Focus Guide

The Manage Dashboard

This Focus Guide is designed for Spitfire Project Management System users. In this guide you will learn about the tools that are found on the Manage Dashboard.

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About Our Documentation

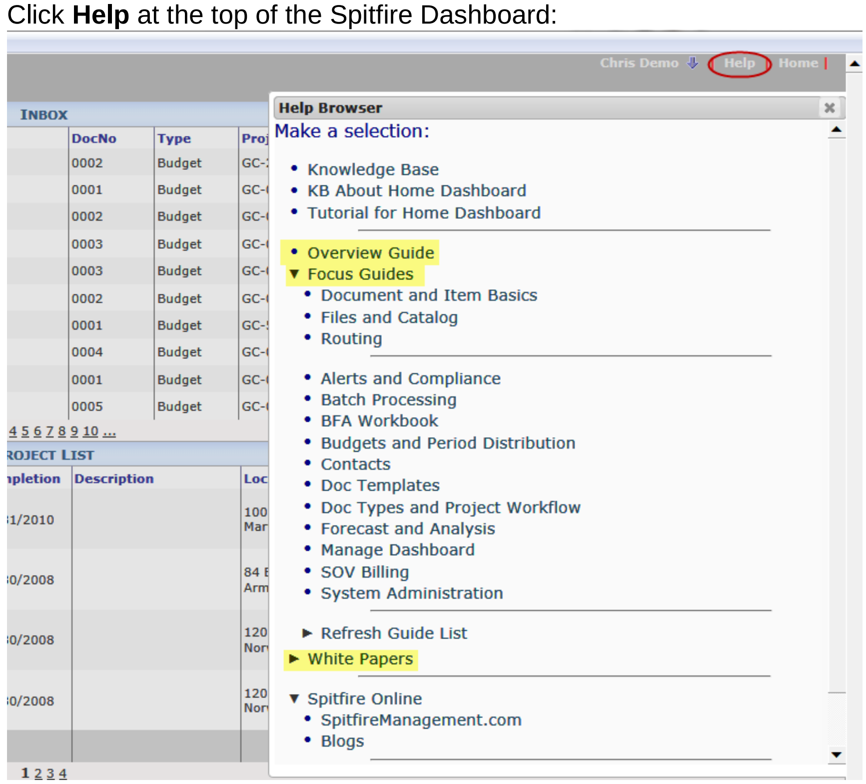
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

Guides

Our guides, which include an *Overview Guide* and various other guides, focus on specific areas or tasks in sfPMS. Often, one Focus guide will refer you to a second Focus guide when an overlapping section is described in more detail in the second guide. By reading the guides, you will get a good understanding of the system in general and you will learn procedures for how to do many of the things that sfPMS allows you to do. We suggest you read the *Overview Guide* first, followed by other Focus guides as needed.

To access the guides:

1. Log in to sfPMS.
2. Click **Help** at the top of the Spitfire Dashboard:

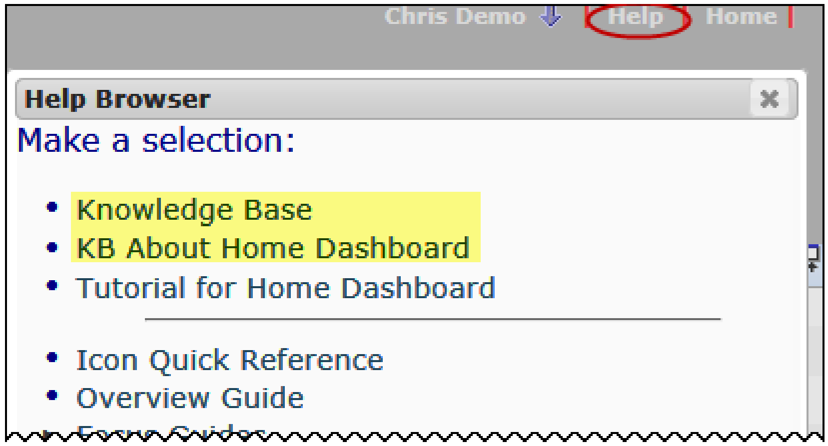


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

   The guide will appear as a PDF file

The Knowledgebase

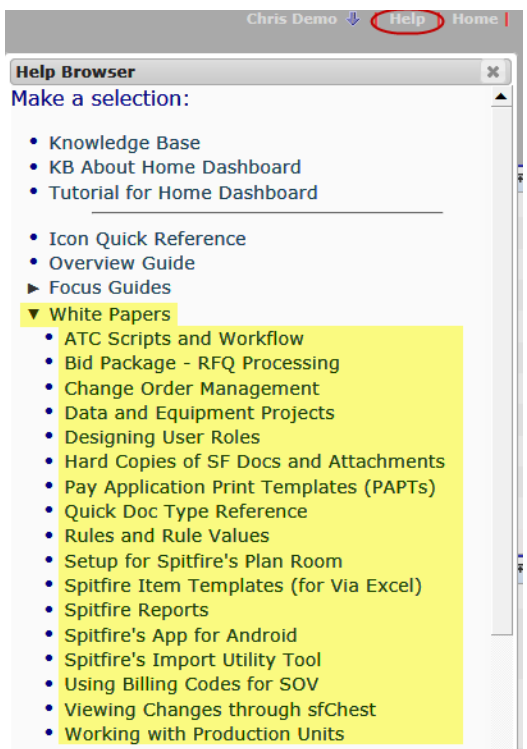
The Knowledgebase contains articles that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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

White Papers

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



Introduction to This Guide

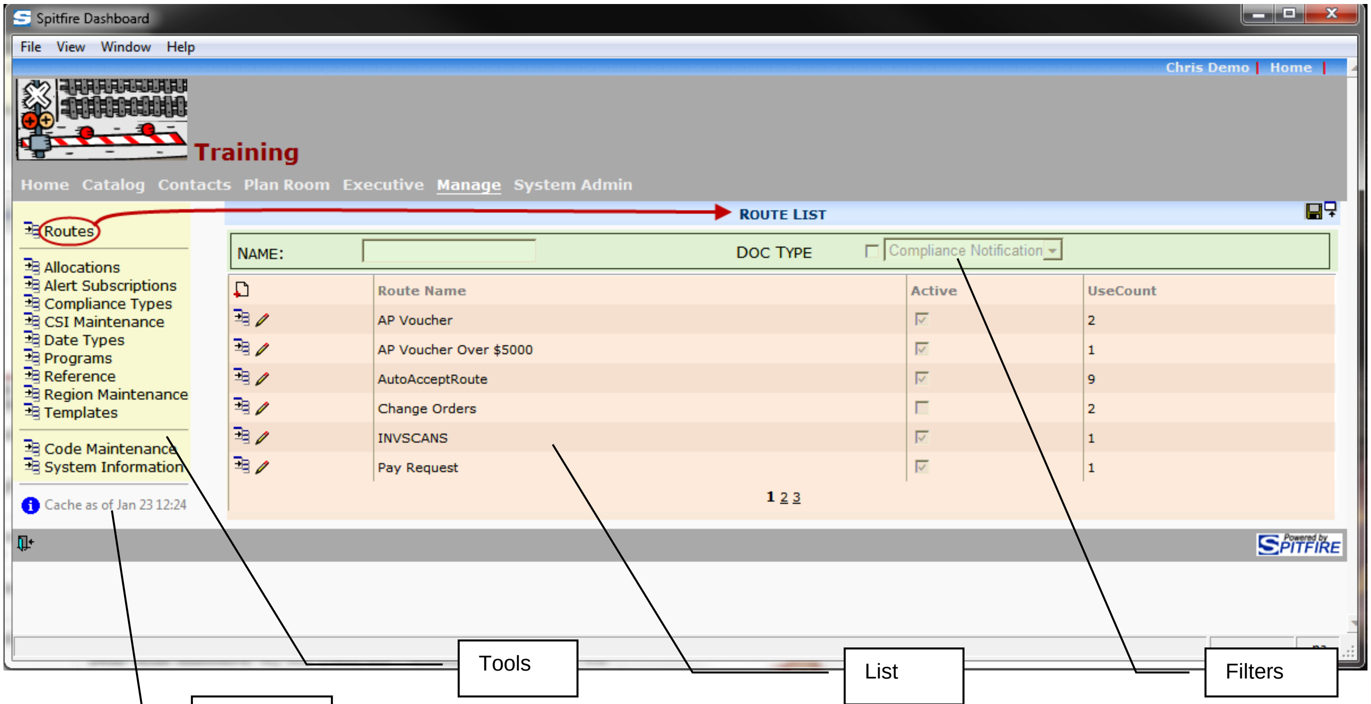
This guide covers tools that are found on the Manage Dashboard and is therefore targeted toward those who have access to the Manage Dashboard.

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 *.

Manage Dashboard



The Manage Dashboard is made up of a list of manager 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 on the System Admin Dashboard.

Note: tools that are also available on the System Admin Dashboard, and are considered to be more system administrator tools than manager tools, are documented only in the *Focus on System Administration* guide, as indicated in the list below.

Manager Tools

The Manager tools enable you to do the following (shown in the order that they are listed on the Manage Dashboard):

- **Routes**: Create and maintain predefined routes that populate the Route Detail tab of documents that meet the specified criteria. (See page 11.)
- **Allocations**: Set up allocations and markups for Change Item Budget Entries. (See page 25.)
- **Alert Subscriptions**: Set up and maintain Alerts for specific users based on a variety of triggers. (See page 33.)
- **Compliance Types**: Set up types of compliance for vendors and Commitments. (See the *Focus on System Administration* guide.)
- **CSI Maintenance**: Set up and maintain a CSI list with short and longer descriptions to be used in Spitfire documents and lookups. (See page 39.)

- **Date Types**: Set up the date types to be used on the Date tabs of certain Spitfire documents. (See the *Focus on System Administration* guide.)
- **Programs**: Set up and maintain programs for the organization and grouping of related projects. (See page 44.)
- **Reference**: Set up and maintain lists based on whatever you want in order to categorize documents and Items. (See page 49.)
- **Region Maintenance**: Set up and maintain regions for the organization of your vendors. (See page 56.)
- **Templates**: Upload a variety of templates for use throughout sfPMS. (See page 59.)
- **Code Maintenance**: Edit or view the options for various drop-downs (pick lists) used in documents and throughout the system. (See the *Focus on System Administration* guide.)
- **System Information**: Check information about servers, versions, and last cache. (See the *Focus on System Administration* guide.)

Routes

The Routes tool allows you to create predefined routes, which then automatically populate the Route Details tab of certain documents, based on Doc type and other conditions. Predefined routes are great time savers and ensure that your documents are being routed consistently. These routes can also be edited.

Considerations for Predefined Routes

Predefined routes contain two parts:

- **Details** that indicate to whom the document will be routed.
- **Rule criteria** used to select which documents will use this route.

What you enter into both the **Details for Selected Route** and the **Rules for Selected Route** parts together make up your named predefined route.

Detail Considerations

TIP

For an explanation of roles, see the *Focus on Contacts* guide or the *Focus on System Administration* guide.

For an explanation of workflow scripts, see the *ATC Scripts and Automatic Workflow* technical white paper.

When creating your list of routees, you'll need to consider the following:

- Which individuals or roles do you want to include in your route (see page 12)?
- Will the route include any ATC workflow scripts?
- Should the role (if using roles) be limited to those contacts also matching the Source Contact (see page 13)?
- Will the routing will be sequential (first one routee, then the next, and so on) or parallel (multiple routees at the same time) or a mixture of both?
- What access level should the routees who normally have read-only access be granted: View or Collaborate?
  Note: people who have write-access to documents will not be affected.
- What routing status (Pending, Pending Any, CC'd) should each routee will be granted?
- Do you want the route due date to be set automatically, based upon when the route is triggered?
- Should any routees get transmittals and be noted in the transmittal log report?
- Should routees who are duplicated on the route appear only once?
- Should any of the routees become the new "email from" person for subsequent routees?

Rule Considerations

When creating your list of rule criteria, you'll need to determine if the following conditions should be considered for the predefined route:

- Specific Doc types?
- A specific document subtype?
- A specific Source Contact (Customer or Vendor)?
- A specific Responsible Party?
- A specific project or only documents on a project with no Project ID or only documents on a project with a Project ID?
- A specific project subtype?
- A specific reference or global reference?
- A specific document priority?
- A specific document status?
- A specific company division?
- Values over or under a set amount?

Concepts

Users vs. Roles

When adding your routees for a predefined route, you need to consider whether each person will be listed by user name or by role. Roles (such as Project Manager or Accounting) are set up by the system administrator and refer to specific people within a project. For example, let's say

- the Project Manager on project CO-013 is John Doe,
- the Project Manager on project GC-003 is Mary Smith,
- the Project Assistants on project GC-003 are Steve Johnson and Mike Nicholson.

If you use roles as the routees in your predefined route, documents that matched the criteria in your predefined route would be routed as follows:

<table>
<tr><th>Documents routed to this role:</th><th>In this project:</th><th>Would be routed to this person:</th></tr>
<tr><td rowspan="2">Project Manager</td><td>CO-013</td><td>John Doe</td></tr>
<tr><td>GC-003</td><td>Mary Smith</td></tr>
<tr><td rowspan="2">Project Assistant</td><td rowspan="2">GC-003</td><td>Steve Johnson</td></tr>
<tr><td>Mike Nicholson</td></tr>
</table>

Roles at Source Contact

As indicated above, if you use a role such as Subcontractor in your routee list, all contacts with that role will be routed the document. If your intention is to route the document to only those subcontractors whose company is the Source Contact of the document, you can indicate this on the Details for Selected Route section (see page 16). For example, a Commitment document routed to **Subcontractor** would go to John Smith of Able Electric only when Able Electric is the company (Source Contact) on the Commitment. That same Commitment document would not be routed to other subcontractors (who are with other companies) on the project.

Who are Source Contacts? The Source Contact can be a vendor, customer, employee or the person named in the To address (the person who will get the document). How the Source Contact is used varies by Doc type. Some common Source Contacts are as follows.
(Your system administrator may have defined other Source Contacts for other Doc types during implementation.)

Document Type	*Source Contact*
Bid	To contact
CCO (Commitment Change Order)	Vendor
Commitment	Vendor
Correspondence	To contact
Customer	Customer
Employee	Employee
Field Directive	To contact
Pay Request	Vendor
RFQ (Request for Quote)	To contact
Safety	To contact
Submittal	To contact
Transmittal	To contact
Vendor	Vendor

Special Roles

In addition to the project-related roles, there are a few special roles that are not set up by the system administrator. These roles have meaning only within the context of the document.

Doc Attendees

The **Doc Attendees** role refers to all Attendees (i.e., Contacts on an Attendee tab) on the document.

Doc Entered By

The **Doc Entered By** role refers to the creator of the particular document. If you want to route a document back to the person who created it, use Doc Entered By.

Doc From Addressee

The **Doc From Addressee** role refers to the “From” Contact on the Addr tab of the document. If there is no From address, or if the address uses a freeform entry, this role is ignored in the route.

Doc Responsible Contact

The **Doc Responsible Contact** role refers to the contact indentified on the Responsible field on a document.

Doc Source Contact

The **Doc Source Contact** role refers to the Source Contact of the particular document. (For examples of Source Contacts, see previous page.)

Doc To Addressee

The **Doc To Addressee** role refers to the "To" Contact on the Addr tab of the document. If there is no To address, or if the address uses a freeform entry, this role is ignored in the route.

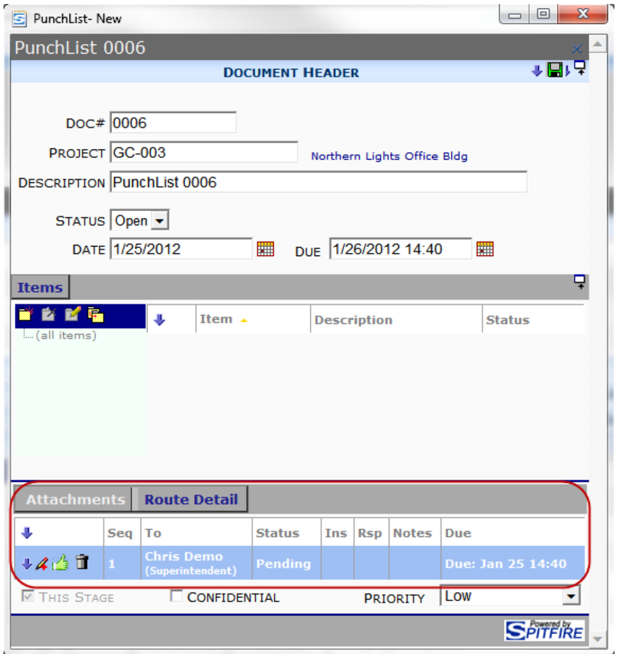
After Setup

Route Detail Tab

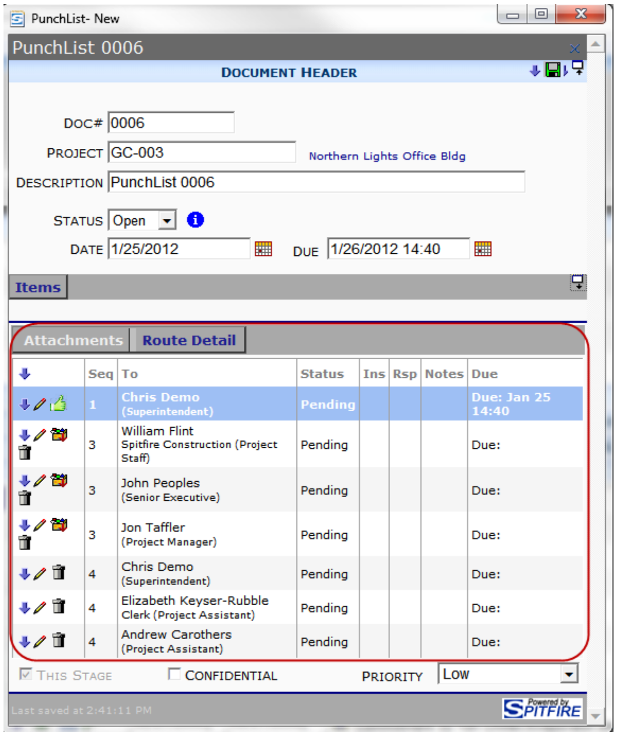
Once you have predefined routes, sfPMS evaluates each new document when it is saved to see if a predefined route should be applied to that document.

When multiple routes apply to a Doc type, the system begins at the route with the most conditions (the most exclusive) and works its way through the applicable routes (most exclusive to least exclusive). Therefore, if one of the conditions in the first routing doesn't apply, the second route will be used.

Predefined routes eliminate the need for a document's creator to set up the routing for the document.



New document, before being saved.

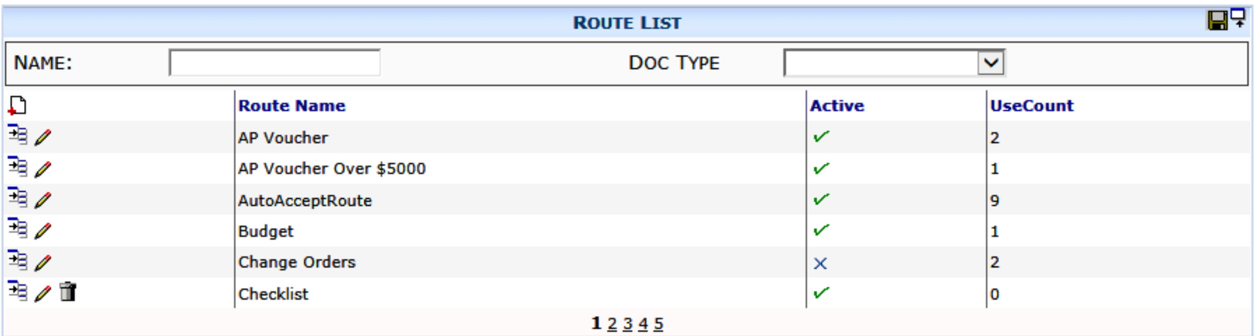


Same document after first save

Note: sfPMS does not evaluate predefined routes until the document is first saved because certain values (such as Priority, Reference, Status and Subtype) are not available when a document is first created. In addition, your system administrator can turn on the **DocTypeConfig | AutoReroute** rule to tell Spitfire to refresh or reset the route at different points. (See KBA-01154).

The Route List

When you select the Routes tool, the Route List appears:



Columns

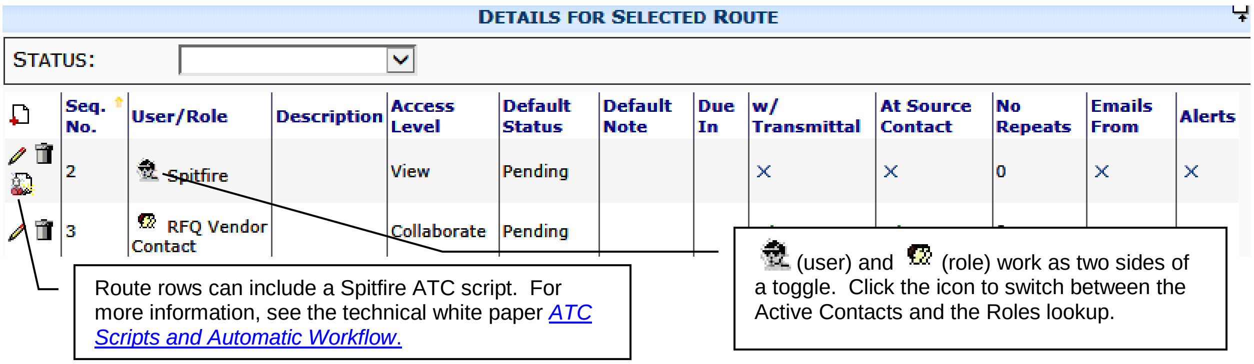
- **Route Name**: the name of the predefined route. We recommend that routes that are tied to just one Doc type use the Doc type name as part of the route name (for example, *Punchlist A* for Punchlist documents).
  Note: Route names do matter. If there are two routes with the same level of exclusivity in criteria, the route whose name appears first alphabetically will be used.
- **Active**: whether or not the predefined route can be accessed and used.
- **UseCount**: the number of “rules” set up for this predefined route (see page 18).

Filters

- **Name**: Type the first few characters or use the wildcard (%) to find one or more predefined routes.
- **Doc Type:** Select a Doc type from the drop-down.

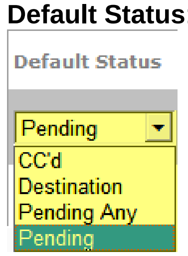
Details for Selected Route

When you expand an predefined route row, the Details for Selected Route part appears:



Columns

- **Seq No.**: the route sequence number. Routees can be entered in sequential or parallel sequences (or a combination of both). For example, rows can be set up for two routees at Seq 2 followed by Seq 3, Seq 4, etc.
- **User/Role**: either the routee's name or the role that will be used by the system to populate the route sequence with the appropriate person(s). If you want to include a workflow script, enter **Spitfire** as the user.
- **Description**: an optional description for the row.
- **Access Level**: whether the person at this sequence should have Collaborate or View access to the document. Collaborate access means that a person who ordinarily has read-only (view) access will be able to edit the document while the document remains in his or her Inbox. **Note**: if the person has write-access to the document through other permissions, this setting is ignored.
- **Default Status**: the route status to be given to the routee.



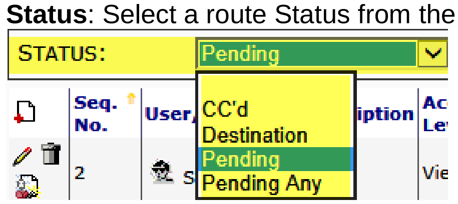
- **Default Note**: an optional note to be included in the route row on the document.

TIP
For an explanation of route statuses, see the *Focus on Routes* guide.

- **Due In**: a whole or decimal number that indicates the number of days or part therein (0.04 is approximately an hour) used to calculate the route due date. The system adds the Due In number to the date on which the route is applied to determine the route due date for the sequence. For example, if the Due In field is **2** and the route is applied on January **4**, the route due date will be January **6** (2+4).
- **w/Transmittal**: whether or not the routee will receive a transmittal printout (if available) and be included in the Transmittal log.
- **At Source Contact**: whether or not the role should be limited to those associated with the Source Contact.
  Note: if a routee name is used instead of a role, this setting is ignored.
- **No Repeats**: any whole number indicating how many sequences back the system should check to see if the routee is a duplicate on the route and then eliminate the duplicate. For example, a No Repeats of **2** on Seq 3 means that if the routee for Seq 3 is already on the route in Seq 1 or Seq 2 (two sequences back), the person will not appear again in Seq 3.
- **Emails From**: if the person at this Seq should become the "on behalf of" and "replies to" person on outbound emails sent after that sequence (or until another person is designated as the Email From person). If more than one person appears at the same Seq., the last person in the Seq will be used. By default, the "on behalf person" is the person who creates the document. For example, if the Emails From checkbox is checked for **Seq 3** and if Chris Demo creates a document and John Doe is added to the document at Seq 3, then Chris Demo will be the "email from" person for Seq 2 and 3 and John Doe will be the "email from" person starting with **Seq 4**.
- **Alerts**: an obsolete checkbox. We recommend you use Alert Subscriptions, as described on page 33.

Filter

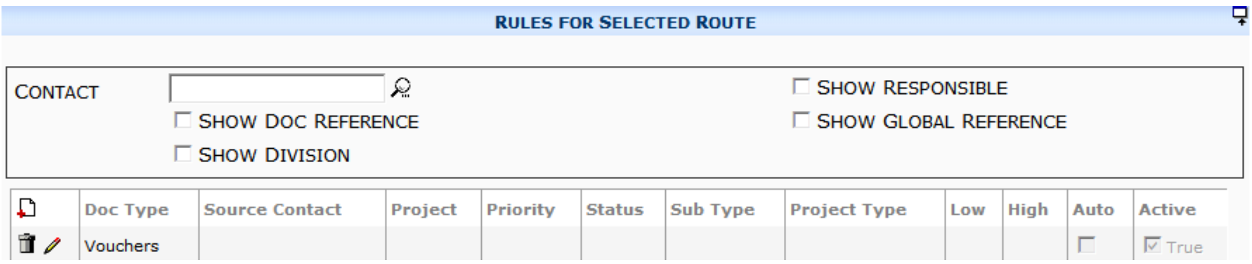
- **Status**: Select a route Status from the drop-down.



Rules for Selected Route

When you expand a named route row, the Rules for Selected Route part appears. Together, the rules determine if a predefined route should be applied to a specific document.

Note: to save space, the **Responsible, Doc Reference, Global Reference** and **Division** criteria fields are normally hidden. If you want to use any of those criteria, click on the appropriate "Show…" checkbox to check it and show the field.



Columns

TIP

You can have just one criterion for your predefined route (for example, Doc Type) or any combination of criteria as needed.

- **Doc Type**: the Doc type to which this predefined route might apply.
- **Source Contact**: a specific person or company used to limit the predefined route. The Source Contact of the document is evaluated against this criterion (see also page 13).
- **Responsible** (*shown only if the Show Responsible checkbox is checked*): a specific person or company used to limit the predefined route. The Responsible person on the document is evaluated against this criterion.
- **Project**: a specific Project ID used to limit the predefined route. The document's Project ID is evaluated against this criterion.
    - If the field is left blank, the route will apply to all projects.
    - If **(unassigned)** is entered in this field, the system will consider documents with no Project ID only.
    - If **(assigned)** is entered in this field, the system will consider documents with (any) Project ID only.
- **Doc Reference** (*shown only if the Show Doc Reference checkbox is checked*): a specific reference used to limit the predefined route. The Reference on the document (see page 49) is evaluated against this criterion.
- **Global Ref** (*shown only if the Show Global Reference checkbox is checked*): a specific global reference used to limit the predefined route   The Global Reference on the document (see page 49).is evaluated against this criterion.

TIP

For more information about the Append and Reset Route options, see the *Focus on Routes* guide.

For more information about workflow scripts, see the *ATC Scripts and Automatic Workflow* technical white paper.

And for more information about the RouteWhenClosed rules, see the *Rules and Rule Values* technical white paper.

- **Priority**: a specific document priority level (entered as a number) used to limit the predefined route. The document's Priority level is evaluated against this criterion.
  - **1** = Urgent
    3 = High
    5 = Medium
    7 = Low
    9 = FYI
  - **99** can also be entered as the Priority if you do not want this predefined route to ever be automatically selected by sfPMS. A predefined route with a Priority of 99 will only be available for selection through the Append and Reset Route options and for use in a workflow script or a **RouteWhenClosed** rule
- **Status**: a specific document status (entered as a code) used to limit the predefined route. Status is best suited for routes that are intended for use through the Append Route feature as the document progresses through its life cycle. The Doc Status is evaluated against this criterion. Doc Status codes are set up in the Code Maintenance tool. Common codes are as follows:
  - **O** = Open
    C = Closed
    A = Approved
    X = Canceled
- **Company** (*shown only if the Show Division checkbox is checked*): a specific company division ID used to limit the predefined route. The company Division associated with the document (by way of the Project Setup) is evaluated against this criterion.
- **Sub Type** *(available only if the Doc type has Sub types)*: a specific document subtype used to limit the predefined route. The document's Subtype (Type, Commitment Type, Permit Type, etc.) is evaluated against this criterion.
- **Project Type**: a specific project subtype used to limit the predefined route. The Type of the Project Setup associated with the document is evaluated against this criterion.

TIP

If the DocTypeConfig | AutoRerouteAmount rule is on, and the document has Items, then cost impact is automatically set to the sum of the Item expense amounts.

- **Low**: a specific number, indicating the lowest value threshold, used to limit the predefined route. The document's cost impact is evaluated against this criterion. A Low amount can be used independently or together with a High amount (see immediately below).
- **High**: a specific number, indicating the highest value threshold, used to limit the predefined route. The document's cost impact amount is evaluated against this criterion. A High amount can be used independently or together with a Low amount.
- **Auto**: whether ( ) or not ( ) this predefined route should start with the second person on the route sequence. Otherwise, the document will go first to the document creator's Inbox until he or she acts on it.

- **Active**: whether ( ) or not ( ) the rule row can be used.

Filters

- **Source Contact**: Look up a name or company to filter by Source Contact.
- **Show Responsible** / **Doc Reference** / **Global Reference** / **Division**: Click the checkbox to see the corresponding column and to use the criterion.

Adding a Predefined Route

The creation of a predefined route consists of three major steps:

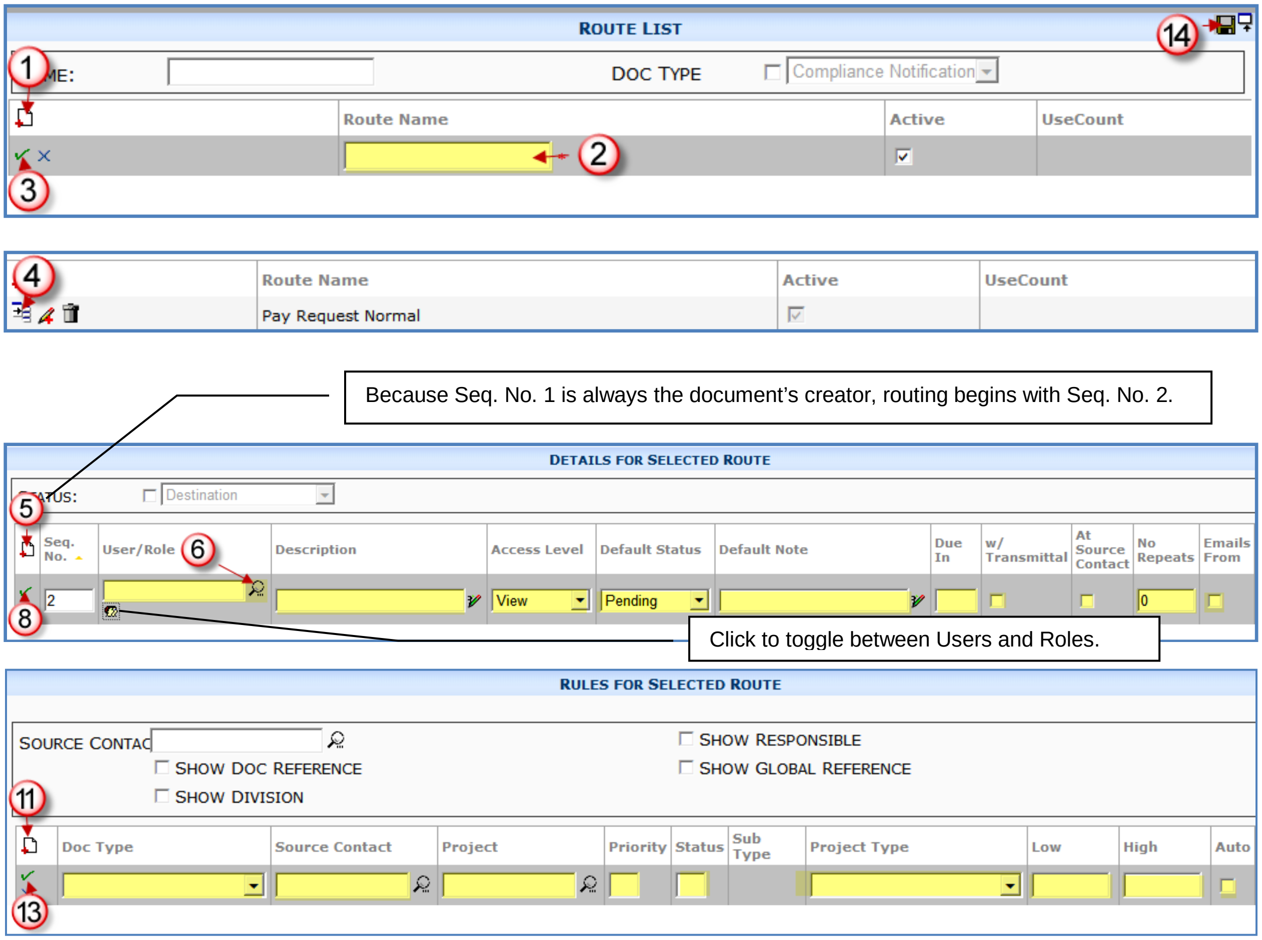
- Naming the route
- Adding routees
- Adding rule criteria

To create a new automated route:

1. Click at the Route List.
2. Enter a **Route Name**.
3. Click to accept the row.
4. Click to get to the Detail and Rule parts.
5. In the Details for Selected Route part, click .
6. Look up a **User/Role** (clicking or first if needed). If you want to add a workflow script, enter **Spitfire** as the user.
7. Fill in the remaining fields as desired (see page 16).
8. Click to accept the row.
9. (*if you want to include a workflow script*) Click at the routee row to open up a popEdit window.
   - o Type your workflow script then save the window.
10. Repeat steps 5 – 8 as appropriate.
11. In the Rules for Selected Route part, click .
12. Fill in the fields as desired (see page 18).
13. Click to accept the row.
14. Repeat steps 11 – 12 if necessary.
15. Click to save the Routes tool.

TIP

For more information about workflow scripts, see the *ATC Scripts and Automatic Workflow* technical white paper.



Predefined Routes

To edit the route on the Route List:

- Click to change the name of the predefined route or to make it inactive.
- Click to delete a predefined route that has no rules. Remember to save after deleting.
  Note: since the icon does not appear for predefined routes that have rules, you must delete the rules of any route you want to delete before you can delete the named route itself.

To edit the Details and/or Rules of a predefined route:

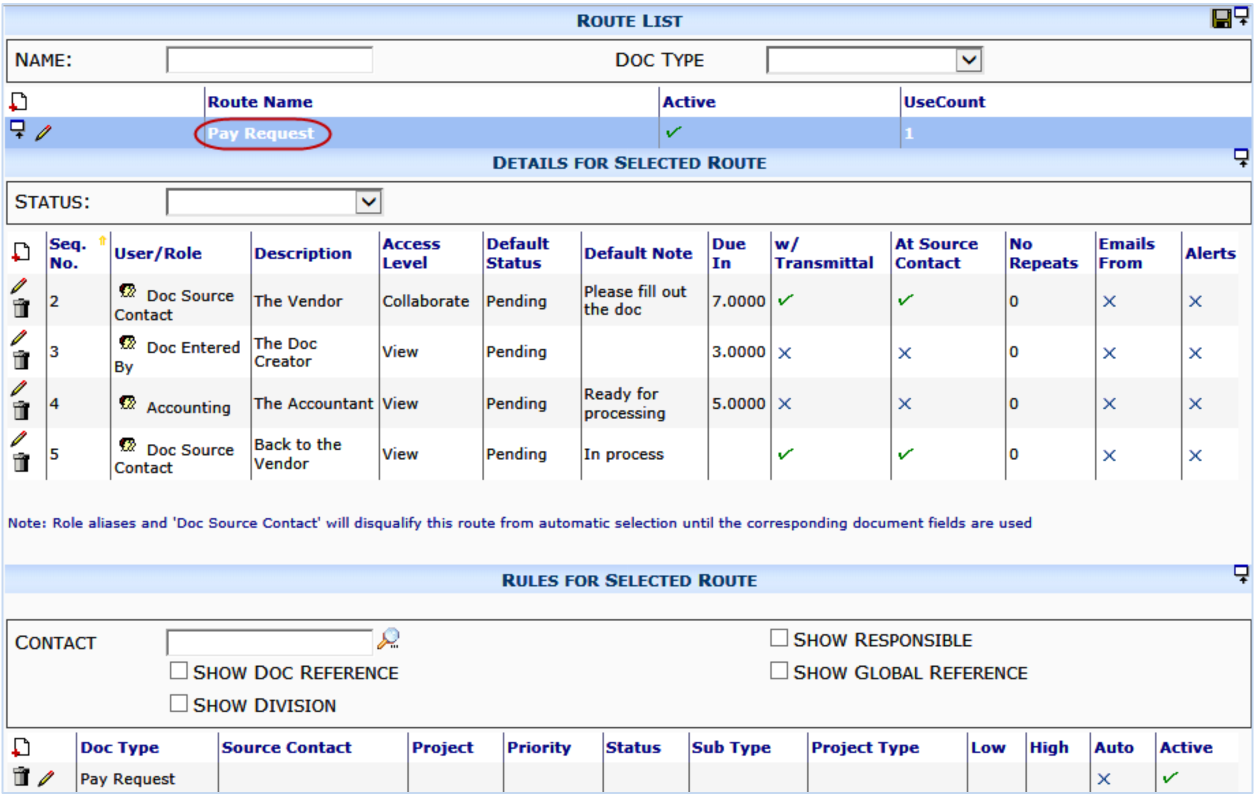
- Click on a route row to edit its Details and/or Rules.
- Click to change the fields of any row.
- Click to delete any row.

To return to the Route List:

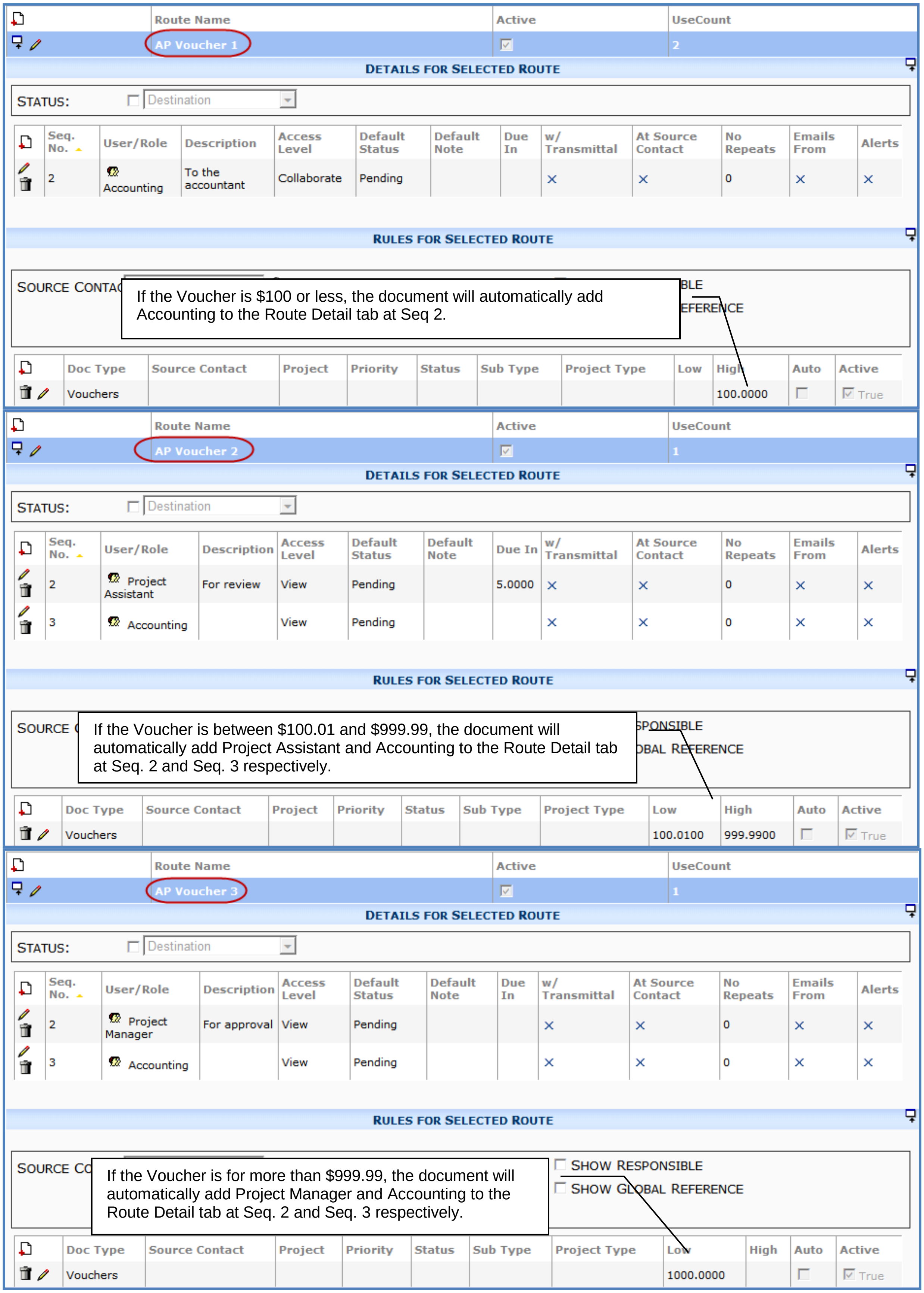
- Click at the route name row.

Examples

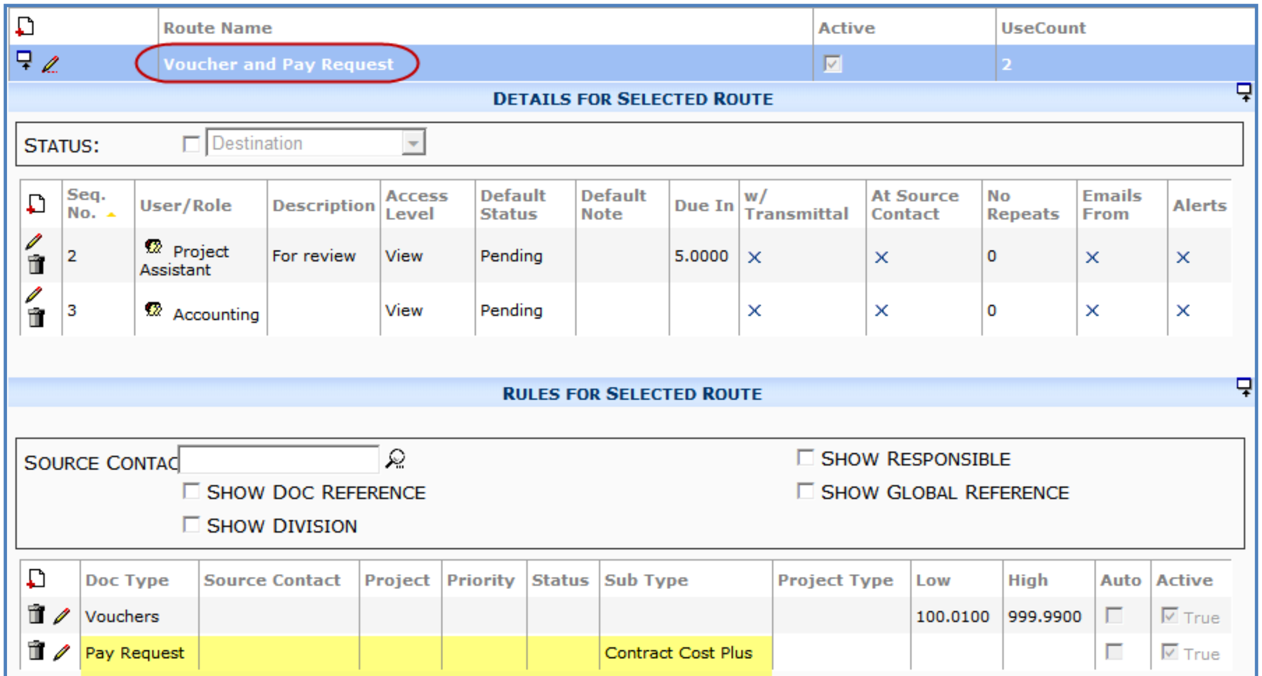
Let us say that you want to create a predefined route for Pay Requests. After leaving the document creator's Inbox, the document should be routed to the vendor (Doc Source Contact) for "fill in" then back to the document's creator (Doc Entered By), then to accounting and then back to the same vendor so he knows that his money is on its way. The vendor is the Source Contact for this document. So you create the following predefined route:



In the next example you set up predefined routes so that AP Vouchers are automatically routed to an appropriate person based on cost impact dollar amounts. If the voucher is for $100 or less, it should go directly to Accounting. If the voucher is for any amount between $100.01 and $999.99, it should go first to the Project Assistant and then Accounting. Finally, if the voucher is for $1000 or more, it should go first to the Project Manager and then Accounting. You create three named routes (shown on the next page), each with the correct combination of routee and criteria (in this case the Doc type of Vouchers and the high and low limits of money).


Route Name
Active
UseCount
AP Voucher 1
2
DETAILS FOR SELECTED ROUTE
STATUS:
Destination
Seq. No.
User/Role
Description
Access Level
Default Status
Default Note
Due In
w/ Transmittal
At Source Contact
No Repeats
Emails From
Alerts
2
Accounting
To the accountant
Collaborate
Pending
0
RULES FOR SELECTED ROUTE
If the Voucher is $100 or less, the document will automatically add Accounting to the Route Detail tab at Seq 2.
Doc Type
Source Contact
Project
Priority
Status
Sub Type
Project Type
Low
High
Auto
Active
Vouchers
100.0000
True
Route Name
Active
UseCount
AP Voucher 2
1
DETAILS FOR SELECTED ROUTE
STATUS:
Destination
2
Project Assistant
For review
View
Pending
5.0000
0
3
Accounting
View
Pending
0
RULES FOR SELECTED ROUTE
If the Voucher is between $100.01 and $999.99, the document will automatically add Project Assistant and Accounting to the Route Detail tab at Seq. 2 and Seq. 3 respectively.
Vouchers
100.0100
999.9900
True
Route Name
Active
UseCount
AP Voucher 3
1
DETAILS FOR SELECTED ROUTE
STATUS:
Destination
2
Project Manager
For approval
View
Pending
0
3
Accounting
View
Pending
0
RULES FOR SELECTED ROUTE
If the Voucher is for more than $999.99, the document will automatically add Project Manager and Accounting to the Route Detail tab at Seq. 2 and Seq. 3 respectively.
SHOW RESPONSIBLE
SHOW GLOBAL REFERENCE
Vouchers
1000.0000
True

You then realize that you also want Pay Requests with a subtype of Cost Plus to be routed first to the Project Assistant and then to the AP Clerk. You extend the usefulness of AP Voucher 2 by adding a new Doc Type criterion for Pay Requests and then renaming the route.



Project Assistant and Accounting will be added to a Pay Request's Route Detail tab (when the Pay Request has a subtype of Cost Plus). The two roles will also be added to Vouchers that are between $100.01 and $999.99 inclusive.

Allocations

The Allocations tool allows you to set up allocations and markups to be automatically calculated and added to a Change Item's Budget Entries window. For more information about the Budget Entries window, see the *Change Order Management* technical white paper.

Considerations for Allocations and Markups

Both Allocations and Markups affect the Budget Entries of a Change Item on a Change Order document.

- **Allocations** are added to the Budget Entries when the  icon is used and conditions are met.
- **Markups** calculate revenue amounts for Budget Entry rows.

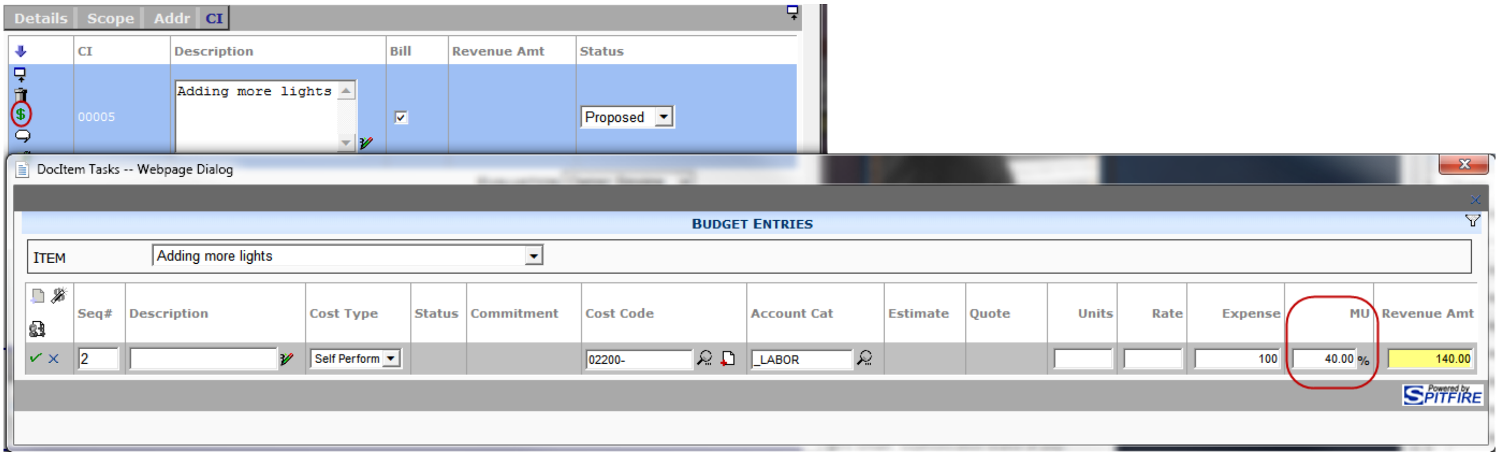
When creating your allocations and markups, you'll need to consider the following:

- Which conditions do you want for each allocation? Will the allocation apply to a certain Contract Type, Project, Cost Code, and/or Account Category? Note that Source Cost Codes are valid only for Self-Perform budget entries.
- In what sequence do the allocations need to be placed? Sequence matters because allocations can apply to previous allocation rows.
- Should the Cost Code for the calculated revenue (target) amount be different from the Source Cost Code? If so, what Cost Code will you use?
- What will be the Account Category for the calculated revenue (target) amount for each allocation?
- Should each allocation be entered as a percentage or a fixed amount?
- Which conditions do you want for each markup? Will the markup apply to a certain Contract Type, Project, Cost Code, and/or Account Category? Note that Source Cost Codes are valid only for Self-Perform budget entries.
- What will be the Account Category for the calculated revenue amount for each markup?
- Should each markup be entered as a percentage or a fixed amount?

After Setup

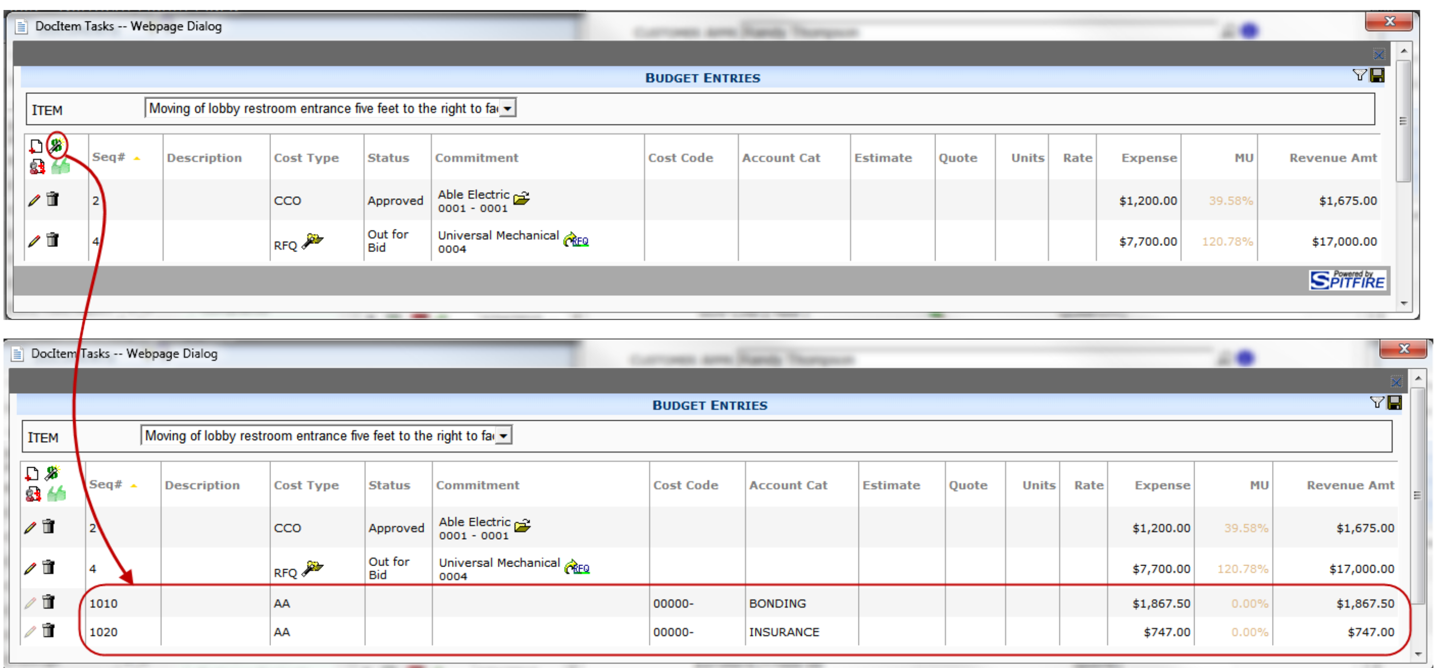
Markups

Once you have markups set up, sfPMS evaluates each row you add to a Change Item's Budget Entries window and, for each row that matches your criteria, calculates the markup amount to add to the Revenue Amount.



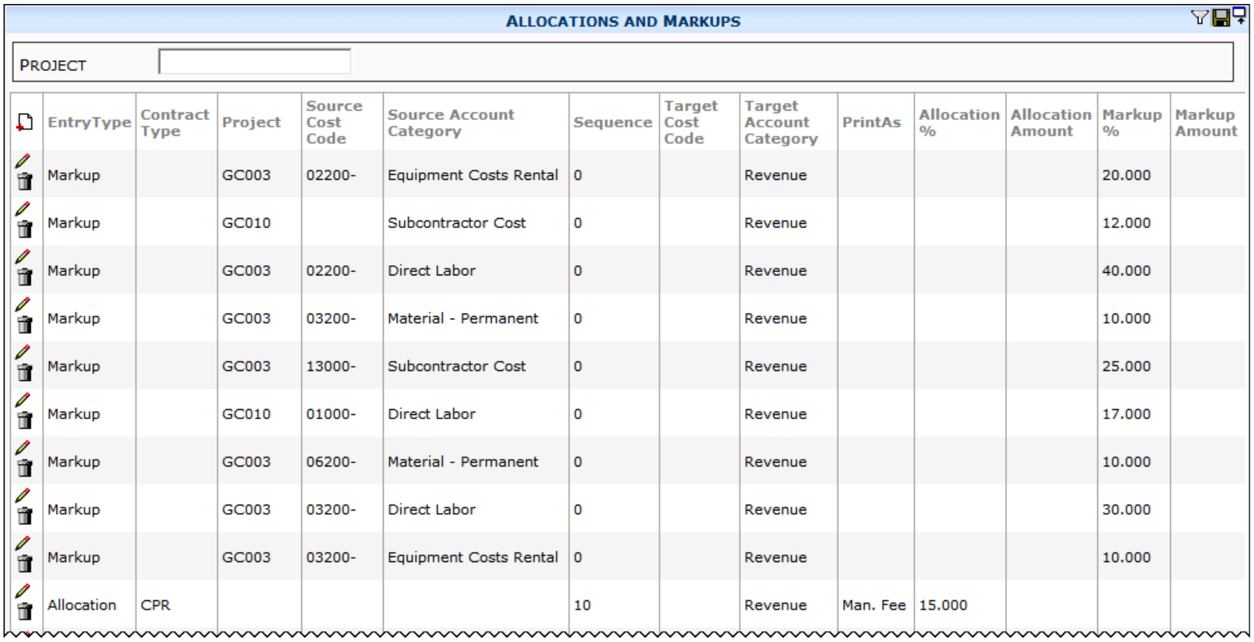
Allocations

Once you have allocations set up, sfPMS evaluates each row on a Change Item's Budget Entries window when you run the allocation engine. Any allocations that match the criteria are added to the Budget Entries window.



The Allocations Part

When you select the Allocations tool, the Allocations and Markups part appears.



ALLOCATIONS AND MARKUPS

PROJECT

EntryType	Contract Type	Project	Source Cost Code	Source Account Category	Sequence	Target Cost Code	Target Account Category	PrintAs	Allocation %	Allocation Amount	Markup %	Markup Amount
Markup		GC003	02200-	Equipment Costs Rental	0		Revenue				20.000	
Markup		GC010		Subcontractor Cost	0		Revenue				12.000	
Markup		GC003	02200-	Direct Labor	0		Revenue				40.000	
Markup		GC003	03200-	Material - Permanent	0		Revenue				10.000	
Markup		GC003	13000-	Subcontractor Cost	0		Revenue				25.000	
Markup		GC010	01000-	Direct Labor	0		Revenue				17.000	
Markup		GC003	06200-	Material - Permanent	0		Revenue				10.000	
Markup		GC003	03200-	Direct Labor	0		Revenue				30.000	
Markup		GC003	03200-	Equipment Costs Rental	0		Revenue				10.000	
Allocation	CPR				10		Revenue	Man. Fee	15.000			

Columns

- **Entry Type:**
  - **Allocation**: tells the system to add this entry to the Budget Entries window when the icon is used and subsequent conditions are met.
  - **Markup**: tells the system by how much to mark up an expense amount on the Budget Entries window when subsequent conditions are met.
  - **Rate**: *for future use*
- **Contract Type:** the often three-letter code of the contract type (**CPR** for Cost Plus to Rev, **FPR** for Fixed Priced to Rev, etc.) that sets up a condition for the Allocation entry. If blank, the markup or allocation will apply to all project types.
  Note: the code is set up in the Code Maintenance tool through the ContractType code set for Project Setup.
- **Project:** the Project ID used as a criterion for the allocation or markup. If left blank, then all Project IDs meet the condition. ID codes should be entered without masks or hyphens.
- **Source Cost Code:** the Cost Code for self-perform Budget Entry lines used as a criterion for allocations or markups. If left blank, then all Cost Codes meet the condition. Cost Codes are ignored on non-self-perform Budget Entries.

- **Source Account Category:** the Account Category for self-perform Budget Entry lines used as a criterion for allocations or markups. If left blank, then all Account Categories meet the condition. sfPMS applies markups for Account Category = Subcontract (by default) for non-self-perform Budget Entries.
- **Sequence:** the order by which allocations are processed and also by which allocations are grouped. Markups do not need Sequence numbers.
    - All allocations must have a Sequence greater than zero.
    - Allocations with the same Sequence number are considered a group; when the conditions for one are met, the others in the group are discarded. This is particularly useful when using Source Account Category to apply varying allocation percents.
    - Each time the hundreds position of the Sequence value changes (001-099, 100-199, 200-299, etc.), allocations are also applied to all prior allocation rows.
- **Target Cost Code:** the Cost Code to be used when this entry is added to the Budget Entries window. If left blank, the Source Cost Code will be used.
  Note: Markups do not use Target Cost Codes.
- **Target Account Category:** the Account Category to be used when this entry is added to the Budget Entries window. **Revenue** appears as a default; other Account Categories are available through a lookup.
  Note: Markups do not use Target Account Categories.

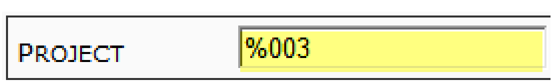
TIP

Allocation % and Allocation Amount are mutually exclusive. Markup % and Markup Amount are also mutually exclusive. If you have accepted the row with a percentage or an amount, but then change your mind and want to use the other field, you must enter a 0 (zero) in the field you are no longer using.

- **Print As:** the description for this entry that appears on the Note column in the Budget Entries window.
- **Allocation %:** the percentage that will be applied by this Allocation to the revenue amounts that meet the criteria. If you do not enter an Allocation % for an Allocation row, you must enter an Allocation Amount.
- **Allocation Amount:** the specific amount that will be applied by this Allocation to the revenue amounts that meet the criteria.
- **Markup %:** the percentage that will be applied as a markup by a markup entry. The percent sign (%) should not be included; just the numbers, for example **10** to mean 10%.
- **Markup Amount**: the specific amount that will be applied by a markup entry.

Filter

- **Project**: Enter the beginning of the Project ID or use a wildcard (%) to find specific projects.



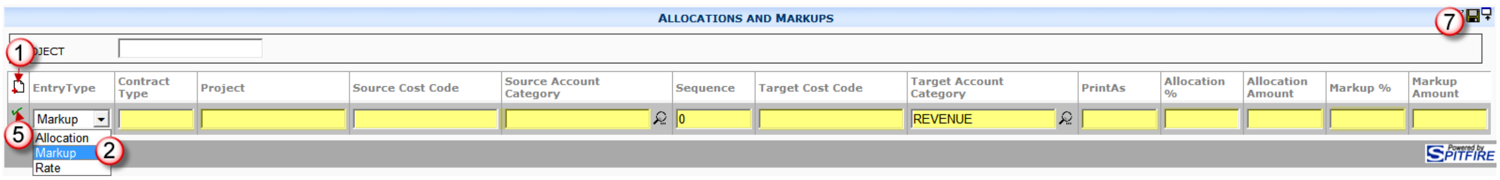
Adding Markups

TIP

If you have a different Account Category for your subs and if you have designated that other Account Category in the **WBAConfig | Subcontract** rule, look up that other Account Category instead.

To add a markup for CI Budget Entries:

1. Click at the Allocations and Markups part.
2. Select **Markup** from the Entry Type drop-down.
3. (*for non-Self-Perform Budget Entries*) Look up SUBCONTRACT as the **Source Account Category**.
4. Fill in the remaining fields as desired (see page 27).
5. Click to accept the row.
6. Repeat steps 1 – 5 as needed.
7. Click to save the Allocations tool.



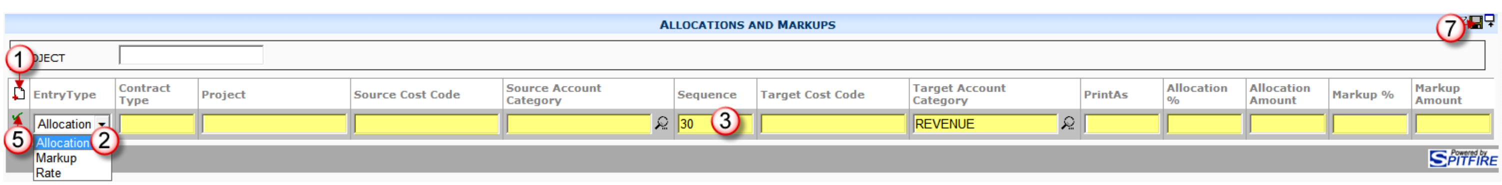
Adding Allocations

TIP

If you enter an **Allocation %** or **Allocation Amount**, you can also enter a **Markup %** to make the Revenue amount different from the Expense amount.

To add an Allocation for CI Budget Entries:

1. Click to add a new row.
2. Select **Allocation** from the Entry Type drop-down.
3. Enter a **Sequence** number. If the Allocation should apply to all previous Allocation rows, change the hundreds position, for example, from 50 to **1**00 or 170 to **2**00, etc.
4. Fill in the remaining fields as desired (see page 27).
5. Click to accept the row.
6. Repeat steps 1 – 5 as needed.
7. Click to save the Allocations tool.



Editing Allocations and Markups

To edit allocations and markups:

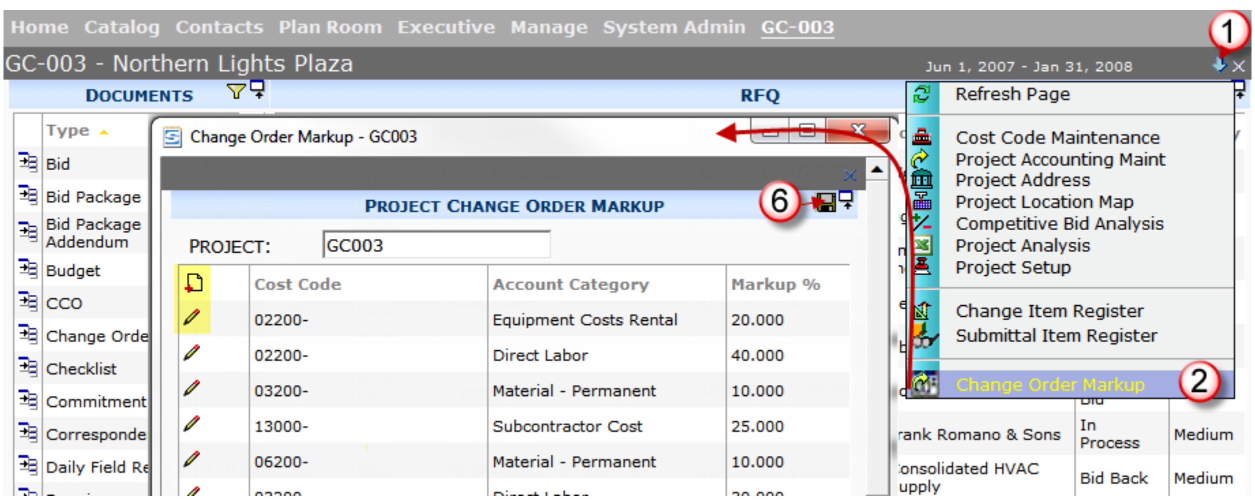
- Click to change any of the fields on an allocation or markup row.
- Click to delete an allocation or markup row.

Change Order Markup Window

Markups can also be set up/edited through the Change Order Markups window found on the Project Options menu.

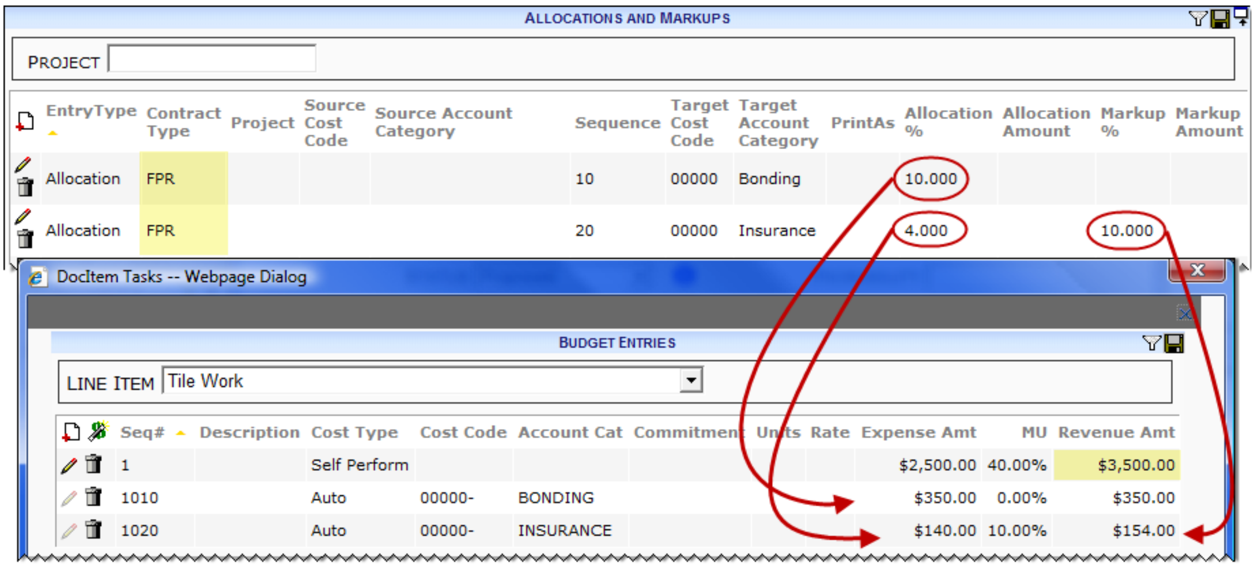
To add or edit a markup on the Change Order Markup window:

1. At the Project Dashboard, click to open the Project Options menu.
2. Select **Change Order Markup**.
3. Click to change the **Cost Code**, **Account Category** or **Markup %** for a specific row.
4. Click to add a new **Cost Code**, **Account Category** and **Markup %**.
5. Click to accept the row.
6. Click to save your changes.

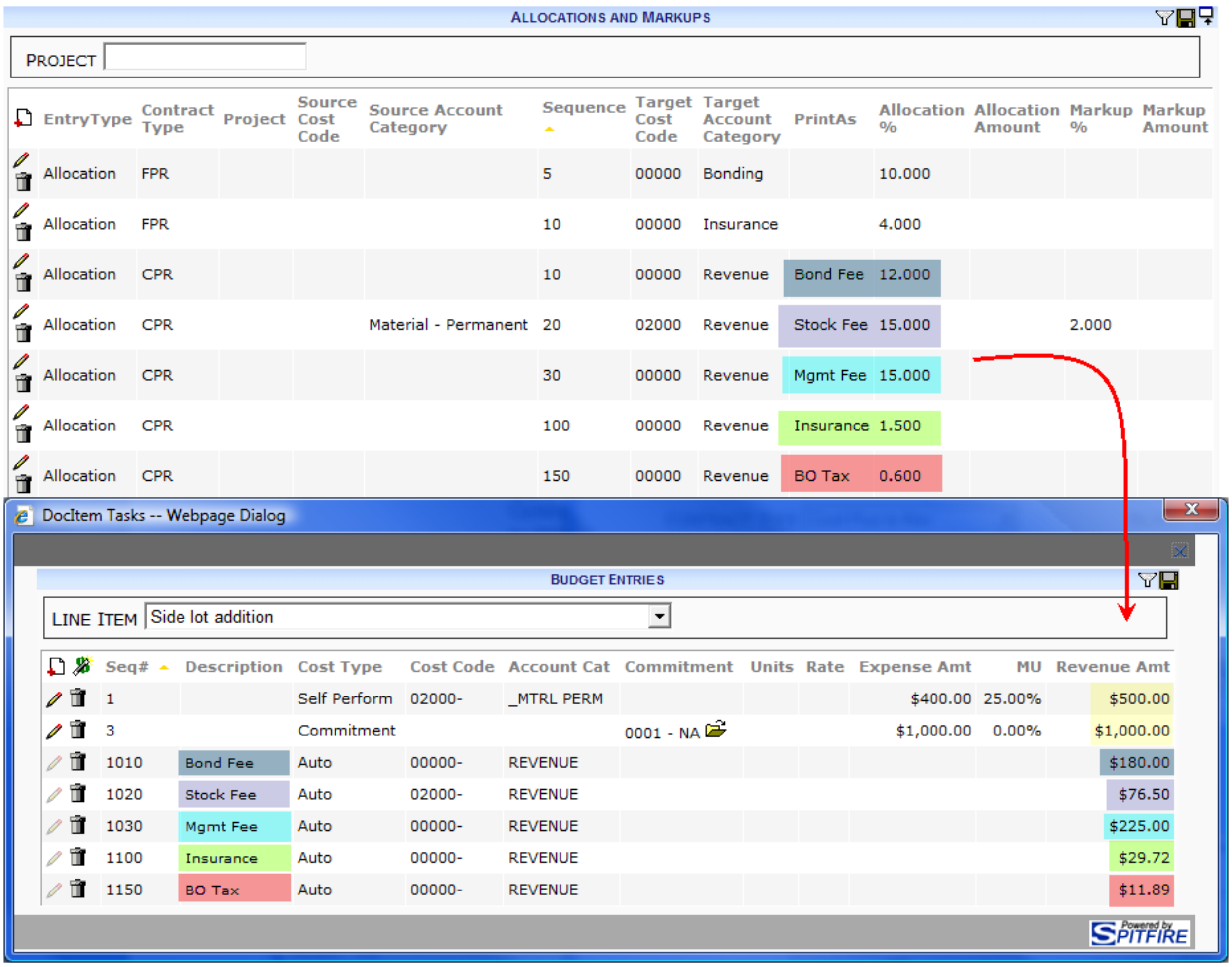


Examples of Allocations

Let's say that you have a Project Setup with a Contract Type of **Fixed Price to Rev (FPR)**. On a Change Order, you open the Budget Entries window from an Item and add a Self Perform entry with an expense amount of $2500 and a revenue amount of $3500. You then click the Allocations icon. Using the Allocations set up as below, you'd get the following results. Because the Contract Type is FPR, both Allocations for FPR would apply, one adding 10% of the revenue as an expense amount and the other adding 4% of the revenue as an expense amount with an additional 1% markup for revenue.



Now let's say you now have a Project Setup with a Contract Type of **Cost Plus to Rev** (**CPR**). You create a Change Order with a Change Item. On its Budget Entries window, you create a Commitment of $1000. You also add a Self-Perform entry for Materials for $400 with a 25% markup, equaling $500 in revenue. When you click the Allocations icon, , you get the following results. All Allocations for the CPR Contract Type are considered for these Budget Entries. Because the Self-Perform entry has a Cost Code of **02000** and an Account Category of **Materials – Permanent**, the "Stock Fee" Allocation and 2% markup apply to it. The other CPR Allocations with a Sequence number under 100 (Bond Fee and Mgmt Fee) are applied to $1500; other CPR Allocations with a Sequence number 100 or higher (Insurance and BO Tax) are applied to the sum of all previous revenue amounts ($500 + $1000 + $180 + 76.50 + $225).


ALLOCATIONS AND MARKUPS

PROJECT

EntryType	Contract Type	Project	Source Cost Code	Source Account Category	Sequence	Target Cost Code	Target Account Category	PrintAs	Allocation %	Allocation Amount	Markup %	Markup Amount
Allocation	FPR				5	00000	Bonding		10.000			
Allocation	FPR				10	00000	Insurance		4.000			
Allocation	CPR				10	00000	Revenue	Bond Fee	12.000			
Allocation	CPR			Material - Permanent	20	02000	Revenue	Stock Fee	15.000		2.000	
Allocation	CPR				30	00000	Revenue	Mgmt Fee	15.000			
Allocation	CPR				100	00000	Revenue	Insurance	1.500			
Allocation	CPR				150	00000	Revenue	BO Tax	0.600			

DocItem Tasks -- Webpage Dialog

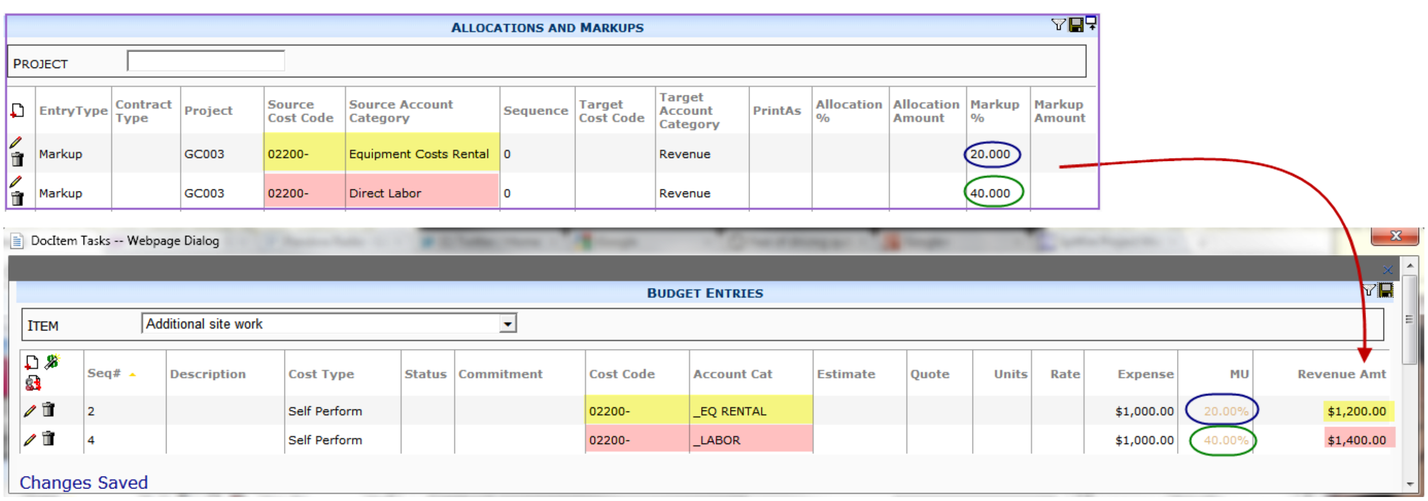
BUDGET ENTRIES

LINE ITEM Side lot addition

Seq#	Description	Cost Type	Cost Code	Account Cat	Commitment	Units	Rate	Expense Amt	MU	Revenue Amt
1		Self Perform	02000-	_MTRL PERM				$400.00	25.00%	$500.00
3		Commitment			0001 - NA			$1,000.00	0.00%	$1,000.00
1010	Bond Fee	Auto	00000-	REVENUE						$180.00
1020	Stock Fee	Auto	02000-	REVENUE						$76.50
1030	Mgmt Fee	Auto	00000-	REVENUE						$225.00
1100	Insurance	Auto	00000-	REVENUE						$29.72
1150	BO Tax	Auto	00000-	REVENUE						$11.89

Example of Markups

In this example, you want Budget Entries with a Cost Code of 02200 and an Account Category of _EQ RENTAL (Equipment Costs Rental) to be marked up 20% and Budget Entries with a Cost Code of 02200 and an Account Category of _LABOR (Direct Labor) to be marked up 40%. After you set these markups up, the amounts are calculated automatically on the Budget Entries window.


ALLOCATIONS AND MARKUPS

PROJECT

EntryType	Contract Type	Project	Source Cost Code	Source Account Category	Sequence	Target Cost Code	Target Account Category	PrintAs	Allocation %	Allocation Amount	Markup %	Markup Amount
Markup		GC003	02200-	Equipment Costs Rental	0		Revenue				20.000	
Markup		GC003	02200-	Direct Labor	0		Revenue				40.000	

DocItem Tasks -- Webpage Dialog

BUDGET ENTRIES

ITEM Additional site work

Seq#	Description	Cost Type	Status	Commitment	Cost Code	Account Cat	Estimate	Quote	Units	Rate	Expense	MU	Revenue Amt
2		Self Perform			02200-	_EQ RENTAL					$1,000.00	20.00%	$1,200.00
4		Self Perform			02200-	_LABOR					$1,000.00	40.00%	$1,400.00

Changes Saved

Alert Subscriptions

The Alert Subscription tool allows you to set up Alerts for other users or for specific roles. Alerts show up in the user's Watchdog Alerts part on the Home Dashboard when certain conditions are met.

Considerations for Alert Subscriptions

Alert subscriptions should be set up for the people who need to be aware of various situations. When creating alert subscriptions, you'll need to consider the following:

- What conditions should trigger an alert?
- Who should get an alert when one is triggered? Should people be identified by names or roles?
- Should alerts be sent when a condition occurs or some days beforehand?
- How often should the system check each alert condition?
- Should the alerts be set for a specific Doc type, Company, or Project?
- Should users receive an email about each alert?

Concepts

Users vs. Roles

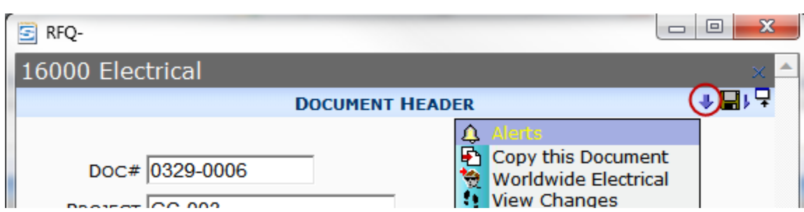
TIP

For an explanation of roles, see the *Focus on Contacts* guide or the *Focus on System Administration* guide.

When indicating who should receive alerts, you need to consider whether each person will be listed by user name or by role. Roles (such as Project Manager or Accounting) are set up by the system administrator and refer to specific people within a project. For example, let's say that both John Doe and Mary Smith are project managers on a project. If an alert is set up to go to Project Managers, then both people would get the alert. If the same alert is set up to go to Mary Smith, then only she would receive it.

Scope of Alert Subscriptions

Alert subscriptions apply only to documents that are created after the alert subscriptions have been saved, and while the alert subscriptions are active. Documents that exist before the alert subscription must have alert tracking added manually through the document's Options menu.



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

After Setup

Watchdog Alerts

Once you have alert subscriptions set up, sfPMS will send out alerts when conditions are met, depending on the recurrence established. Once an alert appears in a user's Watchdog Alerts part (on the Home Dashboard), it will remain there for 99 days or until it is removed. Spitfire will not send out an alert that is the same as one in the Watchdog Alerts part. However, if an alert is removed and the conditions remain, a new alert will be triggered and sent.

WATCHDOG ALERTS

(10 new)	Description	Date	Project Name	Type
	Submittal has route that is overdue	3/4/2013	Northern Lights Office Bldg	Action Overdue
	Change Item Register is overdue	3/4/2013	Le Restaurant de la Lune	Doc Overdue
	Commitment is overdue	3/4/2013	Fabrikam, Inc.	Action Overdue
	Commitment is overdue	3/4/2013	Fabrikam, Inc.	Action Overdue
	Commitment is overdue	3/4/2013	KC Store	Doc Overdue
	Submittal is overdue	3/4/2013	Northern Lights Office Bldg	Action Overdue
	Daily Field Report is overdue	3/4/2013	KC Store	Doc Overdue

1 2

Note: the Watchdog Alerts part shows only your 200 most recently generated alerts.

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

Alert Subscription Part

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

ALERT SUBSCRIPTIONS

DOC TYPE:
USER
ALERT
ROLE NAME
PROJECT

User/Role	Alert	Description	Recurs	Lead Time	Doc Type	Sub Type	Division	Project	Alert Routees	EMailNotify	Active
Project Manager	Document Due		NA	-3				-	×	×	✓
Senior Executive	Document Due		NA	-5				-	×	×	✓
Doc Entered By	Document Due		NA	-1				-	×	×	✓
Doc Entered By	Document Due		NA	0	Change Order			-	×	×	✓
Project Manager	Document Due		Daily	-1				GC-003	×	×	✓
Senior Executive	Document Due		NA	-3	Change Order			-	×	×	✓
Project Manager	Document Due		NA	-1	Change Order			-	×	×	✓

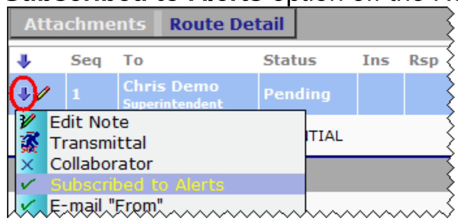
Columns

TIP
The Document Created and Item Created Alert types do not accept a Lead Time or Recurs increment.

- **User/Role**: either the name of the person or the Spitfire role of the people to receive the Alerts. Users are identified by ; roles are identified by . You can click on the icon to change from users to roles and vice-versa.
- **Alert**: the type of document Alert. Alerts types are configured by the system administrator. They describe the conditions that, when met, send out an Alert. The default Alert types
    - Cost Code End
      Cost Code End Change
      Cost Code Start
      Cost Code Start Change
      Document Created
      Document Due
      Document Due Change
      Document Status Change
      Item Created
      Item Due
      Item Due Change
      Item Status Change
      Out-of-Compliance: *compliance type*
      Out-of-Compliance
      Route Due
      Route Due Change
      Route Stage Change

  are described in the *Focus on Alerts and Compliance* guide.
- **Description**: a longer description of the Alert Subscription, if available.
- **Recurs**: how often the Alert should be sent (for example, daily, weekly, monthly, yearly, bi-monthly, etc.) or NA (not applicable).
- **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).
- **Doc Type**: the Doc type to which this Alert should apply. If blank, the Alert will apply to all Doc types.
- **Subtype:** the document's subtype to which this Alert should apply. If blank, the Alert will apply to all subtypes for that Doc type.
- **Company:** the company to which this Alert should apply. If blank, the Alert will apply to all companies.

- **Project:** the project to which this Alert should apply. If blank, the Alert will apply to all projects.
- **Alert Routees**: ✓ indicates that the Alert should be shared only with routees who were chosen to receive Alerts through the **Subscribed to Alerts** option off the Routee drop-down menu.



- **EMailNotify:** ✓ indicates that an e-mail should be sent to the Contact whenever an Alert is sent to his or her Watchdog Alerts list. This duplication of notification is useful for people who do not log in to Spitfire very often.
  Note: proper setup of sfATC during implementation is required for e-mail notification.
- **Active:** whether (✓) or not (✕) this Alert Subscription can be used.

Filters

- **Doc Type:** Select a Doc type from the drop-down.
- **Role Name:** Click 🔍 to look up a role.
- **User:** Click 🔍 to look up an active Contact.
- **Project:** Type all or some of a Project ID. You can use a wildcard (%).
- **Alert:** Click 🔍 to look up an Alert type.

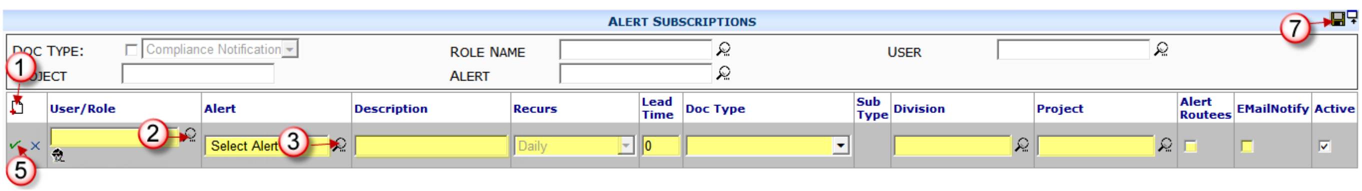
TIP

Any Alerts set up for specific Date types appear on the Alert Type lookup. See the "Date Types" chapter in the *Focus on System Administration* guide for more information.

Adding an Alert Subscription

To add a new global Alert Subscription:

1. Click at the Alert Subscriptions part.
2. In the **User/Role** field, look up the user or role that you want for this Alert Subscription.
   Note: if you want to look up a role and the appears, click the icon to switch to the user lookup (and vice-versa).
3. In the next column, look up an **Alert** type.
4. Fill in the remaining fields and checkboxes as desired (see page 34).
5. Click to accept the row.
6. Repeat steps 1 – 5 as necessary.
7. Click to save Alert Subscriptions.



Editing Alert Subscriptions

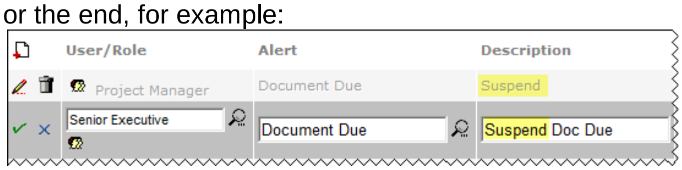
To edit Alert Subscriptions:

- Click on the Alert row and make your changes in the fields.
- Click on the Alert row to delete a subscription.

TIP
From the Alert Subscription tool you can modify Alert Subscriptions that were set up by users from specific documents.

To suspend a subscription:

- Type the word **suspend** in the Description field. If text already exists in this field, you can add suspend either to the beginning or the end, for example:



Examples of Alert Subscriptions

Let us say that you want to set up Alerts based on the Change Order's due date for Change Orders of the Construction Management type. Three days before a Change Order is due, an Alert should go to the Senior Executive. One day before the Change Order is due, an Alert should go to the Project Manager. And on the actual due date, an Alert should go to whoever created the document. You would set up the following alert subscriptions for the **Document Due** Alert type.

ALERT SUBSCRIPTIONS

DOC TYPE: Compliance Notification
USER
ALERT
ROLE NAME
PROJECT

User/Role	Alert	Description	Recurs	Lead Time	Doc Type	Sub Type	Division	Project	Alert Routees	EMailNotify	Active
Doc Entered By	Document Due		NA	0	Change Order	Construction Management		-	×	×	✓
Senior Executive	Document Due		NA	-3	Change Order	Construction Management		-	×	×	✓
Project Manager	Document Due		NA	-1	Change Order	Construction Management		-	×	×	✓

In the following example, an alert subscription for the **Document Status Change** Alert type is set up to send an alert to the Senior Executive of Project GC-003 whenever the status of a Commitment changes.

ALERT SUBSCRIPTIONS

DOC TYPE: Commitment
USER
ALERT
ROLE NAME
PROJECT

User/Role	Alert	Description	Recurs	Lead Time	Doc Type	Sub Type	Division	Project	Alert Routees	EMailNotify	Active
Senior Executive	Document Status Change		NA	0	Commitment			GC-003	×	×	✓

CSI Maintenance

The CSI Maintenance tool allows you to set up and list CSI (Construction Specification Institute) codes with short and longer description that, in turn, can be used on Spitfire documents and lookups. CSI codes provide a structured cataloging system for the documents in your system, allowing you to break down work into whatever level of detail you need.

Considerations for CSI Maintenance

When adding your CSI codes, you'll need to consider the following:

- What short description do you want for each CSI code? This short description can match the description given by the Construction Specification Institute, for example:

03 30 00	**Cast-in-Place Concrete**
03 30 53	Miscellaneous Cast-in-Place Concrete
03 31 00	**Structural Concrete**
03 31 13	Heavyweight Structural Concrete
03 31 16	Lightweight Structural Concrete
03 31 19	Shrinkage-Compensating Structural Concrete
03 31 23	High-Performance Structural Concrete
03 31 24	Ultra High-Performance Structural Concrete
03 31 26	Self-Compacting Concrete
03 33 00	**Architectural Concrete**
03 33 13	Heavyweight Architectural Concrete
03 33 16	Lightweight Architectural Concrete
03 34 00	**Low Density Concrete**
03 35 00	**Concrete Finishing**

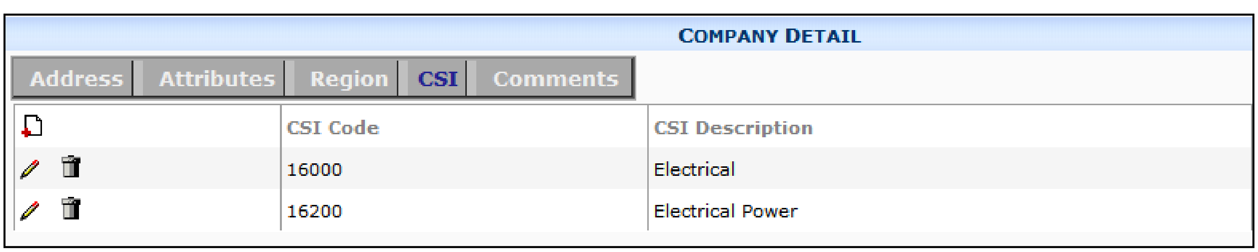
- Do you want to include an extended description for any/all of the CSI codes? Extended descriptions can be as long as you need them to be and can be used to populate certain Item Descriptions automatically.

After Setup

After your CSI codes have been entered into the CSI Maintenance tool, you can use them throughout the system.

Company Detail

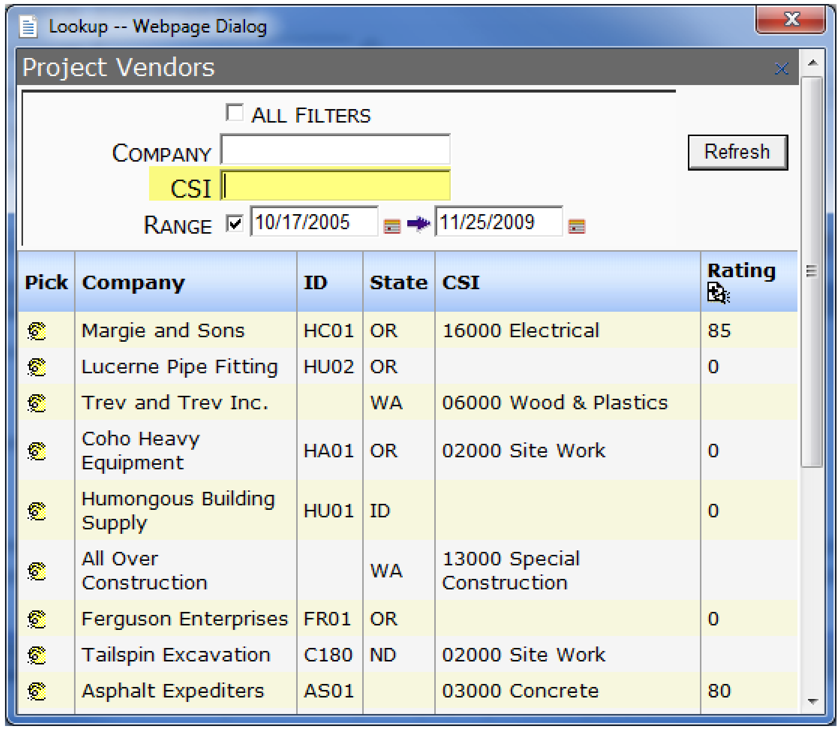
You can add CSI codes to companies through their Company Detail's CSI tab.



Vendor Lookups

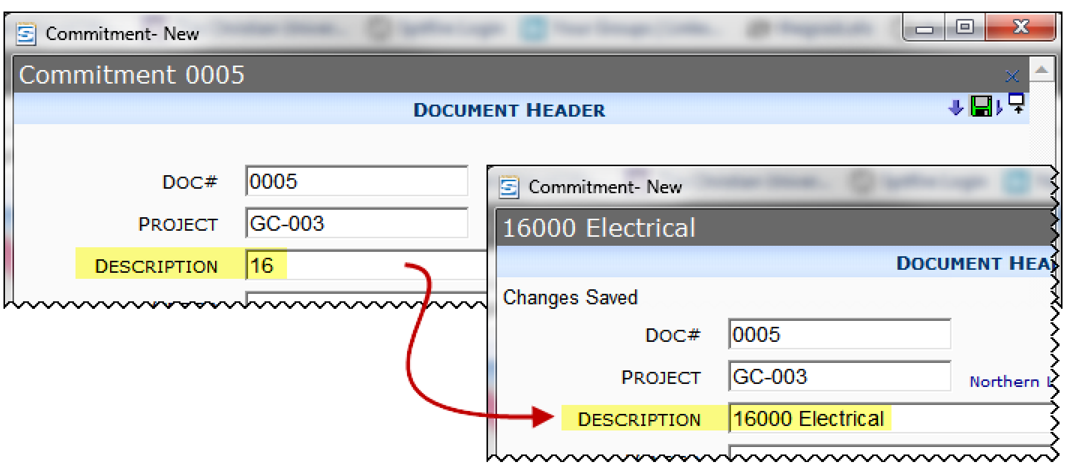
TIP
For more information about CSI codes and Contacts, see the *Focus on Contacts* guide.

Once your vendors are identified by CSI code, you can use CSI codes as filter parameters in Vendor lookups.



Description Field

If you enter a CSI code (or the first few digits of the code) in the **Description** field of a document, sfPMS will zero-fill your entry (turning 16 into 16000 or 162 into 16200, for example) and populate the Description with the short description of the corresponding CSI code when you save the document.

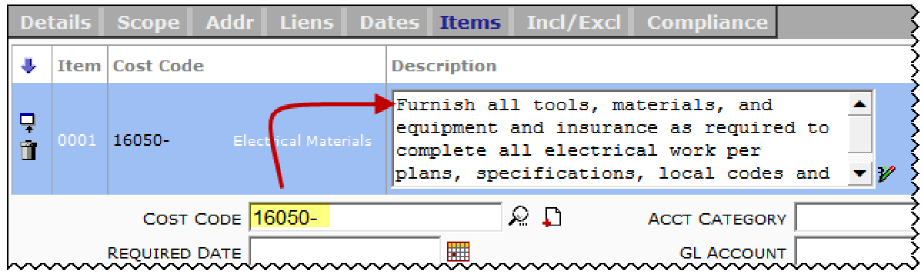


Item Descriptions

TIP

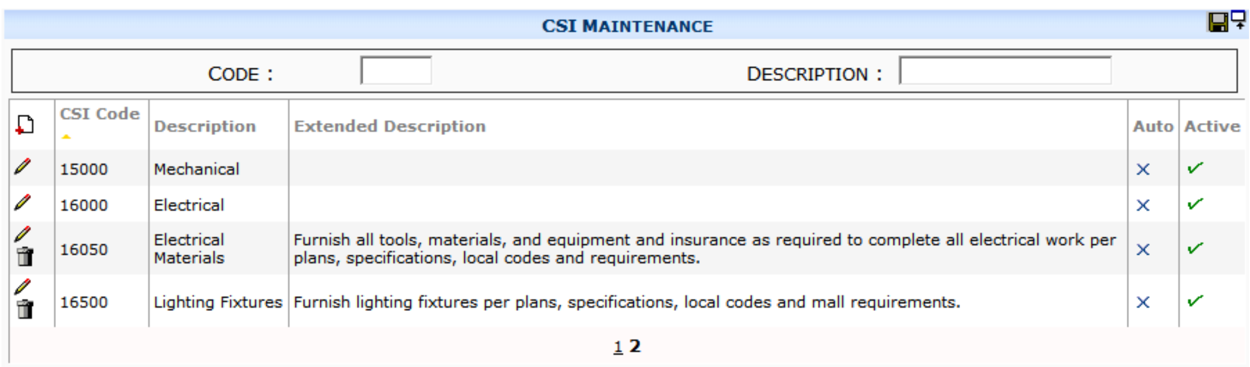
To have an extended description appear for an Item on an applicable document, the DocTypeConfig | ItemText rule must = CSIExtended. Otherwise, the short description will appear.

If you look up a Cost Code for an Item (that accepts Cost Codes, such as on a Commitment), sfPMS uses the extended description of the CSI code associated with the Cost Code to populate the Item Description.



The CSI Maintenance Part

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



CSI MAINTENANCE

CODE : DESCRIPTION :

CSI Code	Description	Extended Description	Auto	Active
15000	Mechanical		✕	✓
16000	Electrical		✕	✓
16050	Electrical Materials	Furnish all tools, materials, and equipment and insurance as required to complete all electrical work per plans, specifications, local codes and requirements.	✕	✓
16500	Lighting Fixtures	Furnish lighting fixtures per plans, specifications, local codes and mall requirements.	✕	✓

1 2

Columns

- **CSI Code:** the 5- or 6-digit Construction Specification Institute code.
- **Description:** a short description of the CSI code. This description can automatically populate the Description field on many Spitfire documents.
- **Extended Description:** a longer description of the CSI code. This description can automatically populate the Description field of Items on certain Spitfire documents,
- **Auto:** whether (✓) or not (✕) the CSI Code should be used to create a cost code automatically during the setup of a new project. (See KBA-01398 for more information.)
- **Active:** whether (✓) or not (✕) the CSI code can be used and selected from lookups in sfPMS.

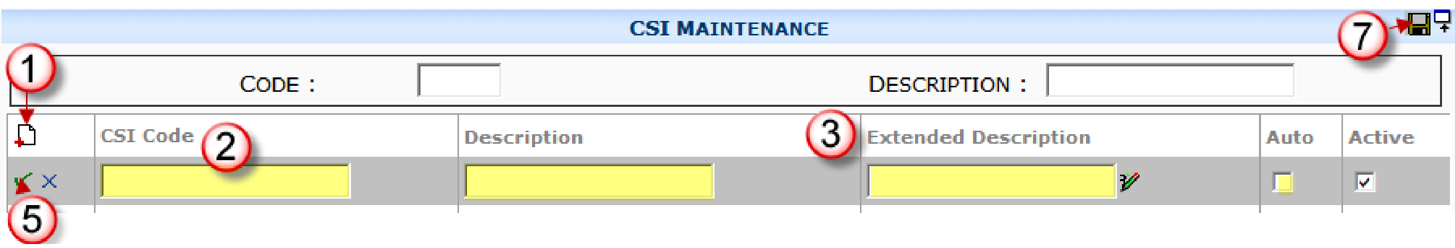
Filters

- **Code:** Type the first characters of the CSI code(s) that you want to find.
- **Description**: Type a few characters or use the wildcard (%) to find a specific Description. For example, **%ings** will find all Descriptions that end in **ings** such as Furnishings.

Adding CSI Codes

To add CSI codes:

1. Click at the CSI Maintenance part.
2. Enter a code in the **CSI Code** field.
3. Enter a **Description**, **Extended Description** or both for the code.
4. Change the **Auto** and **Active** settings, if necessary.
5. Select to accept the row.
6. Repeat steps 1 – 5 as necessary.
7. Click to save your CSI codes.



Editing CSI Codes

To edit CSI codes:

- Click at the row you want to edit.
- Click to delete a the CSI code row.
Note: only CSI codes that have not yet been mapped to a Vendor Contact may be deleted.

Example

Let us say that you want to enter a short and long description for the CSI codes 15000, 16000, 16050 and 16500. The end result might look like the following.

CSI MAINTENANCE

CODE : DESCRIPTION :

	CSI Code	Description	Extended Description	Auto	Active
	15000	Mechanical	Furnish all labor, supervision and insurance as required to complete all mechanical work per plans, specifications, local codes and requirements.	×	✓
	16000	Electrical	Furnish all labor, supervision and insurance as required to complete all electrical work per plans, specifications, local codes and requirements. Price includes all concrete cutting and patch as required for electrical work.	×	✓
	16050	Electrical Materials	Furnish all tools, materials, and equipment and insurance as required to complete all electrical work per plans, specifications, local codes and requirements.	×	✓
	16500	Lighting Fixtures	Furnish lighting fixtures per plans, specifications, local codes and mall requirements.	×	✓

Programs

The Program tool allows you to set up and list Program codes with descriptions that, in turn, can be used to organize projects. By placing any number of projects into programs based on anything you want (such as location or owner/developer), you can better assess how related projects are doing financially.

Considerations for Programs

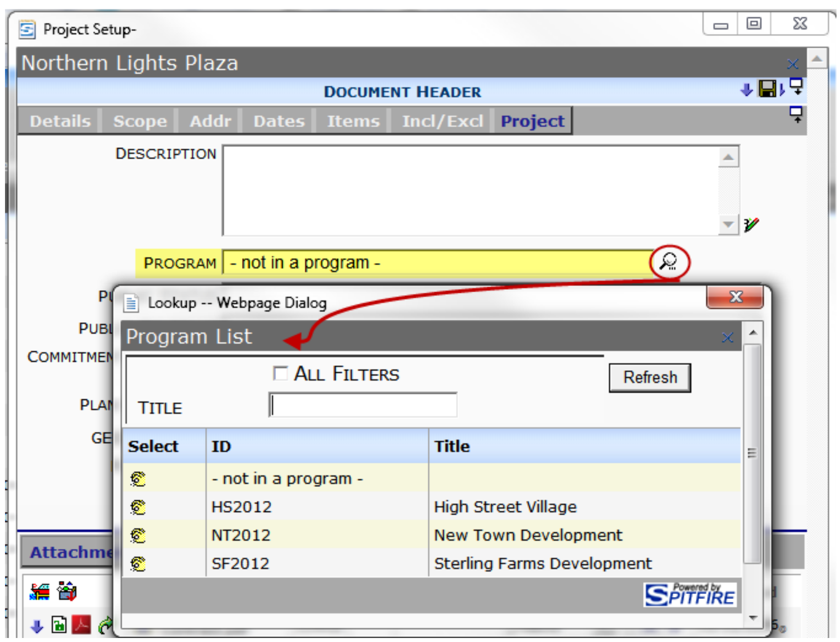
When adding programs, you'll need to consider the following:

- How do you want your projects to be organized? Since projects can appear in more than one program, you might want different types of groups (for example, both programs by owner/developer and programs by location).
- What sort of naming convention do you want for your program IDs?

After Setup

Project Setup Document

After your programs have been entered, you can add projects to each program by selecting the program on the Project Setup's Project tab.



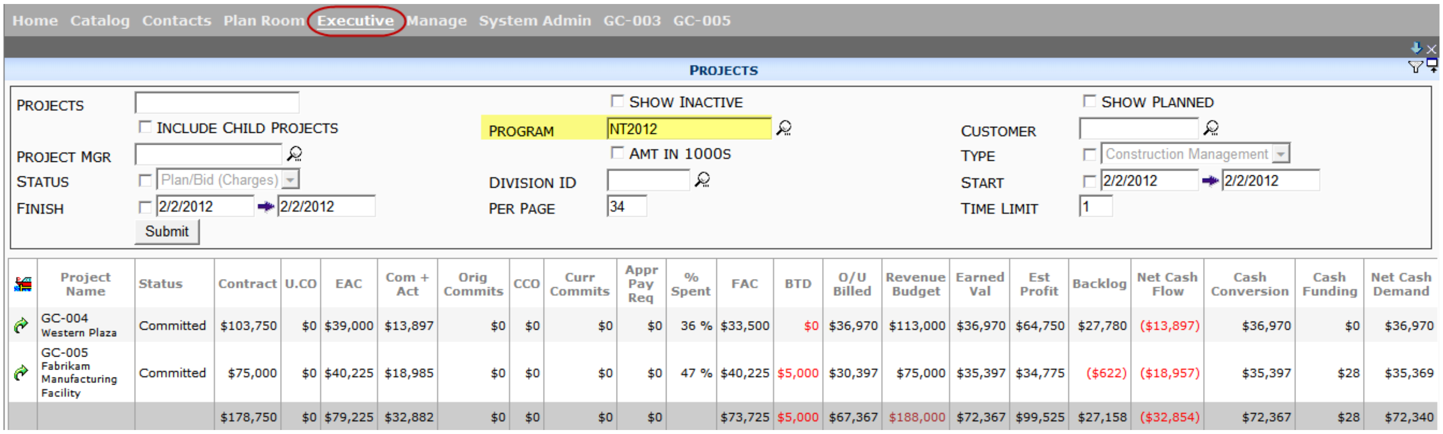
Projects can also be [mapped to programs]() through the Programs tool itself. (See page 46.)

TIP

If the Program field does not appear on your Project Setup document, the Doc type needs to be customized (through the Customization tool) to include Doc Project Setup | Program.

Executive Dashboard

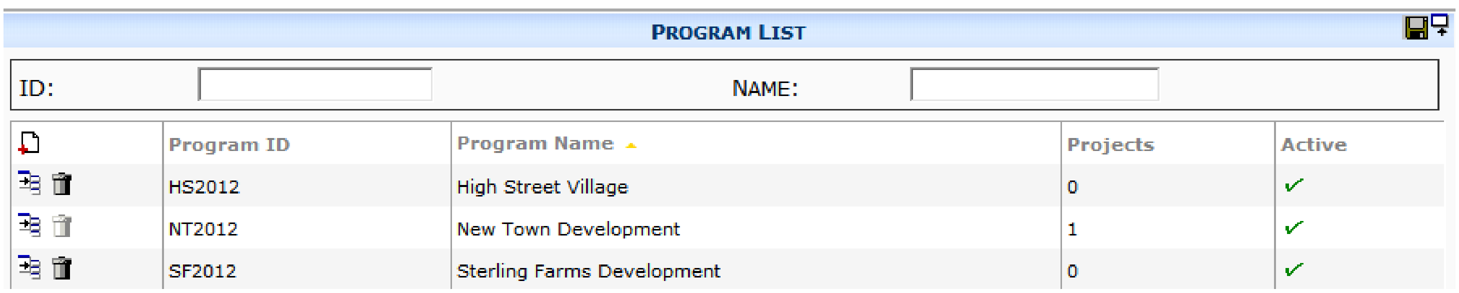
Once your programs include projects, you can use the **Program** filter on the Executive Dashboard to see the financial information for those related projects.



	Project Name	Status	Contract	U.CO	EAC	Com + Act	Orig Commits	CCO	Curr Commits	Appr Pay Req	% Spent	FAC	BTD	O/U Billed	Revenue Budget	Earned Val	Est Profit	Backlog	Net Cash Flow	Cash Conversion	Cash Funding	Net Cash Demand
	GC-004 Western Plaza	Committed	$103,750	$0	$39,000	$13,897	$0	$0	$0	$0	36 %	$33,500	$0	$36,970	$113,000	$36,970	$64,750	$27,780	($13,897)	$36,970	$0	$36,970
	GC-005 Fabrikam Manufacturing Facility	Committed	$75,000	$0	$40,225	$18,985	$0	$0	$0	$0	47 %	$40,225	$5,000	$30,397	$75,000	$35,397	$34,775	($622)	($18,957)	$35,397	$28	$35,369
			$178,750	$0	$79,225	$32,882	$0	$0	$0	$0		$73,725	$5,000	$67,367	$188,000	$72,367	$99,525	$27,158	($32,854)	$72,367	$28	$72,340

The Program List

When you select the Programs tool, the Program List appears:



Program ID	Program Name	Projects	Active
HS2012	High Street Village	0	✓
NT2012	New Town Development	1	✓
SF2012	Sterling Farms Development	0	✓

Columns

- **Program ID**: any combination of numbers and letters used to identify the program.
- **Program Name**: a description of the program.
- **Projects**: the number of projects currently in the program.
- **Active**: whether (✓) or not (✕) the program can be selected in the system.

Filters

- **ID:** Type the first characters of the Program code(s) that you want to find.
- **Name**: Type a few characters or use the wildcard (%) to find a specific program by name. For example, **%Dev%** would find all Names that include Dev, such as New Town Development and Sterling Farms Development.

Mappings for the Program

When you expand a program row, the Mappings part appears:

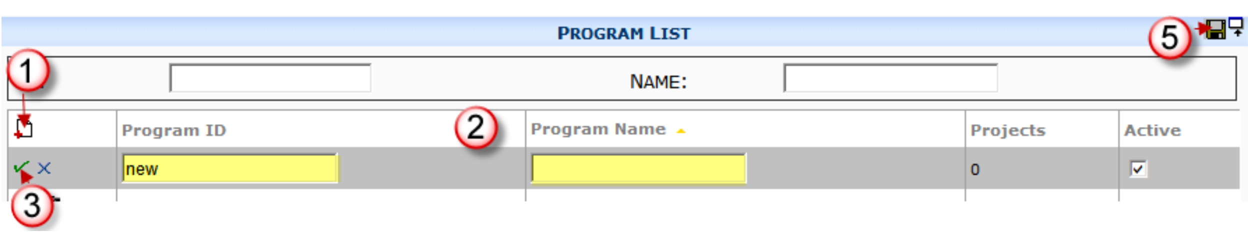
Columns

- **Project**: both the list of projects currently in the program and a lookup from which you can add other projects.
- **Active**: whether (✓) or not (✕) the project is active within the program. This option provides a quick way to temporarily "remove" a project from a program.

Adding Programs

To add Programs:

1. Click at the Programs list.
2. Enter a **Program ID** (this can be any ID you wish) and a **Program Name** to describe the program.
3. Click ✓ to accept the row.
4. Repeat steps 1 – 3 as necessary.
5. Click to save the Programs tool.



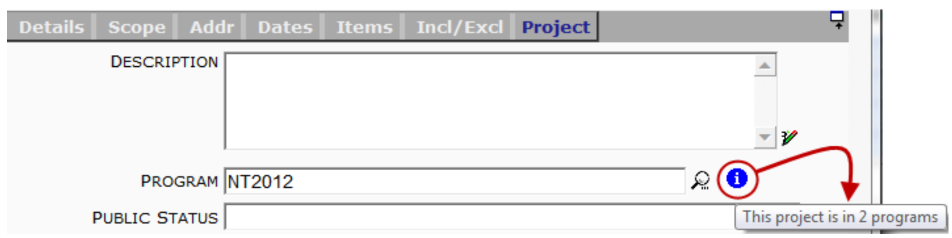
Map Projects to Existing Programs

Once a program has been added, you can expand the program to get to Detail view and add projects to the program. This method is the only way to add a project to multiple programs.

To map projects to programs:

1. Click at the program row. The details for the program will display the **Mappings** part.
2. Click at the Project lookup and select a project.
3. Click to save the Programs tool.
4. Click at the Program row to get back to the Program list.

Note: if a project is included in multiple programs, a message will so indicate when you mouse over the icon.



Editing Programs

To edit Programs:

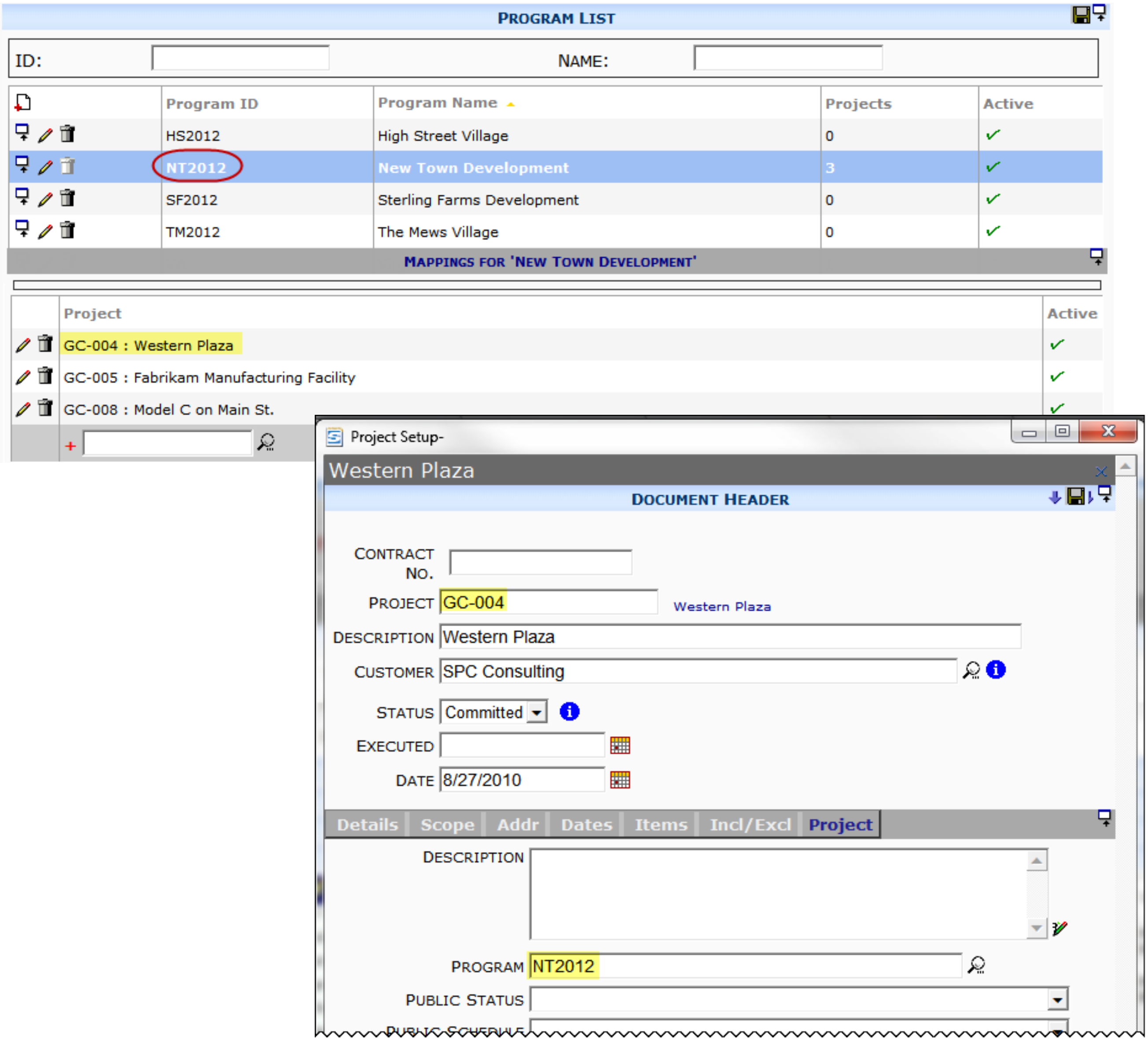
1. At the Program List, click at the Program you wish to edit.
2. Click at the program row to change the Program ID or Program Name.
3. Click at the project row in the Mappings part to make a project inactive in the program.

To delete Programs or Projects in Programs:

- Click on the project row in the Mappings part to remove a project from the program. Remember to save after deleting.
- Click on the program row to delete a program that has no projects. Remember to save after deleting.
  Note: since the icon is invalid for programs with projects, you must delete all projects in a program before you can delete the program itself.

Example

Let us say that you have a project for each new building that you are constructing and that these buildings are in different developments. After you enter each development as a program, you add projects to each program.



Reference

The Reference tool allows you to set up references and global references that can then be used to categorize documents.

Considerations for References

When creating your list of references, you'll need to consider the following:

- How will you use references and global references in the system?
- What do you want on your reference vs. global reference list (see below)?
- Will any references or global references belong to a rollup?
- Will any global reference belong to a division?

Concepts

References and global references are both user-defined, but whereas references are Doc-type driven, global references are system-wide.

Reference vs. Global Reference

Feature	***Reference***	***Global Reference***
Field can appear in document's Detail tab	✓	✓
Field can appear in document's Item Detail view		✓
Value can be selected using a lookup	✓	✓
Can include defined rollups	✓	✓
Can include defined divisions		✓
Can be used as a criterion in automated routes	✓	✓
Can be used as a criterion in the Templates tool	✓	
Can be used as filter in Catalog searches	✓	
Can be used as a role condition	✓	
Can be Doc-type-sensitive (including CodeSetRedirect and ExcludeCommonChoices rules)	✓	

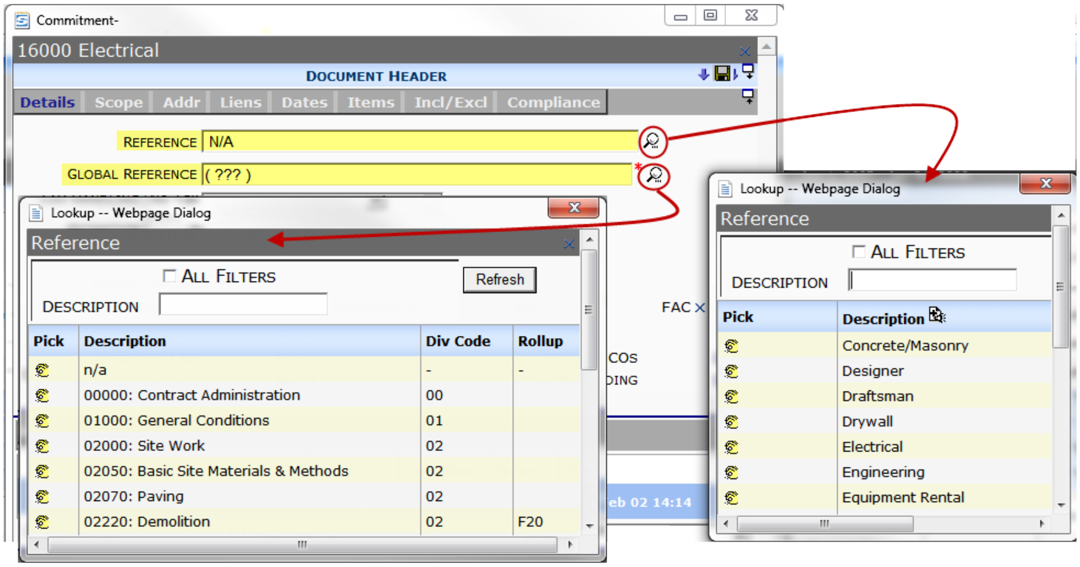
Rollups and Divisions

A Rollup feature allows you to categorize documents at one level and then report on them at a higher Rollup level. For example, you could create references for Hospitals, Clinics, Nursing Homes, and Hospices and roll all of them into a Health Care Rollup. Rollups are used in reports.   Global references can be categorized into both rollups and divisions (which is a second rollup) for custom reports.

After Setup

Document's Detail Tab

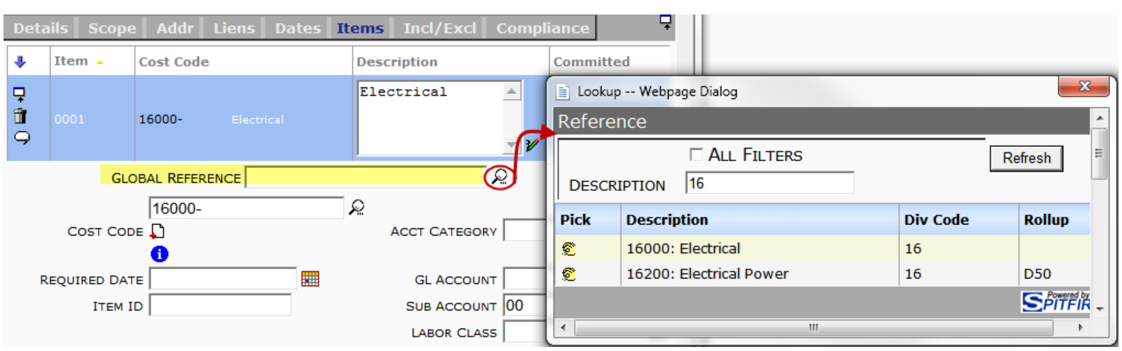
Once you have added references and global references, you can add these references to documents through the Reference and Global Reference fields on a document's Details tab.



Note: if the Reference and Global Reference fields do not appear on your document, the Doc type needs to be customized (through the Customization tool) to include **Doc Detail – Standard | Reference** and/or **Global Reference**. See the *Focus on System Administration* guide for more information.

Document's Item Detail

If you have global references set up, you can add global references to your Item's Details.



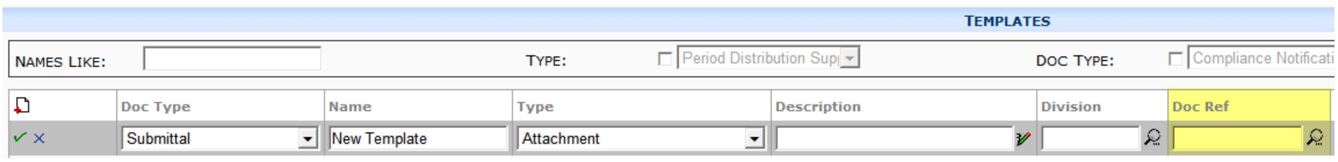
Note: if the Global Reference field does not appear on the Items tab, the Doc type needs to be customized (through the Customization tool) to include **Doc Item Detail – Standard | Reference** and/or **Global Reference**.

Predefined Routes

References and global references can be specified when creating predefined routes through the Routes tool (see page 11).

Templates Tool

A reference can be specified as a condition for a specific template in the Templates tool (see page 59).

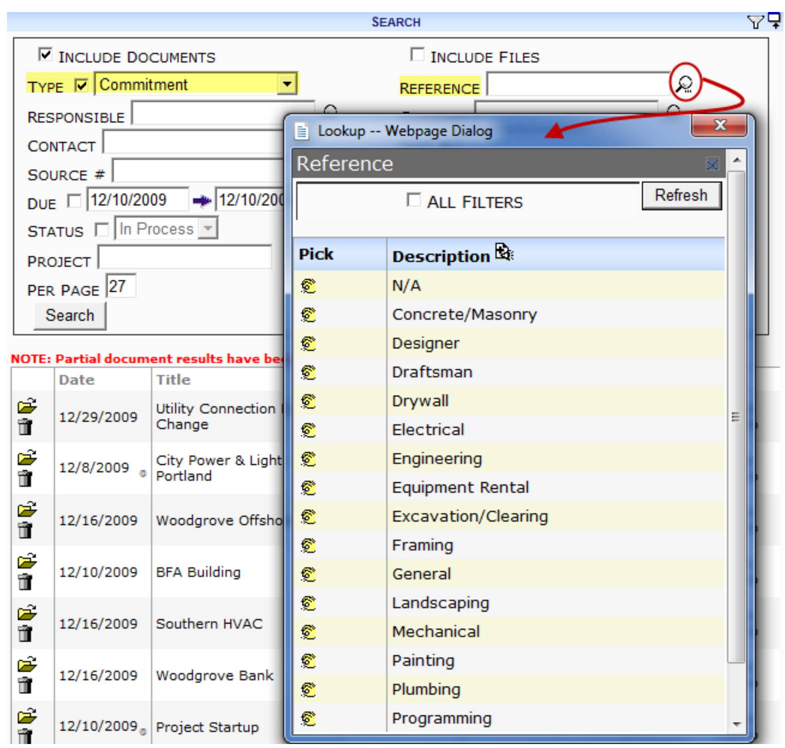


Catalog Searches

References (but not global references) can be used as search parameters for documents in the Spitfire Catalog. Since most references are defined by Doc type, it is likely that the Type filter must be used first.

TIP

For more information about the Catalog, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.



Role Conditions

In addition, permission levels can be restricted by the reference condition. For example, if you grant a subcontractor access to documents with a reference condition of Electrical Work, that subcontractor would only be able to view documents where the reference is Electrical Work. For more information about the Roles tool, see the *Focus on System Administration* guide.

ROLE LIST

ROLE LIKE: ____ TYPE: ☑ Primary

	Role Name	Description	Conditions
	Accounting	Accounting	× ✓ × × ×
	Architect	Architect	✓ × Reference
	Compliance Admin Internal	Compliance Admin Internal	× × × × ×
	Compliance Admin Vendor	Compliance Admin Vendor	× × × × ×
	Concrete Sub	Concrete Sub	✓ × × × ×
	Drywall Sub	Drywall Sub	✓ × × × ×

The Reference Lists

When you select the Reference tool, the Reference and Global Reference lists appear:

REFERENCE LIST

REFERENCE LIKE: ____ DOC TYPE: ____

	Doc Type	Reference	Rollup	Active
		N/A	-	✓
	Bid	Commercial		✓
	Commitment	Concrete/Masonry		✓
	Commitment	Designer		✓
	Commitment	Draftsman		✓
	Commitment	Drywall		✓
	Commitment	Electrical		✓
	Commitment	Engineering		✓
	Commitment	Equipment Rental		✓
	Commitment	Excavation/Clearing		✓
	Commitment	Framing		✓
	Commitment	General		✓
	Bid	Healthcare		✓
	Bid	Hospitality		✓
	Bid	Industrial		✓

1 2

GLOBAL REFERENCE LIST

DESCRIPTION : ____

	Description	Division	Rollup	Active
	n/a	-	-	✓
	08000: Doors & Windows	08		✓
	05000: Metals	05		✓
	15400 Plumbing	15	D20	✓
	02000: Site Work	02		✓
	15000: Mechanical	15		✓

Reference Columns

- **Doc Type**: the document type to which the reference can apply. If left blank, the reference will be available for all Doc types. **Note**: if you want a Doc type to exclude those references that are common to all Doc types, use the **ExcludeCommonChoices** rule group (see the technical white paper *Rules and Rule Values*.)
- **Reference**: the label for the reference.
- **Rollup**: the name of the rollup, if the reference has one. Rollups can be used in custom reports.
- **Active**: whether (✓) or not (✗) the reference can be used and selected in sfPMS.

Reference Filters

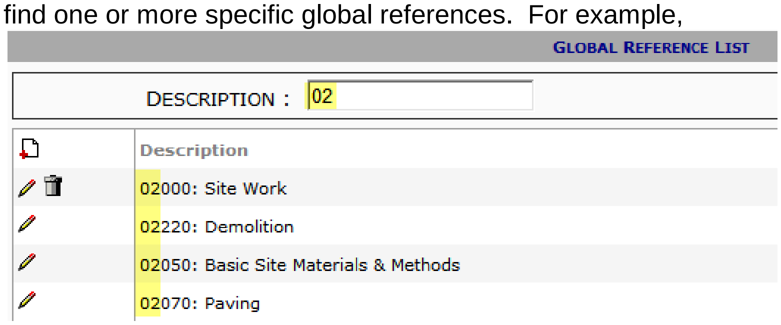
- **Reference Like:** Type the first characters or use the wildcard (%) to find one or more specific References. For example, **%ing** would find all references that end in **ing**, such as Framing, Painting, Plumbing, etc.
- **Doc Type**: Click the checkbox then select a Doc type from the drop-down to filter by Doc type.

Global Reference Columns

- **Description**: the label or description for the global reference.
- **Division**: the division identifier, if the global reference has one. Divisions can be used in custom reports.
- **Rollup**: the name of the rollup, if the global reference has one. Rollups can be used in custom reports.
- **Active**: whether (✓) or not (✗) the global reference can be used and selected in sfPMS.

Global Reference Filter

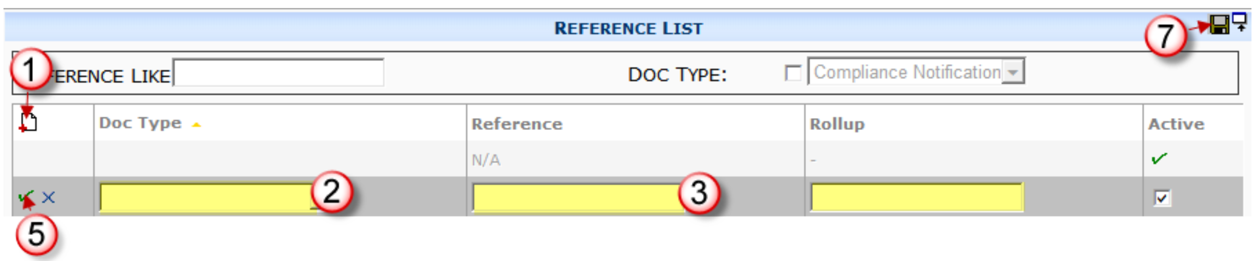
- **Description**: Type the first characters or use a wildcard (%) to find one or more specific global references. For example,



Adding References

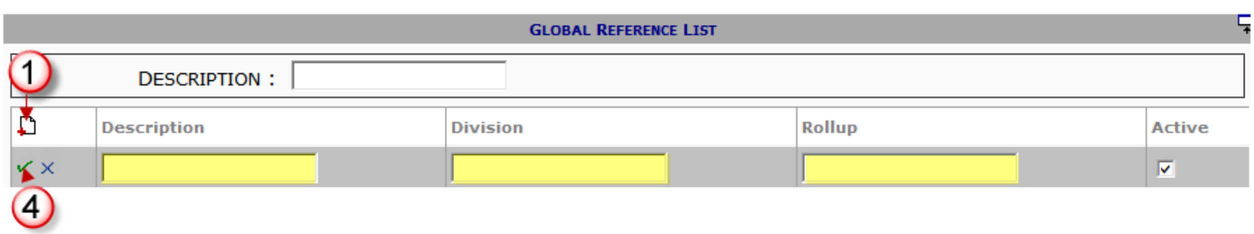
To add a reference:

1. Click at the Reference List.
2. Select a **Doc type** from the drop-down.
3. Enter a description in the **Reference** field.
4. (*optional*) Enter a **Rollup** identifier.
5. Select to accept your changes.
6. Repeat steps 1 – 5 as necessary.
7. Click to save the references.



To add a global reference

1. Click at the Global Reference List.
2. Enter a short **Description** for the global reference.
3. (*optional*) Enter a **Division** and/or **Rollup** identifier.
4. Select to accept your changes.
5. Repeat steps 1 – 5 as necessary.
6. Click to save the references.



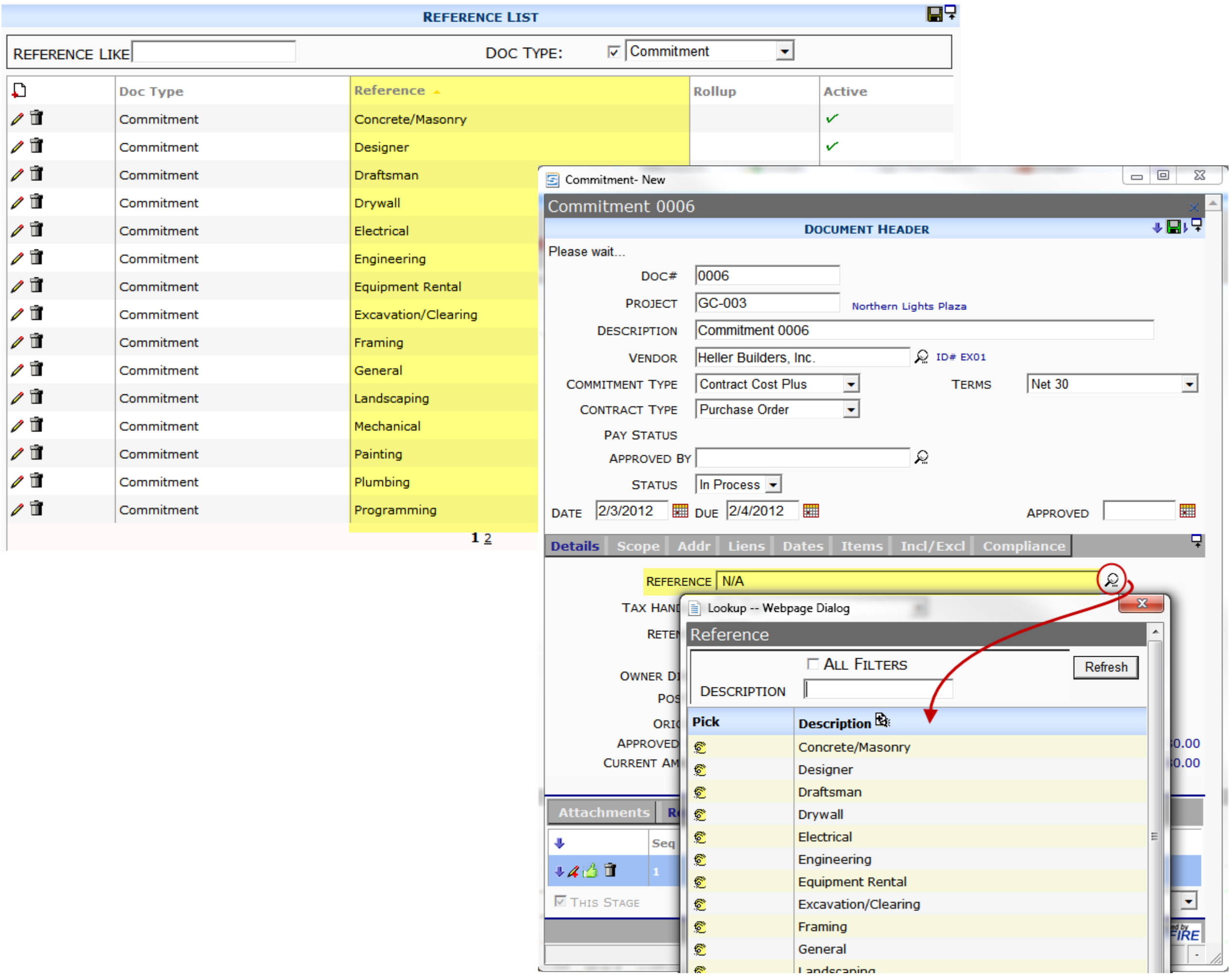
Editing References

To edit a reference or global reference:

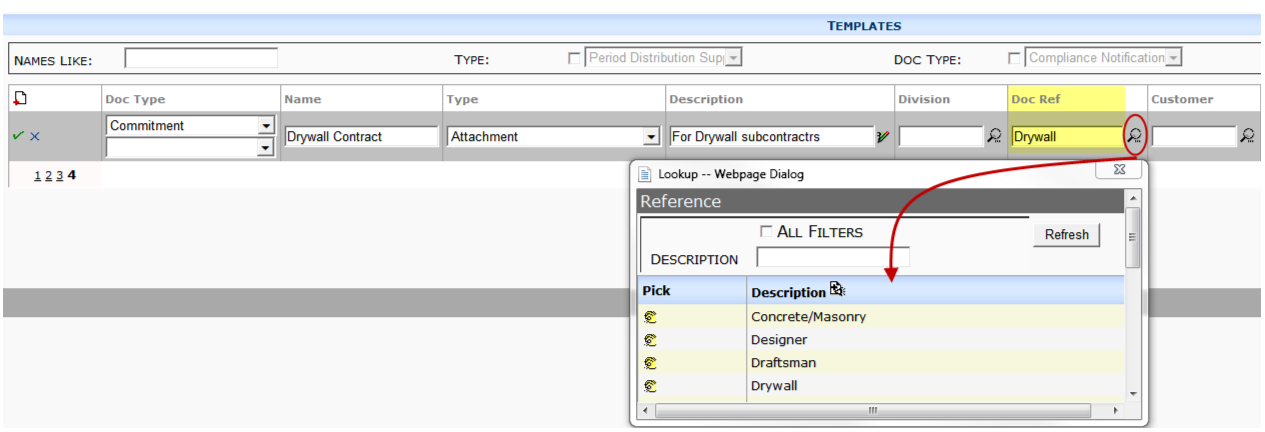
- Click to make changes to the row.
- Click to delete a reference or global reference row.
  Note: only references and global references that have not yet been selected in the system may be deleted.

Example

Let us say that you want to add references for the Commitment Doc type so that users can select the reference on each Commitment document. You enter the various references for the Commitment Doc type.



Then, knowing that Commitments will be identified by the reference, you use reference to distinguish your Attachment template meant for Drywall subcontractors.



Region Maintenance

The Region Maintenance tool allows you to define regions that can then be assigned to vendors. Regions can be whatever works best for you, whether area codes, ZIP codes, geographical regions or some other home-grown variation.

Considerations for Regions

When creating your list of regions, you'll need to consider the following:

- What regions will you use to organize your vendors?
- What IDs will you use to identify each region?

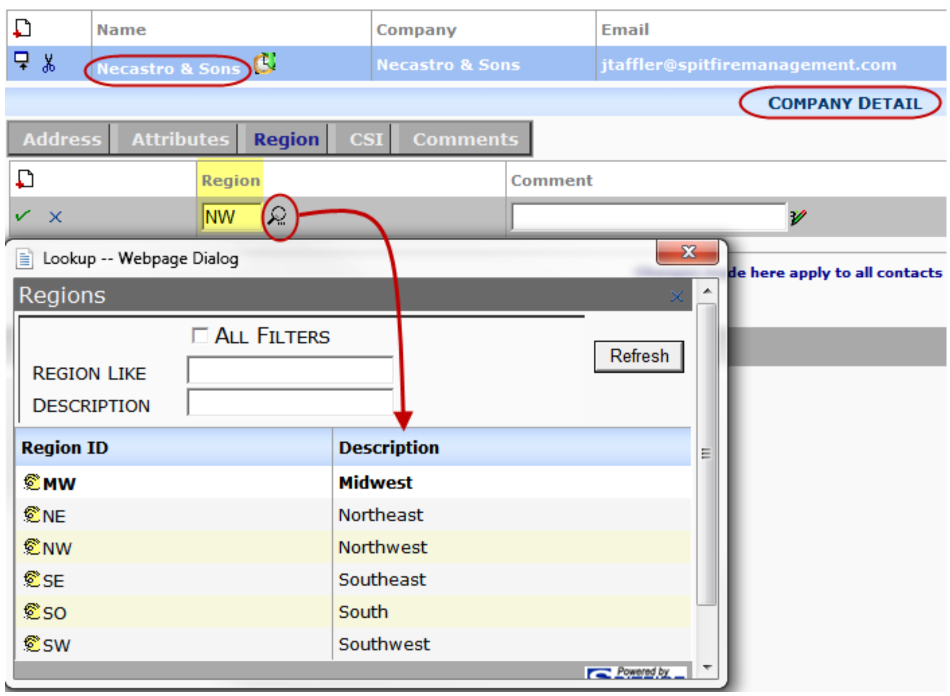
After Setup

Company Details

Once you have regions, you can add a region to each vendor company on the Company Detail's Region tab.

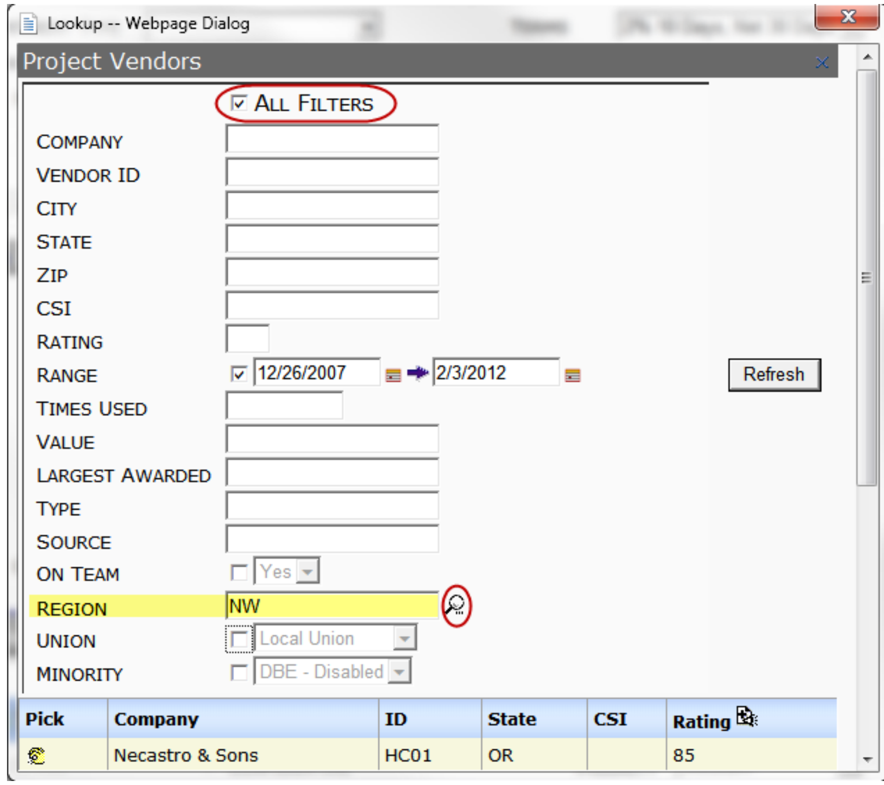
TIP

For more information about Contacts, see the *Focus on Contacts* guide.



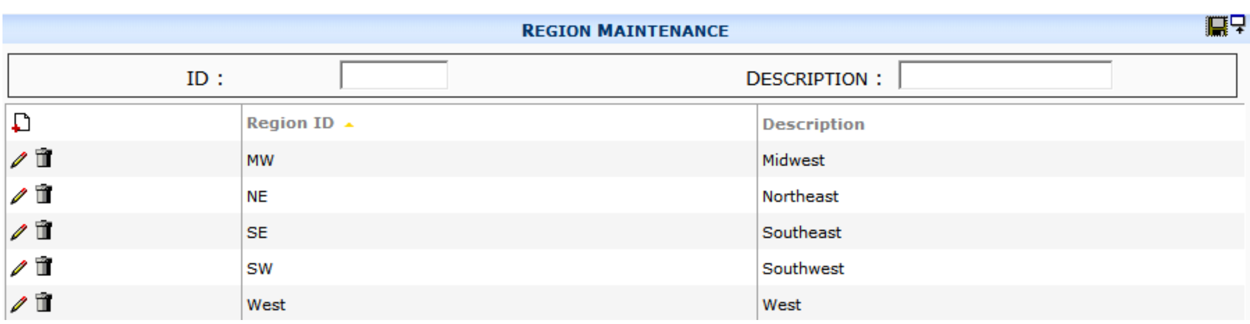
Vendor Lookup

Once your vendors are identified by region, you can use Region as a filter parameter in Vendor lookups



The Region Maintenance Part

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



Columns

- **Region ID**: any combination of 1 to 10 alphanumeric characters used to identify the region.
- **Description**: a description of the region.

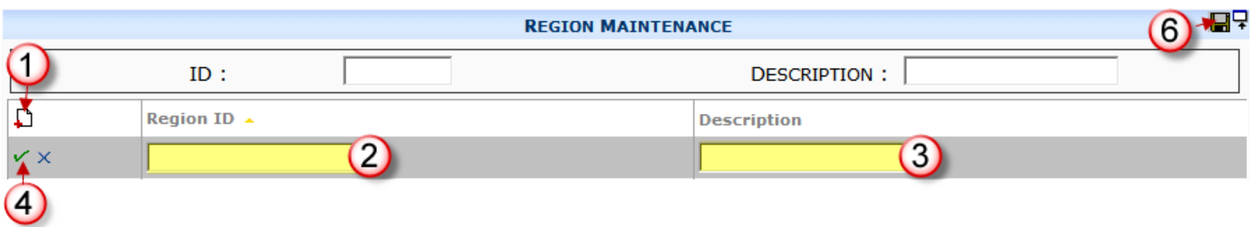
Filters

- **ID**: type the beginning of the ID or use the wildcard (%) to find certain Region IDs.
- **Description**: type the beginning of the Description or use the wildcard (%) to find certain descriptions.

Adding Regions

To add a region:

1. Click at the Region Maintenance part.
2. Type an ID for the region.
3. Type a Description for the region.
4. Click to accept the row.
5. Repeat steps 1 – 4 as necessary.
6. Click to save your changes.



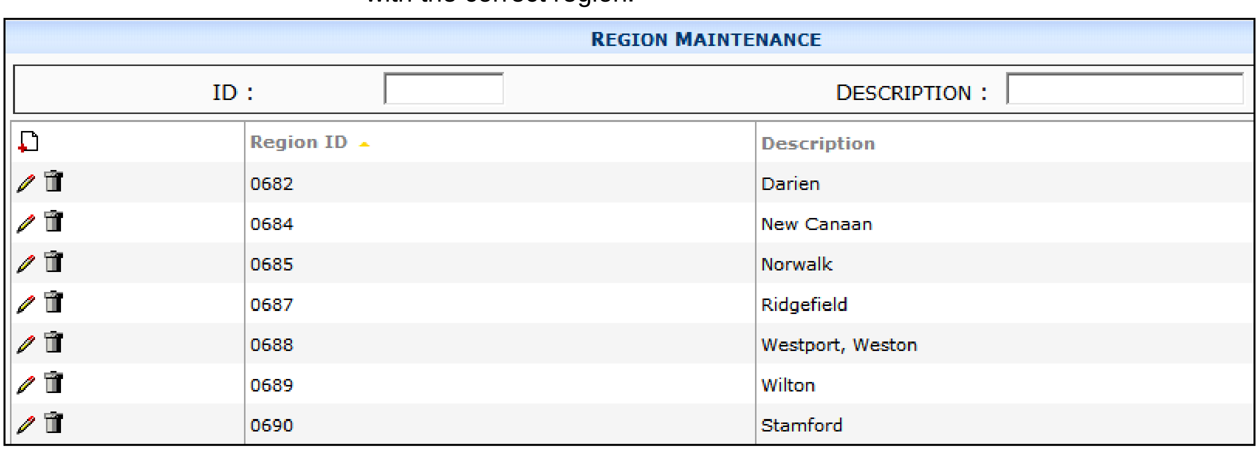
Editing Regions

To edit a region:

- Click at a row to edit that region's ID or Description.
- Click to delete a region row.
Note: only regions that have not yet been selected in the system may be deleted.

Example

Let us say that you want to organize your vendors based on location in Norwalk, CT, and surrounding areas. You set up your regions with the first four digits of the ZIP code so that you can associate each vendor with the correct region.



REGION MAINTENANCE

ID : DESCRIPTION :

	Region ID	Description
	0682	Darien
	0684	New Canaan
	0685	Norwalk
	0687	Ridgefield
	0688	Westport, Weston
	0689	Wilton
	0690	Stamford

Templates

The Templates tool allows you to upload various types of templates into Spitfire's Template Library for use throughout the system.

Considerations for Templates

TIP
Divisions are set up through the Company Divisions tool on the System Admin Dashboard.

TIP
For an explanation of routing options for attachments, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.

Before uploading templates into the Template Library, you'll need to consider the following:

- What type of template is it? (See list below.)
  - If Attachment or Attachment (auto) or Attachment (All), should the output from the template be included in emails and faxes when the document is routed?
  - If yes, should it be assembled with other output, sent as a PDF, or sent in its native application?
- Is the template for one Doc type or Subtype only?
- Is the template for one company Division only?
- Is the template for one Reference only (see page 49)?
- Is the template for one Customer only?
- Is the template for a document that is in a project with a specific Project Setup type (not to be confused with Contract type)?
- Does the template include bookmarks in order to merge information in from a Spitfire document?

Concepts

Template Types

TIP
sfPMS uses Attachment (Auto) templates only if there is one choice possible (based on all parameters).

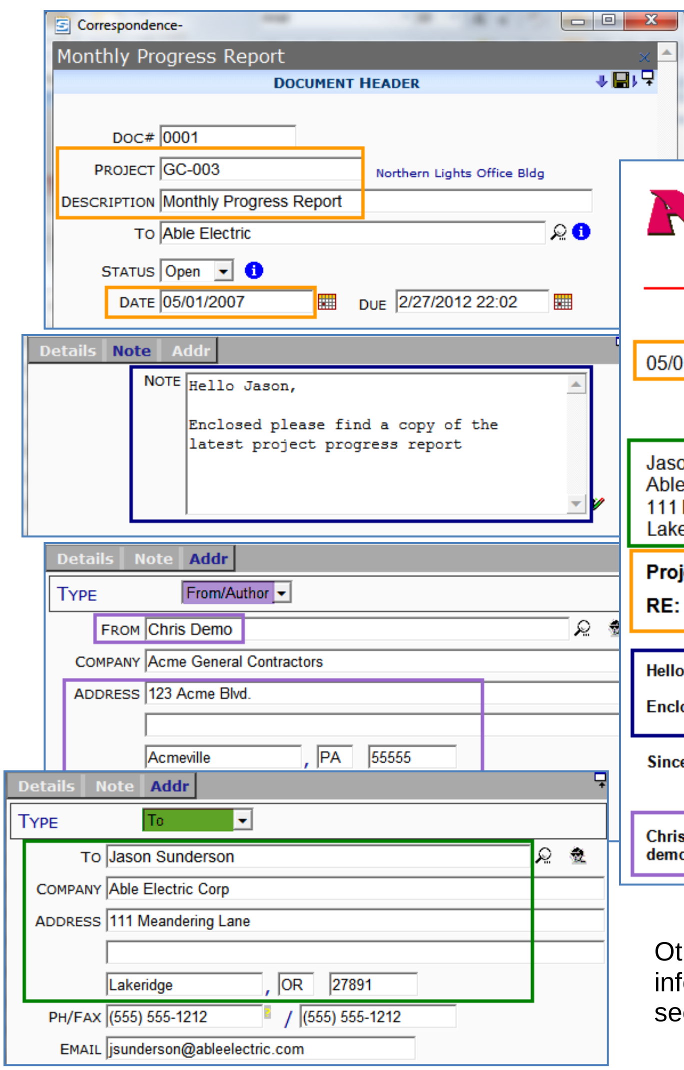
A variety of templates are uploaded into Spitfire and modified through the Templates tool. Currently, the Templates tool accepts

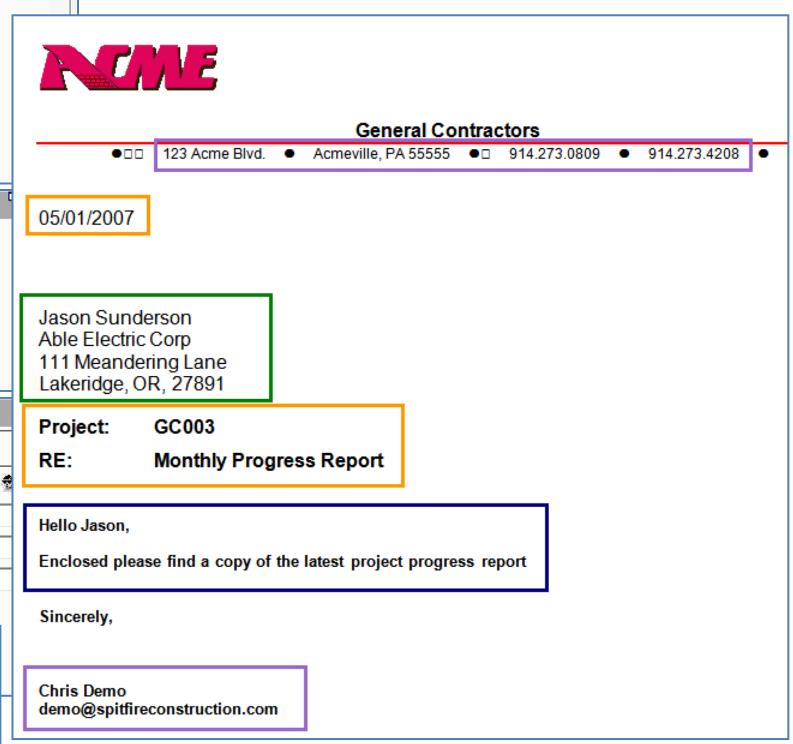
- **Attachment, Attachment (auto) and Attachment (all)** templates for document output. (See the *Focus on Files, Attachments and the Catalog Dashboard* guide.)
- **BFA Budget Import Maps** templates for budgets. (See the *Focus on Budgets and Period Distribution* guide.)
- **BFA Site Settings** files for the BFA workbook. (See the *Focus on the BFA Workbook* guide.)
- **BFA Supplemental** templates for budgets. (See *The BFA Report Tool* technical white paper.)
- **Bid Analysis** templates for CoBRA (Competitive Bid Response Analysis). (See the *Bid Package – RFQ Processing* technical white paper.)
- **Email Body** templates for routed emails. (See the *Focus on Routes* guide.)

- **Exec Dashboard Export** templates for the Executive Dashboard. (See *The Executive Dashboard and EDB Report Tool* technical white paper.)
- **Item Cover** templates for document Items. (See the *Focus on Document and Item Basics* guide.)
- **PAPT** (Pay Application Print Templates) for SOV workbooks. (See the *Pay Application Print Templates (PAPTs)* technical white paper.)
- **Period Distribution Supplemental** templates for PD workbooks. (See the *Supplemental Workbooks* technical white paper.)
- **Transmittals** templates for document output to routees. (See the *Focus on Routes* guide.)
- **Via XL** templates for document Items. (See the *Spitfire Item Templates (for Via Excel)* technical white paper.)

Bookmark Templates

A few template types (**Attachment**, **Attachment (auto)**, **Attachment (all), Item Cover** and **Transmittal**) are created in Microsoft Word and accept bookmarks in order to merge data from Spitfire documents into the templates.

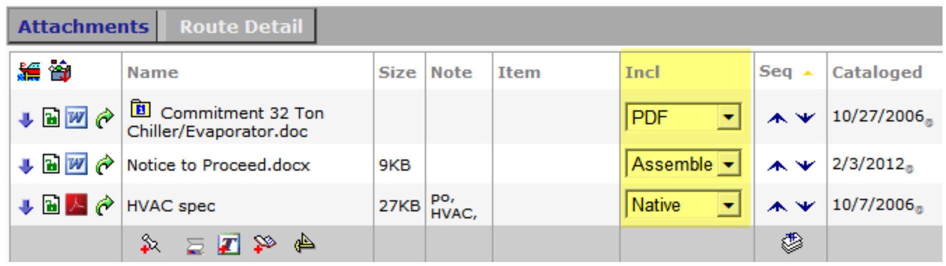




Other template types do not allow bookmarks. For information on how to create templates with bookmarks, see the *Focus on Bookmark Templates* guide.

Include/Incl Settings

The **Include** column in the Templates tool corresponds to the **Incl** column on a document's Attachment tab. Whatever is chosen in the Templates tool is used by default when files are created from the template and attached to the document. The Include setting is valid only for Attachment and (Auto) Attachment templates.



For more information about attached files, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.

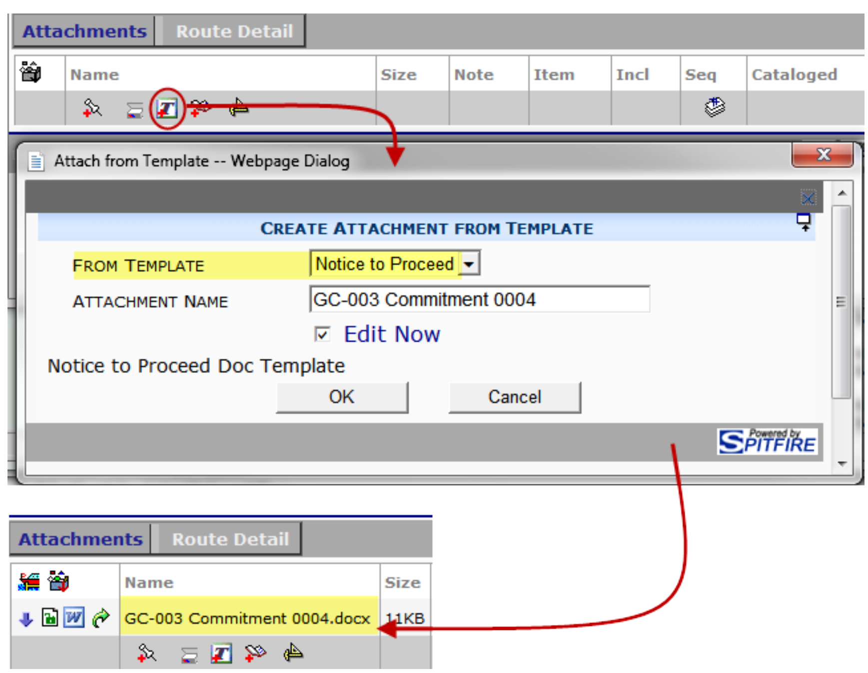
After Setup

Templates that are uploaded into the Templates tool can be selected in various locations of the system, depending on the template type.

Note: BFA Site Setting files are not actually templates; they provide information automatically to the BFA workbook.

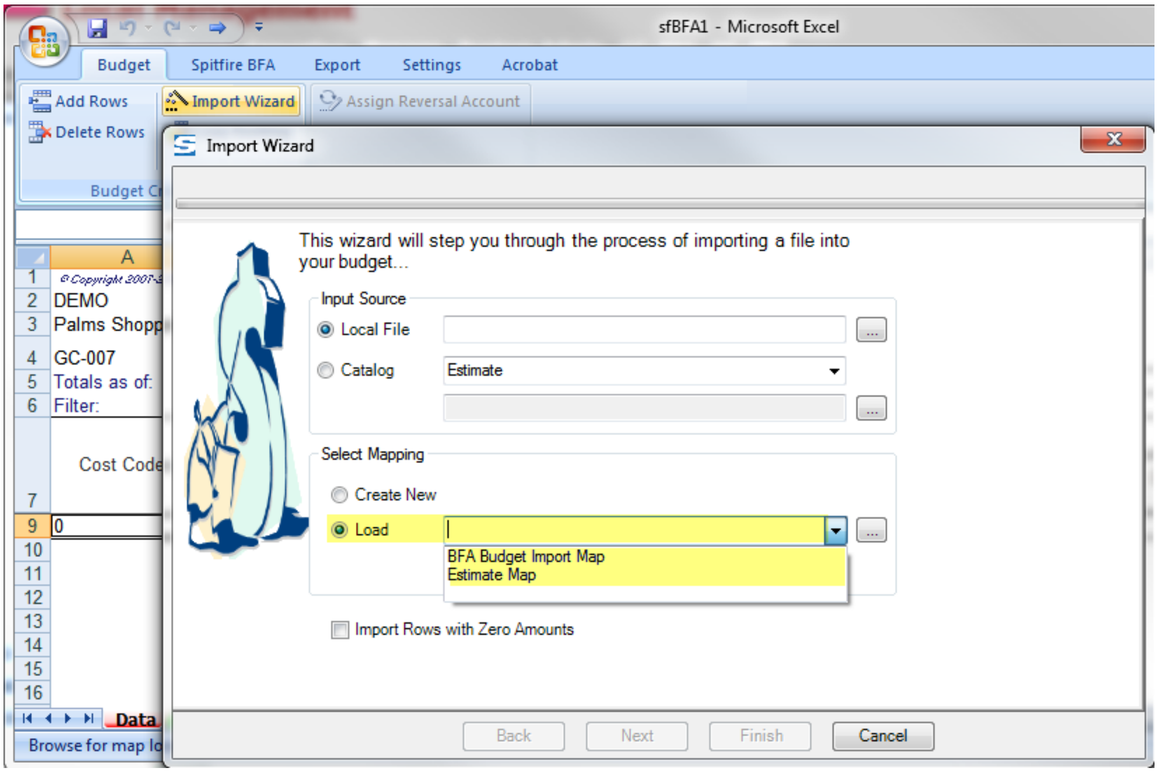
Attachments Tab

An **Attachment** template can be selected from a document's Attachments tab to create an attached file. **Attachment (auto)** and **Attachment (all)** templates are similar except they don't need to be selected because they create the attached files automatically.



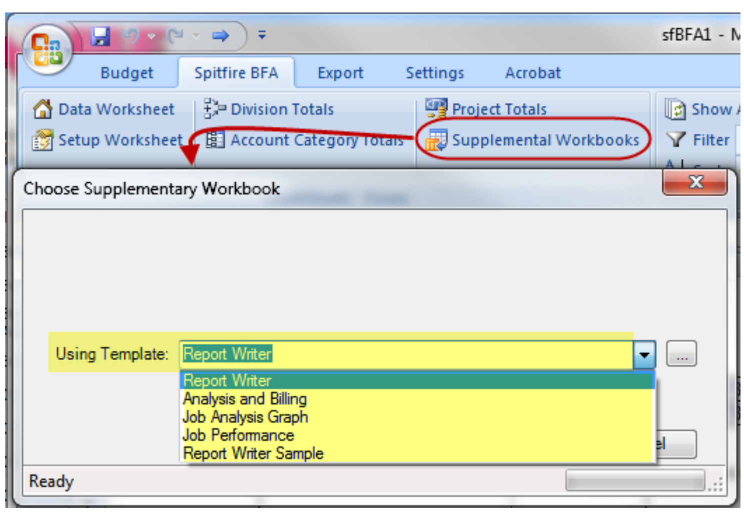
BFA Import Wizard

A **BFA Budget Import Map** template can be selected from BFA's Import Wizard to be used as the mapping file when importing data into the BFA workbook.



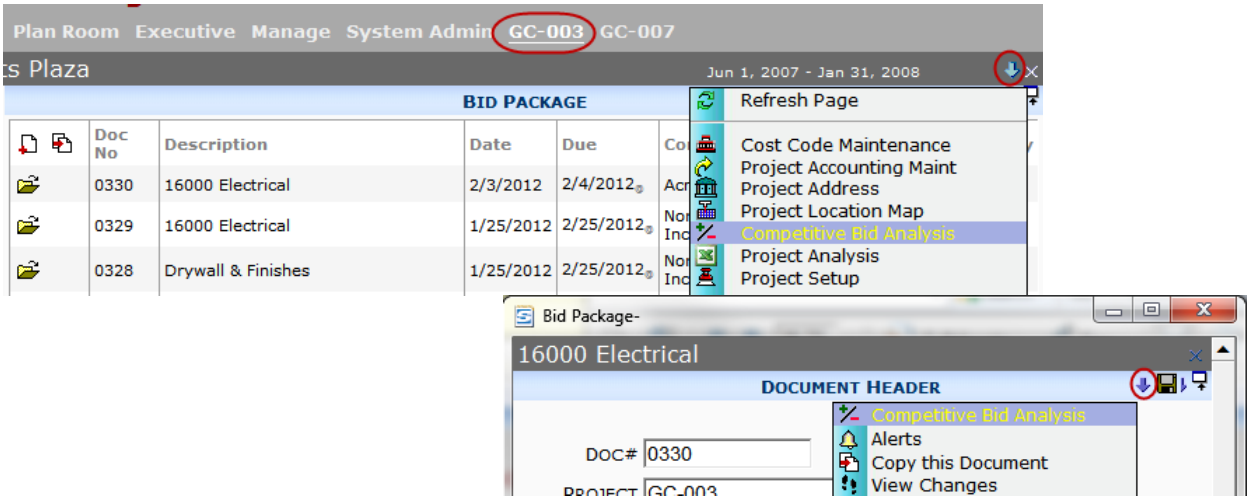
BFA Workbook

A **BFA Supplemental** template can be selected from the BFA workbook to create a report or workbook in Microsoft Excel.



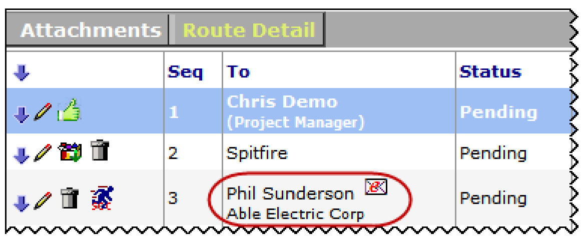
Competitive Bid Analysis Option

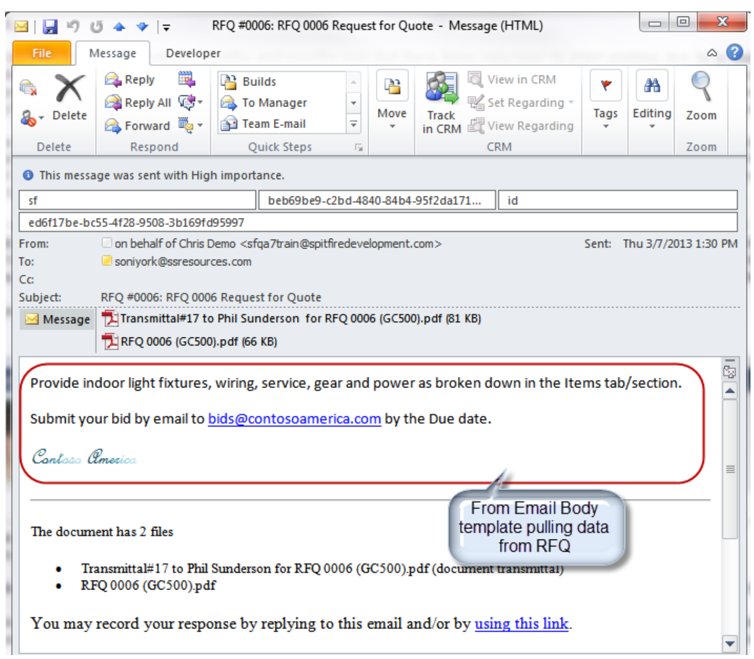
A **Bid Analysis** template can be selected either from the Project Options menu or the Bid Package Options menu to create a CoBRA (Competitive Bid Response Analysis) workbook.



Routed Email

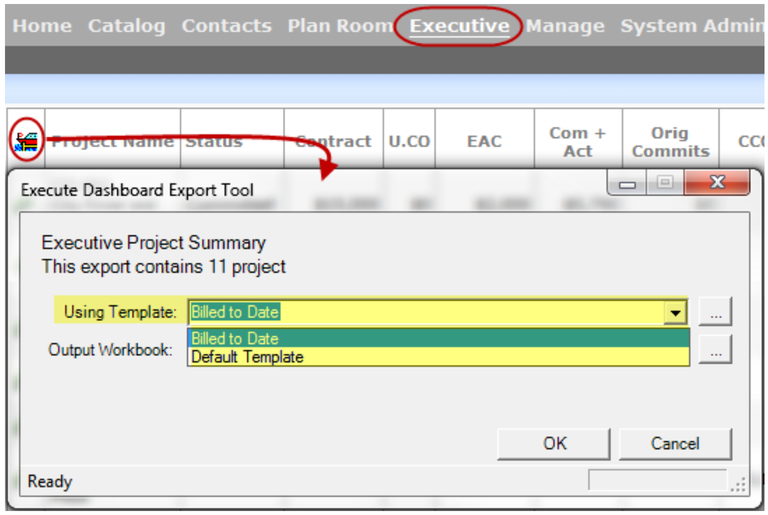
An **Email Body** template is used in the body of an email when a document is routed via email.





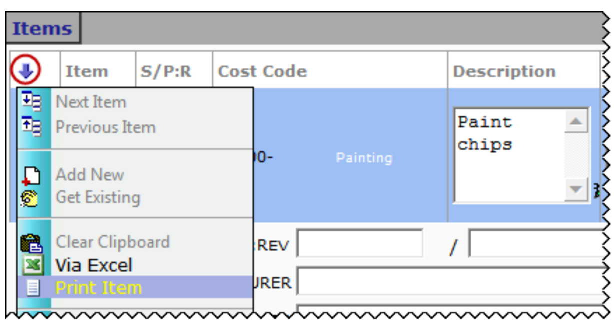
Executive Dashboard

An **Exec Dashboard Export** template can be selected from the Executive Dashboard Export dialog box to create a Microsoft Excel workbook.

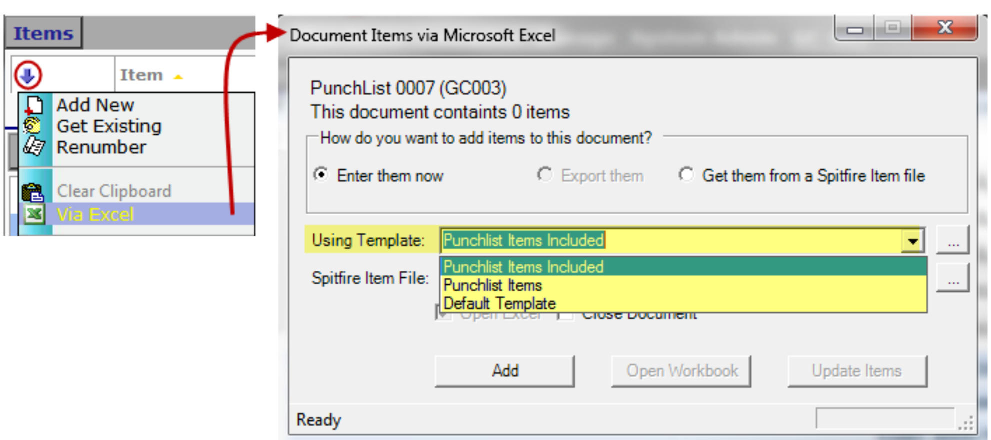


Items Tab

An **Item Cover** template is used automatically by the system to generate a printout for each Item on a document. You can view the printout by clicking on the **Print Item** option.

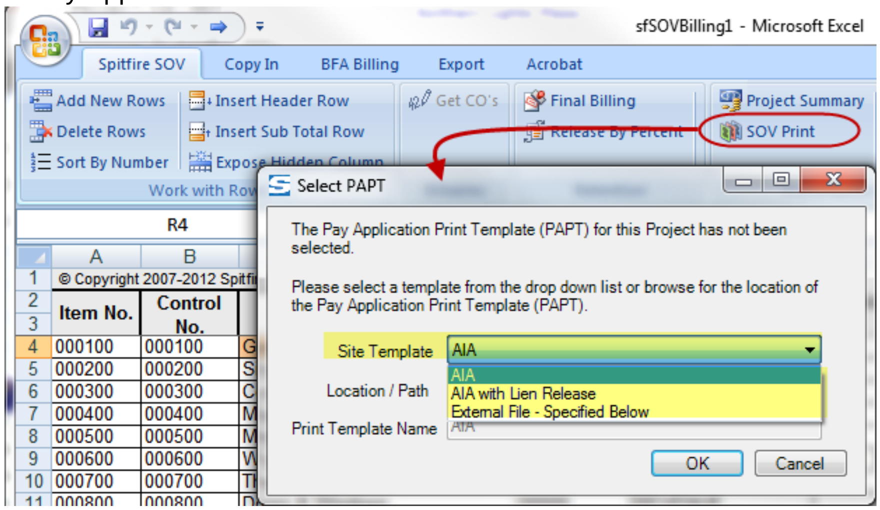


A **Via XL** template can be selected when you use the Via Excel option to add or edit Items using Microsoft Excel.



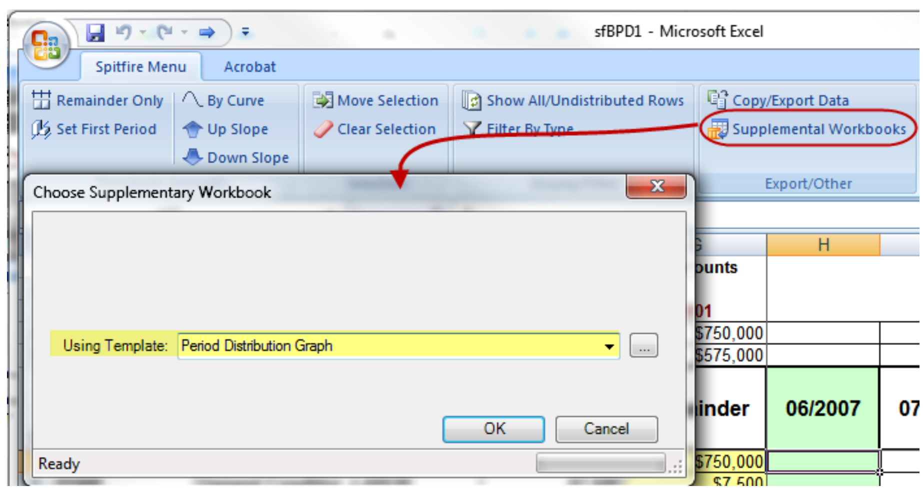
SOV Workbook

A PAPT can be selected from the SOV workbook to create a printout for a Pay Application.



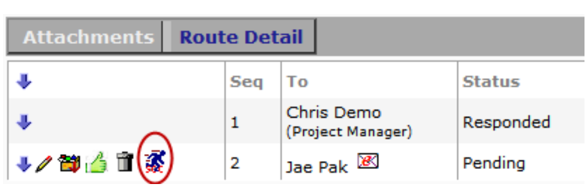
Period Distribution Workbook

A **Period Distribution Supplemental** template can be selected from the Period Distribution workbook to create a report or workbook in Microsoft Excel.



Route Detail Tab

A **Transmittal** template is used automatically by the system to generate a transmittal cover sheet for the routee. You can view the transmittal cover sheet by clicking on the icon.



The Templates Part

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

TEMPLATES

NAMES LIKE: | TYPE: Attachment (auto)

DOC TYPE:

Doc Type	Name	Type	Description	Division	Doc Ref	Customer	Project Type	Include	Bookmarks	Size	Active	Updated
Change Order	Change Order	Attachment (auto)	Change Order					Assemble	✓	56KB	✓	1/3/2013
Daily Field Report	Daily Field Report	Attachment (auto)	Daily Field Report form					Assemble	✓	64KB	✓	11/16/2004
Submittal	Newer Submittal Template	Attachment (auto)	Newer Doc Template for Submittals					Assemble	✓	31KB	✓	8/15/2008

Columns

- **Doc Type**: the document type for which this template is available. A blank Doc Type indicates that the template is available for all Doc types (or does not apply to documents).
- **Name**: the name of the template, for example, the filename of the Microsoft Word or Excel file.
- **Type**: the type of template (see page 59).
- **Description**: a description of the template. This description can help users identify the template in selection dialog boxes.
- **Division**: the specific internal company division—as set up through the Company Divisions tool—for which this template is available.
- **Doc Reference**: a reference—as set up through the Reference tool (see page 49**Error! Bookmark not defined.**)—for which this template is available.
- **Customer**: a specific customer Contact—as set up through the Contacts Dashboard—for which this template is available.
- **Project Type**: the specific project subtype—as indicated on the Project Setup document—for which this template is available.
- **Include**: the Incl setting that will appear by default when files created by the template are attached to documents.
- **Bookmarks**: whether (✓) or not (✕) the template includes bookmarks and will merge data from a Spitfire document. **Note**: if Bookmarks is unchecked, no merging of data will occur even if the template includes bookmarks.
- **Size**: the size of the template file.
- **Active:** whether (✓) or not (✕) the template can be used and selected in sfPMS.
- **Updated**: the date on which the template was last uploaded into sfPMS.

TIP

For information about the Company Division tool, see the *Focus on System Administration* guide.

For information about the Contacts Dashboard, see the *Focus on Contacts* guide.

Filters

- **Names Like**: Type the first characters or use the wildcard (%) to find one or more specific template by **Name**. For example, **%waiver** would find all references that end in **waiver**, such as Final Lien Waiver, Progress Lien Waiver, etc.
- **Type**: Click the checkbox then select a **Type** from the drop-down to filter by template type.
- **Doc Type**: Select a Doc Type from the drop-down to filter by Doc type.

Uploading Templates

Templates are added to sfPMS through a two-step process:

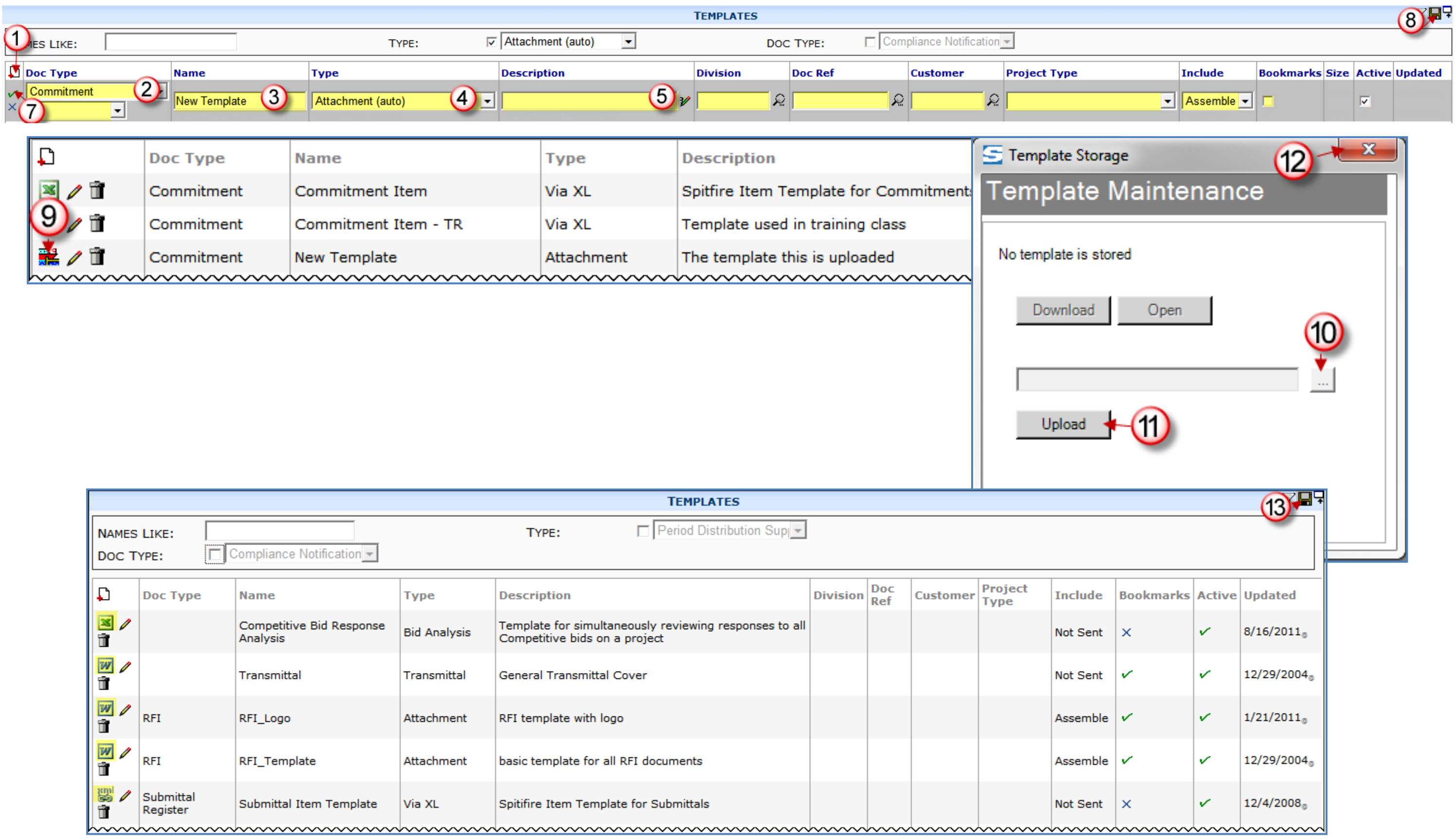
- Add a row in the Templates tool for the template.
- Upload a specific Microsoft Word or Excel file (depending on type of template) as the template

Prerequisite: template files must be created and saved before they can be uploaded into sfPMS.

To upload a template:

1. Click in the Templates part.
2. Select a **Doc Type** for which the template will be available. If no Doc type is desired or appropriate, select the blank that appears at the top of the drop-down choices.
    - o If the Doc Type contains subtypes, a subtype drop-down will appear. Select a subtype, if desired. Otherwise, the template will be available for all subtypes of the Doc type.
3. Type a **Name** for the template then press the Tab key. Often, the filename of the Microsoft Word or Excel file you will be uploaded is appropriate (without the extension).
4. Select a **Type** for the template.
5. Type a **Description** for the template then press the Tab key.
6. Fill in the remaining fields as appropriate (see page 66).
7. Click to accept the row.
8. Click to save the row. The icon will appear on the row, although you may need to find the row after the save.
9. Click . The Template Maintenance dialog box will appear.
10. Click to find the template file on your computer/network. **Note**: if your file is on your desktop or open in a Windows folder, you can drag the file to the filename field on the Template Maintenance window instead.

11. Click Upload. A message on the Template Maintenance dialog box will indicate that the upload was successful:
12. Click X to close the dialog box and return to the Templates too.
13. Click to save the Templates tool. You will notice that the icon has changed to (for.DOCX files), (for .XLSX files) or (for .XLSM files).



Editing Templates

To replace an existing template:

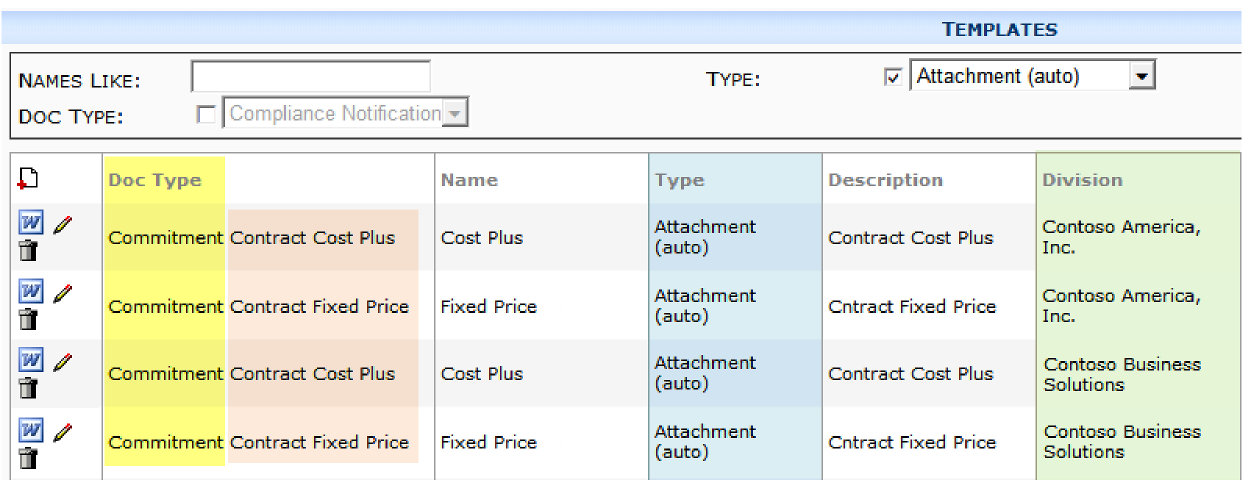
1. Click either or (whichever one appears on the row) to open the Template Maintenance dialog box.
2. (*optional*) If you want to make a change to the existing template file,
   - o Click Download to start with the template currently in sfPMS.

- o Indicate where on your computer/network you want to save the file.
- o Click Open if you want to open the file right away. (You can also choose to open the file outside of sfPMS at a later time.)
- o Make your changes to the file then save the file.

3. Click ... on the Template Maintenance dialog box to find the template file on your computer/network.
Note: if you are uploading at a different time from a download, you will need to repeat steps 1 and 2 first.
4. Click Upload. A message on the Template Maintenance dialog box will indicate that the upload was successful.
5. Click X to close the dialog box and return to the Templates too.
6. Click to save the Templates tool.

Example

Let us say that you want the system to automatically create a file from an Attachment template, based both on the Doc type – Subtype combination and the Company Division. You upload templates of type **(Auto) Attachment** and indicate the Doc Type, Subtype and Division for each.



TEMPLATES

NAMES LIKE:

DOC TYPE: Compliance Notification

TYPE: Attachment (auto)

Doc Type		Name	Type	Description	Division
Commitment	Contract Cost Plus	Cost Plus	Attachment (auto)	Contract Cost Plus	Contoso America, Inc.
Commitment	Contract Fixed Price	Fixed Price	Attachment (auto)	Cntract Fixed Price	Contoso America, Inc.
Commitment	Contract Cost Plus	Cost Plus	Attachment (auto)	Contract Cost Plus	Contoso Business Solutions
Commitment	Contract Fixed Price	Fixed Price	Attachment (auto)	Cntract Fixed Price	Contoso Business Solutions