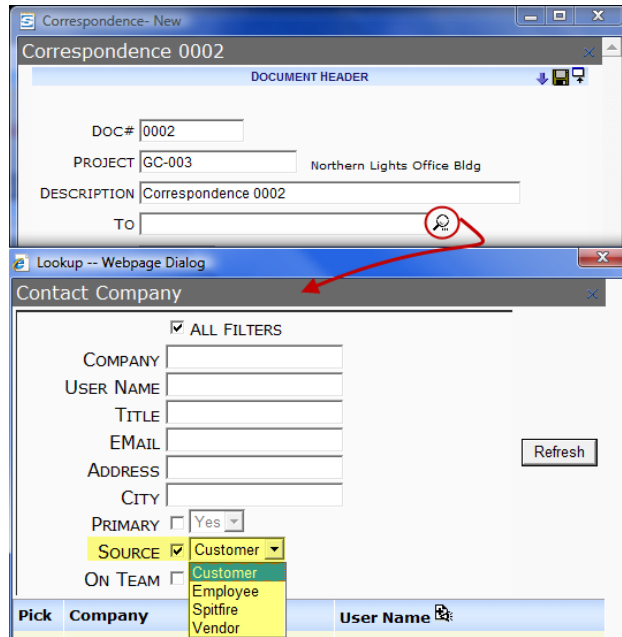
Appears on the Project tab on Project Setup documents:

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

The screenshot shows the 'Project' tab in the Spitfire software. A dropdown menu for the 'PLAN ROOM MODE' field is open, displaying three options: 'Public', 'N/A', and 'Private'. The 'Public' option is currently selected and highlighted in green. Other fields visible include 'DESCRIPTION', 'PROGRAM' (set to 'East Side Center'), 'PUBLIC STATUS', 'PUBLIC SCHEDULE', 'COMMITMENT BUDGETING MODE' (set to 'Update'), 'GEO - LATITUDE', 'FORECASTING THRESHOLD', and 'LONGITUDE'.

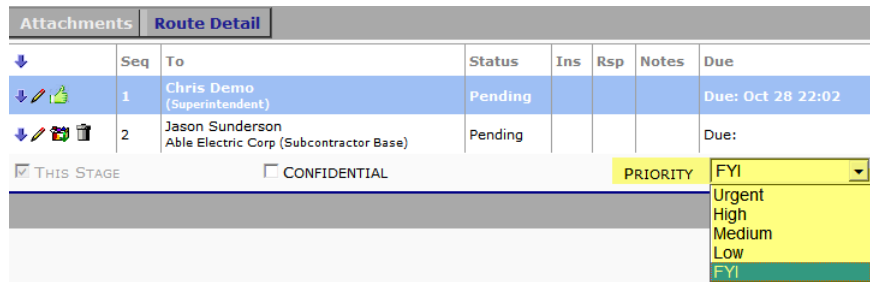
PrimarySource

Appears on certain lookups, such as Contact Company:



Priority

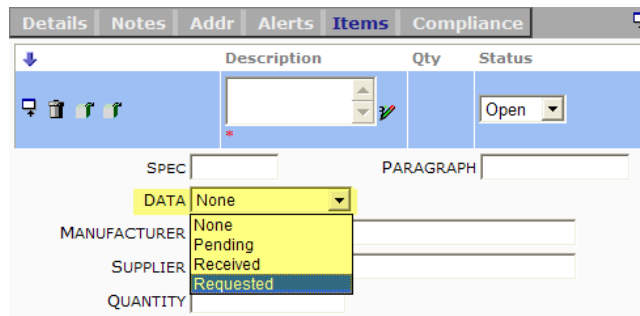
Appears on the Route Detail tab on Spitfire documents:



ProductData

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

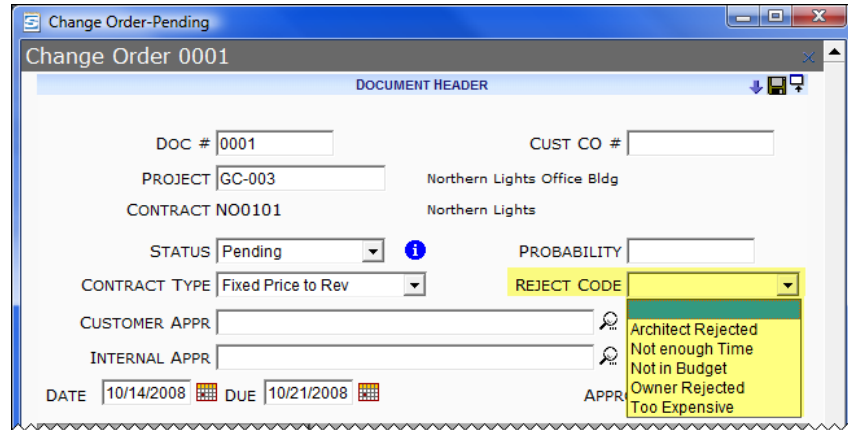
[Customization Part = Doc Tabs, Item = ItemsTab (for Items tab); also Part = Doc Item Detail, Item = Data]



Reason

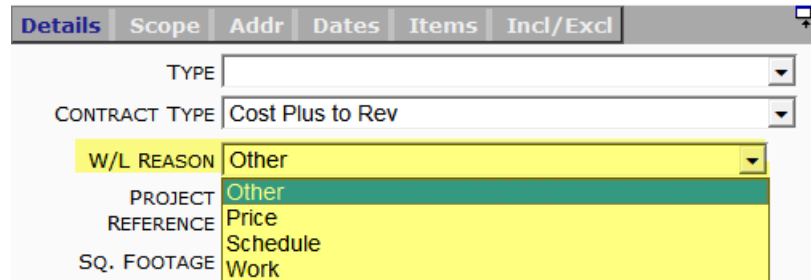
Appears on the Document Header of some Spitfire documents, such as Change Order:

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



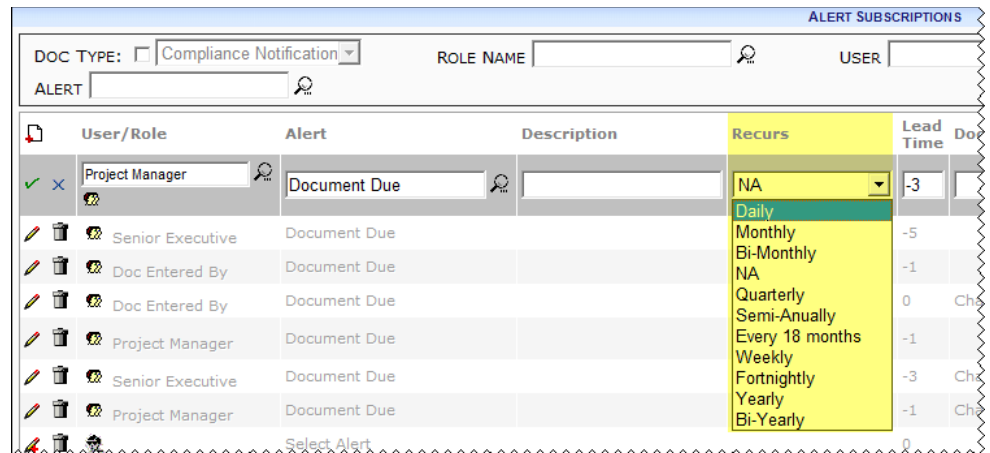
Also found on the Details tab of some Spitfire documents, such as Bid document:

[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:

Attachments		Route Detail			
Seq	To	Status	Ins	Rsp	
1	Chris Demo (Superintendent)	Responded			
2	Andrew Carothers	Pending		<ul style="list-style-type: none"> 1. Will Attend 2. Will Not Attend 3. Will Try to Attend 4. Will Be Late 5. Will Leave Early 	

THIS STAGE CONFIDENTIAL

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]

Details		Scope	Addr	Items	Incl/Excl
Item	Description	Expense Amt	Cost Code		
New:001	Item Description		01000		

LINE ITEM: New:001
 COST CODE: 01000-
 GL ACCOUNT: 4120
 SUB ACCOUNT: 00
 ACCT CATEGORY: _SUB
 LABOR CLASS:
 UOM:
 PERCENT: 0
 QUOTE:
 RETENTION METHOD: None
 ESTIMATE: None
 % of Total

RoleType

Appears on the Roles tool on the System Admin Dashboard:

ROLE LIST					
ROLE NAMES LIKE:	TYPE <input checked="" type="checkbox"/> Primary				
	<ul style="list-style-type: none"> Primary Subordinate 				
Role Name	Description	Condition	Type	Member Count	
Accounting	Accounting	✓ ✓ X X X	<input checked="" type="checkbox"/>	4	
Architect	Architect	✓ X X X X	<input checked="" type="checkbox"/>	6	
Consultant	Consultant	✓ X X X X	<input checked="" type="checkbox"/>	2	
Everyone	Everyone	X X X X X	<input checked="" type="checkbox"/>	18	
GC	GC	✓ X X X X	<input checked="" type="checkbox"/>	4	
Owner	Owner/Customer	✓ X X X X	<input checked="" type="checkbox"/>	4	

1 2

RouteAccess

Appears on the Routes tool on the Manage Dashboard:

Seq. No.	User/Role	Description	Access Level	Default Status
2	Project Manager		Collaborate	Pending
3	Project Assistant		View	Destination
4			View	Pending

RouteStatus

Appears on the Routes tool on the Manage Dashboard:

Seq. No.	User/Role	Description	Access Level	Default Status
2	Project Manager		Collaborate	Pending
3	Project Assistant		View	Destination
4			View	Pending

RouteViaList

Appears on the Connections tab of the Contact Detail window:

PHONE (914) 273-0808
 CELL
 PAGER
 FAX
 IM HANDLE
 ORGANIZATIONAL LEVEL 0
 URL

PREFERRED CONTACT NUMBER Phone
 DEFAULT RESPONSIBILITY Project Assistant
 ROUTE VIA Web
 ALLOW ROUTE VIA E-Mail, Fax, Hard Copy, Web
 IM SERVICE Project Assistant
 SHOW NEW PROJECTS

RuleResultType

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

Rule Name	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	CodeSetFilter	String	Overrides the default system generated filter f
CodeSetRedirect	DocTypeKey	String	Lists the code sets + document type combinations that should be redirected to another document type. This rule is applied at the end of the filter creation and effects the value substituted for the PROCTYPE

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]

The screenshot shows the 'Items' tab in the Spitfire software. The 'SCHEDULE' dropdown menu is open, showing the following options: None, Pending, Received, and Requested. The 'None' option is currently selected.

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]

The screenshot shows the 'Details' tab in the Spitfire software. The 'BILLING TYPE' dropdown menu is open, showing the following options: Flat Rate, Labor & Material, Maintenance, Service Contract, and Warranty. The 'Flat Rate' option is currently selected.

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.

The screenshot shows the 'RULES' maintenance tool in the Spitfire software. The 'ItemCodeLike' rule is listed with the following details:

Rule Name	Filter Info	Type	Description
ItemCodeLike	DocTypeKey	String	Lists the Item code sets + document type combinations that filter available choices based upon the named document code field.

Below the rule list, the 'TEST VALUE LIKE' field is set to 'Itemtype' and the 'DOC TYPE KEY LIKE' checkbox is checked. The 'TEST VALUE LIKE' field is also set to 'Subsegment' and the 'DOC TYPE KEY LIKE' field is set to 'Project Contract'.

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]

The screenshot shows the 'Items' tab in a software interface. At the top, there are tabs for 'Details', 'Notes', 'Addr', 'Items', and 'Compliance'. Below the tabs is a table with columns for 'Description', 'Qty', and 'Status'. The 'Status' column has a dropdown menu set to 'Open'. Below the table, there are input fields for 'SPEC' and 'PARAGRAPH'. A dropdown menu for 'SHOP' is open, showing three options: 'Accepted' (highlighted in yellow), 'Not applicable', and 'Required' (highlighted in blue). Below this are fields for 'MANUFACTURER', 'SUPPLIER', and 'QUANTITY'.

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]

The screenshot shows the 'Commitment' window in a software interface. The title bar says 'Commitment-'. The main window title is 'Electrical Work'. Below the title is a 'DOCUMENT HEADER' section. It contains several fields: 'DOC#' (0001), 'PROJECT' (GC-003), 'DESCRIPTION' (Electrical Work), 'VENDOR' (Able Electric), 'COMMITMENT TYPE' (dropdown), 'CONTRACT TYPE' (Fixed Price), 'PAY STATUS' (In compliance), 'APPROVED BY' (Chris Demo), 'STATUS' (Committed), 'DATE' (2/2/2010), and 'DUE' (2/3/2010). A dropdown menu for 'TERMS' is open, showing options: 'Net 30' (highlighted in yellow), '2% 10 Days, Net 30 Days', 'Due Immediately', 'Net 10', 'Net 15 Days', 'Net 30', 'Net 7 Days', 'Pay When Paid', and 'Prepaid'.

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]

The screenshot shows the 'Details' tab in a software interface. At the top, there are tabs for 'Details', 'Scope', 'Addr', and 'CI'. Below the tabs, there are several fields: 'DESCRIPTION' (Initial Document), 'SOURCE' (dropdown menu open with options: Architect's Drawing, Plans, Shop Drawings, Spec, Architect Change, Owner Request, Subcontractor Request, Internal Change), 'CREATED' (Architect's Drawing), 'SCHEDULE IMPACT:REQ' (Spec), 'RETENTION' (Architect Change), 'EXPENSE AMT' (Subcontractor Request), 'MARKUP AMT' (Internal Change), 'ARCHITECT'S PROJECT #' (blank), 'APPROVED' (blank) DAYS, and 'ESTIMATE' (\$0.00).

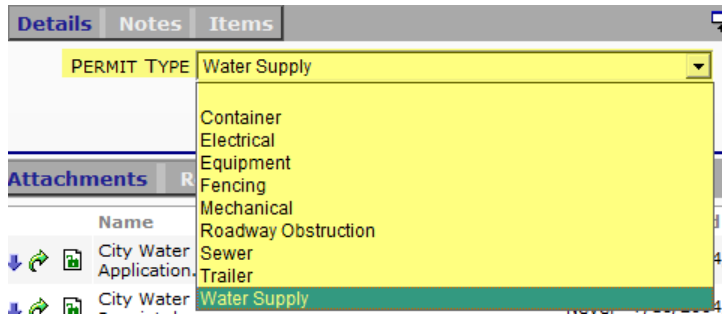
StopTypeList

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:

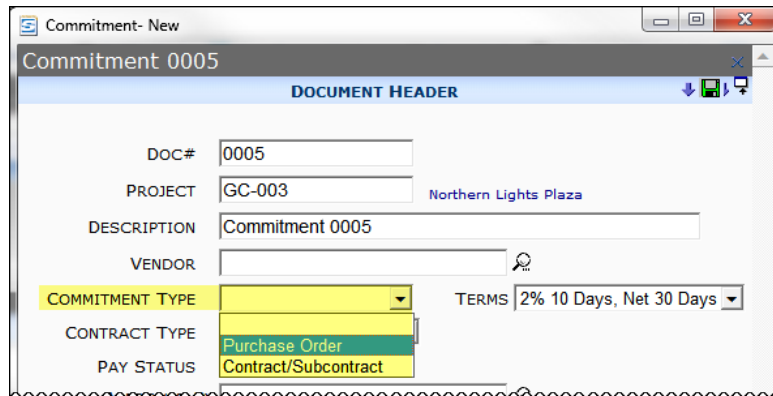
[Customization Part = DocTabs, Item = DetailsTab (for Details tab); also Part = Doc Details – Standard, Item = Subtype]



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:

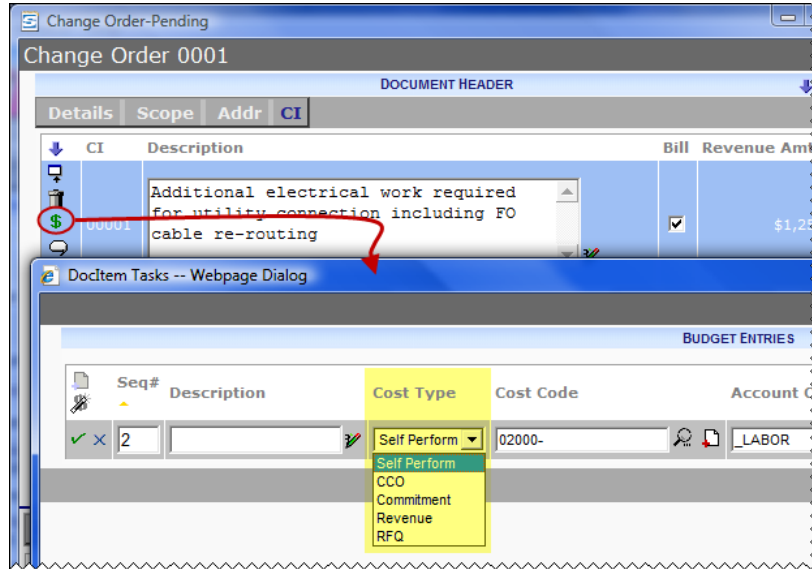
[Customization Part = Doc Header – Commitment, Item = Commitment Type]



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

TaskCostType

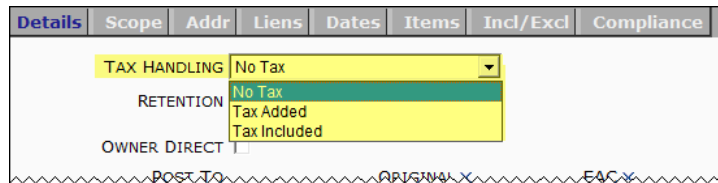
Appears on the Budget Entries window accessed from the CI tab:



TaxHandling

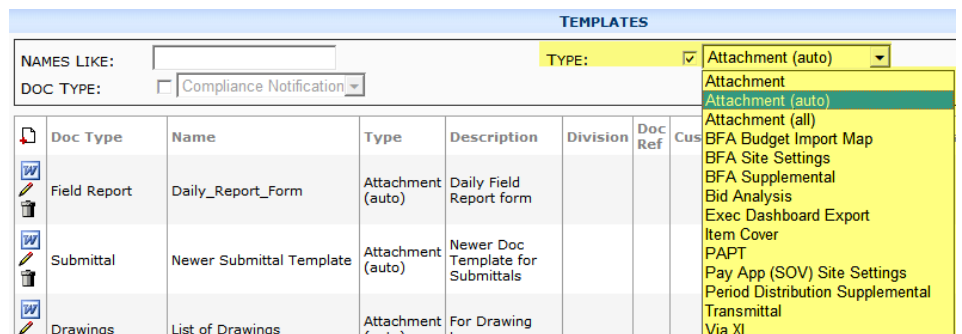
Appears on Spitfire documents that have been configured to include this field on the Details tab, such as Commitments:

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



TemplateType

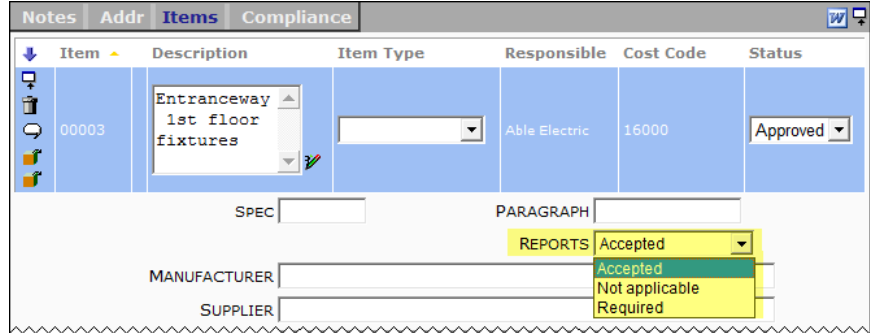
Appears on the Templates tool on the Manage or System Admin Dashboard:



TestReport

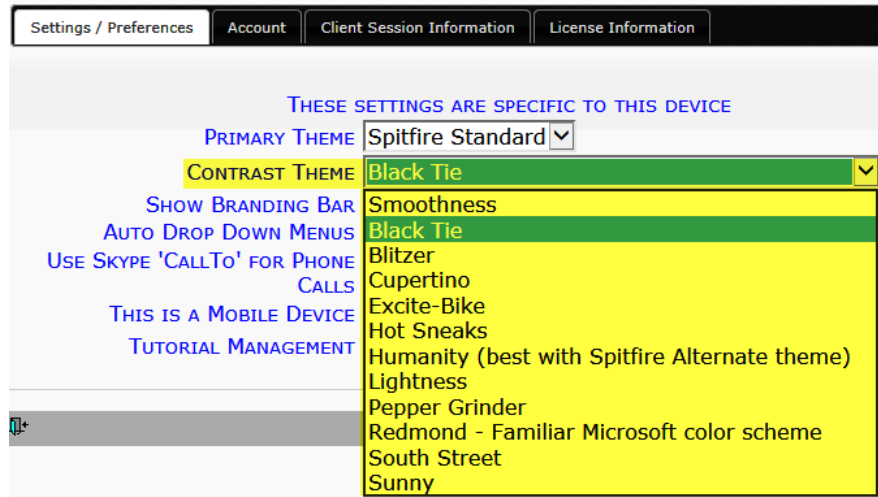
Appears on Spitfire documents that have been customized to include this field on the Items tab, such as Submittal:

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



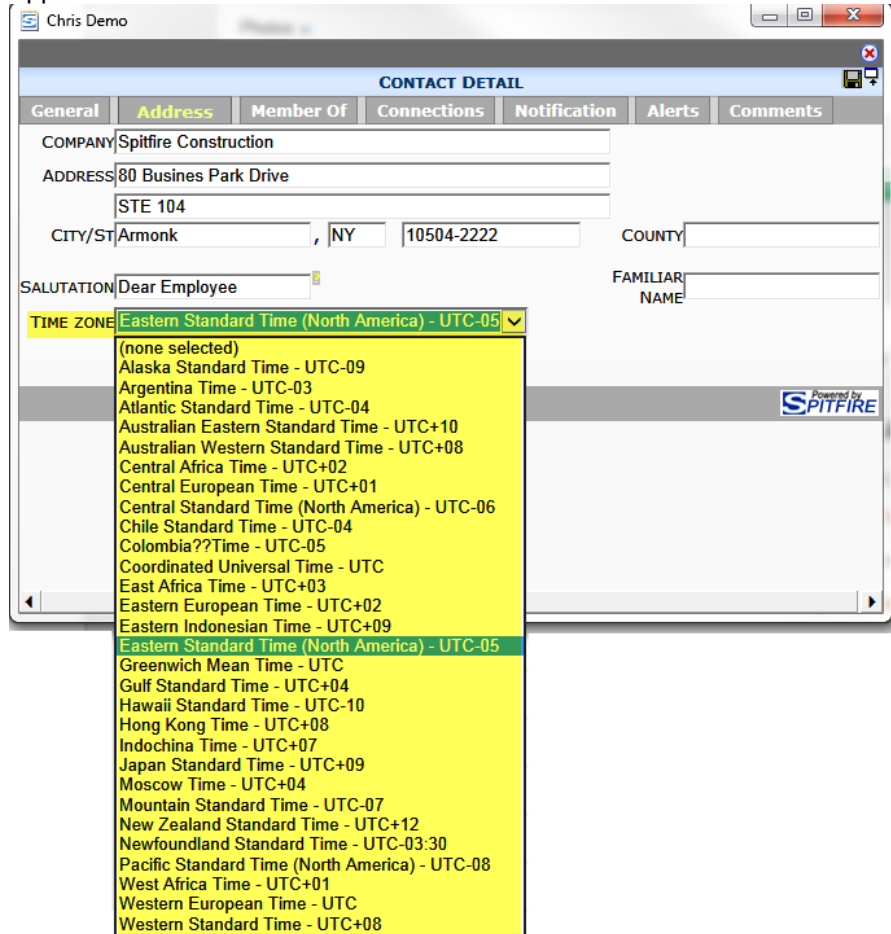
ThemeVariant*

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



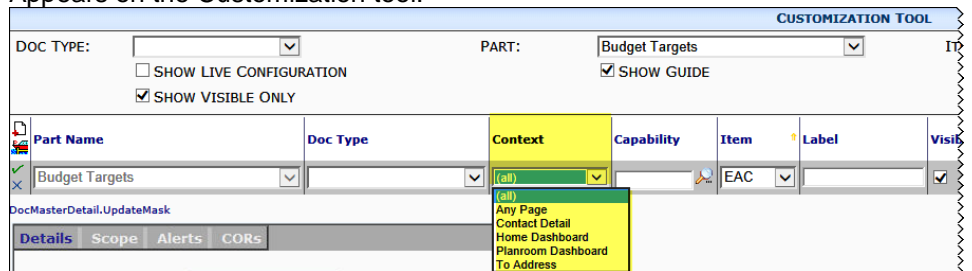
TimeZone*

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]

The screenshot shows the 'Items' tab of a software application. The interface includes a table with columns for 'Item', 'Description', 'Cost Code', and 'Committed'. Below the table, there are several input fields and dropdown menus. The 'UOM' field is highlighted in yellow and set to 'Each'. Other fields include 'COST CODE', 'REQUIRED DATE', 'ITEM ID', 'ORIGINAL UNITS', 'RATE', 'ORIGINAL AMOUNT', 'ESTIMATE', 'RETENTION METHOD' (set to 'None'), 'GL ACCOUNT', 'SUB ACCOUNT', 'ACCT CATEGORY', 'LABOR CLASS', 'COMMITTED UNITS', 'COMMITTED AMT', 'QUOTE', and 'PERCENT'.

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:

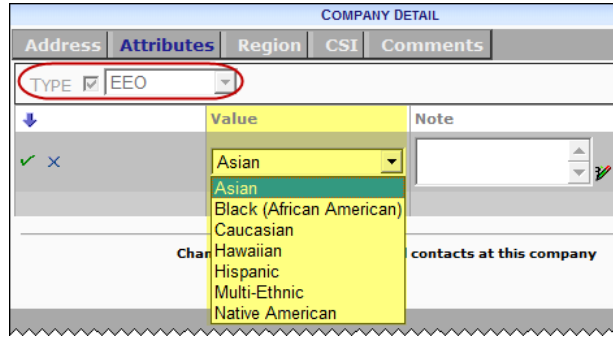
[Customization Part = Doc Tabs, Item = Attributes Tab (for Attributes tab); also Part = Doc Attributes, Item = ValueCol]

The screenshot shows the 'Attributes' tab of a 'COMPANY DETAIL' window. The 'TYPE' is set to 'Classification'. A dropdown menu is open, showing various classification options: 'DBE - Disabled', 'DBE - Disabled', 'Federal', 'MBE - Minority', 'Preferred', 'SBE - Small', 'State', 'VBE - Veteran', and 'WBE - Women'. The 'Value' column is highlighted in yellow. The 'Note' column contains the text 'contacts at this compa'.

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:

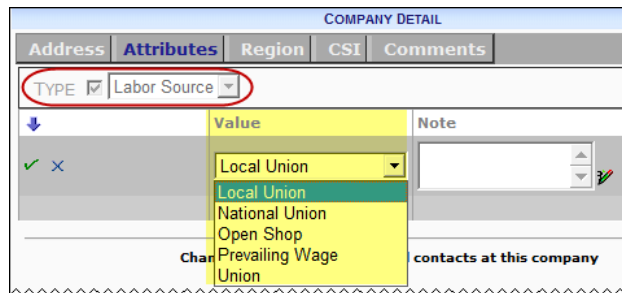
[Customization Part = *Doc Tabs*, Item = *Attributes Tab* (for Attributes tab); also Part = *Doc Attributes*, Item = *ValueCol*]



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:

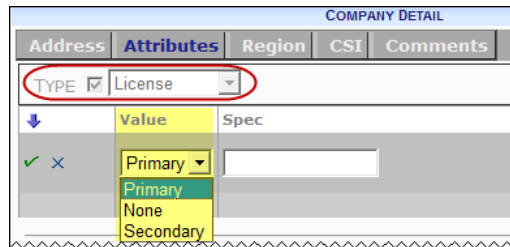
[Customization Part = *Doc Tabs*, Item = *Attributes Tab* (for Attributes tab); also Part = *Doc Attributes*, Item = *ValueCol*]



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*]

The screenshot shows a software interface titled "COMPANY DETAIL". At the top, there are several tabs: "Address", "Attributes" (which is selected and highlighted in blue), "Region", "CSI", and "Comments". Below the tabs, there is a section for defining attributes. A dropdown menu is open, showing "TYPE" with a checked checkbox and the word "Reference" selected. Below this, there is a table with columns "Value" and "Note". The "Value" column contains a dropdown menu with three options: "Bank", "Bank", and "Trade". The first "Bank" option is highlighted in yellow, and the second "Bank" option is highlighted in green. There are also some icons (a blue arrow, a green checkmark, and a red X) and a small icon in the bottom right corner of the table area.

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.

	Role Name	Description	Conditions	Conditions Optional	Active	Member Count
	Architect	Architect	<input checked="" type="checkbox"/> X X X X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
ROLE DETAIL						
<div style="display: flex; justify-content: space-between;"> Capabilities Responsibility Included Roles </div>						
	Role Capabilities	Permit (RIUDS)	<div style="display: flex; justify-content: space-between;"> <div style="background-color: yellow; padding: 2px;">Architect</div> <div> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> </div>			
			<div style="border: 1px solid gray; padding: 5px;"> Additional Capabilities <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> ← Accountant </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> ← Alternate CM </div> <div style="display: flex; justify-content: space-between;"> ← Alternate PM </div> </div>			

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

Role Name	Description	Conditions	Conditions Optional	Active	Member Count
Everyone	Everyone	X X X X X	✓	✓	21

ROLE DETAIL					
Capabilities	Responsibility	Included Roles			
MODULE	<input type="text"/>				
CAPABILITIES	<input type="text"/>				
AREA	<input type="text"/>				
Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities	
DOC	Can change document status (if collaborator)	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1	
DOC	Document Routees	<input type="checkbox"/> ✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 2	
DOC	Owns documents created, routed, global	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 3	
PAGE	Document Viewer (jVue)	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Internal Staff	
PAGE	Home Dashboard	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Attach File From Template	
PAGE	Report viewer	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can add attachments to a closed document	
PAGE	Virtual Popup Pages	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can be designated as another users proxy	
PART	Watchdog Alerts	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can control exclusive access	
SYS	Require Spitfire Dashboard	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can Delete an entire document completely	

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.

Role Name	Description	Conditions	Conditions Optional	Active	Member Count
Owner	Owner/Customer	✓ X X X X	✓	✓	0

ROLE DETAIL					
Capabilities	Responsibility	Included Roles			
	Role Capabilities	Permit (RIUDS)		Additional Capabilities	
	Customer/Owner	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Accountant	
				Alternate CM	
				Alternate PM	

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

Role Name	Description	Conditions	Conditions Optional	Active	Member Count
Plan Room Visitor	Access to the plan room dashboard	<input checked="" type="checkbox"/> X X X X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0

ROLE DETAIL	
Capabilities	Included Roles
MODULE <input type="checkbox"/> CSTM AREA <input type="checkbox"/> Doc Item Detail - Commitment, RFQ	CAPABILITIES LIKE: <input type="text"/>

Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities
PAGE	Can Export file from the catalog	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1
PAGE	Plan Room Dashboard	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 2
			CSTM	Customizable 3

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.

Role Name	Description	Conditions	Conditions Optional	Active	Member Count																																																		
Project Manager	Project Manager	✓ X X X X	✓	✓	0																																																		
ROLE DETAIL																																																							
<table border="1"> <thead> <tr> <th>Capabilities</th> <th>Responsibility</th> <th>Included Roles</th> </tr> </thead> <tbody> <tr> <td>MODULE</td> <td><input type="checkbox"/> CSTM</td> <td>CAPABILITIES LIKE:</td> </tr> <tr> <td>AREA</td> <td><input type="checkbox"/> Doc Item Detail - Commitment, RFQ</td> <td></td> </tr> </tbody> </table>						Capabilities	Responsibility	Included Roles	MODULE	<input type="checkbox"/> CSTM	CAPABILITIES LIKE:	AREA	<input type="checkbox"/> Doc Item Detail - Commitment, RFQ																																										
Capabilities	Responsibility	Included Roles																																																					
MODULE	<input type="checkbox"/> CSTM	CAPABILITIES LIKE:																																																					
AREA	<input type="checkbox"/> Doc Item Detail - Commitment, RFQ																																																						
<table border="1"> <thead> <tr> <th>Module</th> <th>Role Capabilities</th> <th>Permit (RIUDS)</th> </tr> </thead> <tbody> <tr> <td>DOC</td> <td>Can be designated as another users proxy</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Can move items among folders</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Can Resend Fax/Email</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Can set document status to Approved</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Can set document status to committed / pending</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Change Order linking</td> <td>✓ <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Checkout files or see status</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Document Alerts</td> <td>✓ <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>DOC</td> <td>Document Routees</td> <td>✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></td> </tr> </tbody> </table>			Module	Role Capabilities	Permit (RIUDS)	DOC	Can be designated as another users proxy	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can move items among folders	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can Resend Fax/Email	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can set document status to Approved	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can set document status to committed / pending	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Change Order linking	✓ <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Checkout files or see status	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Document Alerts	✓ <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	DOC	Document Routees	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<table border="1"> <thead> <tr> <th>Module</th> <th>Additional Capabilities</th> </tr> </thead> <tbody> <tr> <td>CSTM</td> <td>Customizable 1</td> </tr> <tr> <td>CSTM</td> <td>Customizable 2</td> </tr> <tr> <td>CSTM</td> <td>Customizable 3</td> </tr> <tr> <td>CSTM</td> <td>Internal Staff</td> </tr> <tr> <td>DOC</td> <td>Attach File From Template</td> </tr> <tr> <td>DOC</td> <td>Can add attachments to a closed document</td> </tr> <tr> <td>DOC</td> <td>Can change document status (if collaborate)</td> </tr> <tr> <td>DOC</td> <td>Can control exclusive access</td> </tr> <tr> <td>DOC</td> <td>Can Delete an entire document completely</td> </tr> </tbody> </table>			Module	Additional Capabilities	CSTM	Customizable 1	CSTM	Customizable 2	CSTM	Customizable 3	CSTM	Internal Staff	DOC	Attach File From Template	DOC	Can add attachments to a closed document	DOC	Can change document status (if collaborate)	DOC	Can control exclusive access	DOC	Can Delete an entire document completely
Module	Role Capabilities	Permit (RIUDS)																																																					
DOC	Can be designated as another users proxy	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Can move items among folders	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Can Resend Fax/Email	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Can set document status to Approved	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Can set document status to committed / pending	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Change Order linking	✓ <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Checkout files or see status	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Document Alerts	✓ <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>																																																					
DOC	Document Routees	✓ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																																																					
Module	Additional Capabilities																																																						
CSTM	Customizable 1																																																						
CSTM	Customizable 2																																																						
CSTM	Customizable 3																																																						
CSTM	Internal Staff																																																						
DOC	Attach File From Template																																																						
DOC	Can add attachments to a closed document																																																						
DOC	Can change document status (if collaborate)																																																						
DOC	Can control exclusive access																																																						
DOC	Can Delete an entire document completely																																																						

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

	Role Name	Description	Conditions	Conditions Optional	Active	Member Count
	Project Staff	Project Staff	✓ X X X X	✓	✓	0
ROLE DETAIL						
<div style="display: flex; justify-content: space-between;"> Capabilities Responsibility Included Roles </div>						
MODULE <input type="checkbox"/> CSTM CAPABILITIES LIKE: <input type="text"/> AREA <input type="checkbox"/> Doc Item Detail - Commitment, RFQ						
	Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities	
	DOC	Can move items among folders	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1	
	DOC	Can Resend Fax/Email	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 2	
	DOC	Manipulate the folders that contain items	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 3	
	LIST	Can change catalog file filter	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Internal Staff	
	PAGE	Add Files	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Attach File From Template	
	PAGE	Attach existing Files and sfDocs to Documents	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can add attachments to a closed document	
	PAGE	Auto Add Routee Options	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can be designated as another users profile	
	PAGE	Can Load an alternate route	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can change document status (if collaboration)	
	PAGE	Catalog Dashboard	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DOC	Can control exclusive access	
						1 2 3 4 5 6 7 8 9 10 ...

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

	Role Name	Description	Conditions	Conditions Optional	Active	Member Count
	Senior Executive	Senior Executive	X X X X X	✓	✓	0
ROLE DETAIL						
<div style="display: flex; justify-content: space-between;"> Capabilities Responsibility Included Roles </div>						
MODULE <input type="checkbox"/> CSTM CAPABILITIES LIKE: <input type="text"/> AREA <input type="checkbox"/> Doc Item Detail - Commitment, RFQ						
	Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities	
	PAGE	Executive Dashboard	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 1	
	PART	Executive Project Summary	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CSTM	Customizable 2	
				CSTM	Customizable 3	

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**

Role Name	Description	Conditions	Conditions Optional	Active	Member Count
System Admin	System Administration	X X X X X	✓	✓	2

ROLE DETAIL	
Capabilities	Included Roles
MODULE <input type="checkbox"/> CSTM AREA <input type="checkbox"/> Doc Item Detail - Commitment, RFQ	CAPABILITIES LIKE: <input type="text"/>

Module	Role Capabilities	Permit (RIUDS)	Module	Additional Capabilities
SYS	Global access	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	CSTM	Customizable 1
			CSTM	Customizable 2
			CSTM	Customizable 3

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.

ROUTE LIST							
ROUTE NAMES LIKE: <input type="text"/>							
		Route Name					Active
		RFQ					<input checked="" type="checkbox"/>

DETAILS FOR SELECTED ROUTE							
STATUS: <input type="checkbox"/> Destination							
Seq. No.	User/Role	Description	Access Level	Default Status	Default Note	With	
2	Spitfire		View	Pending		X	
3	Vendor RFQ Respondee		Collaborate	Pending		X	
5	Doc Entered By		View	Pending		X	

Appendix C

Part	Area covered	Is used by
Budget Targets	<i>Post to Original, EAC and FAC indicators</i>	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.

CUSTOMIZATION TOOL

PART: Doc Tabs DOC TYPE: Commitment
 ITEM: Attendee Tab SHOW LIVE CONFIGURATION
 SHOW VISUAL SHOW ADVANCED

Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active
Doc Tabs	Commitment	DOC:Contact / Attendee Maintenance	Attendee Tab	Liens	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

As another example, if you want the BTM (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:

CUSTOMIZATION TOOL

PART: Project Exec Summary ITEM: BTD Col
 SHOW LIVE CONFIGURATION SHOW VISUAL
 SHOW ADVANCED

Part Name	Doc Type	Capability	Item	Label	Visible	SF	Active
Project Exec Summary			BTD Col		✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Project Exec Summary		LIST:Can access all projects without being a team member	BTD Col		✗	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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	