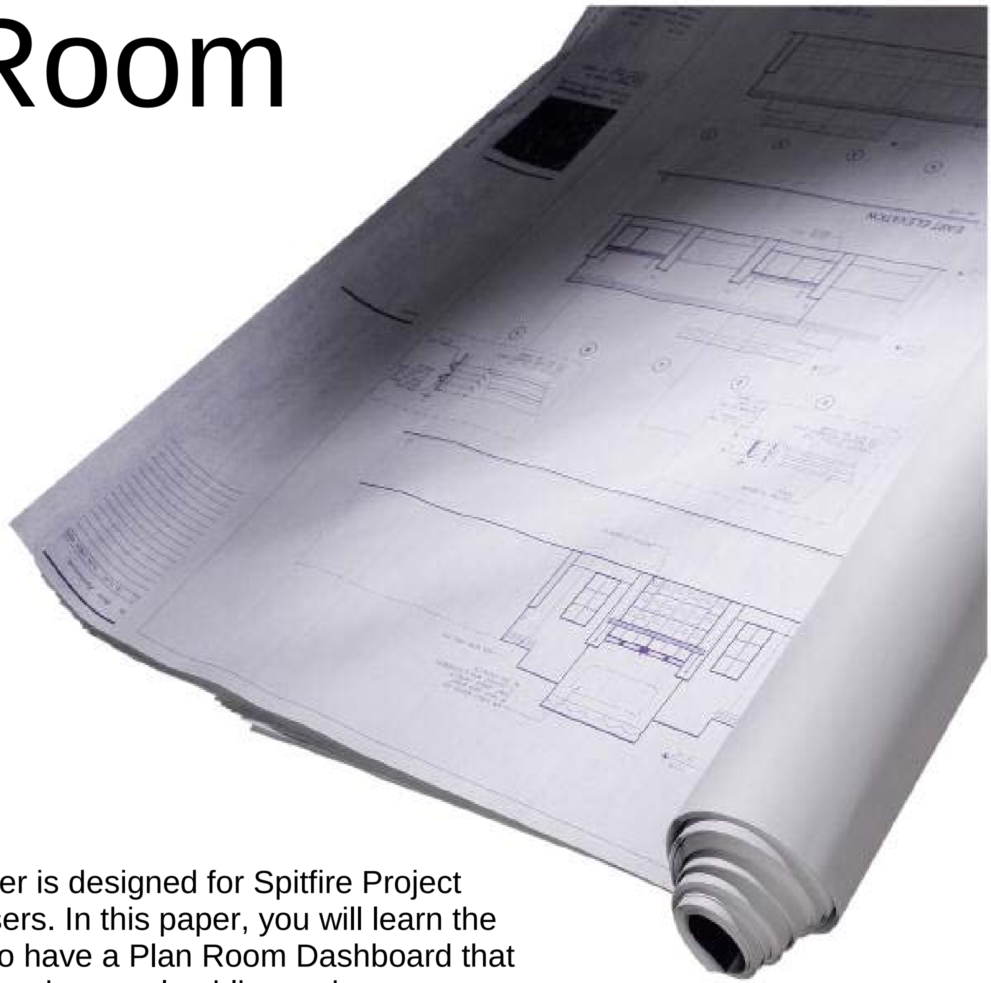
Technical White Paper

Setup for Spitfire's Plan Room



This technical white paper is designed for Spitfire Project Management System users. In this paper, you will learn the setup involved in order to have a Plan Room Dashboard that can be used by specific and general public vendors.

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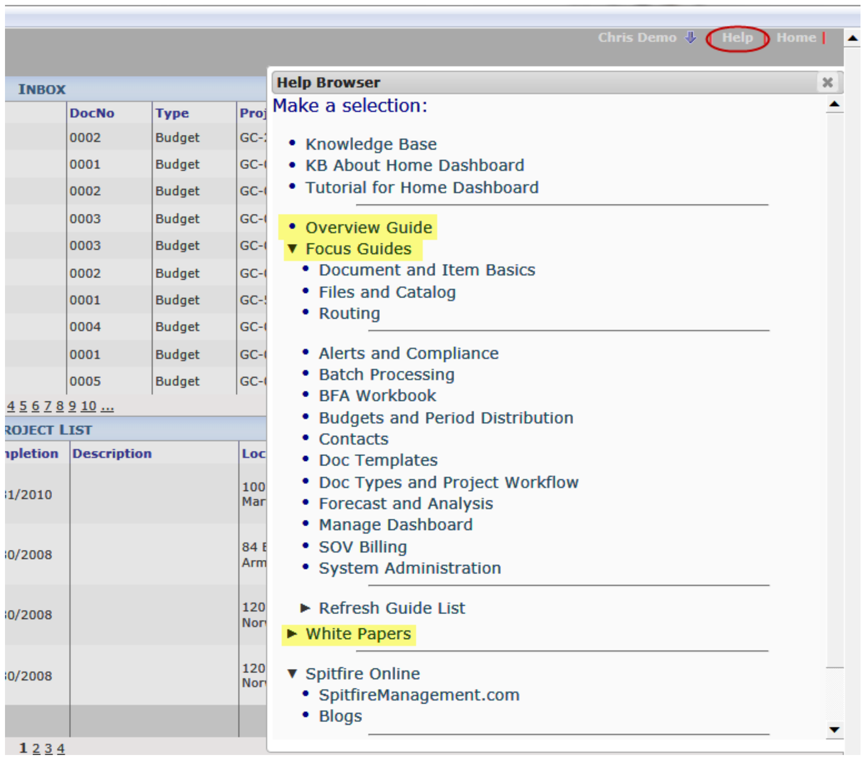
Introduction

This technical white paper describes the setup involved in order to have a Plan Room Dashboard that can be used by specific and general public vendors.

This technical white paper assumes you have a basic understanding of sfPMS in general and are a System Administrator (or someone with equivalent permissions). Most documentation referred to within this technical white paper can be found on the Spitfire Help menu.



Note: sections and chapters that are new or changed from the V4.3 documentation appear with **green headers** and possibly and *.

Concepts

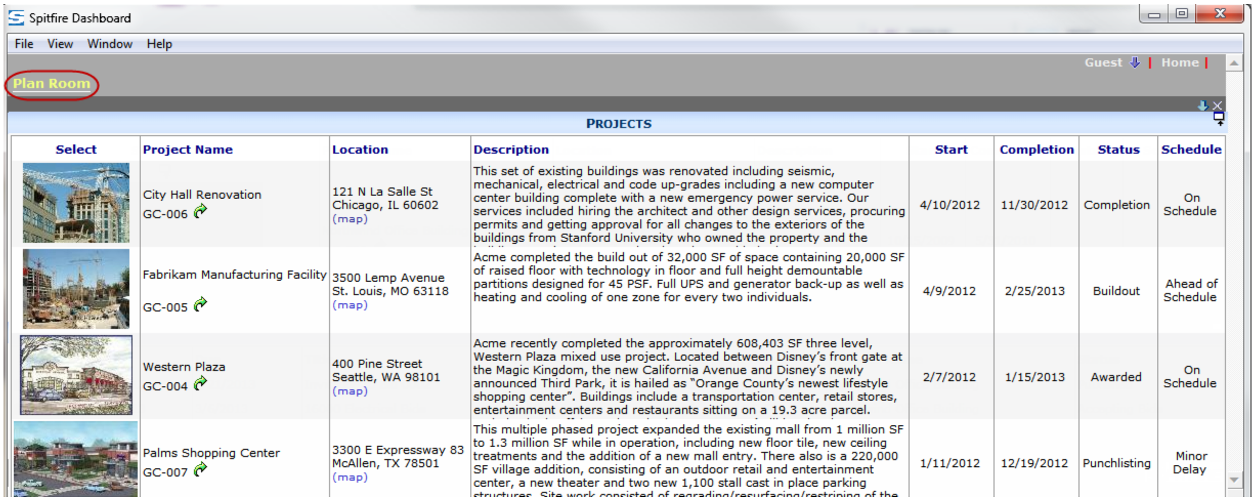
The Plan Room Dashboard allows vendors to access appropriate documents, such as your Bid Packages, and related files and, optionally, create RFQs from those Bid Packages.

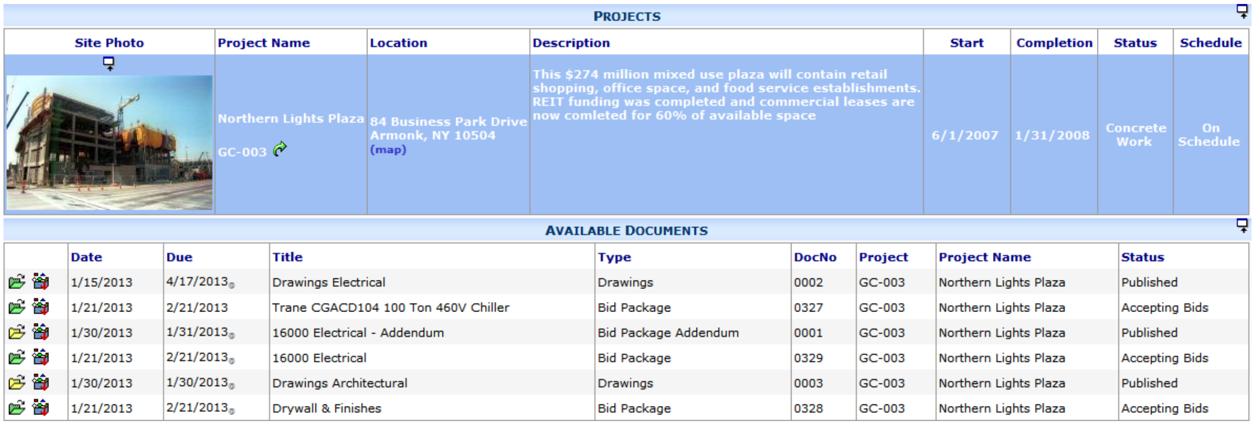
The Plan Room can be set up with a public login ID, so that anyone with the ID and password could access the Bid Packages, Drawing Logs, Bid Addendums, and any other desired Spitfire documents you place there for specific projects, as well as any files attached to those documents.

Public vendors can read through the information on the Spitfire documents, view attached files and export (download) those files onto their computers.

Vendor Contacts with specific login IDs can also be given access to the Plan Room and be given permission to create RFQs through a link on the Bid Package document.

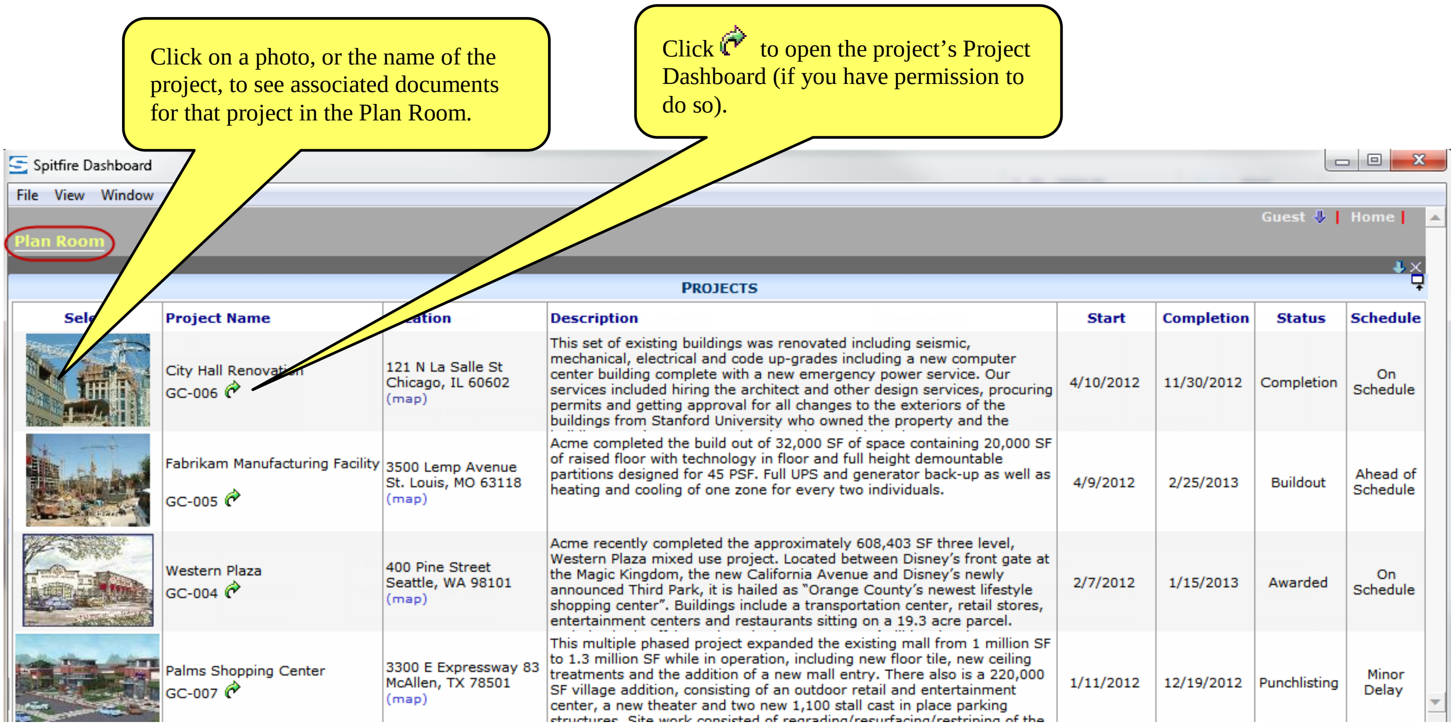
Instructions for your vendors, which you can and should modify to better reflect your company, are available for download (see page 24).





The Plan Room

Projects List



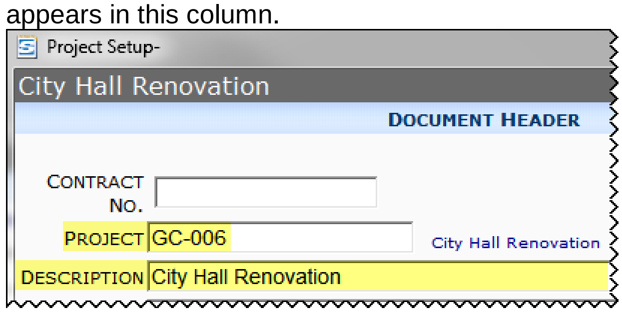
Columns

TIP

The order of the columns can be set through the Customization tool. See the *Focus on System Administration* guide for more information.

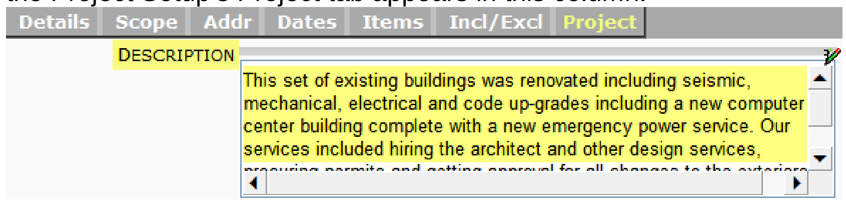
- **Select**: the photo/file associated with the project. The file from the Project Dashboard's **Photo** part appears in this column.

- **Project Name**: the name and Project ID for the project. The **Description** and **ID** from the project's Project Setup document appears in this column.

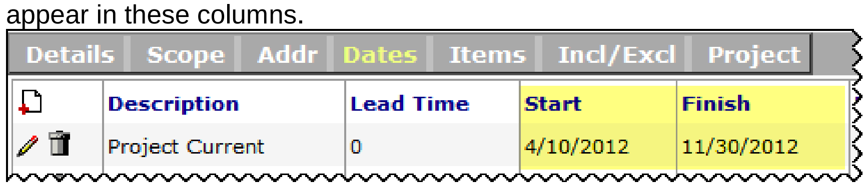


TIP
If the Public Status and Public Schedule fields do not appear on your Project tab, they need to be made visible through the [Customization tool](#) (see page 17).

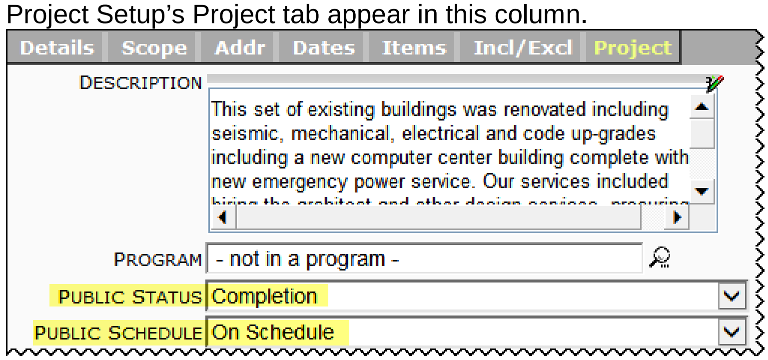
- **Description**: a description of the project. The **Description** from the Project Setup's Project tab appears in this column.



- **Start/Completion**: the start and end dates for the project. The **Start** and **Finish** dates from the Project Setup's Dates tab appear in these columns.

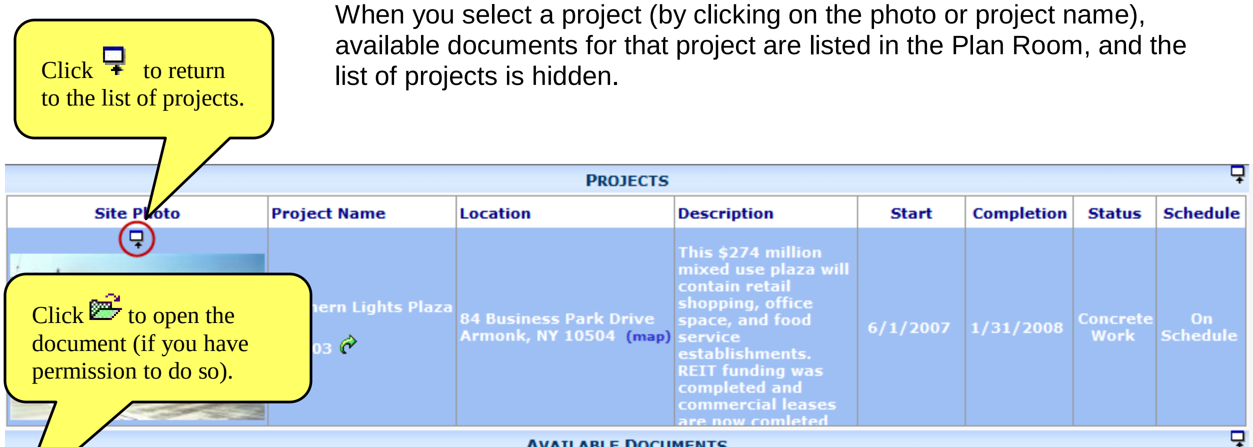


- **Status/Schedule**: the public status and schedule status of the project. The **Public Status** and **Public Schedule** fields from the Project Setup's Project tab appear in this column.



Available Documents

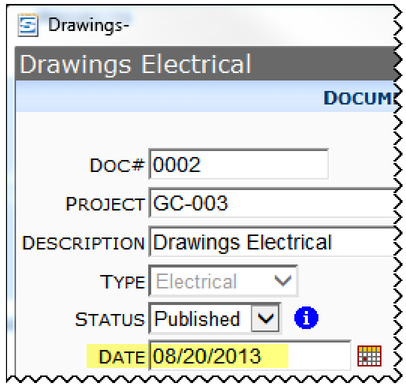
When you select a project (by clicking on the photo or project name), available documents for that project are listed in the Plan Room, and the list of projects is hidden.



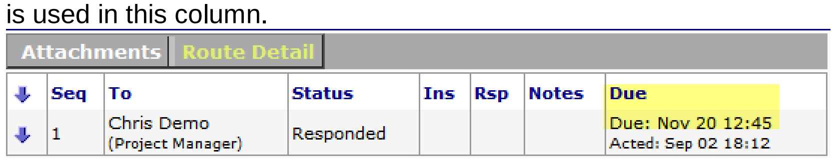
Date	Due	Title	Type	DocNo	Project	Project Name	Status
8/20/2013	11/20/2013	Drawings Electrical	Drawings	0002	GC-003	Northern Lights Plaza	Published
8/26/2013	9/26/2013	Trane CGACD104 100 Ton 460V Chiller	Bid Package	0327	GC-003	Northern Lights Plaza	Accepting Bids
9/4/2013	9/5/2013	16000 Electrical - Addendum	Bid Package Addendum	0001	GC-003	Northern Lights Plaza	Published
8/26/2013	9/26/2013	16000 Electrical	Bid Package	0329	GC-003	Northern Lights Plaza	Accepting Bids
9/4/2013	9/4/2013	Drawings Architectural	Drawings	0003	GC-003	Northern Lights Plaza	Published
8/26/2013	9/26/2013	Drywall & Finishes	Bid Package	0328	GC-003	Northern Lights Plaza	Accepting Bids

Columns

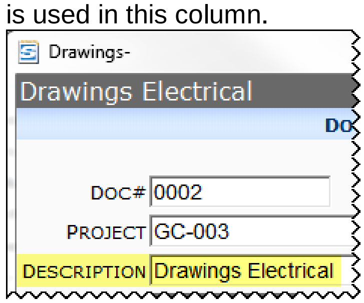
- **Date**: the document's date, often the date of creation. The document's **Date** is used in this column.



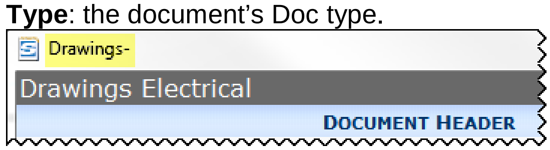
- **Due**: the document's due date. The document's route Due date is used in this column.



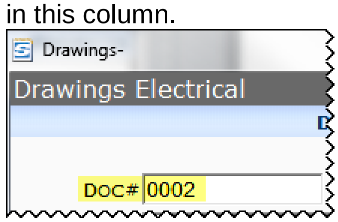
- **Title**: the document's title. The document's **Description** or **Title** is used in this column.



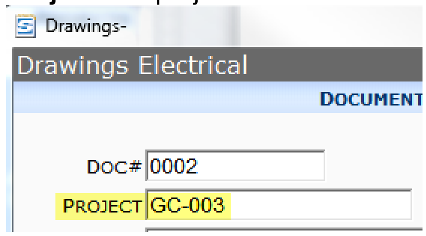
- **Type**: the document's Doc type.



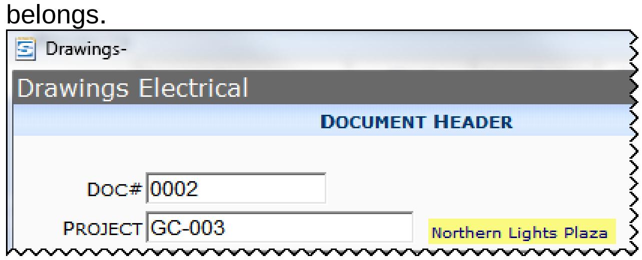
- **DocNo**: the document's number. The document's **Doc #** is used in this column.



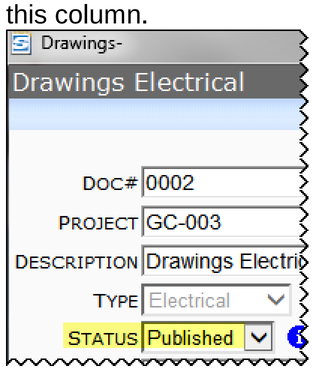
- **Project**: the project ID to which this document belongs.



- **Project Name**: the name of the project to which this document belongs.



- **Status**: the document status. The document's **Status** is used in this column.



To download files from the document:

- Click on the selected row.

Overview of Setup

In order for the Plan Room to work as designed, certain setup is required. This setup may have already been established during implementation. The information here serves as a review.

Setup Tools

The **Roles** tool is used

- To modify the **Plan Room Visitor** role to include the sub role **Doc Viewer** for each desired Plan Room Doc type. (See page 14.)
- To modify a role or sub role to include the **DOC | Self Service RFQ** capability if you want vendors to be able to create RFQs from Bid Packages and to ensure that that same role or sub role includes the **Doc Creator** sub role for RFQ documents. (See page 15.)

The **Customization** tool is used

- To customize the RFQ Doc type so that vendors don't see all fields on the Items tab. (See page 16.)
- To customize the Project Setup Doc type to include Public Setup and Public Schedule fields on the Project tab. (See page 17.)

The **Doc Types** tool is used

- To specify whether a particular Doc type may be included in the Plan Room. (See page 18.)

The **Contacts** Dashboard is used

- To create public login Contacts (if you want general contractors/subcontractors to be able to access the public Plan Room) and to give all public login Contacts the **Plan Room Visitor** role for access to the Plan Room. (See page 19.)
- To make all Vendor Contacts who should have access to the Plan Room "Spitfire Users" and give those Contacts all required roles. (See page 20.)

The **Routes** tool is used

- To create a predefined route for the RFQs created through the link on the Bid Package. (See page 21.)

The **Rules Maintenance** tool is used

- To specify that predefined route name as the result value of the **RouteConfig | SelfService** rule for the RFQ Doc type. (See page 22.)

- To indicate which statuses allow a document to be included in the Plan Room through the **DocStatusIsInPlanRoom** rule group (See page 23.)

The **Download** page on the Spitfire Client website allows you

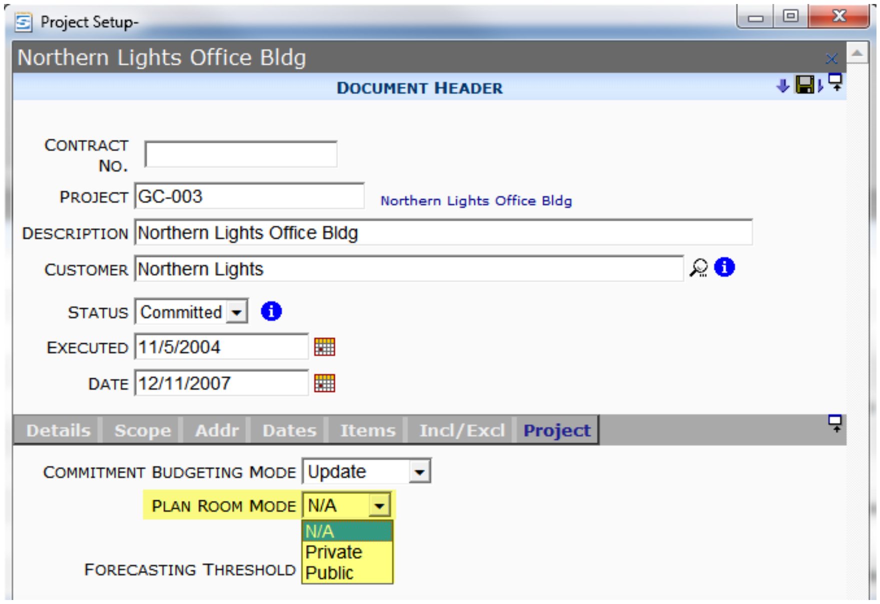
- To download the "how-to" instructions for your vendors, which you should then modify. (See page 24). You can then send these instructions to vendors or place the instructions on your Spitfire Help menu (see KBA-01482).

Inclusion of Documents

In order for a document to appear in the Plan Room Dashboard, it must meet the following criteria.

Project Setup

Which projects are allowed to appear on the Plan Room is determined by the Plan Room Mode option on the Project Setup's Project tab.



- **N/A** means that no documents or files for this project will appear on the Plan Room. The project itself will not appear on the Projects list on the Plan Room.
- **Private** means that documents and files for the project can appear on the Plan Room (if other conditions are met) only for those users who have role-based access to the specific project. In addition, the project itself will appear on the Plan Room only for those users who have access to the project.
- **Public** means that documents and files for the project as well as the project itself will appear on the Plan Room for all who have access to the Plan Room.

Doc Type

Only those documents of a Doc type that has been set up for the Plan Room can appear on the Plan Room (see page 18).

For example, if GC-003 has a Plan Room Mode of Public, but the Drawings Doc type is not designated as Plan Room enabled, then Drawings will not appear on the Plan Room.

Doc Status

Only certain statuses allow a document to appear on the Plan Room (see page 23). A document must have a Plan Room status in order to appear on the Plan Room.

For example, if GC-003 has a Plan Room Mode of Public, and Drawing documents are Plan Room enabled, a Drawings document with a status of **In Process** (which is not set up as a Plan Room status) will not appear on the Plan Room at all.

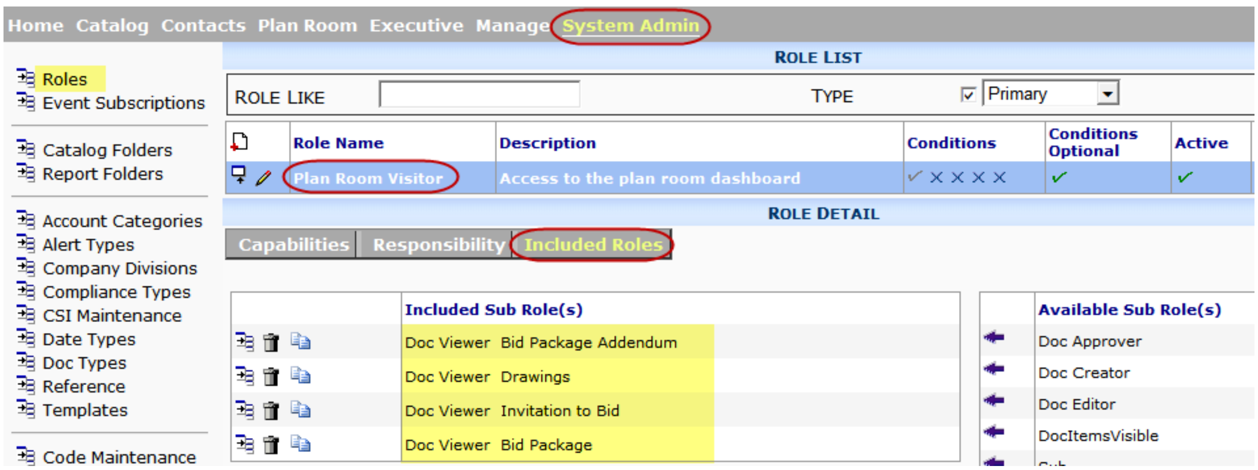
Use the Roles Tool

The Plan Room Visitor Role

The **Plan Room Visitor** role is what gives a Spitfire User permission to see the Plan Room Dashboard.

While the Plan Room Visitor role gives access to the Plan Room Dashboard, the **Doc Viewer** sub role is needed for access to specific Doc types on the Plan Room.

Note: Your Plan Room Visitor role may already have the Doc Viewer sub role for each desired Doc type. (Spitfire-RTG is configured as shown below.)



[*Spitfire-Enterprise only*] Review the Plan Room Visitor role to see if any changes are required.

- If there are Doc types missing, add or copy the Doc Viewer sub role and expand it to select the desired Doc type.
- If there are Doc types listed that you don't want, delete that Doc Viewer row.
- Remember to save your changes.

TIP

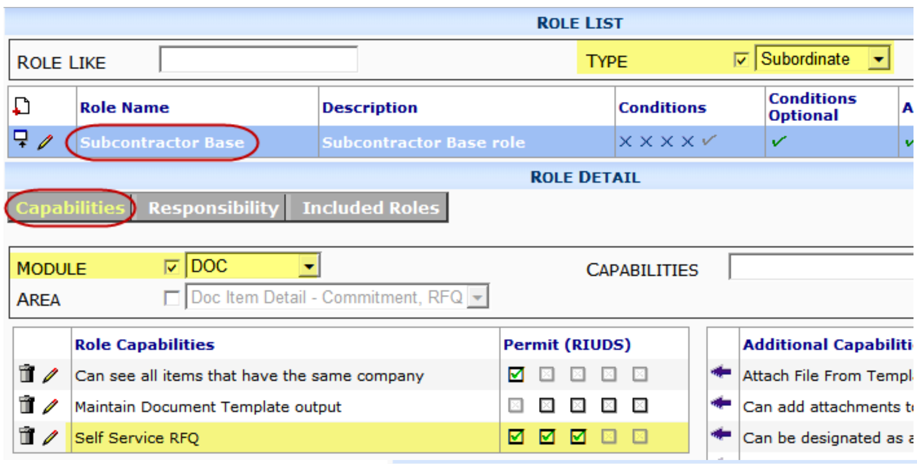
For more information about the Roles tool, see the *Focus on System Administration* guide.

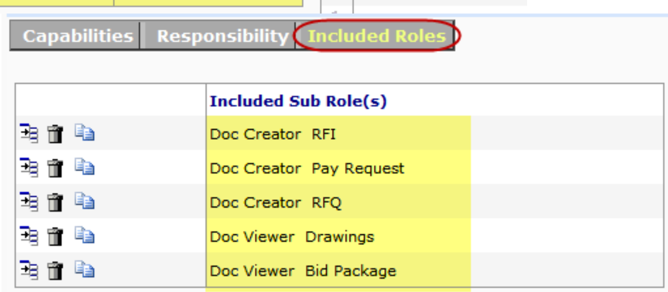
Your Subcontractor Role

You probably have one or more roles that were established and defined for your Vendor Contacts. Perhaps these roles include the Subcontractor Base or another “building-block” sub role.

If you want vendors to be able to create RFQ documents from Bid Packages, they need to have the **DOC | Self Service RFQ** capability through one of their roles or sub roles. In addition they need to have the sub role **Doc Creator** for the RFQ Doc type.

Note: The appropriate role or sub role may already include the **DOC | Self Service RFQ** capability and **Doc Creator** sub role. (Spitfire-RTG is configured as shown below.)





[*Spitfire-Enterprise only*] Review your roles to see if any changes are required.

- If the **DOC | Self Service RFQ** capability is not included in any role or sub role, add it to the most appropriate role or sub role.
    - o You need to give both **R** and **I** permission for the vendor to be able to create the RFQ and **U** permission if you want the vendor to be able to reopen the RFQ.
- If the **Doc Creator RFQ** sub role is not included in the role or sub role, add Doc Creator and then expand it to select the RFQ Doc type.
- Remember to save any changes.

TIP

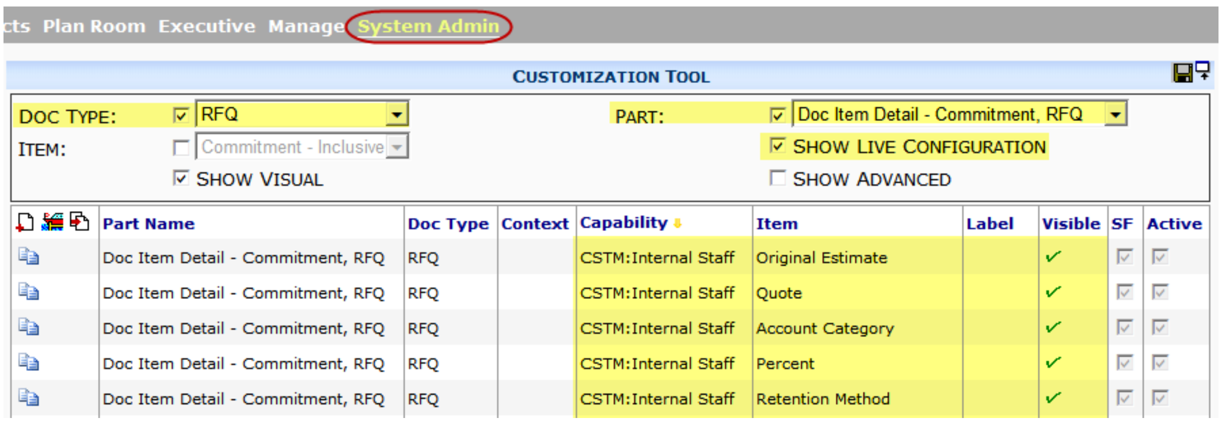
For more information about building roles, see the technical white paper *Designing User Roles*.

Use the Customization Tool

Customize the RFQ Doc Type

The Items tab on your RFQ document can include many fields, including fields such as Estimate and Original Quote, which you may not wish your third-party vendors to see. You can use the Customization tool to make those fields visible only to users with the **CSTM | Internal Staff** role capability—a capability you would probably not give to your vendors.

Note: Your RFQ document may already have been customized to hide certain fields from anyone without the **CSTM | Internal Staff** role. (Spitfire-RTG is configured as shown below.)



[*Spitfire-Enterprise only*] Review the customizations for the RFQ Doc type to see if any changes are required.

- If there are fields on the RFQ that you do not wish your vendors to see, edit the fields (i.e., the correct item on the **Doc Item Detail – Commitment, RFQ** part) to add **CSTM: Internal Staff** as a required capability, if the capability is not already included.
- If there are fields on the RFQ currently linked to the **CSTM: Internal Staff** capability that you *do* want your vendors to see, edit the necessary rows to remove the capability.
- Remember to save your changes.

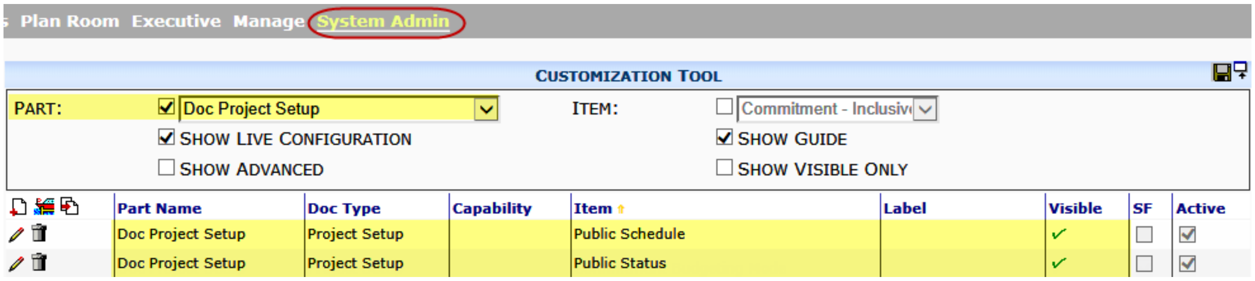
TIP

For more information about the Customization tool, see the *Focus on System Administration* guide.

Customize the Project Setup Doc Type

The Project tab on your Project Setup document can include the Public Status and Public Schedule fields that populate the Plan Room. You can use the Customization tool to make those fields visible.

Note: Your Project Setup document may already have been customized to show these fields.



[*Spitfire-Enterprise only*] Review the customizations for the Project Setup Doc type to see if any changes are required.

- If the **Public Schedule** and **Public Status** fields need to be made visible, copy those rows from the Spitfire defaults and make sure the Visible column is checked (✓). You can change the labels also.
- Remember to save your changes.

TIP

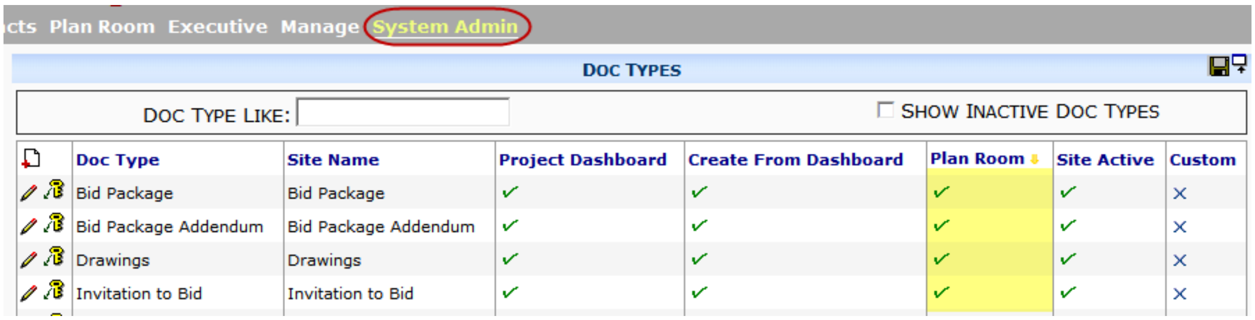
For more information about the Customization tool, see the *Focus on System Administration* guide.

Use the Doc Types Tool

Plan Room Option

Doc Types must be designated for the Plan Room through an option on the Doc Types tool. The Plan Room option is a ✓ / ✗ toggle.

Note: Appropriate Doc types may already have been designated for the Plan Room. (Spitfire-RTG is configured as shown below.)



Doc Type	Site Name	Project Dashboard	Create From Dashboard	Plan Room	Site Active	Custom
Bid Package	Bid Package	✓	✓	✓	✓	✗
Bid Package Addendum	Bid Package Addendum	✓	✓	✓	✓	✗
Drawings	Drawings	✓	✓	✓	✓	✗
Invitation to Bid	Invitation to Bid	✓	✓	✓	✓	✗

[*Spitfire-Enterprise only*] Review the Doc Types tool to see if any changes are required.

- If there are Doc Types that should be included on the Plan Room but are not designated for the Plan Room, edit the Doc type row to make the Plan Room option = ✓.
- If there are Doc Types that are currently designated for the Plan Room that should not be, edit the Doc type row to make the Plan Room option = ✗.
- Remember to save your changes.

TIP

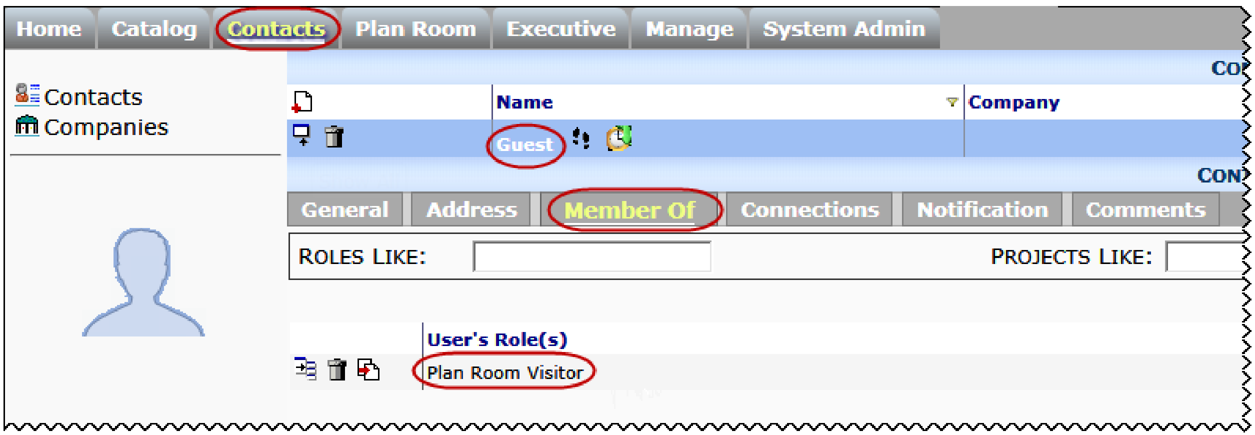
For more information about the Doc Types tool, see the *Focus on System Administration* guide.

Use the Contacts Dashboard

Public Log in Contact

If you want public contractors/subcontractors/vendors to access the Spitfire Plan Room, you must create a public login and password for them to use. Since login IDs and passwords are given only to Spitfire Users, your Contacts must include a "public" Contact (for example, "Guest"). The public login and password will allow anyone to access sfPMS. However, The Plan Room Visitor role you give the public login Contact will limit access to the Plan Room.

Note: You may already have a public login Contact in your Contact list and this Contact may already have the Plan Room Visitor role.



Review your Contacts to see if any changes are required.

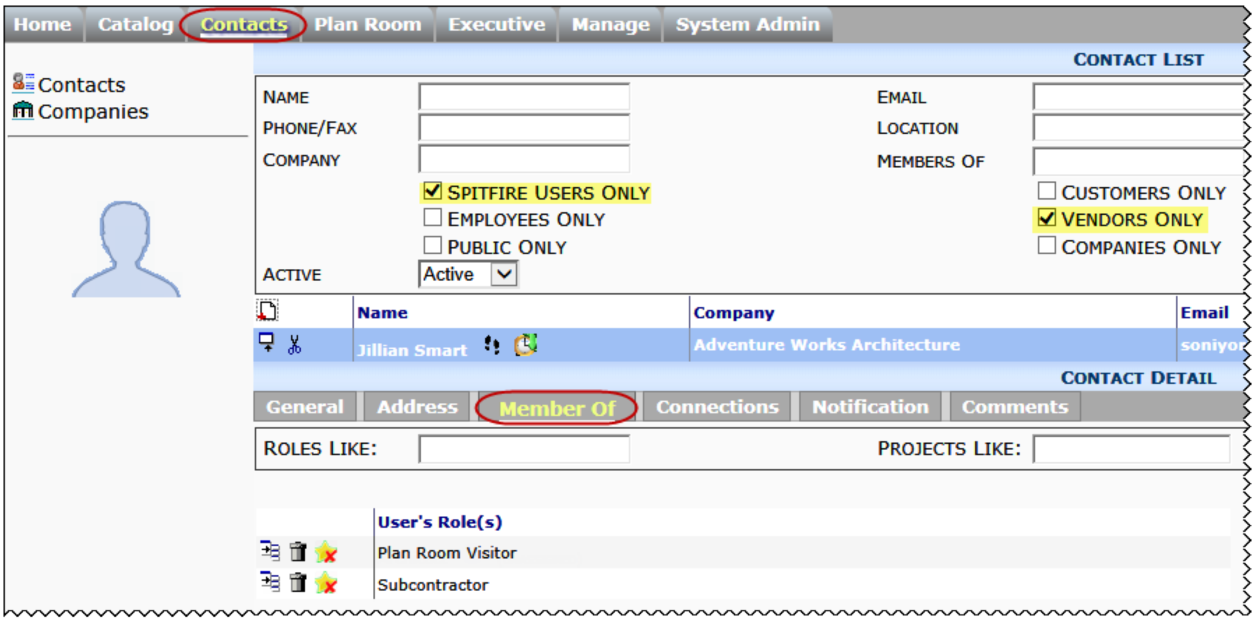
TIP
For more information about adding and editing Contacts, see the *Focus on Contacts* guide.

- If there is no public login Contact, add a new Contact, make that Contact a "Spitfire User" and give that Contact a login ID and password.
- If the public login Contact includes any roles other than Plan Room Visitor in the Member Of tab, *delete the other roles*.
- If the public login Contact does not have the **Plan Room Visitor**, add this role to the Contact.
    - If you want to limit the Plan Room to a specific project, expand the Plan Room Visitor role and look up the project.
    - If you want the Plan Room to include all projects, expand the Plan Room Visitor role and blank out the Project field.

Existing Vendor Contacts

If you want your Plan Room to be accessed by specific Vendor Contacts already in your system, you need make sure that those Contacts are Spitfire Users and that they have the **Plan Room Visitor** role. In addition, if you want them to be able to create RFQs from the Bid Package document, they will need whatever role contains the **DOC | Self Service RFQ** capability.

Note: your Vendor Contacts may already be Spitfire Users who have the necessary roles to access and use the Plan Room.



Review your Contacts to see if any changes are required

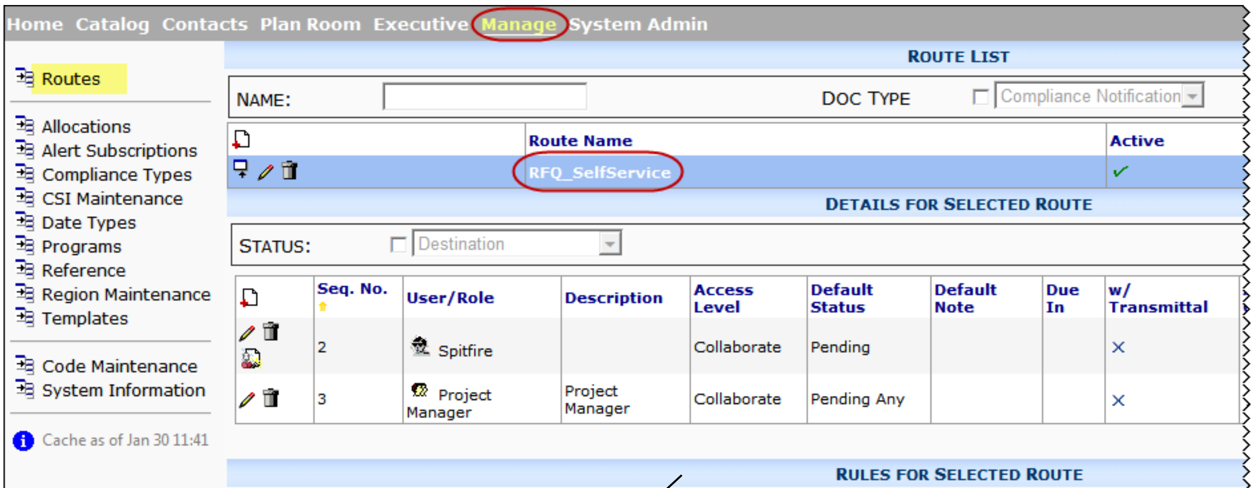
- If any Vendor Contact is not a Spitfire User, make that Contact a “Spitfire User” and give that Contact a login ID and password.
- If any Vendor Contact does not have the **Plan Room Visitor** in the Member Of tab, add this role to the Contact.
    - If you want to limit the Plan Room to a specific project, expand the Plan Room Visitor role and look up the project.
    - If you want the Plan Room to include all projects, expand the Plan Room Visitor role and blank out the Project field.
- If the Vendor Contact does not have the **DOC | Self Service RFQ** capability in one of its existing roles (and you want the vendor to be able to create RFQs from Bid Packages), give the Contact whatever role includes this capability.

Use the Routes Tool

Predefined Route for RFQs

Since you probably don't want your vendors adding routees to the RFQ document, you will want to create a predefined route for RFQs created from the Bid Package through the **Click here for RFQ** link (i.e., "self-service RFQs").

Note: you may already have a predefined route for self-service RFQs. (Spitfire-RTG is configured as shown below.)



Because the RouteConfig rule will govern this route (see next chapter), the "Rules for Selected Route" part will be ignored for this route.

Review your predefined routes to see if any changes are required.

- If there is no route for self-service RFQs, add one and indicate to whom the RFQ should be routed once the vendor sends it on. The route name should not include spaces.
- Use a workflow script for greater control over the document, such as changing the status to "Bid Back" automatically.
- Remember to save all your changes.

TIP

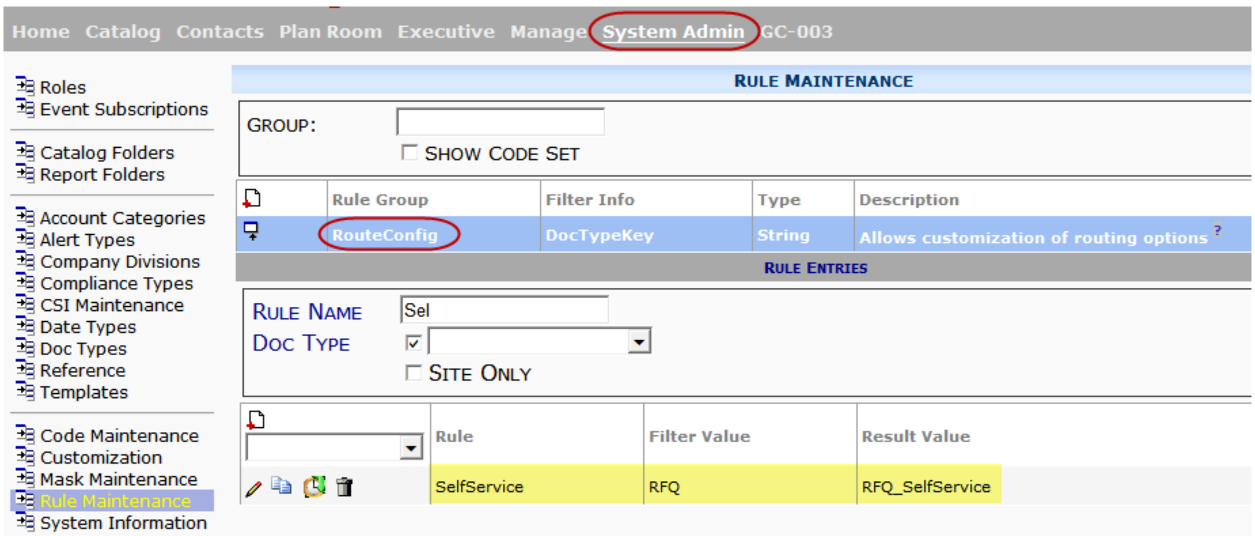
For more information about predefined routes, see the *Focus on the Manage Dashboard* guide.

Use the Rules Maintenance Tool

RouteConfig | SelfService

Not all RFQ documents are necessarily created through the link on the Bid Package document. It is therefore conceivable that you might desire different predefined routes for “regular” RFQs and “self-service” RFQs. The **RouteConfig | SelfService** rule indicates which predefined route for RFQs should override any other predefined routes when an RFQ is created through the Bid Package link.

Note: your **RouteConfig** rule may already include a **SelfService** value for the appropriate predefined route.



[*Spitfire-Enterprise only*] Review your RouteConfig rule to see if any changes are required.

- If your **RouteConfig** rule does not include a **SelfService** value, add one.
- The result value for SelfService must match the name of the predefined route established for RFQs that are created through the link on the Bid Package document (i.e., “self-service RFQs”).
- Remember to save your changes.

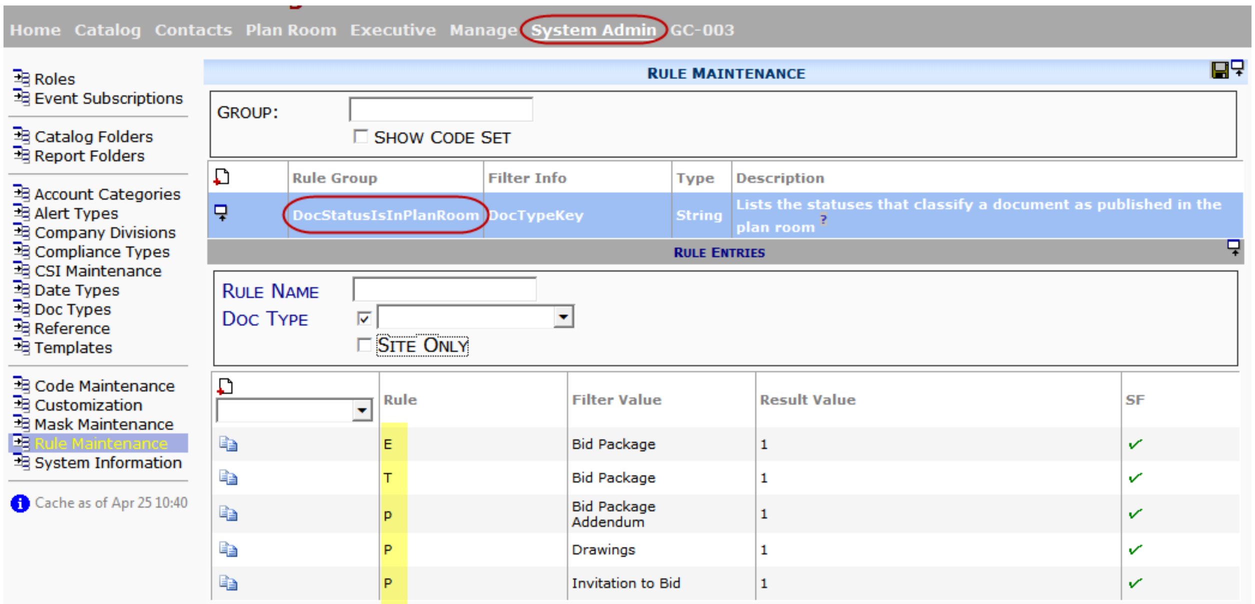
TIP

For more information about the Rules Maintenance tool, see the *Focus on System Administration* guide.

DocStatusIsIn PlanRoom

DocStatus codes that allow a document to appear on the Plan Room are indicated through the DocStatusIsInPlanRoom rule group. All DocStatus codes for a Doc type that allow for inclusion on the Plan Room need to be included.

Note: your **DocStatusIsInPlanRoom** rule group may already DocStatus codes for the applicable Doc types. (Spitfire-RTG is configured as shown below.)



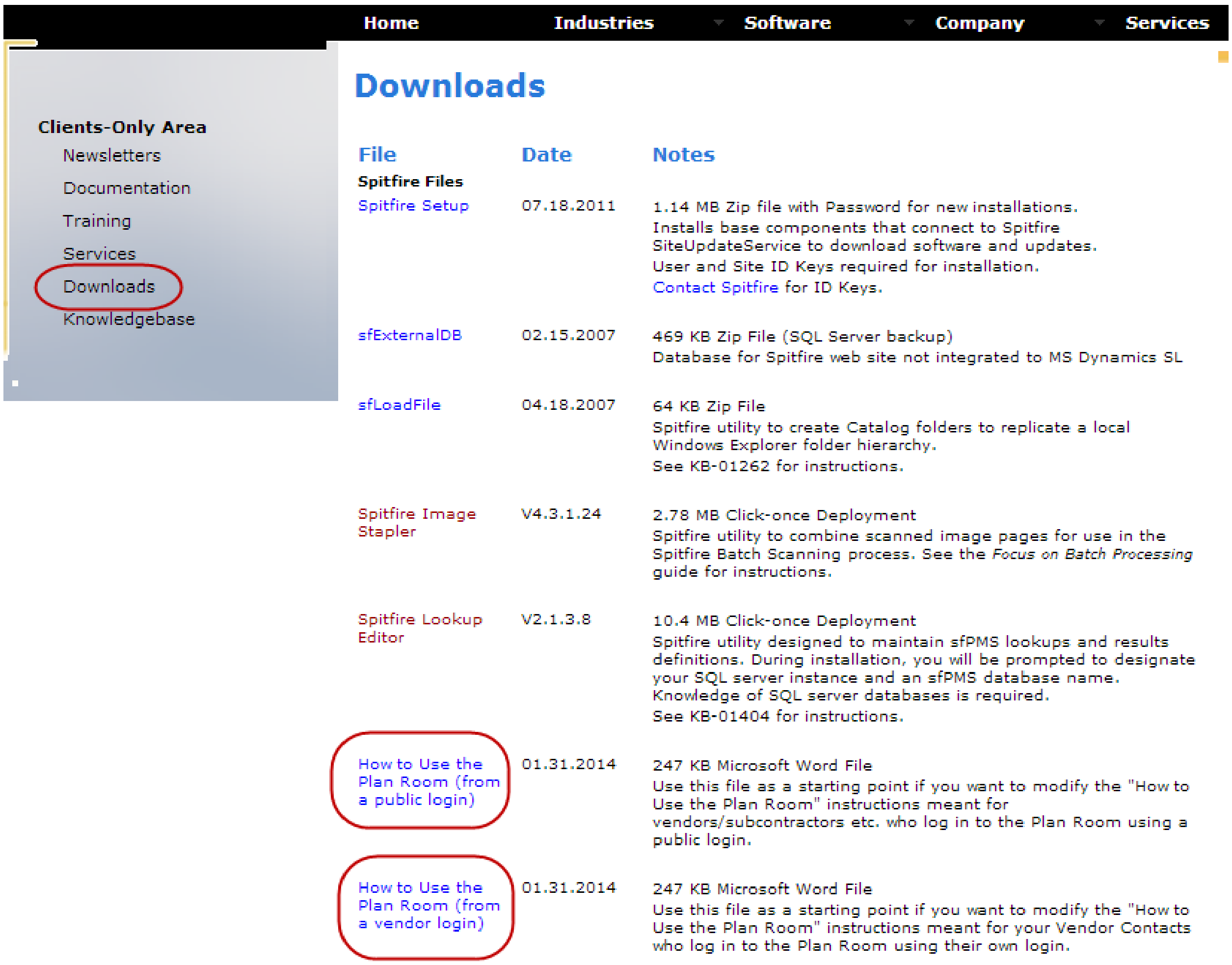
[*Spitfire-Enterprise only*] Review your DocStatusIsInPlanRoom rules to see if any changes are required.

- If desired statuses for any Doc types are missing from the **DocStatusIsInPlanRoom** rule group, add the appropriate DocStatus codes with a Result Value of 1.
- Remember to save your changes.

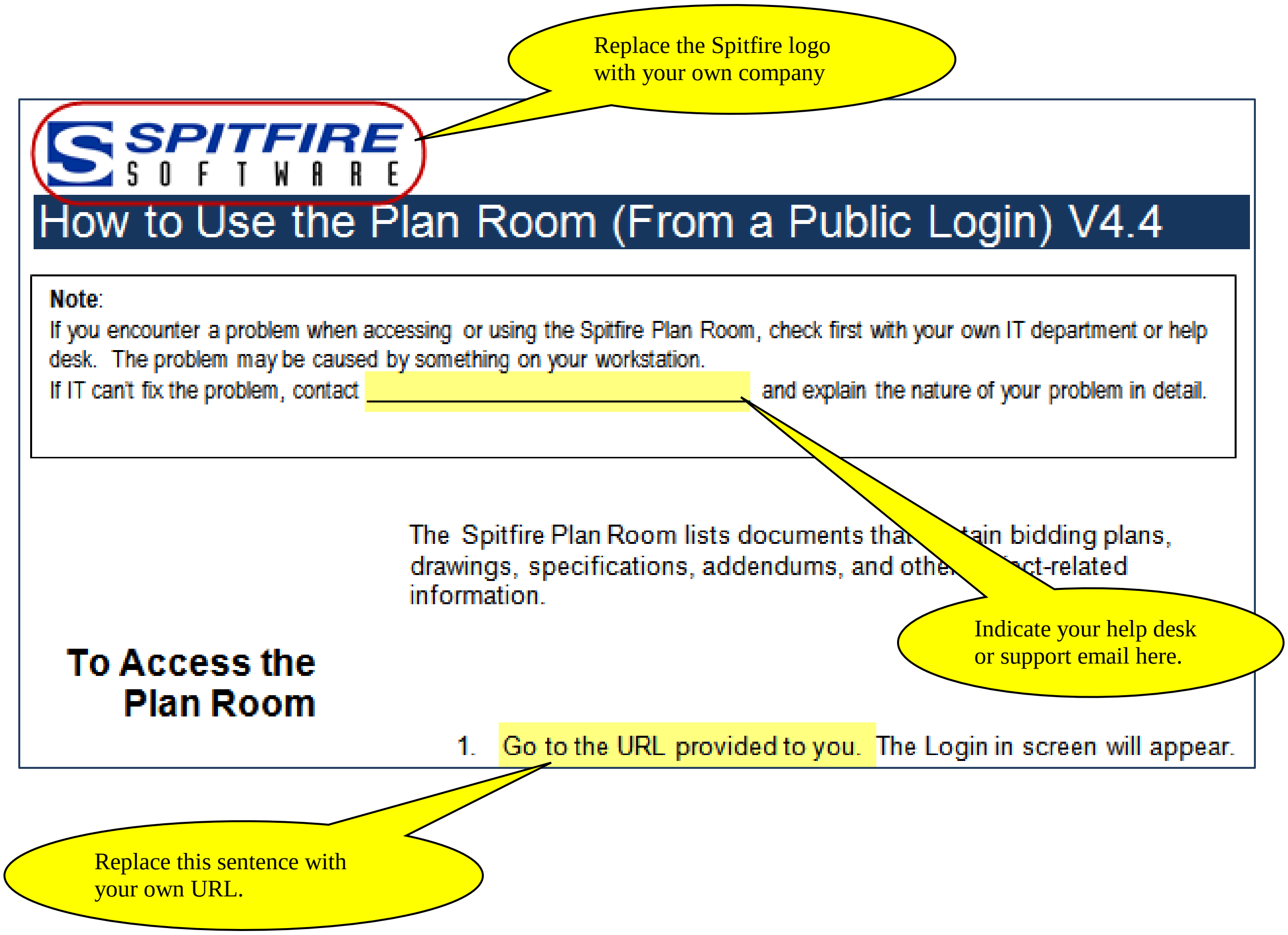
Download the How-To Instructions

Spitfire provides instructions, written in Microsoft Word, for your vendors. These instructions can be used as templates that you modify as needed to end up with instructions from you to your vendors.

Both *How to Use the Plan Room (from a public login)* and *How to Use the Plan Room (from a vendor login)* are available from the Downloads page on the Client area of the Spitfire website (www.spitfiremanagement.com).



- Once you have saved the .docx file on your computer, you should modify it to include your company-specific information.


How to Use the Plan Room (From a Public Login) V4.4

Note:
If you encounter a problem when accessing or using the Spitfire Plan Room, check first with your own IT department or help desk. The problem may be caused by something on your workstation.
If IT can't fix the problem, contact ______________________ and explain the nature of your problem in detail.

The Spitfire Plan Room lists documents that ... ain bidding plans, drawings, specifications, addendums, and othe... ...ct-related information.

To Access the Plan Room

1. Go to the URL provided to you. The Login in screen will appear.

Note: because Spitfire does not know your vendors and does not want to assume access, Spitfire will provide support to third-party vendors only if a support email comes from you (our Spitfire client). These support incidents will then be tracked and processed/charged as all others.

Once modified, you can distribute the instructions or place them on the Help menu of your Spitfire Dashboard. For more information about adding the file to your Help menu, see KBA-01482.