Focus Guide

Overview

This Focus Guide is designed for Spitfire Project Management System users. This guide is meant as a general introduction to the Spitfire Project Management System (sfPMS) to get you familiarized with its look and feel. It covers the basics that you need to know.

Version 4.5

www.spitfiremanagement.com

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Introduction to the Overview Guide

The Spitfire Project Management System (sfPMS) is a …

…comprehensive…

… .NET browser-based…

…collaborative project management…

…workflow/routing…

…document imaging…

…document control…

…solution.

And it can be integrated directly with Microsoft Dynamics SL Project Accounting and Financial series or **Acumatica Cloud ERP**.

This *Overview Guide* is meant as a general introduction to the Spitfire Project Management System (sfPMS) to get you familiarized with its look and feel. It covers the basics that you need to know. More in-depth information about sfPMS can be found in other Focus guides and any custom guide you may have been given.

Note: sections and chapters that are new or changed from the V4.4 documentation appear with **green headers** and sometimes with an *.

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 technical white papers.

Our guides, which include this *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 this *Overview Guide* first, followed by other Focus guides as needed.

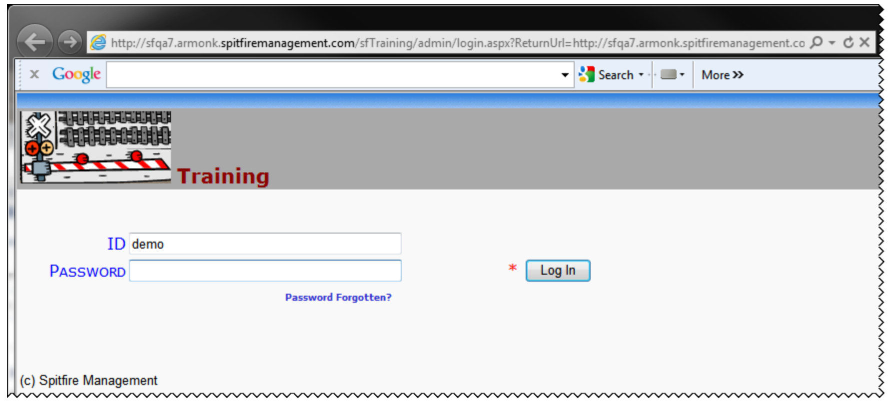
See page 17 for more information about our written documentation and other help.

Getting Started

Logging In to sfPMS

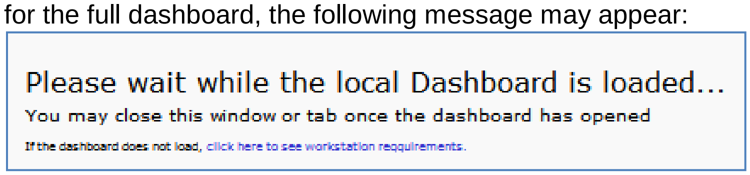
TIP
Spitfire follows the Microsoft convention: User IDs are not case sensitive, but passwords are.

When sfPMS launches, the Login screen appears in your default browser window, for example:



To log in to sfPMS:

1. Enter your ID (as assigned to you by the System Administrator).
2. Enter your Password (as assigned to you by the System Administrator).
3. Click Log In. Assuming you have been given permission for the full dashboard, the following message may appear:



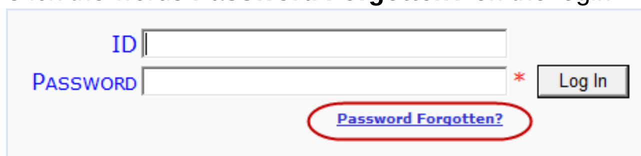
4. Your Spitfire Dashboard will open in a new window, displaying the Home Dashboard. The [Home Dashboard](#) is described in general on the next page and more specifically on page 26.

If You Forget Your Password

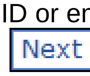
If you can't log in because you do not remember your password, you can use the Password Recovery Wizard to reset the password to something you'll remember. (If you do remember your password, but just want to change it after you log in, see page 14.)

To reset your password:

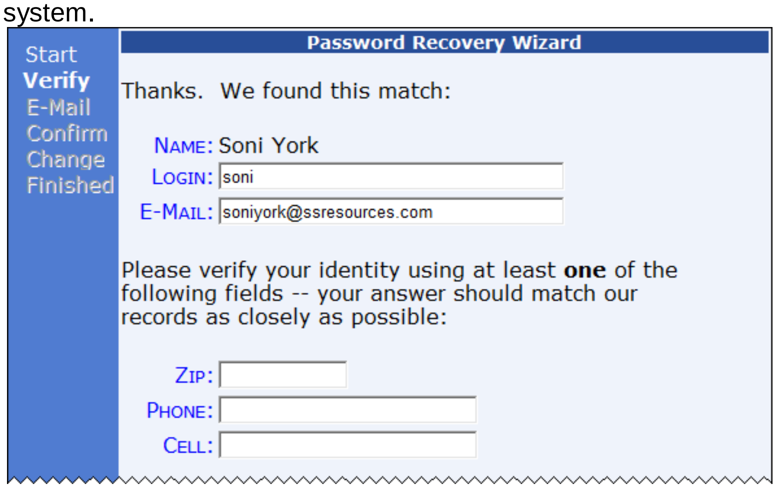
1. Click the words **Password Forgotten?** on the login.



The Password Recovery Wizard will open.

2. As instructed, enter your Spitfire ID or email address and answer the validation question then click .

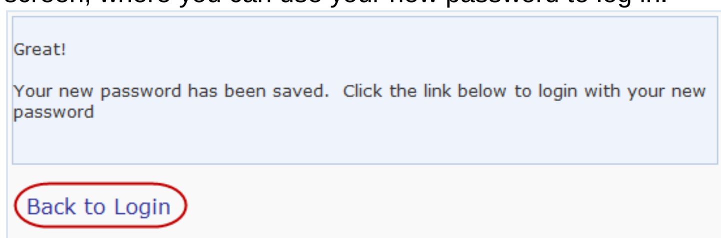
3. As instructed, fill in at least one of the verification fields. Spitfire will check your answer(s) against your Contact information in the system.



4. Click . An email with further instructions will be sent to you.
5. Click  to close sfPMS.
6. When you receive the email, follow the link the re-open the wizard.

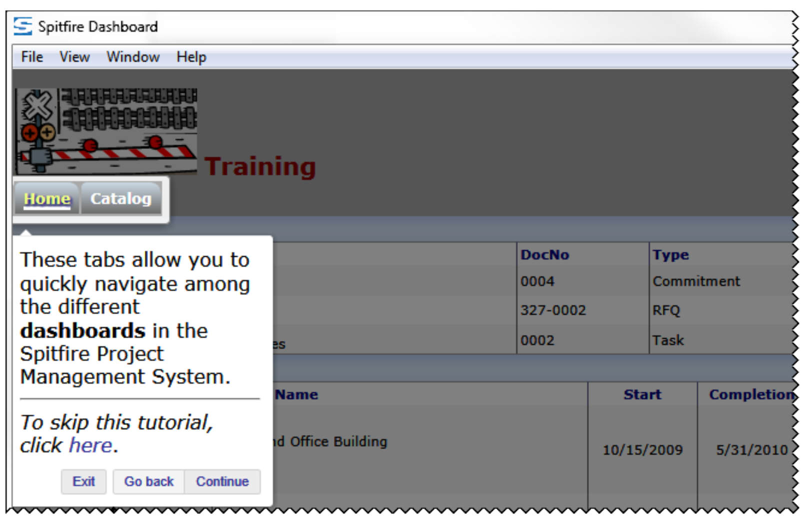
7. Enter a new password in the **Password** and **Confirm Password** fields then click Finish.

8. Click on the words **Back to Login**. You will return to the Login screen, where you can use your new password to log in.



Pop-up Tutorial

The first time you log into sfPMS, a pop-up tutorial shows up on the Home Dashboard. Each dashboard has its own tutorial.

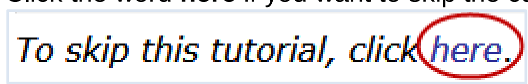


The tutorial is made up of “cards” that you can view, each explaining or pointing out something on the dashboard. The tutorial is meant to help you get started.

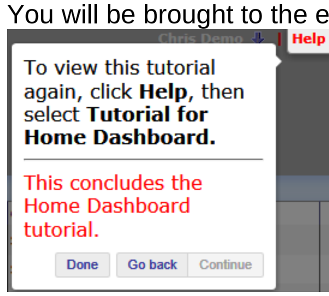
The first time you go to another dashboard, you see the tutorial for that dashboard.

To navigate the tutorial:

- Click the  button to see the next card in this tutorial.
- Click the  button to see the previous card in this tutorial.
- Click the  button to close the pop-up tutorial on the current dashboard. The system knows that you have not seen the whole tutorial. The tutorial will appear again the next time you log in, allowing you to see the whole tutorial.
- Click the word **here** if you want to skip the current tutorial.

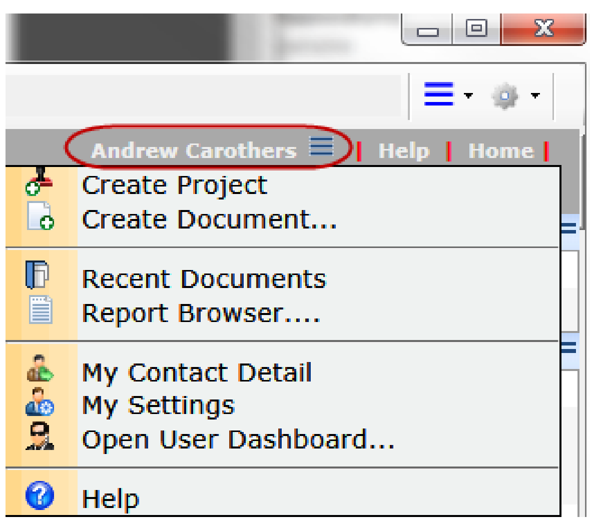
  You will be brought to the end of the dashboard tutorial.

- Click the  button to complete the tutorial. It will not appear again automatically. (See also page 16.)

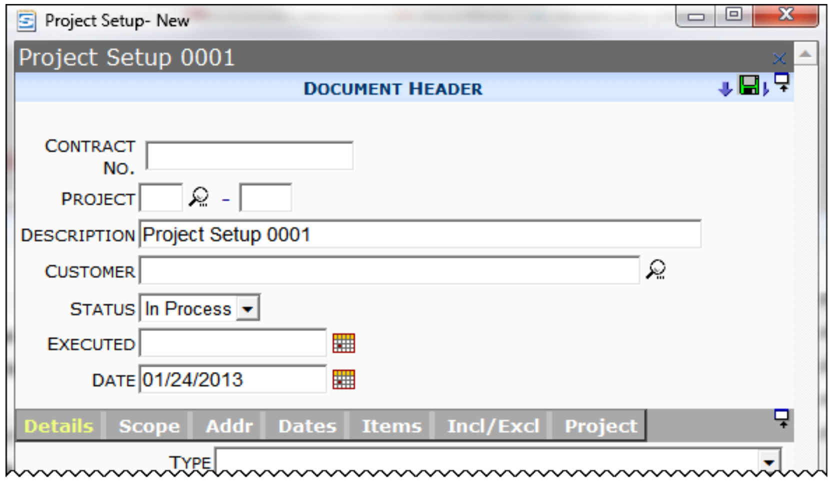
Your Name / Options Menu*

When you log into sfPMS, your name is displayed in the upper right corner. If you click on your name or the ☰ icon next to your name, you will open the Site Options menu. You need not use these options until you've learned how to use the system, although you may want to change some of your settings.



Create Project

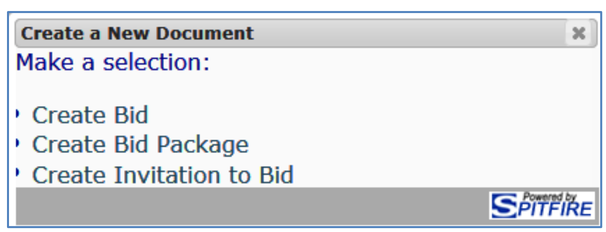
If you have permission to do so, the **Create Project** option allows you to create a new Project Setup document. When you save the Project Setup document, a new project (and Project Dashboard) is created.



For more information, see the *Focus on Doc Types and Project Workflow* guide.

Create Document

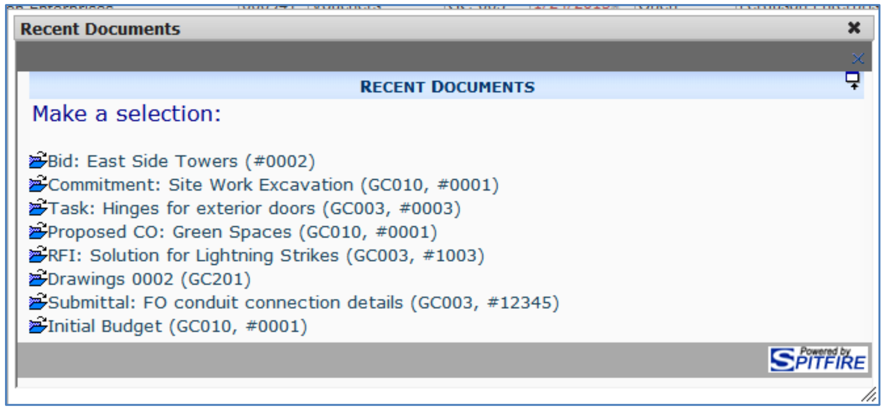
The **Create Document** option allows you to create a Bid, Bid Package or Invitation to Bid document outside of a project. Because Bids come before projects, this is generally the only way to create a new Bid document.



For more information about documents, see the *Focus on Document and Item Basics* guide.

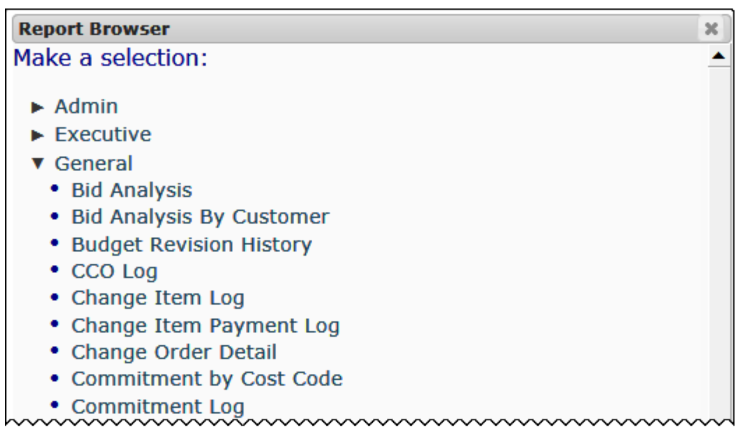
Recent Documents

The **Recent Documents** option lists the eight documents that you most recently opened/created. You can reopen these documents quickly from this list.



Report Browser

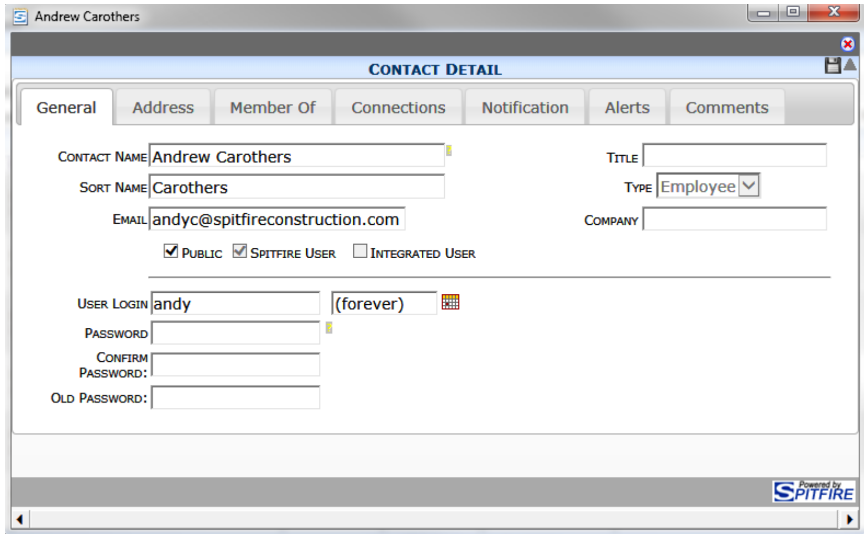
The **Report Browser** option opens a list of all the reports that can be viewed by you. Click on a report to open it.



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

My Contact Detail

The **My Contact Detail** option opens your Contact Detail window.



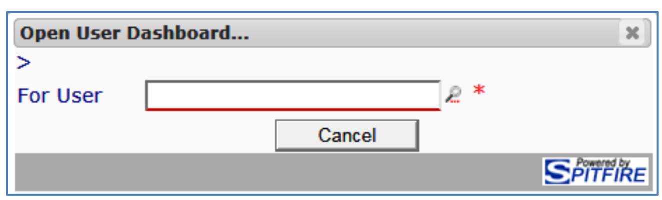
For more information, see the “Accessing Contact Details” chapter in the *Focus on Contacts* guide.

My Settings

The **My Settings** option displays the User Preference page. For more information, see the next section.

Open User Dashboard

The **Open User Dashboard** option displays a dialog box from where you can look up the dashboard for another user, if you have proxy permissions for those users.



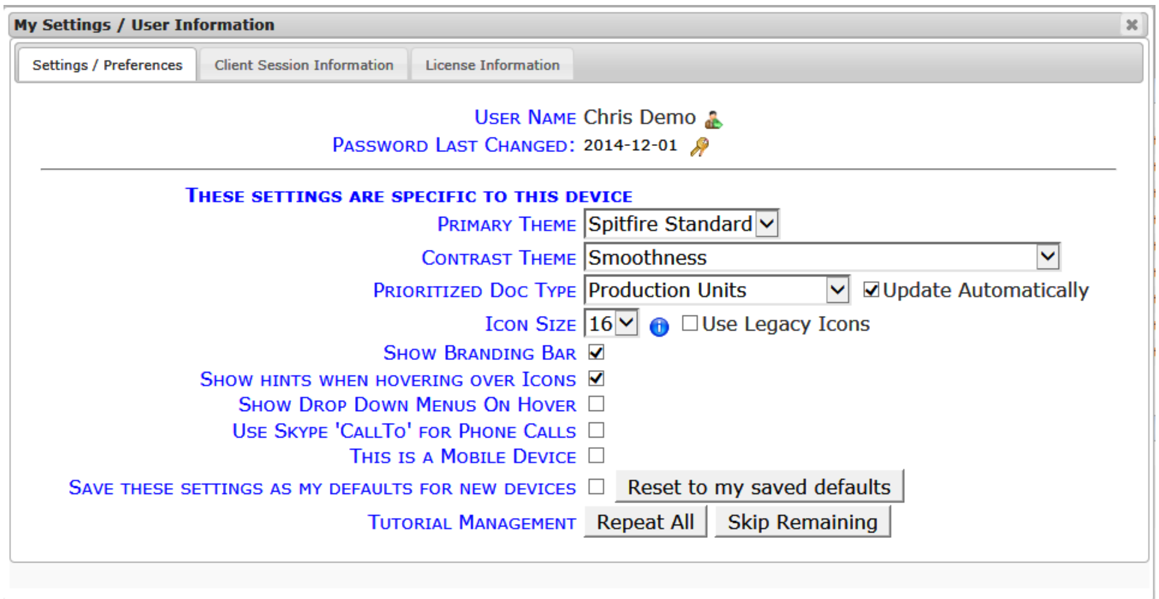
Help

The **Help** option opens the Help menu. For more information, see page 17.

User Preferences

When you select the **My Settings** option, the User Preference window appears.

- Click to close the window.

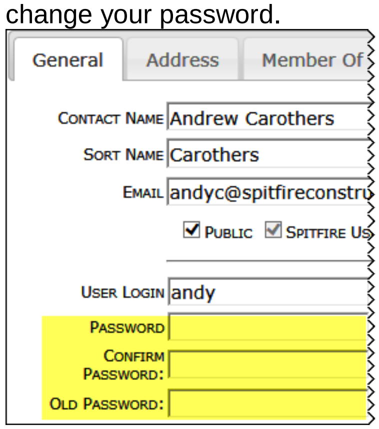


Settings/ Preferences*

The Settings/Preference tab allows you to set up certain options that affect sfPMS on your computer or device.

User Name

You can access your Contact Detail window. Your Contact Detail window contains a variety of information about you. **Note**: The General tab on the Contact Details window offers you one way to change your password. The instructions on the next page offer another way to change your password.



- (*optional*) Click after your name to open your Contact Detail window.

TIP

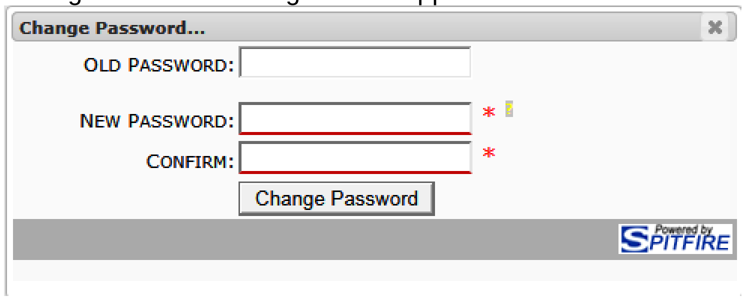
Your password must be 4-32 characters long and must contain one numeric digit, with no special characters, for example, 3Alpha.

System Administrators can change a user's password without knowing the current (old) password.

Password Last Changed

To change your password:

1. Click next to the date of your last password change. The Change Password dialog box will appear.



2. Type your current password in the Old Password field.
3. Type a new password in the **New Password** field and again in the **Confirm** field.
4. Click the Change Password button.
5. Click to close the dialog box.

Primary Theme

The primary theme affects the look of your dashboards. **Spitfire Standard** is the default. **Alternate** offers a different color scheme and look. **Enlarged** increases the text size throughout.

- (*optional*) Select a Primary Theme from the drop-down.

Contrast Theme

The contrast theme offers more color choices. There are 12 choices. **Smoothness** is the default.

- (*optional*) Select a Contrast Theme from the drop-down.

Prioritized Doc Type

When the **Update Automatically** checkbox is checked, sfPMS will note which Doc type you last selected on a Project Dashboard and make that the default Doc type on the Project Dashboard and on Manage and System Admin dashboard tools.

- (*optional*) Select a Doc Type from the drop-down to manually establish the default Doc type and uncheck the **Update Automatically** checkbox to keep that Doc type as the default.

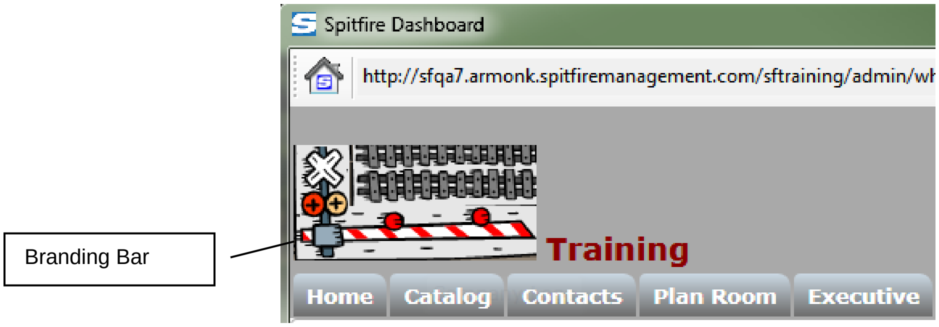
Icon Size

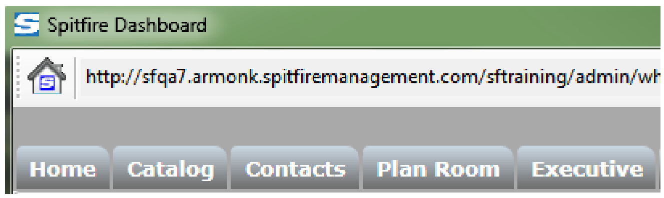
sfPMS offers four sizes of icons. The default is **20**. You can select an icon size for each computer and device that you use; the larger sizes are particularly helpful on tablets and smartphones.

- (*optional*) Select the Icon Size from the drop-down. If you select 16, you have the choice of using the V4.4 legacy icons.

Show Branding Bar

sfPMS allows room for your logo at the top. You can also choose to collapse that area.





- (*optional*) To hide the branding bar area, uncheck the checkbox.

Show Hints When Hovering Over Icons

Normally, when you mouse over an icon, text appears that tells you what the icon does. Such pop-up text might get in the way when you are on a tablet or smartphone. You can choose to not have these hints appear.

- (*optional*) To stop showing pop-up text when you hover over an icon, uncheck the checkbox.

Show Drop Down Menus on Hover

Normally you need to click on an icon to open a drop-down menu. You can choose to have the drop-down menu open when you just hover your mouse close to the icon.

- (*optional*) To have menus appear when you hover near the icon, check the checkbox.

Use Skype 'Call To' for Phone Calls

If you use Skype to make phone calls, sfPMS can connect to Skype when you click on a phone number in the system.

- (*optional*) To have sfPMS use Skype for phone calls, check the checkbox.

This is a Mobile Device

sfPMS should know that it is being used on a mobile device. To ensure that it does, you can manually identify your mobile devices.

- (*optional*) To identify a mobile device, check the checkbox.

Save These Settings as My Defaults for New Devices

You can indicate that all your settings on the current device (e.g., your desktop computer) should be saved as defaults and used as the settings on any new device (e.g., a tablet).

- (*optional*) To save your current settings as your defaults, check the checkbox.

Reset to My Saved Defaults

If you are on a device that is not your default device, you can choose to change all your settings to your saved defaults.

- (*optional*) To change all your settings to your saved default settings, click the Reset to my saved defaults button.

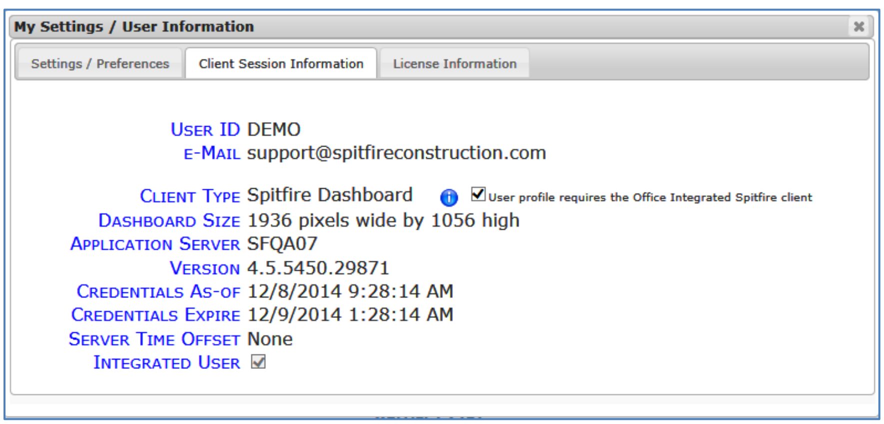
Tutorial Management

There are two options for the pop-up tutorial that new users see by default when they first log in (see page 8).

- (*optional*) To reset the tutorial so it appears again when a user logs in, click the Repeat All button.
- To skip all unseen tutorial cards, click the Skip Remaining button.

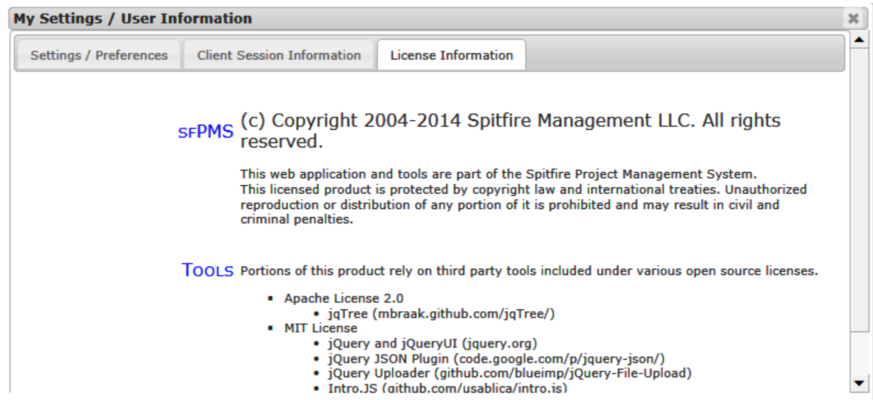
Client Session Information

The Client Session Information tab contains information about the current user session, such as the browser type, specific server (and relative time difference between client and server, if any), when the session began and when it will expire. This information is usually used by Support during troubleshooting.



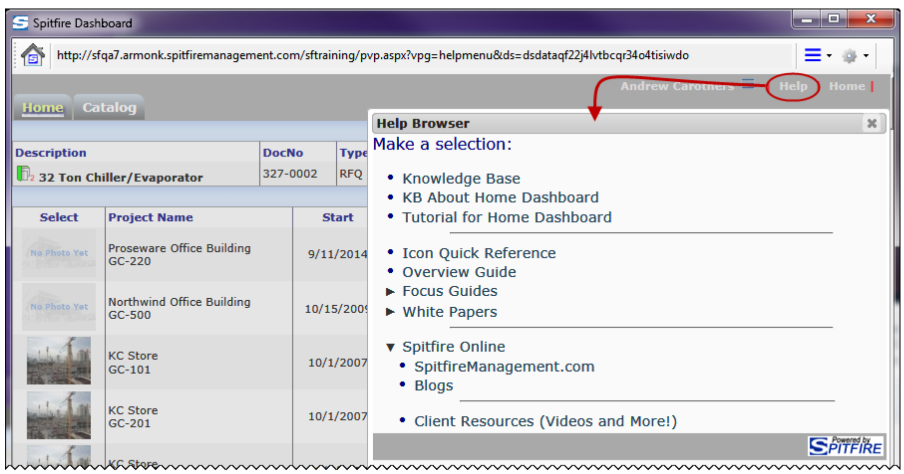
License Information

The License Information tab contains information about your particular licenses.



Help Menu

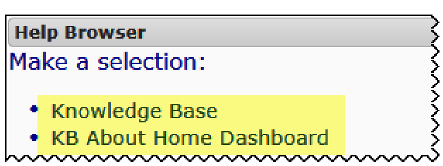
The Help menu provides you with useful and handy information.



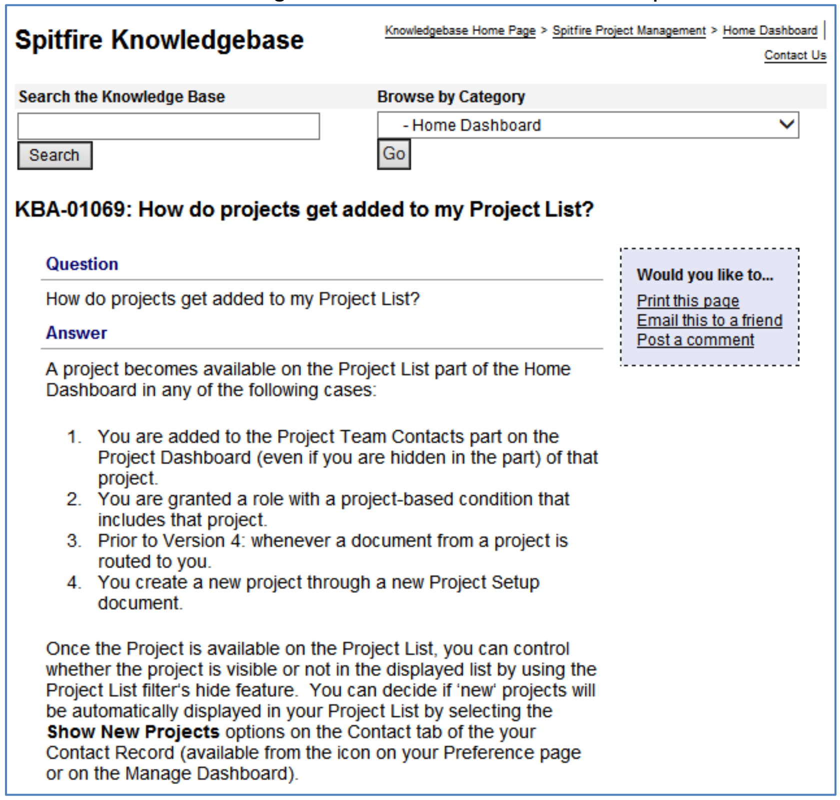
Note: when **Help** appears in red, it means there are pop-up tutorials that haven't been seen yet. (See page 8 for more about pop-up tutorials.)

The Knowledgebase

The Knowledgebase contains articles, in a question-and-answer format, that cover either more specific or more technical information about sfPMS.

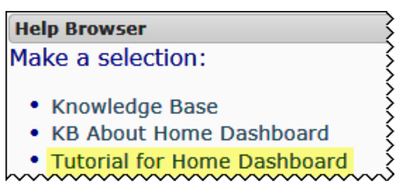


Articles in the Knowledgebase are numbered, for example, KBA-01044.



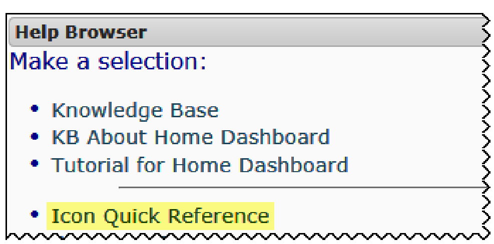
Tutorial

The pop-up tutorial for the current dashboard (see page 8) can be accessed at any time from the Help menu.



Icon Quick Reference

A reference card describing the most common icons can be viewed from the Help menu. The icons will appear in the size you have set (see page 14).



Icon Quick Reference

open a closed document or one with no (or no known) due date	open a document with a future due date
open a document with a due date this week (through Sunday)	open a document with an overdue due date
open a document that has been CC'd to you	send document on its route and remove it from Inbox
acknowledge a document that has been CC'd to you (on its route)	log out of sfPMS
collapse a Dashboard part	expand a Dashboard part that has been collapsed
save	display filters
add or create a new document/item/row etc.	copy document
create a new Project Setup document and related Project Dashboard	open Project Setup document
show row/item details	discard/delete/remove item or row
open multi-select window with filters to select one or many choices	select a choice from a lookup
open Options drop-down menu	create a file from a template and attach it to the document
attach a doc/file from the Catalog	add a scanned or uploaded file to the Catalog; attach file to document
edit the row	open the Field Zoom window for editing and text formatting
download attached files	export files
open Options menu for a file that is checked-in	open Options menu for a file that is checked-out

See the Overview Guide for a description of every icon and much, much more!

Focus Guides

The Focus guides give detailed information and instructions about the system. Each Focus guide has its own topic. You can also access this Overview guide from the Help menu.

Help Browser

Make a selection:

- Knowledge Base
- KB About Home Dashboard
- Tutorial for Home Dashboard

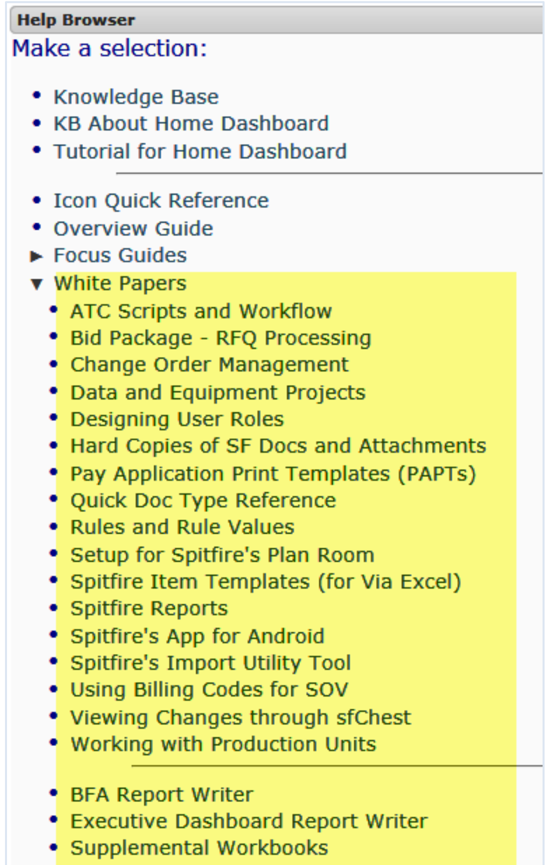
- Icon Quick Reference
- Overview Guide
- Focus Guides
  - Document and Item Basics
  - Files and Catalog
  - Routing

  - Alerts and Compliance
  - Batch Processing
  - BFA Workbook
  - Budgets and Period Distribution
  - Contacts
  - Doc Templates
  - Doc Types and Project Workflow
  - Forecast and Analysis
  - Manage Dashboard
  - SOV Billing
  - System Administration

The selected guide will appear as a PDF file.

White Papers

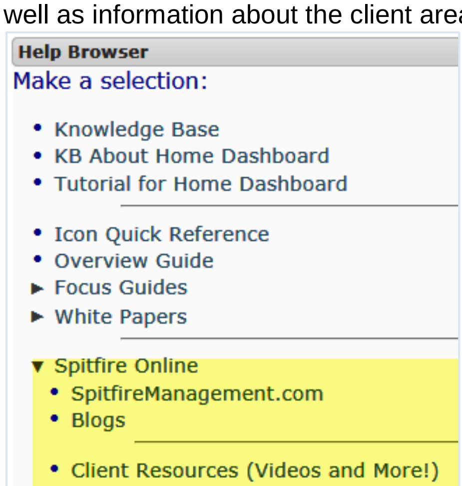
White papers (also known as technical white papers or TWP) are documents that delve into some of the more technical aspects of sfPMS.



The selected TWP will appear as a PDF file.

Spitfire Online

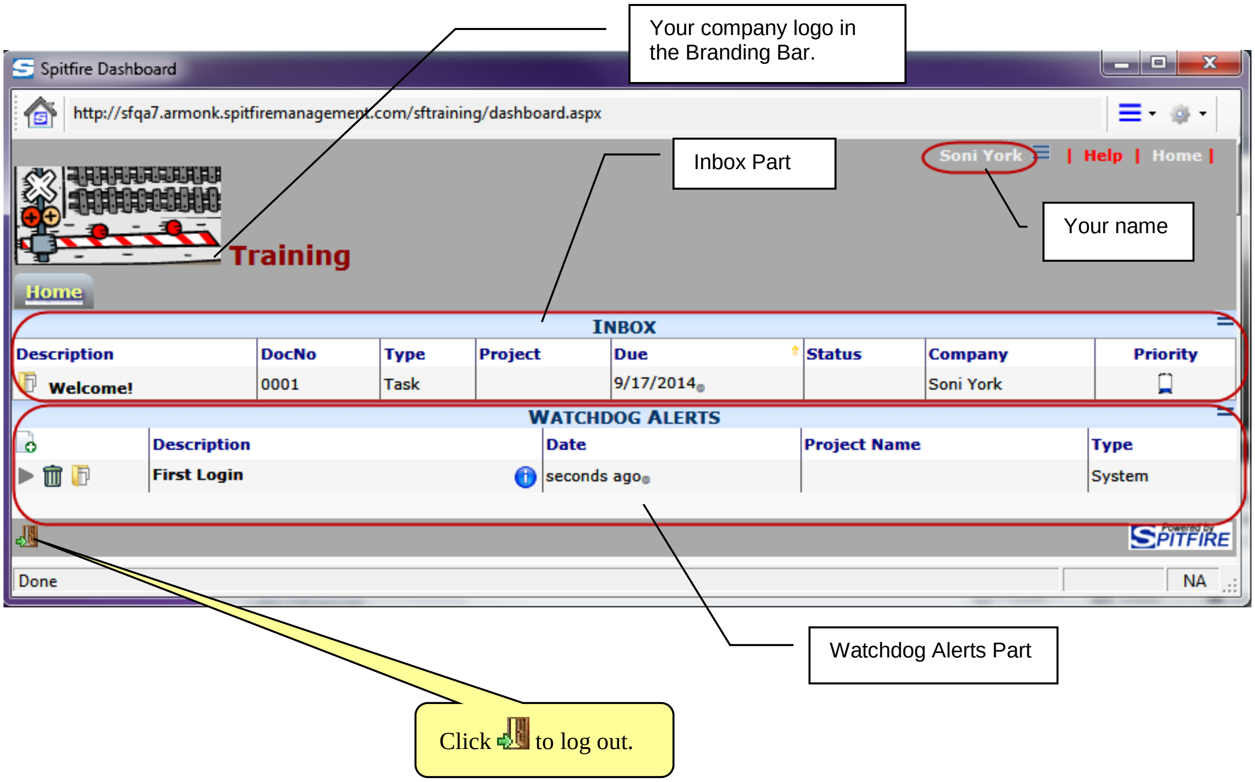
The Help menu allows you to access the Spitfire website and its blog as well as information about the client area of our website.



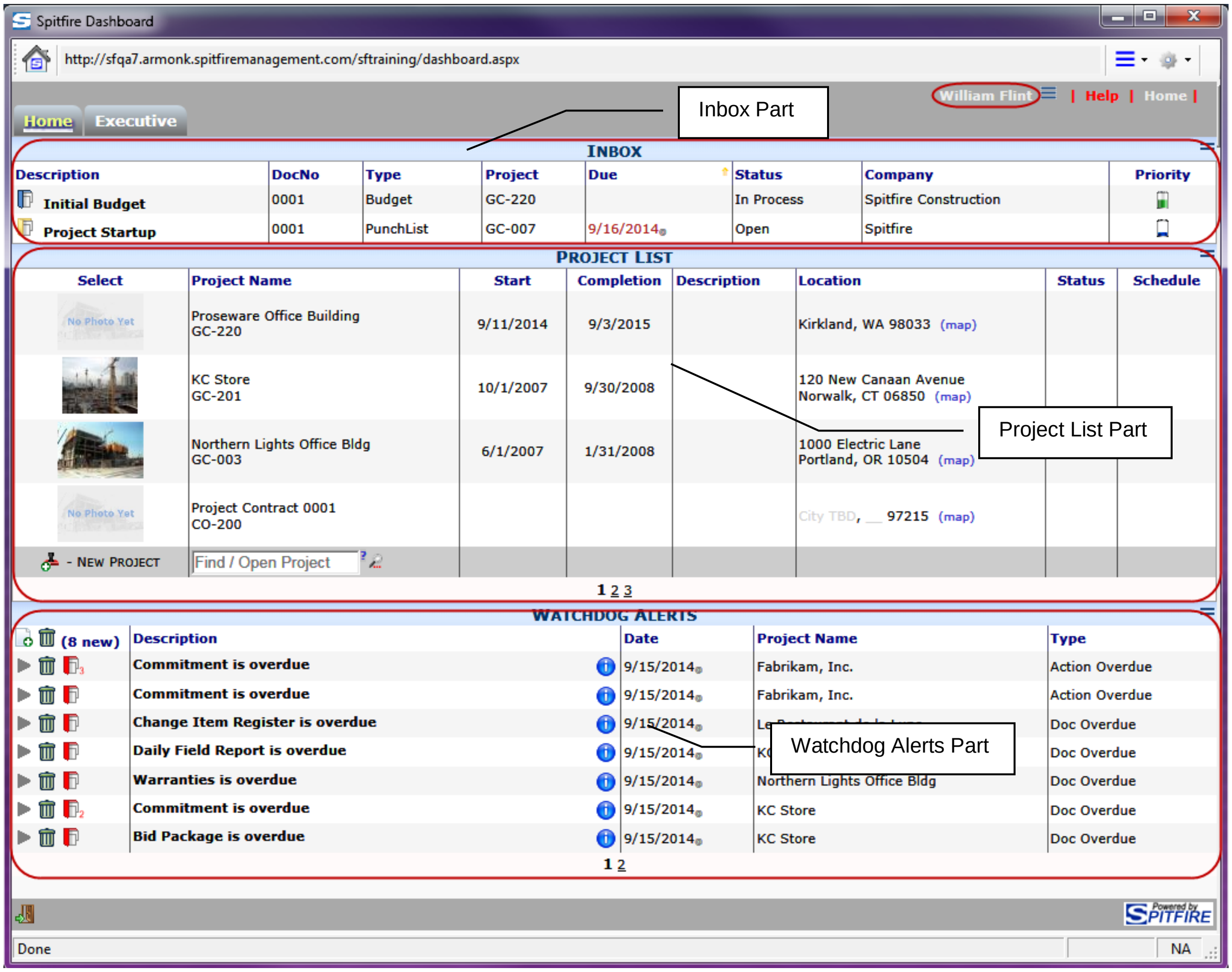
Basic Dashboard Components

On each of the Project Management dashboards, you'll find various parts and tools to help you arrange, filter and navigate through the system and data.

What you actually see depends on your level of permission. So, for example, if you have only some basic access rights, what you first see may look something like the following:



However, if you have more access, and have used sfPMS for a while, your Dashboard may look like the following picture.



Tabs

Each Dashboard is on a separate tabbed page in the Spitfire Dashboard window. You can move from one Dashboard to another by clicking on the appropriate tab.

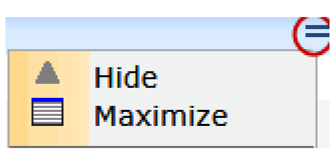
Parts

A Part is a section of the dashboard. For example, on the Home Dashboard shown above, three parts are displayed:

- Inbox
- Project List
- Watchdog Alerts

Part Views*

A Part can be shown, hidden or maximized. Parts are “shown” by default.



Hide/Show

- To hide a part, click to open the options menu, then select **Hide**.
- To show a part, click to open the options menu, then select **Show**.

Maximize

sfPMS allows you to maximize one part per dashboard. This means that the part will display up to 100 rows of information. When you select a part to maximize, any other maximized part will revert back to “normal” view (a few rows shown, with pagination if necessary to get to other rows).

- To maximize a part, click to open the options menu, then select **Maximize**.
- To stop maximizing a part, click to open the options menu, then select **Normal View**.

Lookup Bar

The Project List part on the Home Dashboard offers one more display option. You can choose to hide the rows but keep the project lookup field visible.

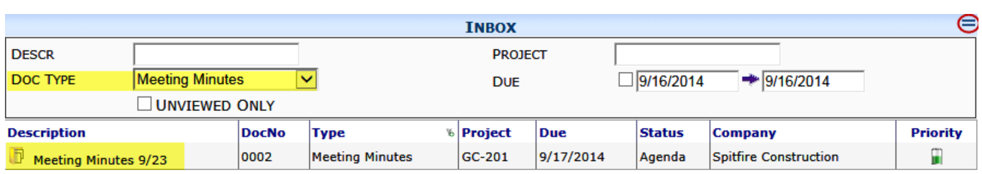
- To hide the part except for the lookup field, click to open the options menu, then select **Lookup Bar Only**.

Part Filters*

There are two ways to filter the part details.

Show All Filters

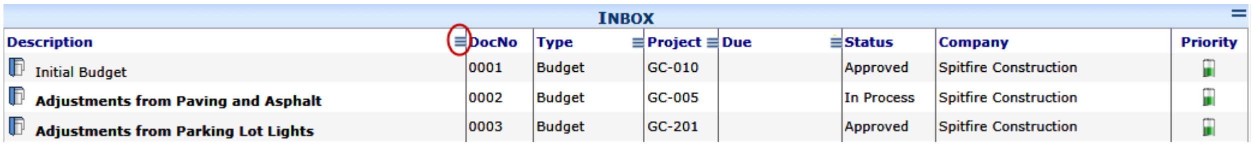
You can display all filter fields on top of the part. Once you use one or more filters, the part’s details will be limited to only the data that matches your criteria.



- To display all the part filters, click to open the part options menu, then select **Show Filter**.
- To hide the filters, click to open the part options menu, then select **Hide Filter**.

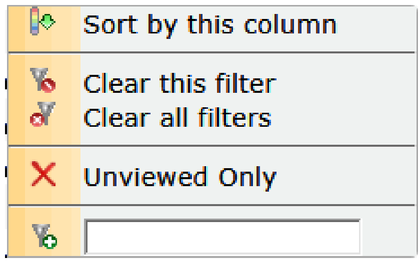
Column Filters

Many columns in the parts display a drop-down menu when you click anywhere on the header. Columns with this functionality show a small icon when you mouse over the header. The drop-down menu allows you to sort the column and filter on the column. (See also page 45.)



INBOX

Description	DocNo	Type	Project	Due	Status	Company	Priority
Initial Budget	0001	Budget	GC-010		Approved	Spitfire Construction	
Adjustments from Paving and Asphalt	0002	Budget	GC-005		In Process	Spitfire Construction	
Adjustments from Parking Lot Lights	0003	Budget	GC-201		Approved	Spitfire Construction	



- To filter on the specific column, enter your filter criteria at the field at the bottom of the drop-down menu. For example, if you open the menu at the Type column, you can enter **Budget** in the filter field to filter by the Budget Doc type.

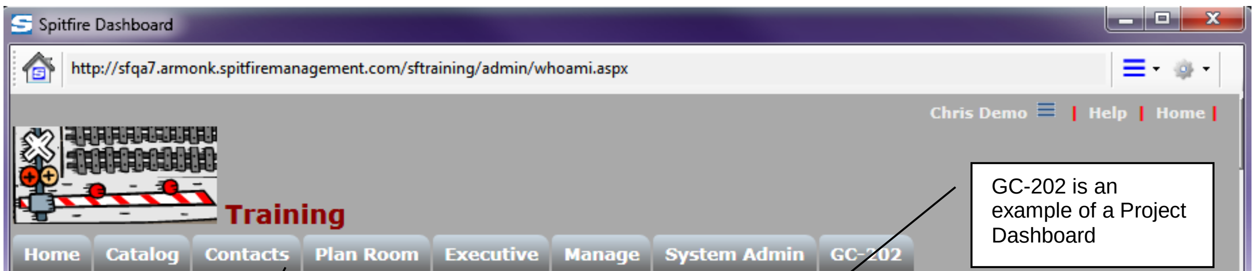
Dashboards

A Dashboard is collection of parts that are grouped together for a specific purpose.

To move to a Dashboard:

- Click on the appropriate Dashboard tab.

Dashboard tabs are located in the upper left side of the Spitfire window. If your Branding Bar (company logo area) is displayed, the Dashboard tabs will be displayed just below the logo. When a Project Dashboard is opened, a tab for the project will also be displayed.



Dashboard tabs

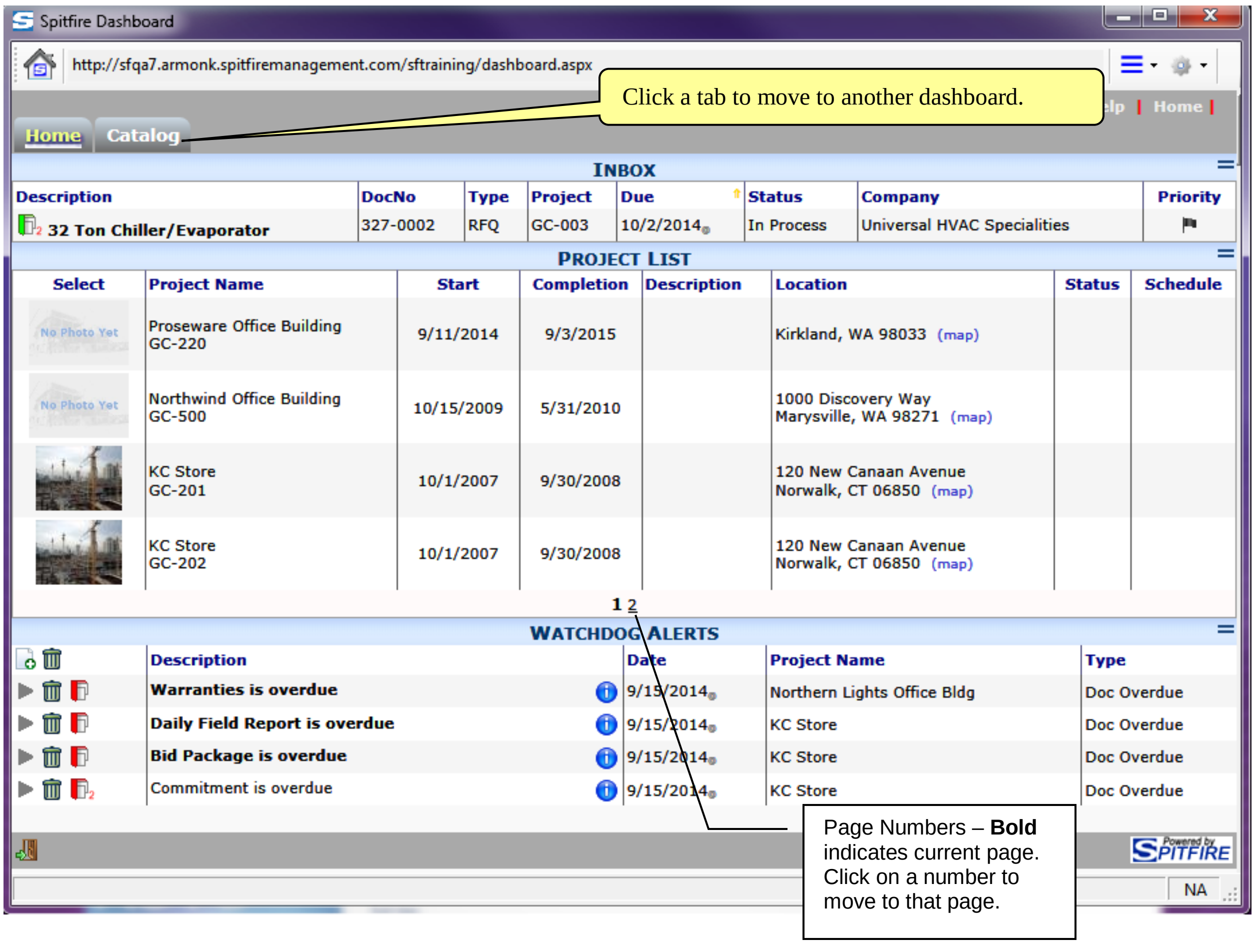
Dashboard	Purpose
Home	Groups your Inbox, Watchdog Alerts, and Projects into one user-specific page. You can open a Project Dashboard from the Project List, if you have permission to do so.
Catalog	Groups all the files scanned or uploaded into the system and provides search capabilities on both these files and Spitfire documents.
Contacts	Groups Contacts and Companies in your system.
Plan Room	Groups documents of selected Doc types. This tab may be the only tab in the system for certain users (such as contractors).
Executive	Groups all project financials and gives access to the Project Dashboards. You can also export the information to Microsoft Excel.
Manage	Groups management tasks, for example, creating predefined routes and managing alert subscriptions.
System Admin	Groups administrative tasks, for example, defining roles, creating catalog folder hierarchy, system customization, etc. Few users have access to this dashboard.
Project *(e.g., GC-202)*	Groups all the data for one project. This tab appears only after you open a Project Dashboard from the Home Dashboard or Executive Dashboard.

Note: if you do not have permission to access a particular dashboard, its tab will not appear for you.

Home Dashboard

When you log in, the Home Dashboard appears. Depending on your permission level, the Home Dashboard displays one to three parts: Inbox, Project List and Watchdog Alerts.

Here you see only what you have permission to see. The Inbox contains documents for you; the Project List contains your projects; and the Watchdog Alerts are your alerts.



Inbox

TIP

See the *Focus on Routes* guide for more information about routed documents.

Your Inbox lists Spitfire documents that have been newly created by you or have been routed to you. These documents remain in your Inbox until you change their route status and either send them on to another person on the route, or just remove them from your Inbox.

INBOX

Description	DocNo	Type	Project	Due	Status	Company	Priority
8 8 Scanned Invoices	0001	AP Scans	-	9/16/2014	Open	Spitfire Construction	
Additional electrical work required for utility	0001	Proposed CO	GC-003	9/26/2014	Open	Northern Lights	
Adjustments from 32 Ton Chiller/Evaporator	0001	Budget	GC-005		In Process	Spitfire Construction	
Adjustments from Electrical Work	0003	Budget	GC-005		In Process	Spitfire Construction	
Adjustments from Parking Lot Lights	0003	Budget	GC-201		Approved	Spitfire Construction	
Adjustments from Paving and Asphalt	0002	Budget	GC-005		In Process	Spitfire Construction	
Adventure Works 000004	000004	PO	GC-003	9/20/2014	Open	Spitfire Construction	
AP Voucher: Able Electric	000964	Vouchers	GC-005	9/15/2014		Able Electric	
1 AP Voucher: Able Electric	000834	Vouchers	GC-003	10/8/2014	Open	Able Electric Corp	

Click or to open a document in your Inbox. indicates that the document has been routed to you as a CC (courtesy copy) only.

The color of the due dates indicate the following: red=past, brown=today, black=future

The Folder Icons

Note: a small number next to the folder icon indicates the number of attached files on that document.

- Blue indicates that the document is closed or has no due date.
- Red indicates that the document is overdue.
- Yellow indicates that the document is due this week (through the next Sunday).
- Green indicates that the document is open and due in the future.

The Priority Indicators

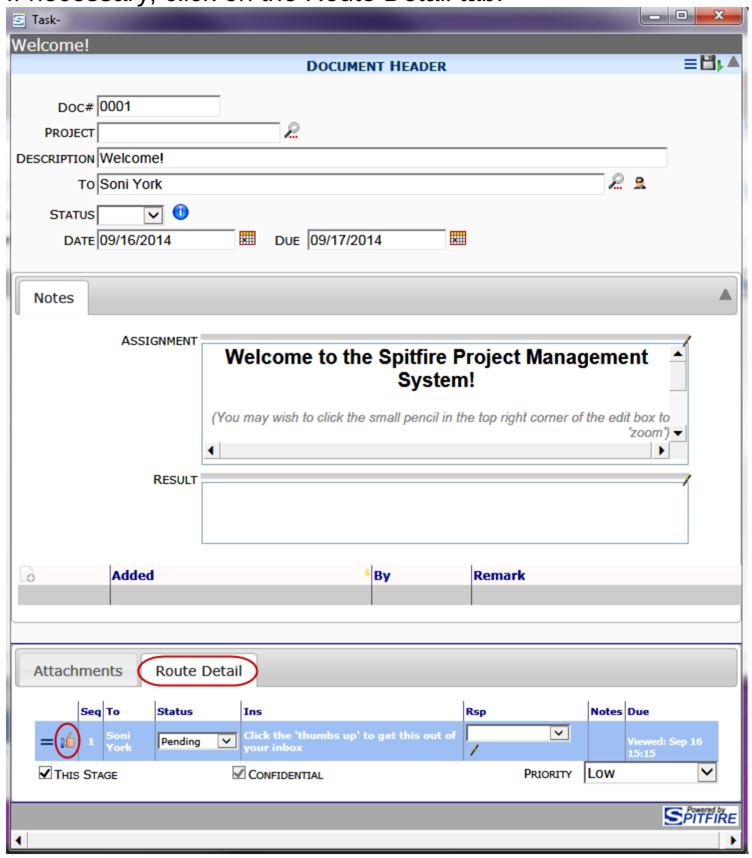
- means a priority of FYI (the lowest possible)
- means a priority of Low
- means a priority of Medium
- means a priority of High
- means a priority of Urgent (the highest possible)

Removing Documents from the Inbox

Since even users with minimal permission levels may have documents routed to them, you will probably end up with documents in your Inbox. You "remove" a document from your Inbox by opening it and responding to its route.

To remove a document from your Inbox:

1. Click (of whatever color) next to the document you want to remove from your Inbox. The document will open.
2. If necessary, click on the Route Detail tab:



3. Click on the row with your name. This icon will automatically save the document, sending the document on to the next routee (if any) and out of your Inbox.

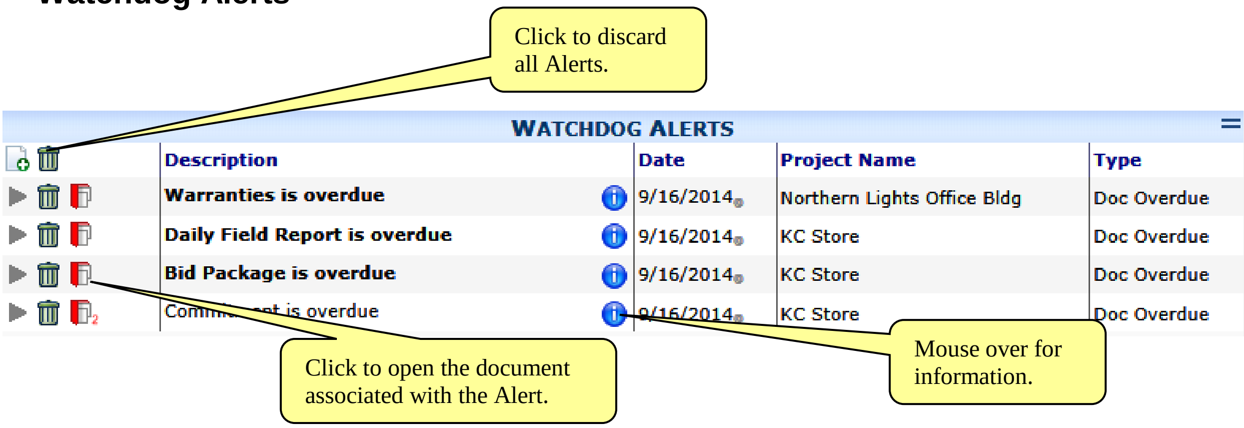
   Note: you may need to wait until the Dashboard refreshes to see that the document is no longer in your Inbox.

4. Click on top to close the document window.

To remove a CC'd document from your Inbox:

1. Click next to the CC'd document you want to remove from your Inbox. The document will open.
2. If necessary, click on the Route Detail tab.
3. Click on the row with your name. The route status will change to **CC'd: Ack** and the document will be saved and removed from your Inbox.
   Note: You may need to wait until the Dashboard refreshes to see that the document is no longer in your Inbox.
4. Click on top to close the document window.

Watchdog Alerts



TIP

See the *Focus on Alerts and Compliance* guide for more information on Alerts.

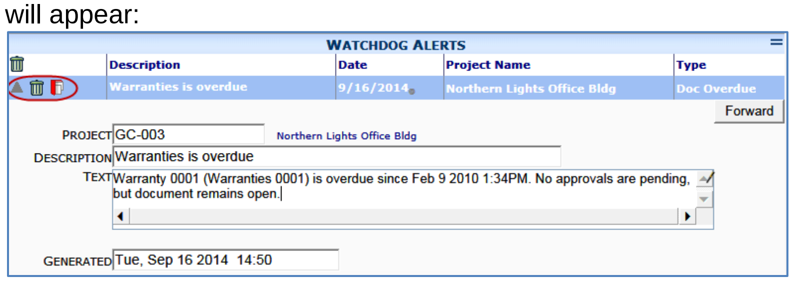
TIP

The first time you discard an Alert, a confirmation box will appear. If you click OK, the confirmation box will not appear for subsequent Alerts that you discard in the same session.

Alerts provide information. When you have made note of the information or taken action because of the message, you can discard the Alert.

To open and discard an Alert:

1. Click next to the Alert you want to open. Details of the Alert will appear:

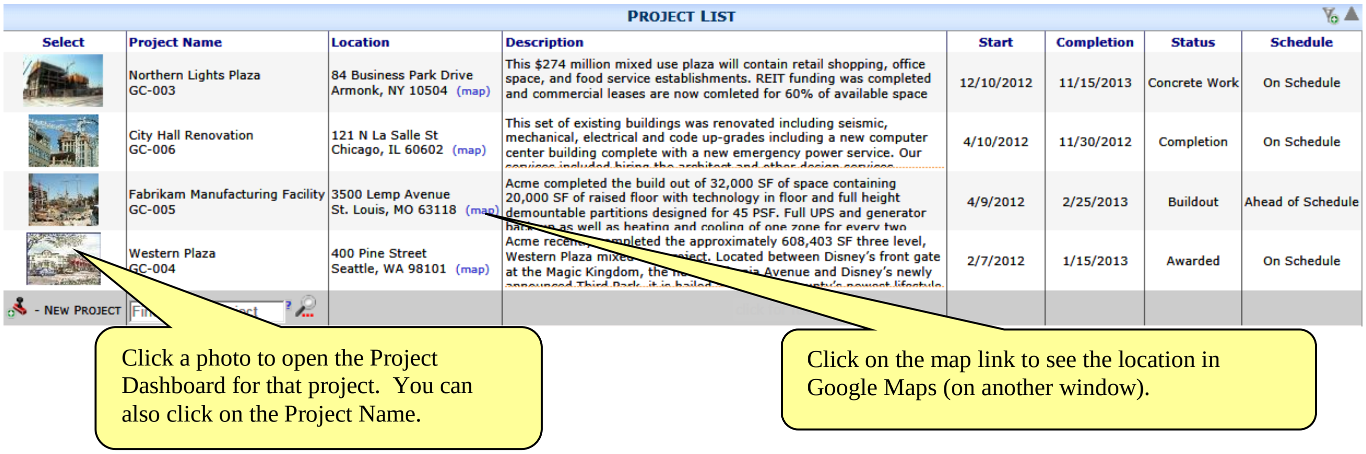


2. (*optional*) Click (of whatever color) to open the document to which this Alert corresponds.
3. (*optional*) Click to return to grid view.
4. Click to discard the Alert from the Watchdog Alerts part. The next time the Dashboard refreshes, the Alert will be removed. **Note**: you can also discard the Alert directly from grid view without opening it first.

To Forward an Alert:

- With the Alert in Detail view, click Forward.

Project List

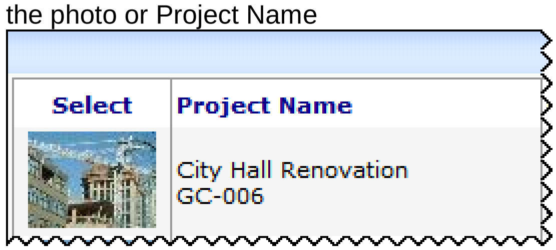


Note: The Project List includes only those projects to which you have been granted user access. If a project is not included in the Project List and you think it should be, contact the Project Manager or your System Administrator. If you do not have access rights to any Project Dashboard, then this part will not be assigned to you.

Project Dashboard

To open a Project Dashboard:

1. Go to either the Projects part on the Home Dashboard and click the photo or Project Name

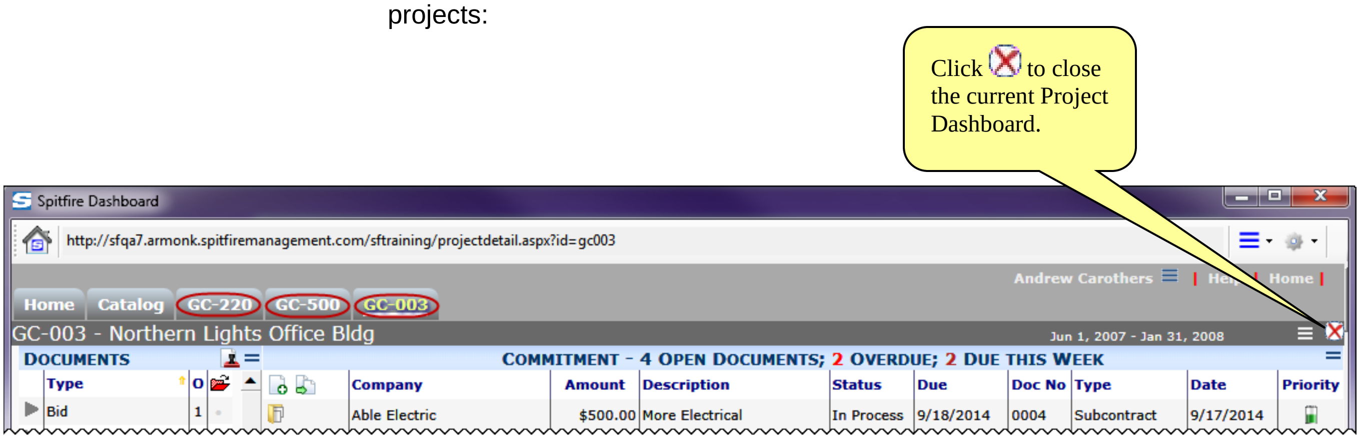


- or-

(*if you have access*) Go to the Executive Dashboard and click

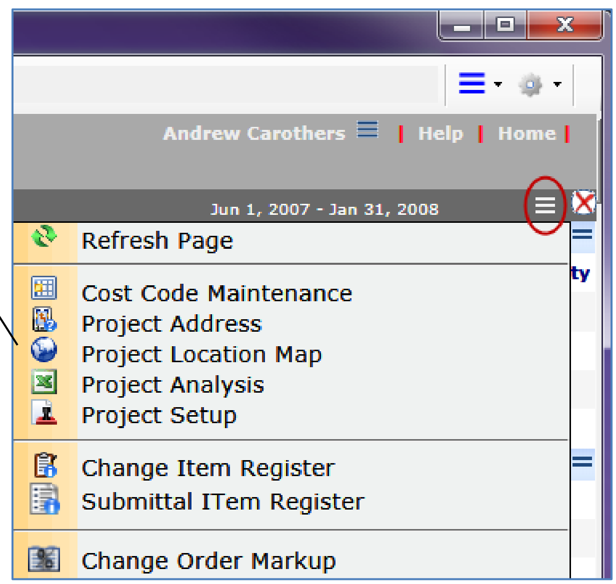
The Project Dashboard brings together all the elements of the project: Documents, Contacts, Linked Projects, Revenue and Expenses, Files, Site Photos, and Site Conditions.

If you have user access rights to multiple projects, you can open multiple Project Dashboards and each Project Dashboard will have its own tab in your Spitfire browser. The following picture displays tabs for three projects:



Project Options Menu

The Project Options menu allows you to view the Project Address and open the Project Setup document, among other things. More information about these options can found in the “Project Dashboard Options Menu” section of the *Focus on Doc Types and Project Workflow* guide.
Note: if you don’t have permissions for all these options, your menu will appear shorter.

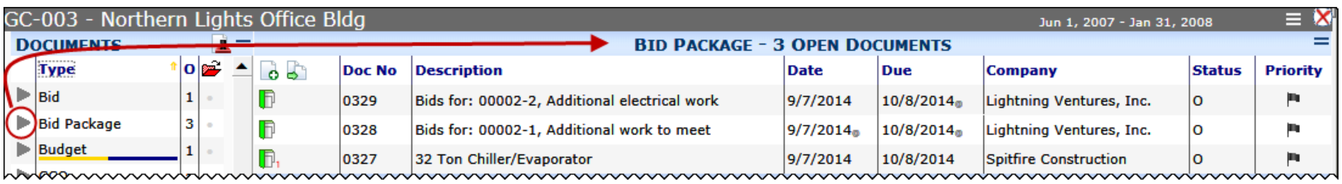


Project Dashboard Parts

The Project Dashboard can display up to 10 parts, depending on your access level.

Documents

The Documents menu contains active Doc types. Doc types indicate the type of Spitfire documents that you can create and open. When you click ▶ or a Doc type name in the menu, the corresponding Document part changes to match your selection. Depending upon your access rights, the Document part will display either all of the documents of that Doc type on the project, or only those documents that have been created by you or routed to you.



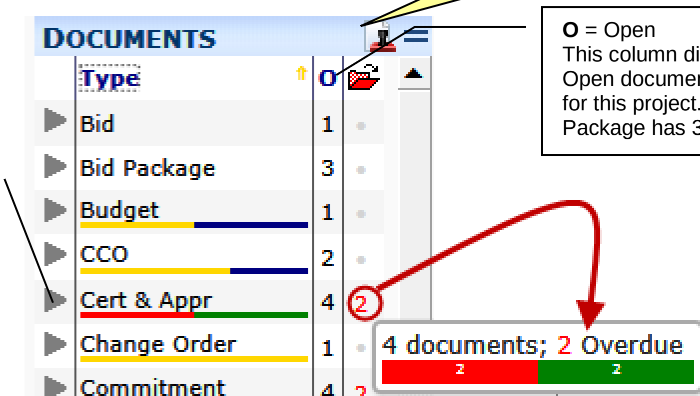
- More information about documents can be found in the *Focus on Document and Item Basics* guide.

Document Menu

Click ═ then ▤ to show all Doc types.
Click ♜ to open the Project Setup document for this project.

O = Open
This column displays the number of Open documents for this Doc type for this project. For example, Bid Package has 3 open documents.

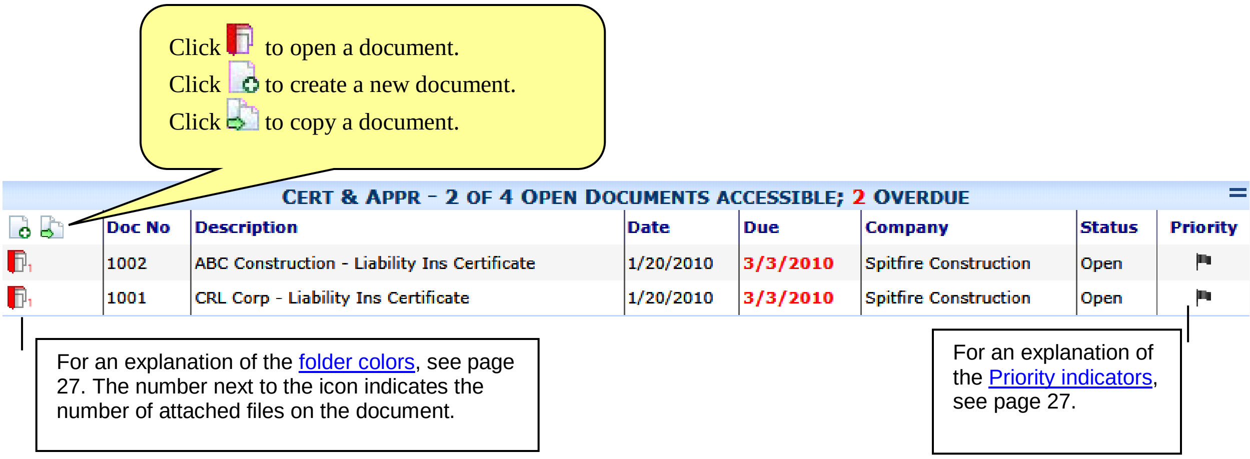
Click ▶ to get to the Document part for that Doc type (as shown in the following picture).



Overdue
This column displays the number of overdue documents for this Doc type for this project. For example, Cert & Appr has 2 overdue documents.

The color bars indicate the due status of the documents. Mouse over the overdue column to see a larger color bar:
Blue means the document is closed or has no due date.
Red means the document is overdue.
Yellow means the document is due this week (through the next Sunday)
Green means the document is open and due more than a week in the future.

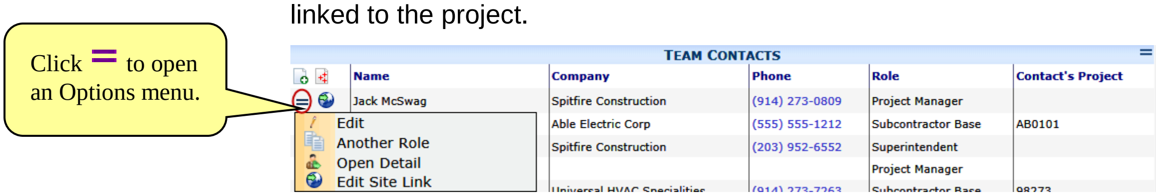
Corresponding Document Part



Doc No	Description	Date	Due	Company	Status	Priority
1002	ABC Construction - Liability Ins Certificate	1/20/2010	3/3/2010	Spitfire Construction	Open	
1001	CRL Corp - Liability Ins Certificate	1/20/2010	3/3/2010	Spitfire Construction	Open	

Team Contacts

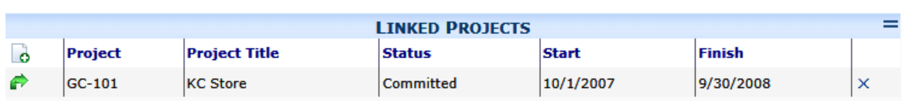
The Team Contacts part includes not only Spitfire users with access rights to the project but also vendors, subcontractors, and/or customers linked to the project.



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

Linked Projects

The Linked Projects part appears only if there is at least one project linked to the current project.

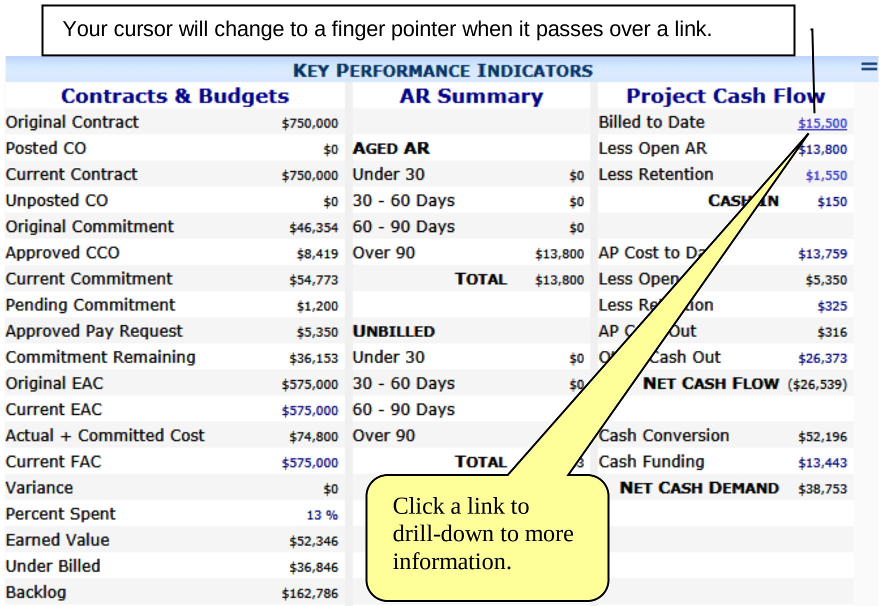


Project	Project Title	Status	Start	Finish
GC-101	KC Store	Committed	10/1/2007	9/30/2008

- For more information about Linked Projects, see the technical white paper *Data and Equipment Projects*.

Key Performance Indicators

The Key Performance Indicators part provides summary information from your Microsoft Dynamics SL Project Accounting data (if your site is integrated) as well as from Project Contract, Commitment and Change Order documents. Drill-down is available on any of the linked amounts.



Where the data comes from

Original Contract	From the Project Setup document
Posted CO	Revenue value of the posted billable Change Orders
Current Contract	Contract value plus revenue value of approved Change Orders (Original Contract + Posted CO)
Unposted CO	Revenue value of the billable but not yet posted Change Orders
Original Commitment	Expense value of all the Commitments on the project
Approved CCO	Expense value of all the approved Commitment Change Orders
Current Commitment	Original Commitment expense plus the value of approved CCOs
Pending Commitment	Expense value of unapproved (Pending) CCOs + Pending Commitments
Approved Pay Request	Expense value of all approved Pay Requests (for Subcontracts/Commitments)
Commitment Remaining	Future anticipated payment requests(see KBA-01492)
Original EAC	Posted expenses on the Initial Budget
Current EAC	Posted expenses on the current (revised) Budget
Actual + Committed Cost	Actual plus committed expenses on the Project (AP Vouchers, Commitments, Labor, Labor Burden)
Current FAC	Posted expenses to the Forecast (Original Budget is posted to FAC from Initial Budget entry only)
Variance	Calculated variance between current Budget expense and Forecast expense
Percent Spent	Calculated actual plus committed amounts compared to total Budget expenses
Earned Value	Calculated amount earned based on percent complete and actual/committed compared to EAC
Under Billed	Calculated billed amounts compared to expenses
Backlog	Calculated margin minus earned income

Cost Analysis Detail

The Cost Analysis Detail part displays the up-to-date data from Microsoft Dynamics SL Project Accounting and Microsoft Dynamics SL Financials (if your site is integrated).

Click on any header to sort the rows according to that column, ascending or descending. The arrow indicates the direction of the sort.

COST ANALYSIS DETAIL

Account	EAC	U.CO	=Sum	Actual	Com Cost	=A+C	Spent	FAC	Variance
EQ PARTS	$0	$0	$0	$0	$0	$0	n/a	$0	$0
_MTRL EXPEND	$0	$0	$0	$0	$0	$0	n/a	$0	$0
_SUB RTAX	$150	$0	$150	$0	$1,550	$1,550	*******	$0	$150
_EQ RENTAL	$5,125	$0	$5,125	$0	$0	$0	0.00 %	$5,125	$0
_OTHER	$8,750	$0	$8,750	$0	$0	$0	0.00 %	$8,750	$0
_SUB	$127,375	$0	$127,375	$0	$0	$0	0.00 %	$138,625	($11,250)
_LABOR	$163,750	$0	$163,750	$0	$4,500	$4,500	2.75 %	$169,000	($5,250)
_MTRL PERM	$241,500	$0	$241,500	$0	$26,500	$26,500	10.97 %	$253,500	($12,000)
REVENUE	$700,000	$0	$700,000	$0	$0	$0	n/a	$700,000	$0
Revenue	$700,000	$0	$700,000	$0			0%	$700,000	$0
Expense	$546,650	$0	$546,650	$0	$32,550	$32,550	5.95%	$575,000	($28,350)
Margin	$153,350	$0	$153,350	$0				$125,000	$28,350

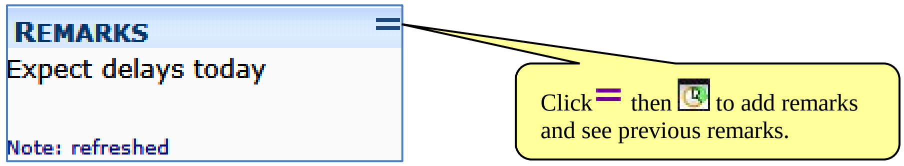
Photo

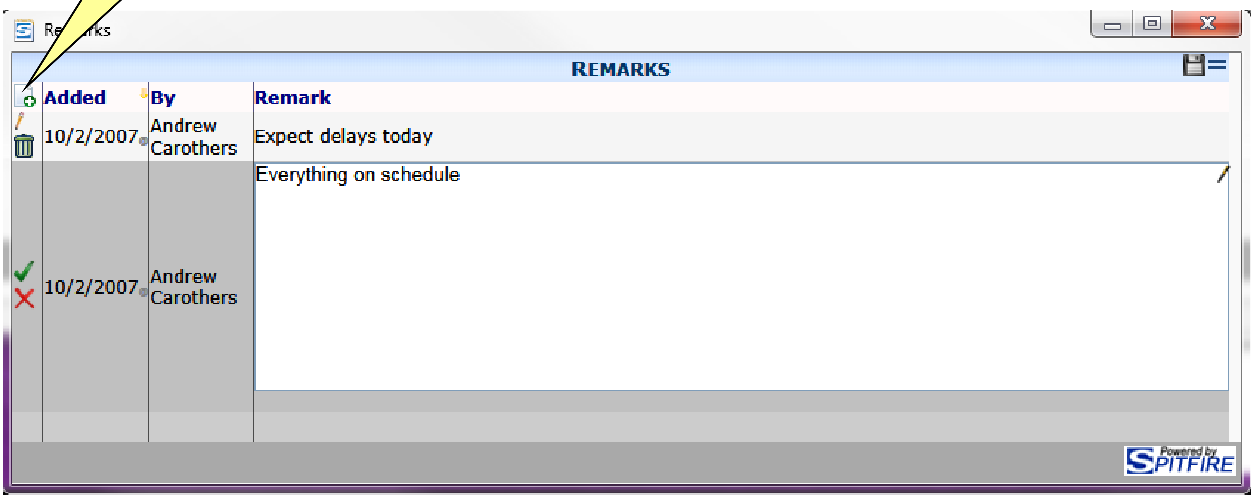
Project Photos are the display of your project. Once photos are uploaded or scanned into the system, they are stored. This archiving will supply you with a pictorial history of the project.

Click = then to upload photos.
Click on the photo to see a larger view.

Remarks

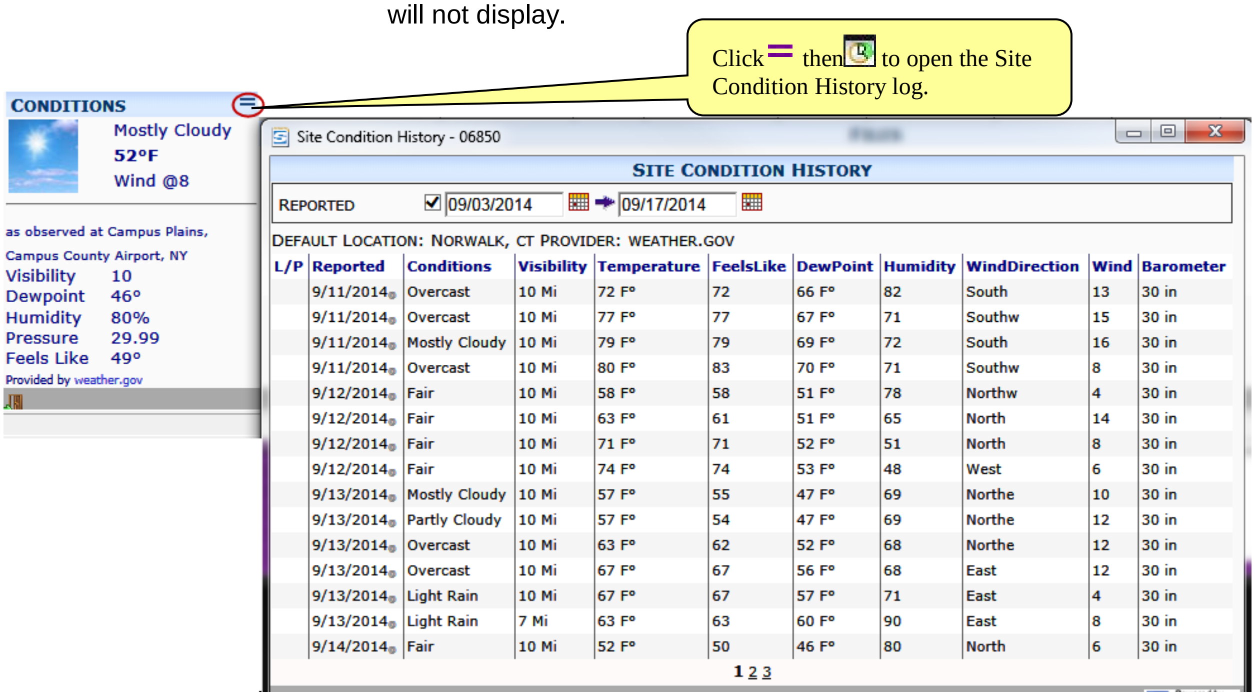
The Remarks part displays a note about the project. A new remark will override a previous remark on the Project Dashboard, but all remarks are kept in the Remarks window.





Conditions

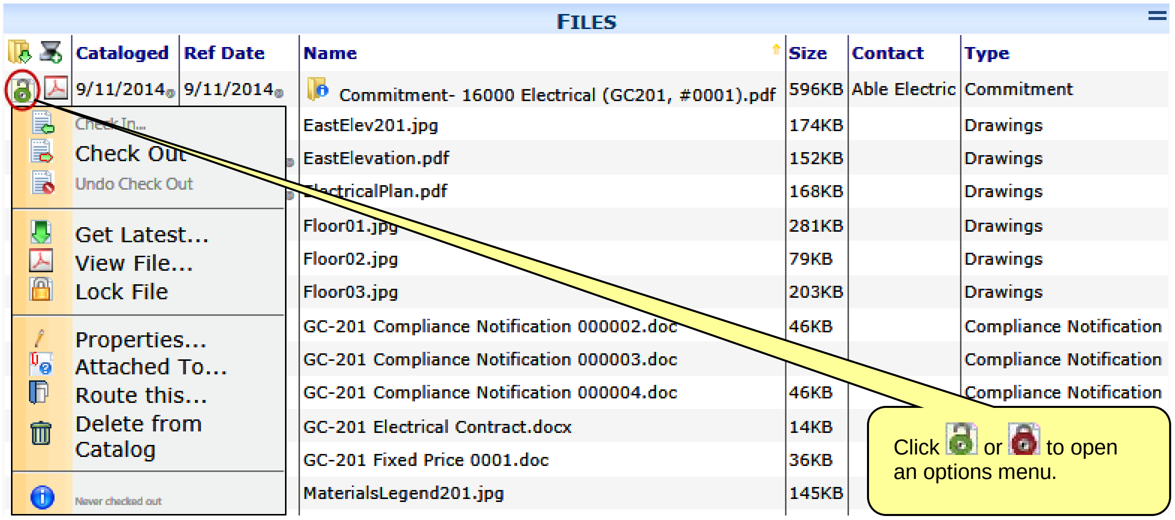
Conditions are programmed to connect to www.weather.gov and display the forecasted weather conditions for the project site address. (The site address is taken from the Project Setup document for the project.) If your connection to the Internet is interrupted, the Site Conditions information will not display.



L/P	Reported	Conditions	Visibility	Temperature	FeelsLike	DewPoint	Humidity	WindDirection	Wind	Barometer
	9/11/2014	Overcast	10 Mi	72 F°	72	66 F°	82	South	13	30 in
	9/11/2014	Overcast	10 Mi	77 F°	77	67 F°	71	Southw	15	30 in
	9/11/2014	Mostly Cloudy	10 Mi	79 F°	79	69 F°	72	South	16	30 in
	9/11/2014	Overcast	10 Mi	80 F°	83	70 F°	71	Southw	8	30 in
	9/12/2014	Fair	10 Mi	58 F°	58	51 F°	78	Northw	4	30 in
	9/12/2014	Fair	10 Mi	63 F°	61	51 F°	65	North	14	30 in
	9/12/2014	Fair	10 Mi	71 F°	71	52 F°	51	North	8	30 in
	9/12/2014	Fair	10 Mi	74 F°	74	53 F°	48	West	6	30 in
	9/13/2014	Mostly Cloudy	10 Mi	57 F°	55	47 F°	69	Northe	10	30 in
	9/13/2014	Partly Cloudy	10 Mi	57 F°	54	47 F°	69	Northe	12	30 in
	9/13/2014	Overcast	10 Mi	63 F°	62	52 F°	68	Northe	12	30 in
	9/13/2014	Overcast	10 Mi	67 F°	67	56 F°	68	East	12	30 in
	9/13/2014	Light Rain	10 Mi	67 F°	67	57 F°	71	East	4	30 in
	9/13/2014	Light Rain	7 Mi	63 F°	63	60 F°	90	East	8	30 in
	9/14/2014	Fair	10 Mi	52 F°	50	46 F°	80	North	6	30 in

Files

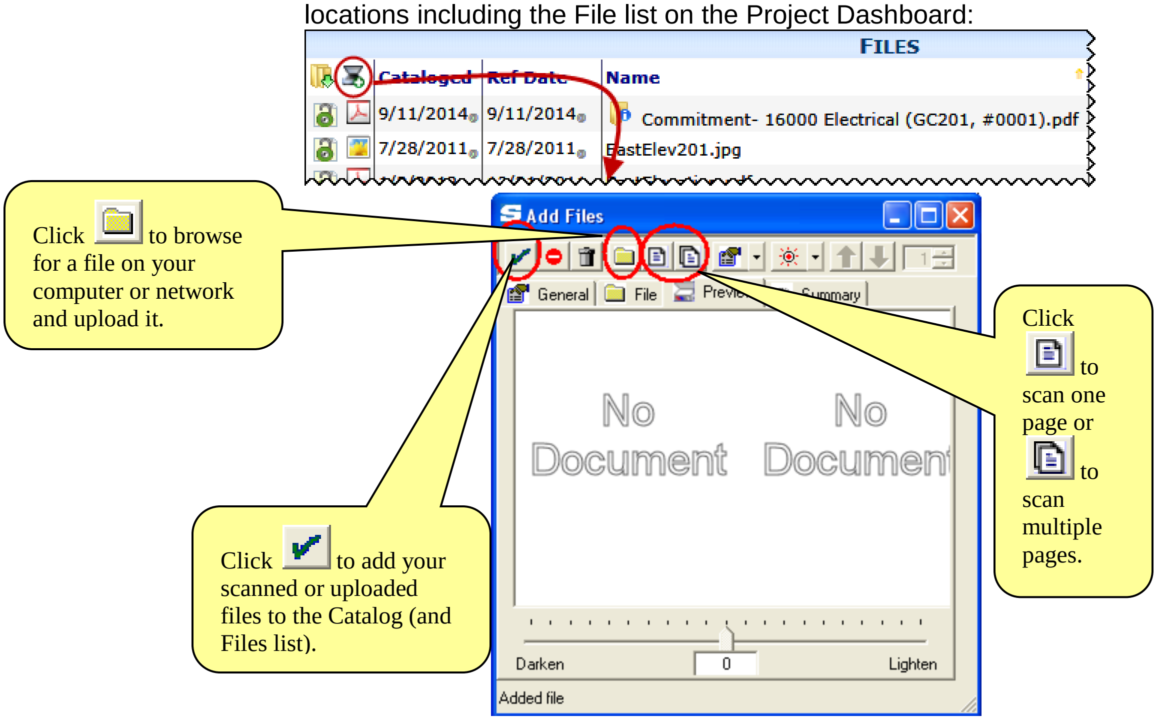
The Project Files area contains all the uploaded files (both scans and electronic files) that are associated with this project. It is the same as the Files list on the Catalog Dashboard when the Catalog is filtered for the project.



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

Add Files Tool

You can add files to the Files list (and to sfPMS) through the Add Files tool. The Add Files tool allows you to upload and scan files from various software applications. You can access the Add Files tool from various locations including the File list on the Project Dashboard:



The Add Files tool is available on the Catalog Dashboard also.

Catalog Dashboard

The Catalog Dashboard gives you quick access to all of the documents and files in your Spitfire system.

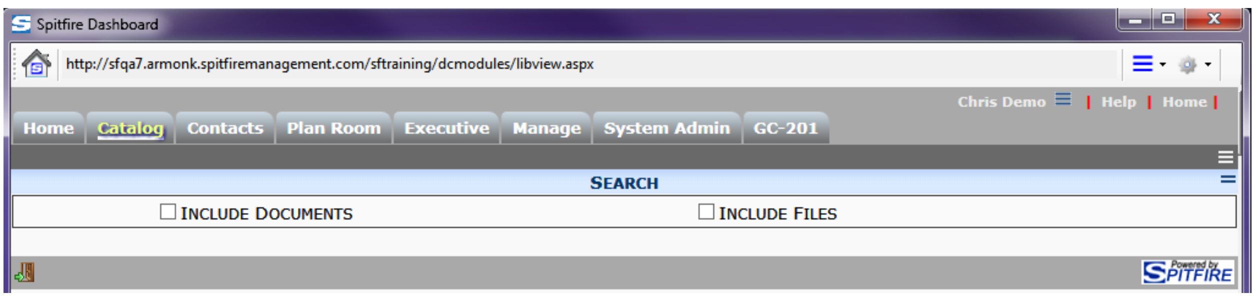
Document – A document is a specific window created within sfPMS from one of our Doc types. There are over 55 Doc types in the system, all of which can be customized. Each Doc type has a specific purpose. Some documents are linked to Microsoft Dynamics SL forms if your site is integrated (e.g., Pay Requests, Pay Applications) and some never are (e.g., Meeting Minutes, Drawings).

File – A file is any electronic file uploaded or scanned into sfPMS, such as Microsoft Word documents, CAD files, and scanned AP invoices. A file can also be an uploaded Web URL or email. A file can be attached to a Spitfire document or uploaded directly to the Catalog.

Both documents and files can be attachments on a Spitfire document.

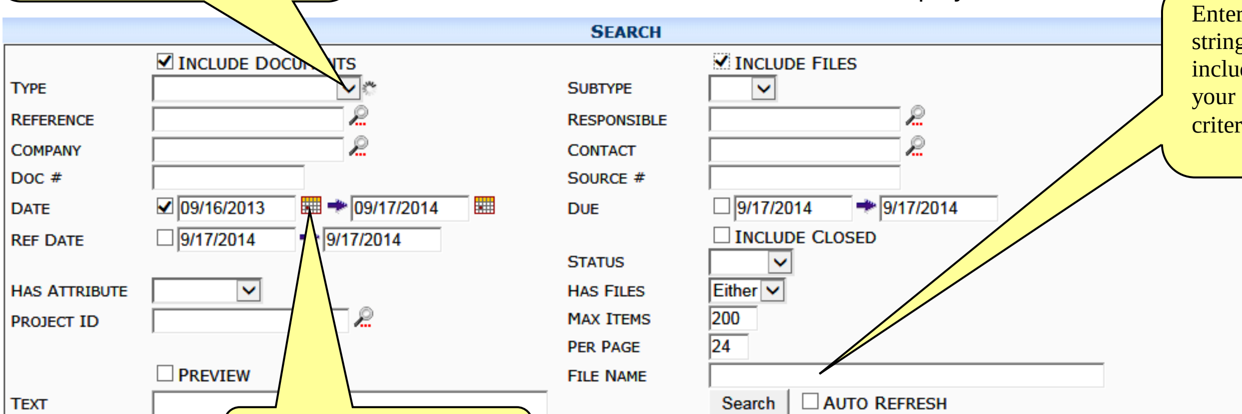
Catalog Dashboard Part

The Catalog Dashboard opens with a simple filter: documents, files or both.



Select a type from the drop-down to include a specific document type in your search criteria.

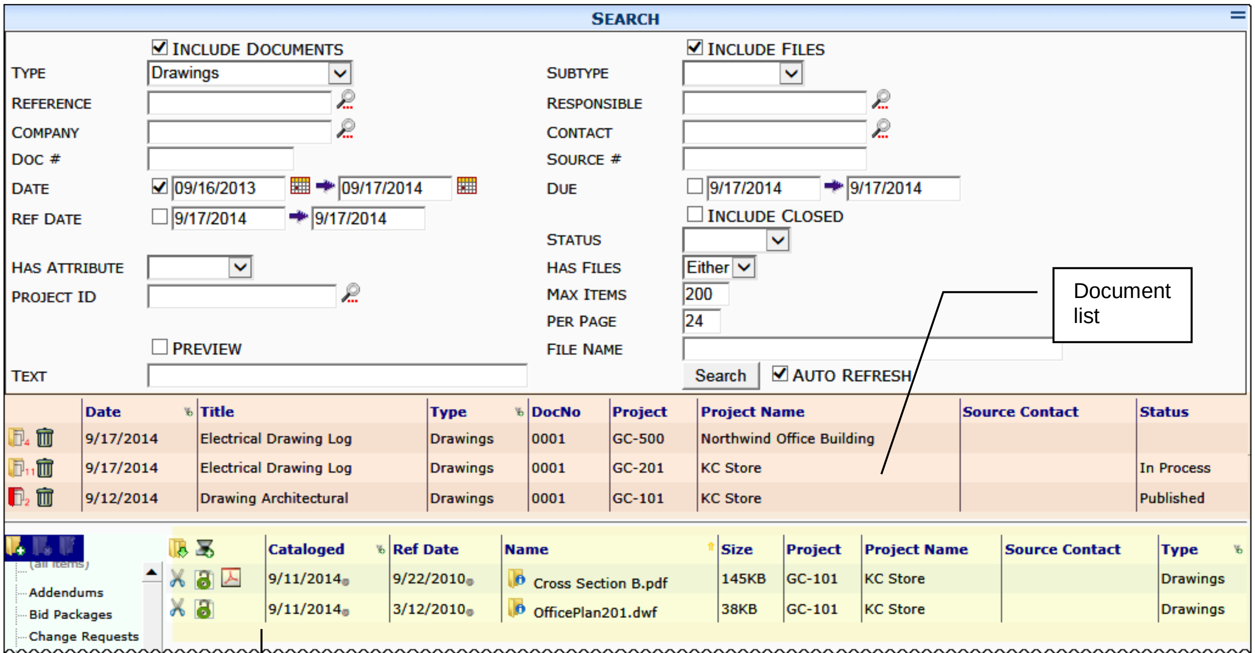
After you make your initial selection by clicking on one or both checkboxes, additional search criteria are displayed:



Enter a text string to include in your search criteria.

Include a date range in your search criteria.

Once your criteria are entered, click Search. The results that match your search criteria will be displayed below your search criteria, for example:



File list with user-defined folder tree

The documents that match your search will be displayed in the upper section. Files that match your search appear in the file section below. This section contains a hierarchical tree in the left column. This folder tree can be site-defined.

TIP

More information about documents can be found in the *Focus on Document and Item Basics* guide; more information about files can be found in the *Focus on Files, Attachments and the Catalog Dashboard* guide.

Library of Files

Any file that is linked to a project or Spitfire document can be accessed from the Project Dashboard or from the Spitfire document. The Catalog Dashboard offers an overview or library of all of your files and may contain files not associated with a specific project, but relevant to your company (budget templates, procedural documents, etc.).

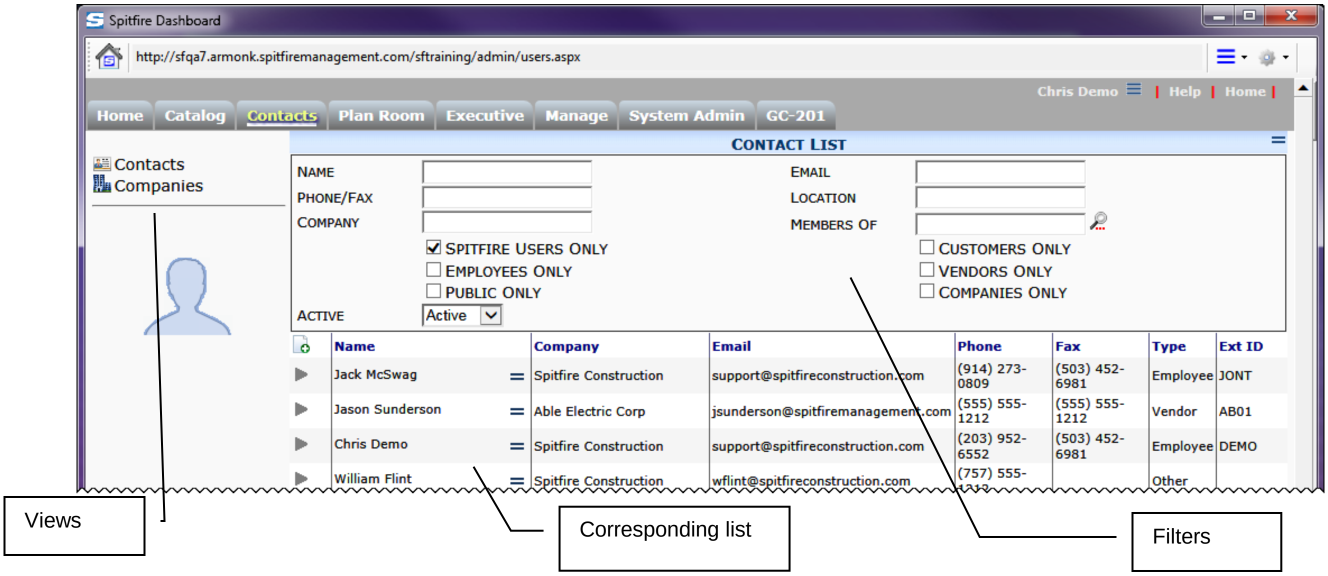
Files in the Catalog

Every file in your catalog is searchable. Using the full-text search functionality built into sfPMS, you can quickly find any and all documents that contain particular phrases, such as “window leakage” or “Grand Insurance Building”.

Files in the Catalog can be deleted (if you have permission to do so), checked in or out, locked, and viewed. Furthermore, security and permissions apply in the Catalog just as they do on the User and Project Dashboards. For example, if a user cannot access Project GC-123, then that user cannot access files linked to Project GC-123 in the Catalog.

Contacts Dashboard

The Contacts Dashboard gives you quick access to all Contacts in your Spitfire system.



Contacts View

Click to add a new Contact and to view or edit details of an existing Contact.

The Contacts view allows you to find all or a subset of Contacts in your system and, if you have permission to do so, to add and edit the Contacts. Contacts include Spitfire users who can log in to sfPMS as well as vendors, subcontractors, customers, etc. who are or will be referenced in your projects. Contacts view shows on the left side (as seen in the picture above).

Name	Company	Email	Phone	Fax	Type	Ext ID
Jack McSwag	Spitfire Construction	support@spitfireconstruction.com	(914) 273-0809	(503) 452-6981	Employee	JONT
Jason Sunderson	Able Electric Corp	jsunderson@spitfiremanagement.com	(555) 555-1212	(555) 555-1212	Vendor	AB01
Chris Demo	Spitfire Construction	support@spitfireconstruction.com	(203) 952-6552	(503) 452-6981	Employee	DEMO
William Flint	Spitfire Construction	wflint@spitfireconstruction.com	(757) 555-		Other	

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

Companies View

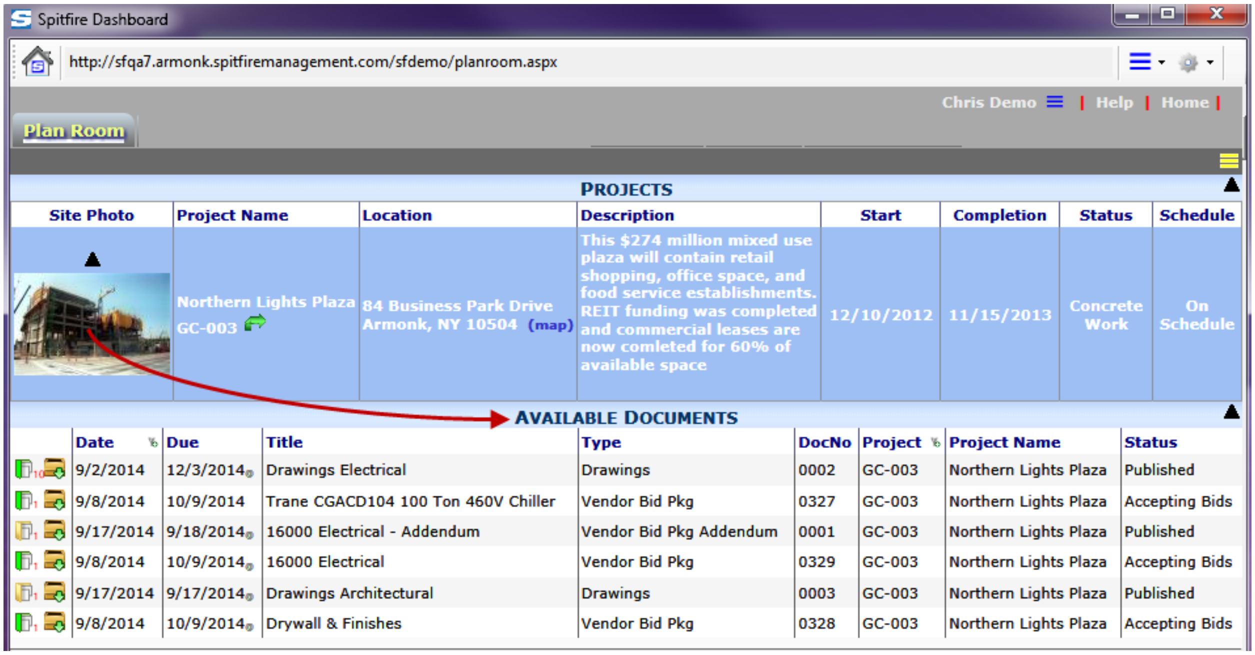
Click to add a new Company and to view or edit details of an existing Company.

The Companies view is a pre-filtered list of just your Company Contacts. Other filters allow you to find specific companies quickly. You can also add and edit Company details here. Company view shows on the left side.

Name	Phone	Fax	Type	Ext ID
Northwind Computers	(555) 555-1212	(555) 555-1212	Customer	C105
The Phone Company - Kent	(555) 555-1212	(555) 555-1212	Customer	TI02
Trey Processing	(555) 555-1212	(555) 555-1212	Customer	OC02
Margie's Travel	(555) 555-1212	(555) 555-1212	Customer	PO01

Plan Room

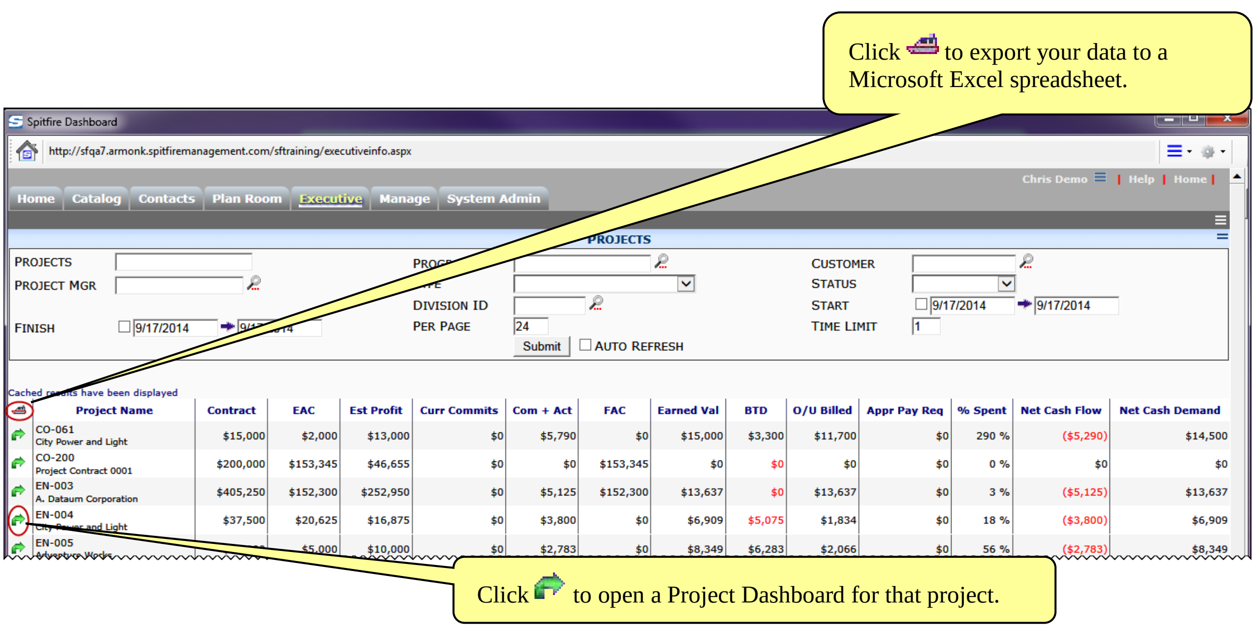
The Plan Room gives public or private users access to certain documents and any files attached to those documents.



- For more information, see the *Setup for Spitfire's Plan Room* technical white paper.

Executive Dashboard

The Executive Dashboard is designed to give your company's executives an overview of the company's projects. The Executive Dashboard includes a number of filters.



Columns

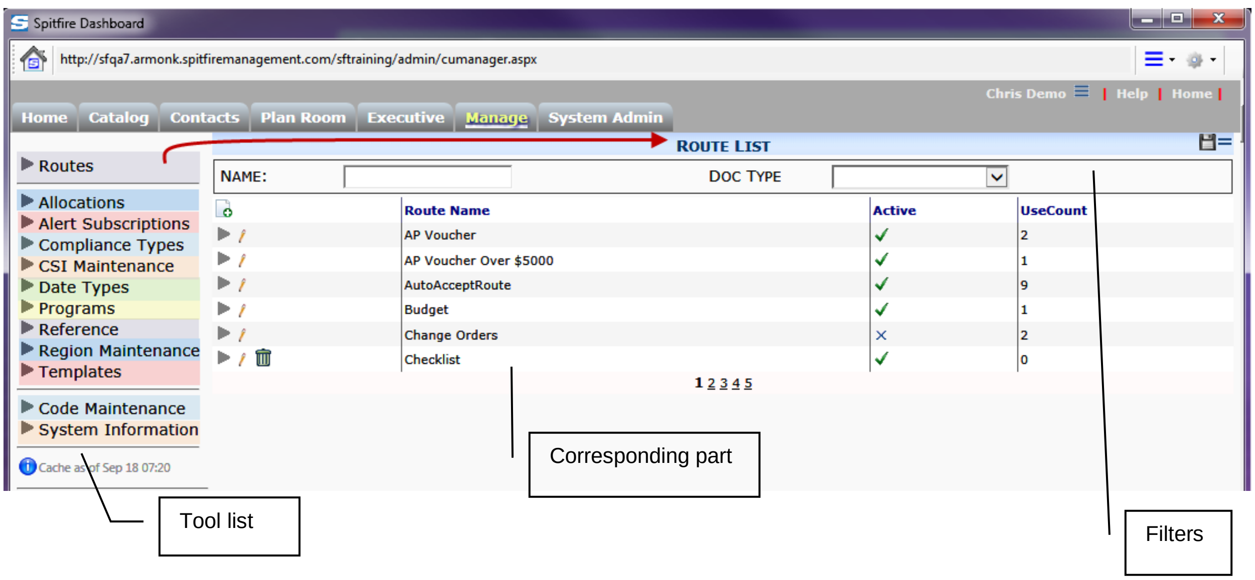
Note: columns are affected by customization. Your site might not include all of the following columns (read left to right)

Project Name	Contract (Amount)	U.CO (Unapproved Change Orders)	EAC (Estimate At Completion)
Com + Act (Committed + Actuals)	Orig Commits (Original Commitments)	CCO	Curr Commits (Current Commitments)
Appr Pay Req (Approved Pay Requests)	% Spent	FAC (Forecast at Completion)	BTD (Billed To Date)
O/U (Over/Under)Billed	Revenue Budget	Earned Val (Value)	Est (Estiimate) Profit
Backlog	Net Cash Flow	Cash Conversion	Cash Funding
Net Cash Demand			
Not shown above but also available:			
PM Name	Status	Project ID	Last Forecast (Date)
Orig (Original) Contract	Posted CO	Act (Actuals)	Last Action (Date)

- For more information, see *The Executive Dashboard and EDB Report Tool* technical white paper.

Manage Dashboard

The Manage Dashboard is displayed only if you have been given access permission to it.



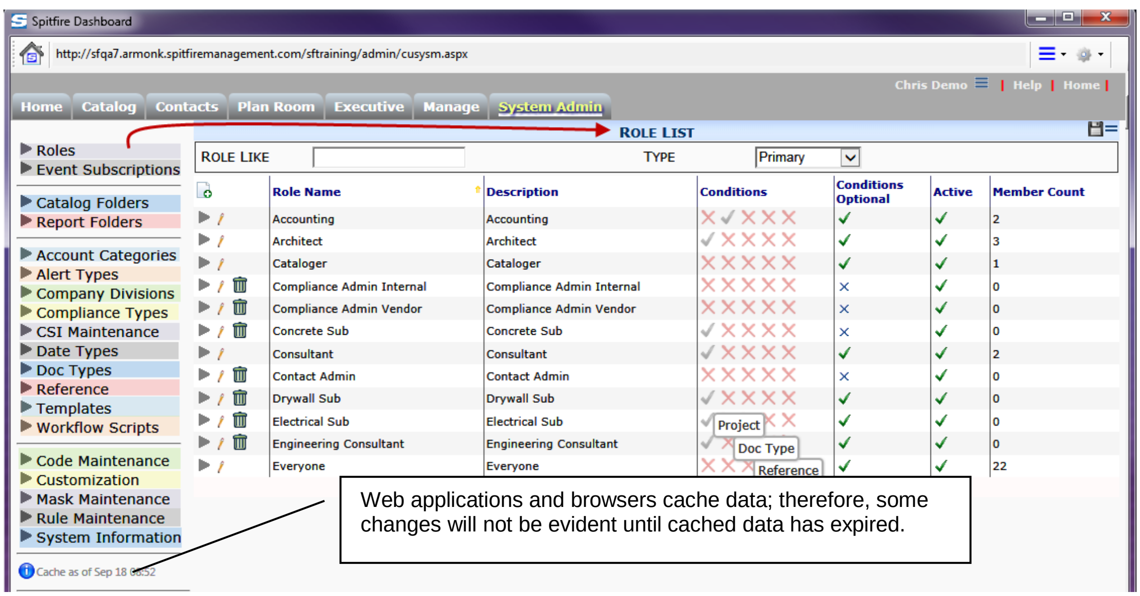
Parts on the Manage Dashboard

The Manage Dashboard displays two parts. The Tools part on the left controls which part is displayed in the right column. For example, in the picture above, Routes is selected in the Tools part and the Routes List part appears in the right part.

For more information about	***See the guide***
Routes Allocations Alert Subscriptions CSI Maintenance Programs Reference Region Maintenance Templates	*Focus on the Manage Dashboard*
Code Maintenance Compliance Types Date Types System Information	*Focus on System Administration*

System Admin Dashboard

The System Admin Dashboard is displayed only if you have been given access permission to it.



Parts on the System Admin Dashboard

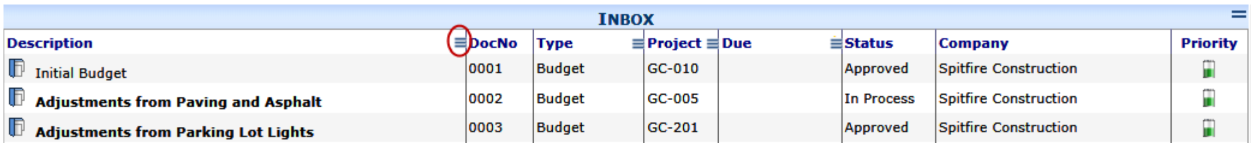
Similar to the Manage Dashboard, the Tools part in the left column controls which part is displayed in the right column. For example, in the picture above, Roles is selected in the Tools part and the Role List appears in the right part.

A few of the System Admin tools appear also on the Manage Dashboard.

For more information about	***See the guide***
CSI Maintenance Reference Templates	*Focus on the Manage Dashboard*
Roles Catalog Folders Report Folders Account Categories Alert Types Company Divisions Compliance Types Date Types Doc Types Code Maintenance Customization Mask Maintenance Rules Maintenance System Information	*Focus on System Administration*
Workflow Scripts	*ATC Scripts and Automatic Workflow* TWP
Event Subscriptions	*The Developer's Primer*

Column Options

Many of the columns that you find on the dashboards allow you to sort and filter. Columns that have these options display ≡ when you mouse over the column header, for example:


INBOX

Description	DocNo	Type	Project	Due	Status	Company	Priority
Initial Budget	0001	Budget	GC-010		Approved	Spitfire Construction	
Adjustments from Paving and Asphalt	0002	Budget	GC-005		In Process	Spitfire Construction	
Adjustments from Parking Lot Lights	0003	Budget	GC-201		Approved	Spitfire Construction	

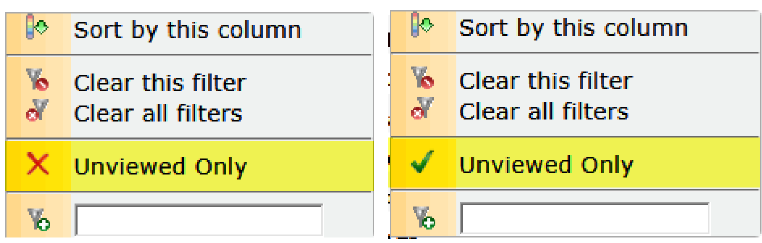
Options on the drop-down menu:

- **Sort by this column** will sort the current column alphabetically or numerically. Once a column is sorted, the option to **Toggle Sort** appears on the drop-down menu if you want to sort in the opposite direction.
- **Clear this filter** will clear the filter currently applied to the column, if any.
- **Clear all filters** will clear all filters currently applied to the part, if any.
- will filter the column by what you enter or select in the filter field.

In addition, toggle options on the drop-down menu vary depending on the dashboard and part.

Home Dashboard

Inbox

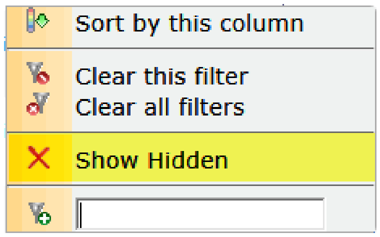


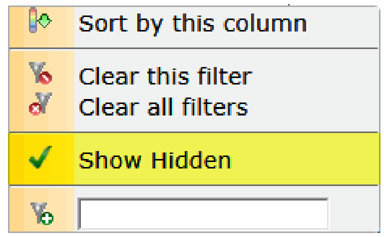
- **Unviewed Only** displays only documents that have not yet been viewed.

Project List

TIP

Whether a project appears as hidden or not by default is set on the Contact's Detail window, on the Connections tab. For more information, see the *Focus on Contacts* guide.



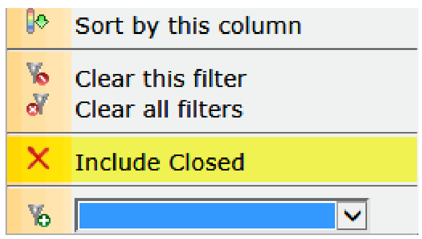


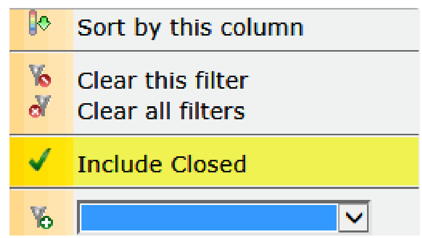
- **Show Hidden** includes projects that have been designated as "hidden" in the list, and also displays the Show column so you can hide and unhide projects.

Note: this toggle option also appears on the Plan Room Projects list.

Catalog Dashboard

Document List

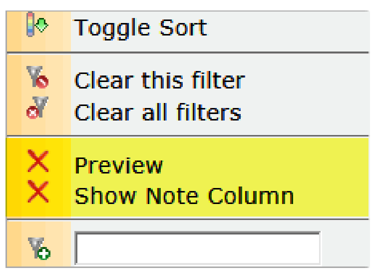


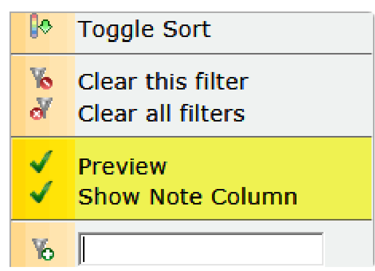


- **Include Closed** includes documents that have a closed status (and are now read-only) in the list.

Note: this toggle option also appear on the Plan Room Documents list.

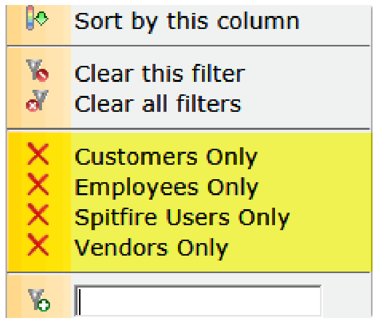
File List

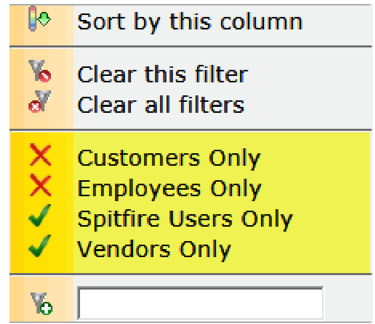




- **Preview** displays thumbnail pictures for files if available.
- **Show Note Column** displays the Note column in the File list.

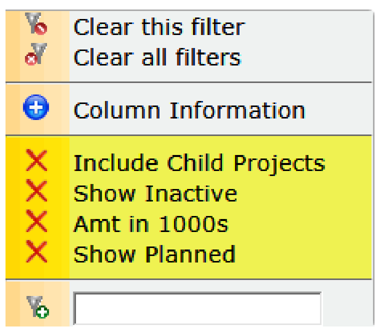
Contact Dashboard

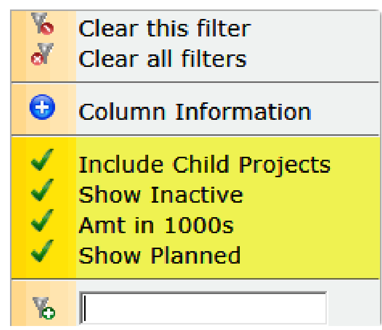




- **Customers/Employees/Spitfire Users/Vendors Only** displays only the selected group of Contacts.
  Note: **Spitfire Users Only** can be selected at the same time as one of the other toggle options.

Executive Dashboard





- **Include Child Projects** includes child projects in the project list.
- **Show Inactive** includes inactive projects in the project list.
- **Amt in 1000s** shows the numbers as thousands, e.g. **4** instead of **4000**.
- **Show Planned** includes projects with a status of **In Process** in the project list.

Types of Fields

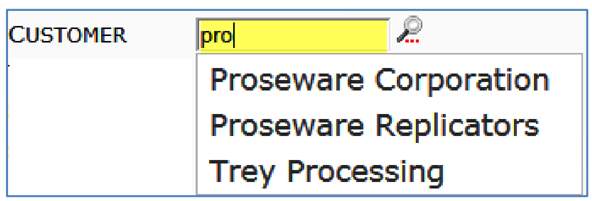
There are various types of fields that allow user input throughout the system.

Lookup

Lookup fields require information from a specific lookup list. You can either click the icon to open the corresponding lookup list or, if you know that the name you want is on the list, you can type it directly and specifically in the field. (See also page 50.)

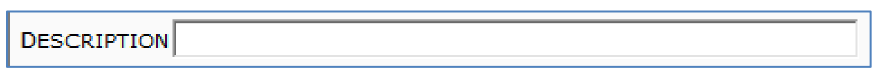
Autocomplete

The lookup fields include autocomplete. Once you type three characters (ID or name/title/description) in the field, the system will attempt to provide a drop-down with some valid choices that match those three characters. Typing more characters refines the list. You can select from that drop-down list using the keyboard (Up and Down arrow keys and Enter key). (See also KBA-01538.)



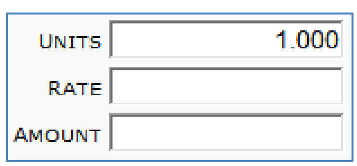
Freeform

Text



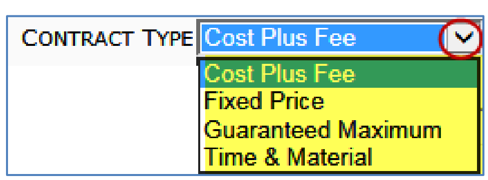
Text fields allow you to type any text in them.

Numeric



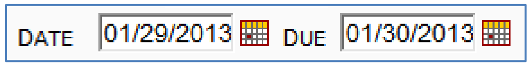
Numeric fields accept only numbers.

Drop-Downs



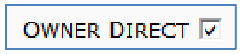
Drop-downs provide a list of possible choices for that field.

Dates



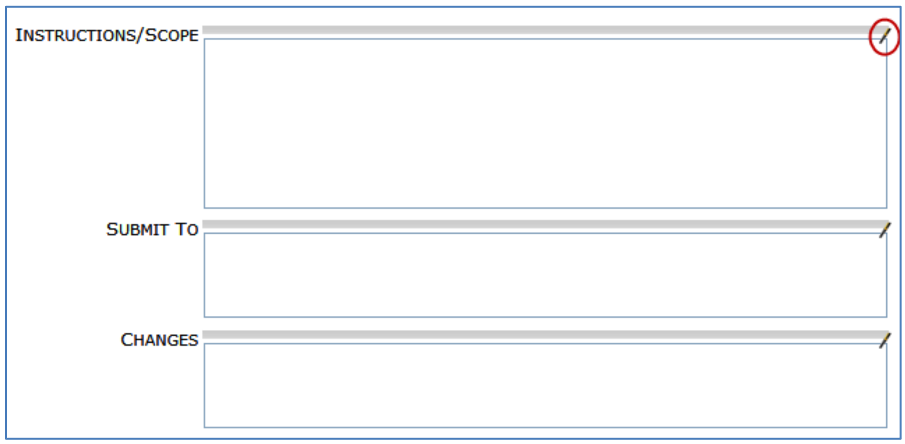
Date fields allow you to type or select a date. (See also page 52.)

Checkboxes



Checkboxes are toggles between a checkmark (for Yes or On) and a blank (for No or Off).

Notes



Note fields allow for direct entry and will retain text formatting entered through the text editor (see page 52). Text formatting is transferred to template output.

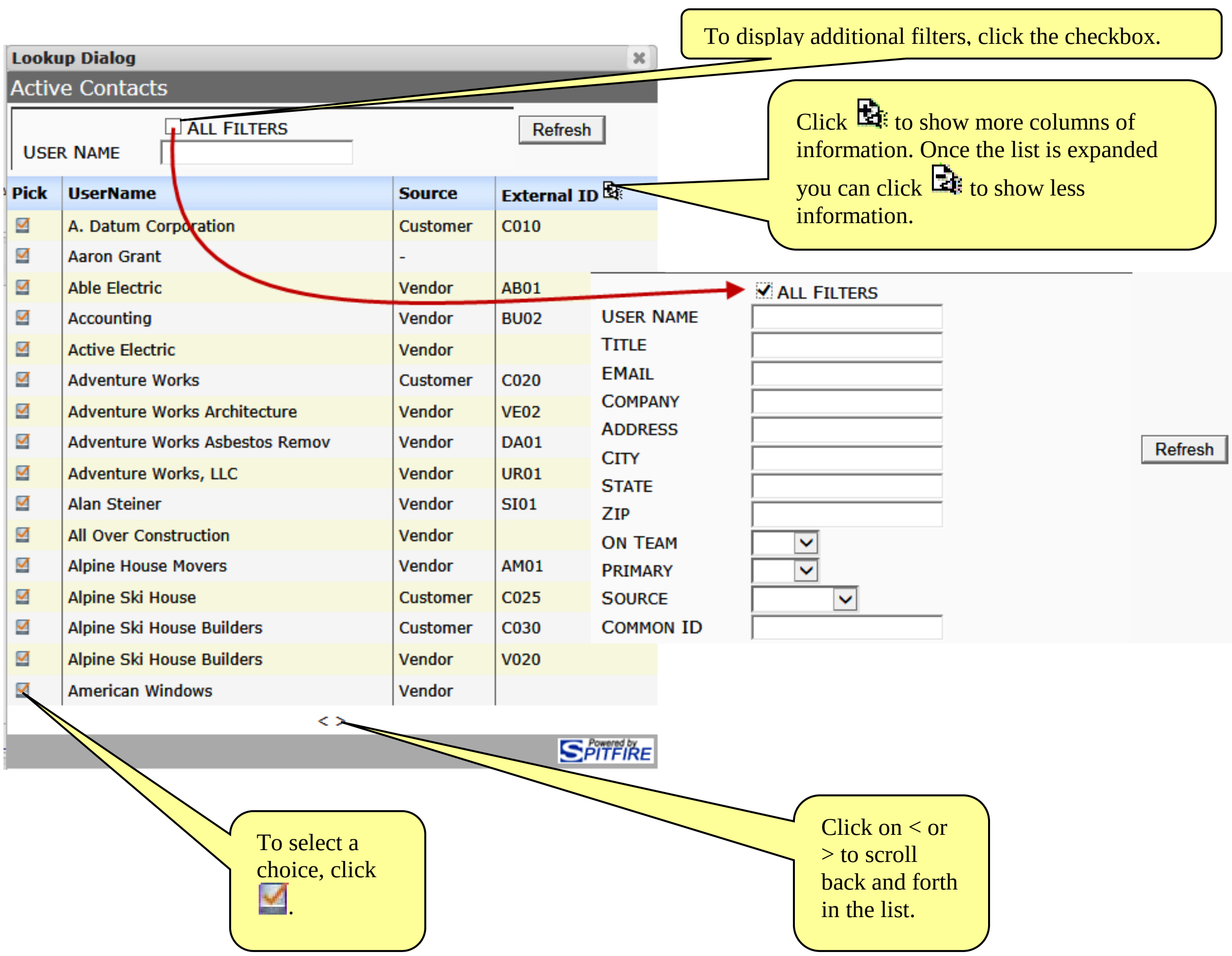
Icons

A quick summary chart of all icons appears on page 54. However, some icons, used throughout sfPMS, require a more detailed explanation.

Lookup
Pick
Show More
Show Less

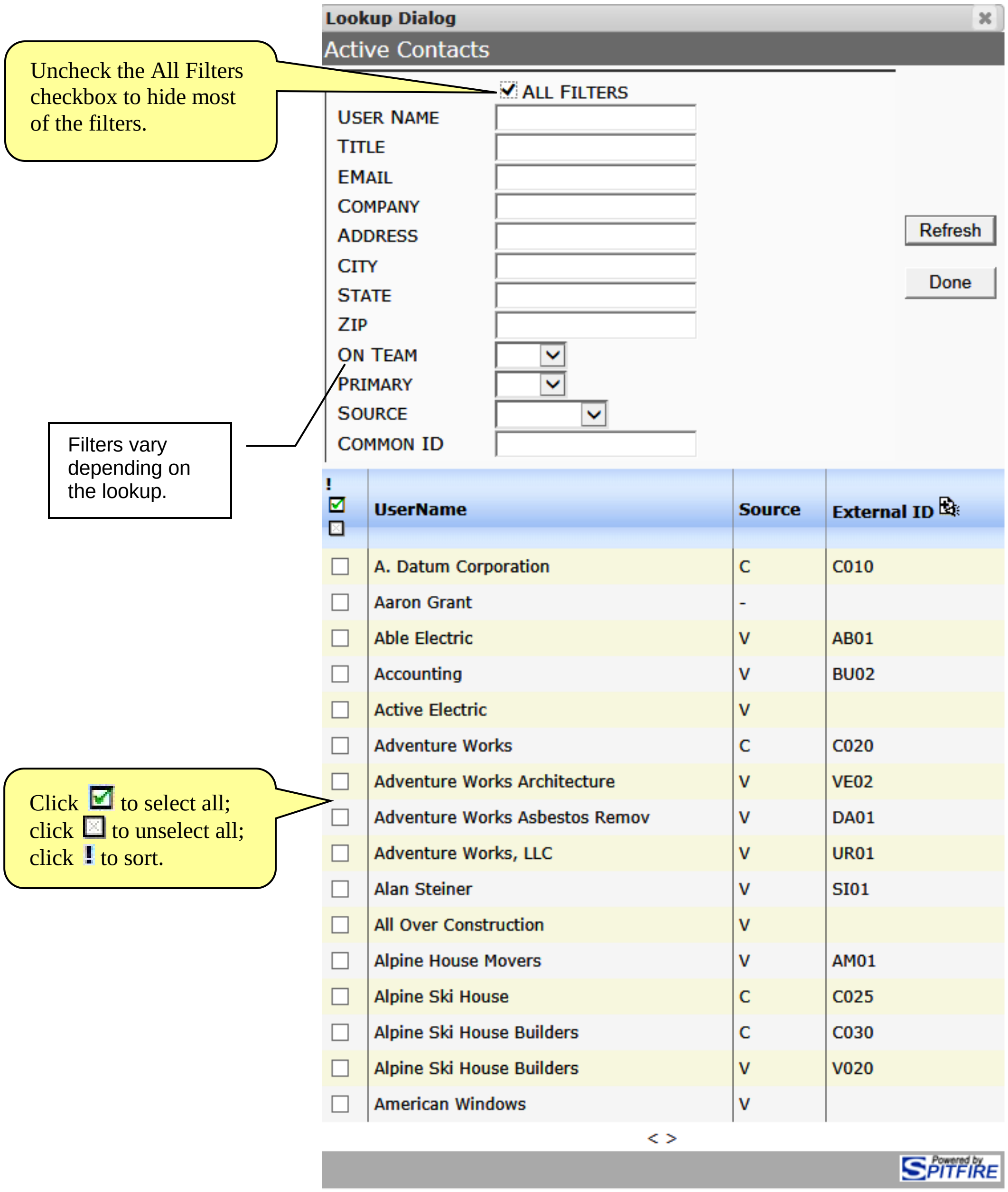
Many fields require you to enter information. Often, you are only allowed to enter information that exists on a predetermined list. You can easily recognize these fields because the icon appears next to the field, for example:

When you click , a list appears, for example:



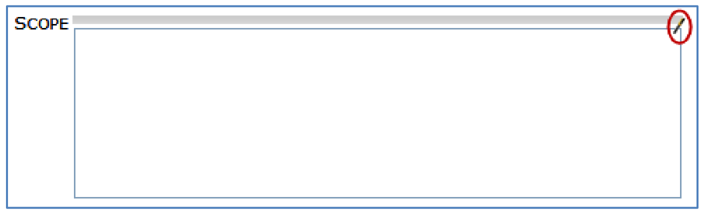
Multi-Select

In various places in sfPMS, the icon opens a multi-select lookup window for Vendors, Contacts or Items. Filters allow you to find the Vendors/Contacts/Items that you want. You can then choose to click to select all on the list or click individual checkboxes. Once your Vendors/Contacts/Items have been selected, click Return.

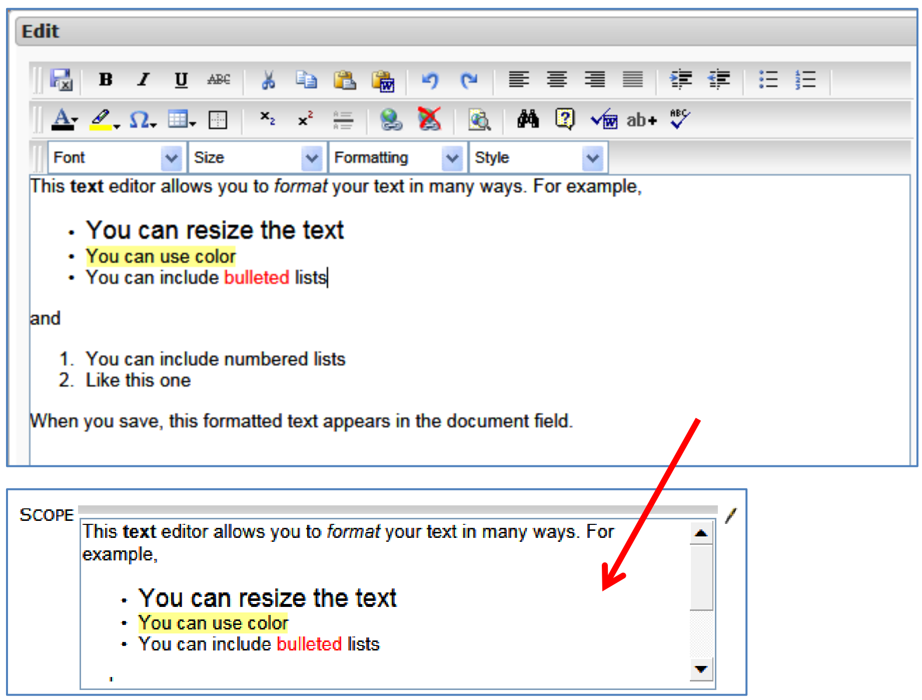


Text Editor

Many of the text fields in sfPMS (especially description and note fields) have the capacity to hold an unlimited amount of text. Since display of these text fields on the screen is limited, a pop-up text editor is used to display and edit the entire text entry. These text boxes are identified by the icon next to them, for example:

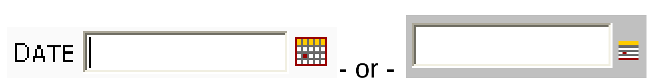


When you click on , the Text Editor window appears, for example:

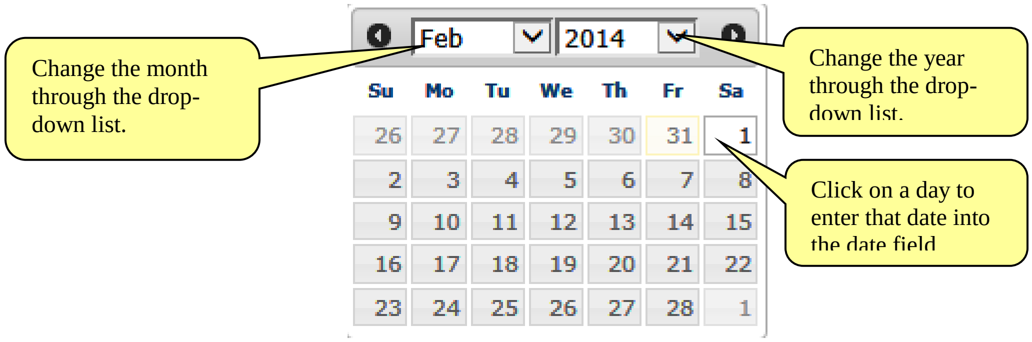


Lookup Date ,

Date fields allow you to either enter a date manually (in formats such as 8/21/09 or Aug 21 2009) or look up the date in a calendar. Date fields have the ( ) icon next to them, for example,

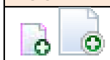
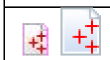


When you click **,** a calendar appears, for example:

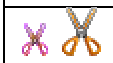
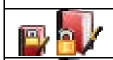
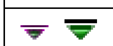
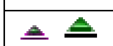

Change the month through the drop-down list.
Feb
2014
Change the year through the drop-down list.
Su Mo Tu We Th Fr Sa
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 1
Click on a day to enter that date into the date field

Icon Quick Reference

Note: you cannot click on an icon if it appears grayed out.

Icon	*Used to*	*Notes*
	Add/Create New	Used throughout sfPMS to add or create a new document or row.
	Multi-select	Opens a window with filters and choices from which you can select one or more.
	Create new Project Setup (Project)	
	Change Project ID	Appears on the Project Setup Options menu, if you have proper permission.
	Open the Project Setup	Opens the Project Setup document for the project.
	Uncommit Project Setup/contract value	Appears on the Project Setup Options menu.
	Delete Project	Removes an empty project from sfPMS. Found on the Project Setup's Option menu.
	Add a Site Photo through the Add Files tool	Appears on the Photo part of the Project Dashboard.
	Display subject line and email address	Displays the information needed for anyone to send an email that will get attached automatically to the current document.
	Open a PDF file	Opens the file in either edit or read-only view depending on permissions.
	Open the Document Alerts window	Appears on the Document's drop-down Options menu.
	Run allocation engine	Adds allocations to Change Order's Budget Entries.
	Append route	Adds more routees to the current route.
	Add role or capability	Used to select Roles or Capabilities for a person.
	Attach an existing file or document to a document	Allows you to attach a catalogued file or document through the Doc Attach tool.
	Attach multiple files/documents	Allows you to attach multiple files and documents to a document through the Doc Attach tool.
	Create and attach a Microsoft Word or Excel file from an Attachment template	Appears on the Attachment tab only if an "Attachment" template exists for the Doc type.
	Attach an issue to the document *or* Link a project to another project *or* Attach an Invitation to Bid to a Bid Package	On most documents, allows you to attach an Issue. Also used to attach a Project Setup document to another thereby linking the two related projects. On the Bid Package, allows you to attach a corresponding Invitation to Bid document.
	Attach Drawing Log files to the document	Opens the Doc Attach tool with a list of Drawings documents.
	Attach file from the document to another document	Appears in the Doc Attach tool after you use the  icon.
	Open the Add Files tool	Used to add a scanned or uploaded file to the Catalog (project or document).

	List related documents	Appears on some documents' option menus (e.g. RFI, CCO, Commitment, Pay Request).
	Open/view submittal register	Appears on the Project Options menu.
	View project address	Displays the address for a project; found on the Project Options menu.
	Open Competitive Bid Response Analysis	Opens the CoBRA report for the project.
	Open the Change Item Register	Appears on the Project Options menu.
	Accept changes *or* Turn an option on	
	Cancel changes *or* Turn on option off	
	Indicate unknown compliance status	Appears when information for compliance has not yet been entered.
	Check In file	"Returns a checked-out file for use by others.
	Check Out file	Allows you to check out a file for exclusive use and revision.
	Cancel checkout / Unlock file	
	Lock file	Prevents further revisions to the file.
	Open file options menu when the file is checked out	
	Open file options menu, indicating that the file is checked in	Indicates that a file is checked in. When clicked, it displays the File Options menu.
	Clear Clipboard	
	Hide a part or details	Collapses the part or Detail view, returning to Grid view.
	Show a part	Expands a part.
	Show details (Item Detail view)	Displays details of the item or document type.
	Add remarks	
	View existing remarks	
	Show Companies view	Appears on the Contact Dashboard.
	Show Contacts view	Appears on the Contact Dashboard.
	Copy line item *or* Add new role to team contact	
	Copy all line items	Appears on the Incl/Excl tab.
	Cancel the copy	
	Copy document, Doc type	
	Copy folder	
	Delete folder	
	Add a new folder	Appears on the Files part and also the Items tab.

	Paste folder	
	Rename a folder	Appears on the Files part and also the Items tab.
	Copy the percentage to all rows	Appears on the Pay Request Items tab.
	Indicate that Item is selected to be copied	
	Cut item or file to move to another folder *or* Merge Contact info "from"	
	Indicate that the "cut" file or item is ready to be pasted into a folder	
	Paste item(s), file,	
	Open Document Exclusivity menu	Appears on documents and displays a drop-down of document exclusivity options.
	Keep document exclusive until released	Appears on the Document Exclusivity menu.
	Release document exclusivity	Appears on the Document Exclusivity menu.
	Keep document exclusive until routed	Appears on the Document Exclusivity menu.
	Keep document exclusive for 24 hours	Appears on the Document Exclusivity menu.
	Remove a role's global attribute	Appears on the Contact Detail's Member Of tab.
	Make a project-specific role, global	Appears on the Contact Detail's Member Of tab.
	Open an Options menu	Displays a drop-down menu of possible actions/options.
	Open Budget Entries window	Appears on the Item detail of Change Orders and Proposed COs.
	Move a file to a lower position in assembled output	Appears on a document's Attachment tab to indicate Seq.
	Move a file to a higher position in assembled output	Appears on a document's Attachment tab to indicate Seq.
	View content that has been routed	Allows you to view or save a zip file with the output from a document as it was routed to someone.
	Preview content to be routed	Allows you to view or save a zip file with the output from a document as it will be routed to someone.
	Download files	
	Edit *or* Open the File Properties window	Allows you to view and edit information. Also, opens the File Properties from the File Options menu.
	Edit document number	Appears only if doc number editing is allowed on the Doc type.
	Edit file	Appears only if you have permission to edit the file.
	Edit/Change Password	Appears on the Account tab of your Settings and if you are required to change your password.
	Open BFA, PD or SOV workbook *or* Download Microsoft Excel Template *or* Edit or open Microsoft Excel file	Indicates that the BFA, PD or SOV workbook has data. Also used to download a template at the Templates tool and to open a Microsoft Word file.

	Open empty BFA, PD or SOV workbook	Used to open a BFA (Budget, Forecast and Analysis), PD (Period Distribution) or SOV (Schedule of Values) workbook. Once the Microsoft Excel workbook is saved, the icon will change from this to the one shown below.
	Log out	Logs you out of sfPMS.
	Export files	Exports files to your computer or CD.
	Get version of file	Allows you to copy the current or a prior version of the file to the location of your choice.
	Show filters	Opens search criteria fields and check boxes.
	Clear all filters for the part	Appears on column drop-down menus.
	Clear the current filter	Appears on column drop-down menus
	Close filters	Hides (closes) the search criteria fields and checkboxes.
	Get vendors from Invitation to Bids	Appears on the RFQ tab of Bid Packages.
	Indicate who added a route row	Appears on the Routee Options menu.
	Approve file version	Approves file in File Properties.
	Revoke file approval	Revokes approval of file in File Properties.
	Open file in read-only view	
	Refresh data from accounting package	
	Open contact record for person/company	
	Signify Role	Indicates that what follows is a Role; found on the Manage | Routes tool.
	Opens the Help window	Appears on the Name/Site drop-down Options menu.
	Open sfCHEST	Opens the Spitfire Change History Exploration and Search Tool.
	Open calendar	Used to enter date fields.
	Upload template	Appears after a new row is entered and saved in the Templates tool and is used to upload the actual template.
	Build route	Appears on the Route Options menu.
	Reset route	Appears on the Route Options menu.
	Show pop-up information	Displays information when you mouse over the icon.
	Show pop-up folder information	Displays information when you mouse over the icon.
	Copy doc type GUID to clipboard	Use Microsoft clipboard paste function to paste contents (GUID).
	Look up a name for the field	Displays possible choices depending on the field.
	Send email from team contacts list	Appears on the Team Contact Options menu.
	Create Competitive Bid (Bid Package) or RFQ	Appears on Budget Entries in Change Order documents.
	Open RFQ	Appears on Budget Entries in Change Order documents.

	View project location	Shows the project location on a map.
	Indicate that the document in created in an integrated accounting system	Is an indicator only; clicking on it does nothing.
	Merge contact record to	Appears after a Contact record has been selected to “merge from”.
	Open Microsoft Project file	Opens the file in either edit for read-only view depending on permissions
	Opens the User Preferences tabs	Appears on the Name/Site drop-down options menu.
	Open Project Dashboard	Appears on the Executive Dashboard.
	Add a new Item by copying an existing Item on the document	Appears on the Item Options menu.
	View next item	Appears as a shortcut in Item Detail View.
	View previous item	Appears as a shortcut in Item Detail View.
	Open a closed document or one with no (or no known) due date	
	Open a document with a future due date	
	Open a document with an overdue due date	
	Open a document with a due date this week (through Sunday)	
	Open document that has been CC’d to you	Appears in your Inbox to designate a document that has a route status of CC.
	Acknowledge CC’d document	Appears on the Route Detail for CC’d documents only.
	List Change Order markups	Appears on the Project Options menu.
	Open Outlook file	
	Maximize a dashboard part	Appears on the Part Options menu.
	Show a particular partial view of the part	Appears on the Part Options menu.
	Pick *or* Get All or Existing items	Used in lookup windows to select a choice. Also used to copy items from one document to another.
	Pick or create SOV line	Appears on the Item detail of Change Orders.
	Open the Text Editor window for editing	Offers bullets and numbered lists formatting options.
	Open the Text window for viewing	
	Post expenses for a Change Order	Appears on the Change Order document.
	Indicate that expenses have been posted	Appears after has been clicked.
	Post revenue for a Change Order	Appears on Change Order documents.
	Indicate that revenue has been posted	Appears after has been clicked.
	Indicate an Urgent priority for a document	
	Indicate a High priority for a document	

	Indicate a Medium priority for a document	
	Indicate a Low priority for a document	
	Indicate an FYI priority for a document	
	Recycle the IIS Application	Appears on the System Information page.
	Indicate that Item is not yet in a Submittal, Submittal Package	Appears in the Items tab of Submittals, Submittal Packages and the Submittal Register.
	Indicate that Item is in a Closed or Approved Submittal, Submittal Package	Appears in the Items tab of Submittals, Submittal Packages and the Submittal Register.
	Indicate that Item is in a Pending Submittal, Submittal Package	Appears in the Items tab of Submittals, Submittal Packages and the Submittal Register.
	Recalculate / refresh the screen	
	Send all RFQs on their route	Used on a Bid Package or Change Order (though the Budget Entries) to send all RFQs to Seq 2 of the route.
	Accept route (respond) and send document on	Appears on Route Detail for non-CC'd documents.
	Renumber Items	Appears on the Items Options menu.
	Preview report	Used to open certain reports and logs.
	Reset to default	
	Indicate that the document will be routed via email and show a preview of the email that will be sent	Appears next to a routee's name in the Route Detail if applicable.
	Indicate that the document will be routed via fax	Appears next to a routee's name in the Route Detail if applicable.
	Indicate that the document will be routed via hard copy	Appears next to a routee's name in the Route Detail if applicable.
	Change Route Via	Used to change how a document will be routed (email/fax/hard copy).
	Create automatic workflow	Used when a document is routed to "Spitfire" for automatic workflow.
	Edit existing workflow and to indicate that workflow exists	
	Save	Saves all changes to document, file or sfPMS.
	Save the document, which happens to be held exclusively by you	Indicates that you have exclusive rights to the document.
	Indicate that you cannot save the document	Appears when someone else has exclusive rights to the document.
	Save the document, which is currently exclusive to you	Indicates that you have exclusive rights until you close the document window.
	Saves and closes the window	Appears on the Text Editor window.
	Send Contact info to integrated accounting system	Found on the Contact Dashboard, Company view at integrated sites.

	Indicate when a document was routed	Appears on the Routee Options menu.
	Toggle between arrows and numbers to indicate sequence *or* Sort column/toggle sort direction	Appears on a document's Attachment tab in the Seq column. Appears on a column drop-down menu
	Open integrated accounting application	
	Associate a website with a Contact	Appears on the Team Contact Options menu.
	Open/view an image file	
	Show less	Shows less information in lookup windows.
	Show more	Shows more information in lookup windows.
	Mark the document as "un-read"	Appears on the Routee Options menu; displays the document in bold text in the Inbox
	View Audit trail / changes	Links to history of changes.
	Route a Transmittal printout	Used to both route a printout from a Transmittal template and also mark the document route on the transmittal report.
	Delete or remove	Deleting generally requires a save to truly delete.
	Show/Hide folder tree	Toggles between showing and hiding the folder tree.
	Toggle entry: contacts / freeform *or* Indicate Name is individual	Allows only lookup entries / allows any text entries. Also, indicates that what follows is the name of an individual.
	See where a file is attached	See what documents have a certain file attached to it.
	Show/Hide item numbers	Toggles between showing and hiding Item numbers.
	Create indicated document	Appears on a Document Options menu.
	Indicate an invalid entry	
	Open the Cost Code Maintenance widow	
	View the weather conditions history log	Appears on the Conditions Options menu.
	Download a template in Microsoft Word *or* Edit or open Microsoft Word file	Used to download a template at the Templates tool and to open a Microsoft Word file.
	View the current version of the Microsoft Word file	Appears on the File Version tab of a file's Properties.
	View an older version of the Microsoft Word file	The red indicates that the file is not the latest approved version.
	Close Dashboard	
	Download BFA Budget Import map	Used to download a BFA Budget Import map in the Templates tool.

	Clear Budget	Removes data from a project's budget so a new Initial Budget can be created. Found on the Project Setup's Option menu.
	Make active	
	Make not active	
*	Indicate a required field	
!	Indicate an invalid entry	
	Indicate sort direction: Ascending / Descending.	
	Indicate that a new update is available and to display release numbers and dates	Appears on the System Information page when a new update is available.