

# **Spitfire Reports**

This technical white paper is designed for Spitfire Project Management System users. Recognizing that reports can be, and often are, customized, this technical white paper describes only the Spitfire reports as they are initially shipped with the system.

aber **Nhit** chnica

www.spitfiremanagement.com

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Spitfire Management, LLC. 7 Skyline Drive, Suite 350 Hawthorne, NY 10532

ph. 914.273.0809 fax: 914.273.4208

www.spitfiremanagement.com

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, Filters	
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Filters	
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Filters	
Columns	
Archive List	
Filters	
Columns	
Capability Matrix	
Filters	
Columns	
Configuration Changes	
Filters	
Columns	
Doc Type Code Sets	
Filters	
Columns	
Email Alerts by Address	
Filters	
Columns	
Full Text Indexing Filters	
Columns Integrity Check	
Filters	
Columns	
Login History	
Filters	
Columns Next Doc Status Matrix	
Filter	
Columns	
Outbound Email Pending	

Filter	
Columns	
Rule Configuration	
Filter	
Columns	
User Capability Detail	
Filters	
Column	
User Role Matrix	
Filters	
Columns	
Work Accomplished	
Filters	
Columns	

# Introduction

Spitfire Project Management System (sfPMS) includes a number of reports that gather data about access, user roles and capabilities, finances, and documents.

Reports offer filters by which to focus the data in your system. Using the proper filters, you can quickly create, view and/or print out the information you need.

Recognizing that reports can be, and often are, customized, this technical white paper describes only the Spitfire reports as they are initially shipped with the system.

Keep in mind that access to reports depends on a user's permission level, as established through the Report Folders tool on the System Admin Dashboard. (For more information, see the <u>Focus on System</u> <u>Administration</u> guide.)

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

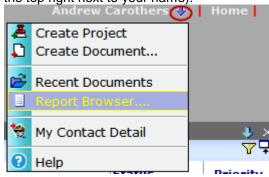
# **The Report Browser**

While some reports can be viewed from a corresponding document, all reports are available through the Report Browser to those who have permission to see them.

Note: for best results, do not open more than one report at a time.

#### To view reports:

1. Select the **Report Browser** off the Site Options menu (found on the top right next to your name):



2. (*optional*) Go to the Admin or Executive folder if the report is not on the General folder (which is the one selected by default).

3. Select your report.

Report Browser	×
	×
RUN A REPORT	7
Make a selection:	
► Admin	
Executive	
General	
Bid Analysis	
Bid Analysis By Customer	
Budget Revision History	
CCO Log     Change Item Log	
<ul><li>Change Item Log</li><li>Change Item Payment Log</li></ul>	
Change Order Detail	
Commitment by Cost Code	
Commitment Log	
<ul> <li>Commitment Summary</li> </ul>	
Compliance Log	
Contact List	
<ul> <li>Document Items</li> <li>Document Log</li> </ul>	
<ul> <li>Document Log</li> <li>Document Performance by Company</li> </ul>	
Equipment Profitability	
Meeting Minutes	
Open Routing	
<ul> <li>Pay Request Detail Log</li> </ul>	
Pay Request Log	
Payment Detail	
<ul> <li>Project CO Log</li> <li>Project CO Request Form</li> </ul>	
Project Log	
Project Vendor List	
Proposed CO Request Form	
Purchase Order	
Receipt Log	
RFI Log	

4. (*optional*) Enter filter information in the report window, for example:

		REPORT PARAME	ETERS 7
Bid Analysis	by Customer		
CUSTOMER		<u> </u>	
FROM DATE	☑ 06/13/2013	06/13/2014	
COMPANY	(Auto)	~	
	Run Report		

5. Click Run Report . You should click this button even if you have not used the filters..

The following reports are available from Spitfire. **Note**: Your site might not have all of these reports or they may have been renamed.

# **General Reports**

## **Bid Analysis**

This report lists bids that are won or lost (or both).

Bid Analysis								
OPEN/CLOSED	Both	•			DUE	3/23/2012		2
CREATED	3/23/	/2012 🗰 3/	23/2012		CLOSED	3/23/2012		2
PROJECT	%				PROJECT REFE	EREV (all) 💌		
CONTACT			<u></u>		CUSTOMER		Q	
Status	🔽 (any	) 🔽			DIVISION	(ALL)		•
	Run R	leport						
								sfTraining Report
								Bid Analysis
Description	No	Project	То	Created Date	Due Date Responsible	Project Type	Status	Amount
East Side Towers	CIT- 1197.23		Adventure Works	3/23/2012	3/23/2012 Alan Steiner	Commercial	w	750,000.00
Fire Protection System Bid	0001	Northern Lights Office	York Architects, Ir	nc. 3/23/2012	4/13/2012 Chris Demo	N/A	0	0.00
System bid		Bldg						
No of Bids	2			1	750,000.00		Bi-t B	
-		Bidg 750,000.00 0.00	Won Lost	1 1 0%	750,000.00		Status Description W Awarded	Count

## Filters

- **Open/Closed** the state of the Bid document. You can select **Open**, **Closed** or **Both**.
- **Due** the date range for when the document is/was due. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Created** the date range for when the document was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Closed** the date range for when the Bid document was closed. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Project Reference** the reference for the Bid document, as established in the Reference tool. You can select a specific reference or keep the **(all)** default.
- Contact the Contact on the Bid document. You can look up ( ) a specific Contact or leave blank for all Contacts.
- **Customer** the Customer company on the Bid document. You can look up () a specific Customer or leave blank for all Customers.

- **Status** the Bid document's status. You can select a specific status or keep the **(any)** default.
- **Division** your company division. You can select a specific divison, or (ALL) for all divisions or (Auto) for your own division.

#### Columns

- **Description** the Bid document's description.
- No the Bid Number on the Bid document.
- **Project** the project associated with the Bid document.
- **To** the Customer who received your bid.
- **Created date** the Bid document's Date.
- **Due Date** the Bid document's Due date.
- **Responsible** the Responsible contact on the Bid document.
- **Project Type** the project type or reference on the Bid document.
- Status the Bid document's status, in code. Note: Statuses are described at the end of the report, with counts of how many Bids have each status.

Status	Description	Count
W	Awarded	1
0	In process	1

• Amount – the total amount on the Bid document.

Columns are followed by summarizing information:

- No of Bids the total number of Bid documents.
- **Open** the number of open Bid documents.
- **Cancelled** the number of Bid documents with a status of Cancelled.
- **Won** the number of Bid documents with a status of Won or Awarded, followed by the dollar amount on all won Bids.
- **Lost** the number of Bid documents with a status of Lost followed by the dollar amount on all lost Bids.
- % Won the percentage of won Bid documents.

## Bid Analysis By Customer

	UTO) 💌 Run Report	FRO	M DATE	<b>▼</b> 8/17	/2010 👳	<b>*</b> 8/17/2	011 👳		USTOMER		Q	
		100%	- 🖌 🔬 c	ollaborate	• 🥖 Sign	- 📙	F	ind				
												_
											sfTraining	-
										Bid Anal	ysis By Cus	stor
		_	_	-	_	-	Bid Ratio I	Based on Num	ber of Bids	Bi	d Ratio Based on Ve	alue of
		Total	In Process Ca	meelid	Bids Made	Out	Lost	Jobs Awarded	Bid Ratio	Value of Bids	Value of Jobs Awarded	Va Ra
ID Conto	Customer Name	Total	Process Ca	incera	Made	out	LOST	Awarded	Katio	value of Blus	Awarded	Ra
C020		3	1	0	2	0	0	2	100.0 %	\$850,000	\$850,000	100
C025	Alpine Ski House	1	0	0	1	0	0	1	100.0 %	\$154,258	\$154,258	10
C035	Blue Yonder Pools	1	0	0	1	0	0	1	100.0 %	\$56,578	\$56,578	10
C065	City Highway Department	2	0	0	2	0	1	1	50.0 %	\$1,085,525	\$98,000	
MU01	Coho Printing	1	1	0	0	0	0	0	0.0 %	\$0	\$0	
		8	2	0	6	0	1	5	83.3 %	\$2,146,361	\$1,158,836	5
	Contoso Construction Inc CCC	0	~									

#### This report lists bids made to customer companies.

#### **Filters**

- **Customer** the customer company receiving your bid. You can look up ( $\triangleright$ ) a specific customer or leave blank for all customers.
- From Date the date range indicating when the Bid was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Company** the Company Division on the bid. You can select a specific division, **(ALL)** for all divisions, or keep the **(AUTO)** default for your own division.

- ID the Customer ID of the customer.
- Customer Name the name of the customer.
- Total the number of Bid documents created for the customer.
- In Process the number of Bid documents with a document status of In Process.
- **Cancel'd** the number of Bid documents with a document status of Canceled.
- **Bids Made** the total number of Bid documents with a document status of Awarded, Lost or Out for Bid.
- **Out** the number of Bid documents with a document status of Out for Bid.

- Lost the number of Bid documents with a document status of Lost.
- Jobs Awarded the number of Bid documents with a document status of Awarded.
- **Bid Ratio** the bid ratio for the customer based on the number of bids.
- Value of Bids the total amount of bids for the customer.
- Value of Jobs Awarded the total amount of bids awarded by the customer.
- Value Ratio the bid ratio for the customer based on the value of the bids.

Note: all columns are subtotaled by company division and then totaled.

## Budget Revision History

This report lists revisions made to project budgets.

	%				%		_		_	
ROJECT	% □ 8/17	/2011 🔿 8/17/201	11	COST CODE	Run Re	port		-	TARGETS	
						port				
) 🗎 🕻	= 🔶 🕹	1 / 7 Ik	🖞 🔍   🖲 🖲	100% - 🔬	Collaborate •	🥖 Sign 🕶		Find	•	
										sfDemo Rep
										Budget Revision Histo
					For All Budg	jet Revisions o	n All Project	s		
			Start	ing Budget (snap	shot) Values		Change			
	WBS	Account	Revenue	OAC	EAC	FAC	Туре	Amount	Flag	Notes
	ER-0001	Equipment Rental								
		Posted 1/6/2009 6:4	5:30 AM by DEMO	to all in period 2	200901					
	00000	CONTRACT VALUE		-				\$0.00	N	umber of Davisions: 1
	ER-0001	VALUE		-				\$0.00	N	umber of Revisions: 1
			za					\$0.00	N	umber of Revisions: 1
	ER-0001 GC-003	VALUE	za				-	\$0.00	N	umber of Revisions: 1
	ER-0001 GC-003	VALUE Northern Lights Pla		to all in period	200406	-		\$0.00	N	umber of Revisions: 1
	ER-0001 GC-003	VALUE Northern Lights Pla 1 Initial Budget		to all in period \$0.00	200406 \$0.00	\$0.00	Add	\$0.00	Ni	umber of Revisions: 1
	ER-0001 GC-003	VALUE Northern Lights Pla 1 Initial Budget Posted 6/9/2006 10:	04:00 PM by DEMO			\$0.00	Add		Ni	umber of Revisions: 1
	ER-0001 GC-003 Revision	VALUE Northern Lights Pla 1 Initial Budget Posted 6/9/2006 10: REVENUE	04:00 PM by DEMO \$0.00	\$0.00	\$0.00			\$750,000.00	N	umber of Revisions: 1
	ER-0001 GC-003 Revision	VALUE Northern Lights Pla 1 Initial Budget Posted 6/9/2006 10: REVENUE _LABOR	04:00 PM by DEMO \$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00	Add	\$750,000.00 \$7,500.00	N:	umber of Revisions: 1
	ER-0001 GC-003 Revision	VALUE Northern Lights Pla 1 Initial Budget Posted 6/9/2006 10: REVENUE _LABOR _MTRL PERM	04:00 PM by DEMO \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00	Add 0	\$750,000.00 \$7,500.00 \$0.00	N	umber of Revisions: 1
	ER-0001 GC-003 Revision 01000	VALUE Northern Lights Pla I Initial Budget Posted 6/9/2006 10: REVENUE _LABOR _MTRL PERM _OTHER	04:00 PM by DEMO \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	Add 0 Add	\$750,000.00 \$7,500.00 \$0.00 \$8,750.00	N	umber of Revisions: 1

Filters		
	•	<b>Project</b> – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
	•	<b>Cost Code</b> – the Cost Code associated with the budget row. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.
	•	<b>Targets</b> – the budget "bucket" where the revision was posted. You can select <b>All, Original, EAC,</b> or <b>FAC</b> .
	•	<b>Period</b> – the date range indicating the fiscal period to which the budget revision was posted. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates
Columns		
	•	<b>WBS</b> – a) the Project ID and b) the work-breakdown-structure code (Cost Code) for the budget row.
	•	Account – a) the project Description and b) the budget row Account Category.

- **Revenue** the starting amount of revenue in the budget.
- **OAC** the starting Original At Completion amount.
- **EAC** the starting Estimate At Completion amount.
- **FAC** the starting Forecast At Completion amount.
- **Change Type** the type of change (Add or Replace) made to the budget.
- Amount the change amount.
- Flag CB if the value matches the current budget.
- Notes notes for the budget row.

# CCO Log

#### This report lists CCO documents.

VED 🗆	(any) <b>v</b> 3/17/2011 3/17/2011 Run Report	VENDOR STATUS GROUP BY	I⊽ (any) I⊽ (any) none ▼	•	•				
		100% 🗸 🎍	Collaborate •	🥖 Sign 🗸 🔛	Find	•			
_					Schedule Imr	sect		sfDe	-
DocNo	Doc Date - Description	Status	Source	Approved Date	Schedule Imp Requested		nete Amount	sfDe Quote Amount	CCO L
	Doc Date - Description : : GC-003 - Northern Lights Plaza	Status	Source	Approved Date			nete Amount		CCO L
		Status	Source				nate Amount		CCO Lo
Project	: GC-003 - Northern Lights Plaza						nete Amount		CCO L.
Project	: GC-003 - Northern Lights Plaza 16000 Electrical 03/15/2011 Changes for CO 0001-002:		Able Electri Architect	2			nate Amount		mo Repo CCO Lo Amo \$19,000. 1,200. 3,500.

#### Filters

- **Project** the Project ID. You can look up (*A*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor associated with the CCO. You can select a specific vendor or keep the **(any)** default.
- **Commitment** the Commitment to which the CCO is linked. You can select a specific Commitment (if you are also using the Project filter) or keep the **(any)** default.
- **Status** the document's status. You can select a specific status or keep the **(any)** default.
- **Approved** the date range of when the CCO was approved. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Group By** the criteria by which to group the results. You can select **None** or **Vendor**.

- **DocNo** a) the Commitment document number and b) the CCO document number.
- Doc Date Description the CCO Date followed by the CCO title.
- Status the CCO's document status.
- **Source** a) the CCO's vendor and b) Source of change.
- Approved Date the date on which the CCO was approved.
- Schedule Impact: Requested the number of days on the CCO's Schedule Impact: Req field.

- Schedule Impact: Approved the number of days on the CCO's Approved Days field.
- Estimate Amount the Total Estimate amount on the CCO's Detail tab.
- **Quote Amount** the Total Quote amount on the CCO's Detail tab.
- **Amount** the Amount on the CCO's Detail tab.

**Note**: all dollar amount columns are subtotaled by Commitment and then project and then totaled.

## Change Item Log

#### This report lists Change Items.

Change Ite	em Log											
PROJECT IS CLOSED DESCRIPTI IS BILLABL			STATU RESPO SUBM	NSIBLE	✓ (any) ✓ 3/17/2 Run Re		<u>ළ</u> 011					
88		🔶 🔟 / 1 🛛 🚺 🥰	e 💿 💿 🚺	- 🔬	Collaborate 🕶	🖉 Sign 🗸	<b>→</b>	Find	•			
Ê												
69											sfDem	o Report
											Change I	tem Log
	CI #	Description	Requested By S	Submitted	Status	Reviewed	Billable	Estimate	Quote	Expense	Revenue M	largin Amount
		Description Northern Lights Plaza	Requested By S	Submitted	Status	Reviewed	Billable	Estimate	Quote	Expense	Revenue M	largin Amount
		· ·			Status Proposed	Reviewed 6/9/2006	Billable	Estimate	Quote	Expense 3,500.00	Revenue M 4,200.00	
	GC003 : I	Northern Lights Plaza Change to lighting over the	Nick York	6/9/2006				Estimate	Quote			largin Amount 700.00 9,775.00
	GC003 : I 00001	Northern Lights Plaza Change to lighting over the security desk area. Moving of lobby restroom entrance five feet to the right to facilitate pedestrian traffic flow. Requires partial re- plumb and moving 2 light	Nick York Jason Sunderson	6/9/2006 6/9/2006	Proposed	6/9/2006	~		Quote	3,500.00	4,200.00	700.00
	GC003 : 1 00001 00002	Northern Lights Plaza Change to lighting over the security desk area. Moving of lobby restroom entrance five feet to the right to facilitate pedestrian traffic flow. Requires partial re- plumb and moving 2 light fixtures and 2 wall outlets. Reroute of basement hot	Nick York Jason Sunderson Universal Mechanical	6/9/2006 6/9/2006 3/9/2010	Proposed Approved	6/9/2006 3/5/2010	*		Quote 3,500.00	3,500.00 8,900.00	4,200.00 18,675.00	9,775.00

Filter

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Status the document's status. You can select a specific status if you have indicated a specific Document Type or keep the (any) default.
- Is Closed whether the report should include open or closed Change Items. You can select **No**, Yes or Both.
- **Responsible** the person Responsible for the Change Item. You can look up ( $\swarrow$ ) a person or leave this blank for all persons.
- **Description** the description of the Change Item. You can enter the beginning of a description or use the % mask. **Note**: the % mask is assumed after whatever you type.
- **Submitted** the date range for when the Change Item was submitted. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- Is Billable whether the report should include billable Change Items. You can select Both, Yes or No.

#### Columns

- Cl # a) the Project ID and b) the Change Item number.
- **Description** a) the project description and b) the Change Item description.
- **Requested By** the Contact who requested the change.
- **Submitted** the Submitted date on the Change Item.
- Status the status of the Change Item.
- **Reviewed** the Reviewed date on the Change Item.
- **Billable** whether **V** or not the Change Item is billable.
- Estimate the Estimate amount on the Change Item.
- **Quote** the Quote amount on the Change Item.
- **Expense** the Expense amount on the Change Item.
- **Revenue** the Revenue amount on the Change Item.
- Margin Amount the Revenue amount minus the Expense amount.

Note: all dollar amount columns are subtotaled by project.

## Change Item Payment Log

This report lists payment associated with CCOs that were created on Change Order Budget Entries.

Change Item Paym	nent Log							
	ange Item <mark>. ▼</mark> Run Report		VENDOR APPROVED	I⊽ (any) □ 3/17/2011 3/17/2011				
	1 / 1	1 🖑 🤻 💿 🖲	) 100% - 🄬	Collaborate 🔹 🥖 Sign 🔹 😽	Find	•		
69								emo Report
						Chan	ge Item Pa	ayment Log
Ref #		Status	Doc Date Fina	al Lien Approved Date Waivers	Approver	Request Amount	Retention Amount	Net Pay Amount
Project	Type : GC-003 - Northern	n Lights Plaza						Net Pay Amount
Project : Change feet to ti	Type : GC-003 - Northern Item 00002 - Movin he right to facilitate		ntrance five v. Requires					Net Pay Amount
Project : Change feet to ti partial re	Type : GC-003 - Northern Item 00002 - Movin he right to facilitate	n Lights Plaza ng of lobby restroom er e pedestrian traffic flow	ntrance five v. Requires					Net Pay Amount
Project : Change feet to th partial ro outlets.	Type : GC-003 - Northern Item 00002 - Movir he right to facilitate e-plumb and movir	n Lights Plaza ng of lobby restroom e e pedestrian traffic flow ng 2 light fixtures and 2	ntrance five v. Requires	Waivers Able Electric				Net Pay Amount 2,925.00
Project : Change feet to ti partial rr outlets. 0001	Type : GC-003 - Northern Item 00002 - Movir he right to facilitate e-plumb and movir	n Lights Plaza ng of lobby restroom ei e pedestrian traffic flow ng 2 light fixtures and 2 <u>16000 Electrical</u>	ntrance five V. Requires 2 wall	Waivers Able Electric	Approver	Amount	Amount	
Project : Change feet to ti partial rr outlets. 0001	Type : GC-003 - Northern Item 00002 - Movir he right to facilitate e-plumb and movir	n Lights Plaza ng of lobby restroom ei e pedestrian traffic flow ng 2 light fixtures and 2 <u>16000 Electrical</u>	ntrance five V. Requires 2 wall	Waivers Able Electric - 6/9/2006	Approver	Amount 3,250.00	Amount 325.00	2,925.00
Project : Change feet to ti partial rr outlets. 0001	Type : GC-003 - Northern Item 00002 - Movir he right to facilitate e-plumb and movir	n Lights Plaza ng of lobby restroom ei e pedestrian traffic flow ng 2 light fixtures and 2 <u>16000 Electrical</u>	ntrance five V. Requires 2 wall	Waivers Able Electric - 6/9/2006	Approver Jon Taffler	Amount 3,250.00 3,250.00	Amount 325.00 325.00	2,925.00 2,925.00

**Note**: for this report to have data, at least one Pay Request must be linked to a CCO through the CCO field on the Document Header (as shown on the next page) and the CCO must be on a Change Item (on a Change Order).

Pay Request-	100		
Pay Request 0001 for Electrical V	Vork		× _
	DOCUMENT HEADER		.↓ 🖬 ⊧ 🖓
	# 0001	INV/REF # 0001-0001	
	T GC-003 Northern Lights Plaza		
COMMITMEN	T 0001 16000 Electrical		
CC	CCO: Changes for CO 0001-002: Moving 2 lights (GC003)	<mark>بر</mark>	
	Able Electric 2 compliance issues, 1 ver	ndor issue! Pay When Paid	

Filter

- **Project** the Project ID. You can look up (*P*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor on the related Commitment. You can select a specific vendor or keep the **(any)** default.
- **Group By** the criteria by which to group the results. You can select **Change Item** or **Vendor**.
- **Approved** the date range of when the Pay Request was approved. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- Ref # a) the Project ID and description and b) the Change Item number and description OR Vendor name, depending on Group By filter and c) the document number of the Commitment being changed by the CCO and d) the associated Pay Request's document number.
- Pay Type the subtype of the related Commitment.
- **Status** a) the description of the related Commitment and the status of the related Pay Request.
- **Doc Date** the related Pay Request's Date.
- Final whether (\*) or not the Pay Request was a final payment.
- Lien Waivers a ) the number of lien waivers that are outstanding or b) the date the last lien waiver was marked as received.
- **Approved Date** a) the vendor on the related Commitment and b) the date on which the Pay Request was approved.
- Approver the person who approved the Pay Request.
- Request Amount the amount requested on the Pay Request.
- Retention Amount the retention amount on the Pay Request.

• **Net Pay Amount** – the payment amount on the Pay Request.

**Note**: all dollar amount columns are subtotaled by Change Item or Vendor and then by project and then totaled at the end of the report.

## Change Order Detail



Deta	il Cha	ange Orde	r Log								
PRC	JECT	%			CHA	ANGE ORDER %					
STA	TUS	%					LUDE CANCELED				
		Ru	in Report								
							4		_		
-			1 / 2		🥰 🕒 💌 🛛 1009	% 👻 🔬 Collaborate	• 🆉 Sign • 😽	Find	•		
ß											
66										sfDerr	no Report
										Change Ord	
										Change Oru	er Detall
						For All Char	ige Orders on All Proje	ects			
		CO#	CI#	Cost Code	Description	For All Char Account	nge Orders on All Proje Units Rate	ects Budget Cost	Revenue	Profit	Profit %
		CO # GC-003	CI # Northern Lig		Description				Revenue	Profit	Profit %
					Description				Revenue	Profit	Profit %
		GC-003	Northern Lig In Process Scope:	hts Plaza Additional el	ectrical work to meet c				Revenue	Profit	Profit %
		GC-003	Northern Lig	hts Plaza Additional el		Account			Revenue	Profit	Profit %
		GC-003	Northern Lig In Process Scope:	hts Plaza Additional el pact:	ectrical work to meet c 2 days Change to lighting ove	Account			Revenue	Profit	Profit %
		GC-003	Northern Lig In Process Scope: Schedule Im	hts Plaza Additional el	ectrical work to meet c 2 days	Account			Revenue	Profit	Profit %
		GC-003	Northern Lig In Process Scope: Schedule Im	hts Plaza Additional el pact:	ectrical work to meet c 2 days Change to lighting ove	Account			Revenue \$4,200.00	Profit	Profit %
Ģ		GC-003	Northern Lig In Process Scope: Schedule Im	hts Plaza Additional el pact:	ectrical work to meet c 2 days Change to lighting ove	Account city's new requirements. er the security desk area.				Profit	Profit %

#### Filters

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Change Order the Change Order's document number. You can enter a specific Doc # or use the % mask for multiple Change Orders.
- **Status** the document's status. You can enter a specific status or leave blank for all statuses.
- Include Canceled whether *v* or not the report should include Change Orders that have been canceled.

- **CO #** a) the Project ID and b) the Change Order's document number.
- **Cl #** a) the Project Description and b) the Change Order's document status and c) the Scope on the Change Order and d) the Schedule Impact on the Change Order and e) the Change Item's number.
- **Cost Code** the Cost Codes on the Change Item's Budget Entry lines.

- **Description** a) the Description of the Change Item and b) the Description of the Cost Code on the Change Item.
- Account the Account Category for the Cost Code on the Change Item's Budget Entry line.
- **Units** the number of units on the Change Item's Budget Entry line.
- **Budget Cost** the expense amount on the Change Item's Budget Entry line.
- **Revenue** the revenue amount on the Change Item's Budget Entry line.
- **Profit** the revenue amount minus the expense amount, seen on the totals that appear at the end of the report.
- **Profit %** the profit, in percentage, seen on the totals that appear on the end of the report.

**Note**: all dollar amount columns are subtotaled by Account Category and then totaled at the bottom of the list. In addition, totals for Original Contract, Pending, Potential Additional Changes and Potential Contract appear at the end of the report.

CI#	Cost Code	Description	Account	Units	Budget Cost	Revenue	Profit	Profit %
Northern Lig	ghts Office Bld	g						
	16120	Wires and Cables						
	10120	wires and Gables						
			_SUB	10.000	\$1,000.00			
		Subtotals:						
			_LABOR	7.000	\$700.00			
			_SUB	12.000	\$1,200.00			
			REVENUE			\$2,925.00		
		Totals			\$1,900.00	\$2,925.00	\$1,025.00	35.04 %
Summary by	y Change Orde	r Status						
			Original Contract		\$575,000.00	\$750,000.00	\$175,000.00	23.33 %
			Pending Total		\$1,900.00	\$2,925.00	\$1,025.00	35.04 %
		Potential Addit	ional Changes - Total		\$1,900.00	\$2,925.00	\$1,025.00	35.04 %
		Po	tential Contract Total		\$576,900.00	\$752,925.00	\$176,025.00	23.38 %

## Commitment Budget Comparison

This report lists how Commitment Items compare to the budget. This report is available only from a Commitment or CCO's Options menu (Commitment-vs-Budget).

ommitm	ent Budget Co	mparison								
ROJECT	GC003	Q					Show	DETAIL		
	Run Report									
									cfDorr	no Repo
							Com	mitmont		
		Catego	v Detail for budge	t lines related to	commitment #0	001 on Project GC		imitment	Budget Con	npariso
Reference #	Description	-	Pending Budget CO Amount	Original Amount	Approved COs		Total w/ Pending	Remaining to Commit	This Allocation	Paid
GC003	Northern Lights Plaza									
16000	Electrical									
	_SUB	17950.00	0.00	12800.00	3,700.00	0.00	16,500.00	1450.00	12800.00	4,185.0
	16000	17950.00	0.00	12800.00	3,700.00	0.00	16,500.00	1450.00	12800.00	4,185.
16050	Electrical Materials									
	_SUB	0.00	0.00	1500.00	0.00	0.00	1,500.00	-1500.00	1500.00	700.
	16050	0.00	0.00	1500.00	0.00	0.00	1,500.00	-1500.00	1500.00	700.
16120	Wires and Cables									
	_SUB 16120	1000.00 1000.00	0.00	0.00	1,000.00 1,000.00	0.00	1,000.00 1,000.00	0.00	0.00	0.) 0.)
GC003		\$18,950.00	\$0.00	14,300.00	4,700.00	0.00	19,000.00		14300.00	4,885.
6003	Project Totals	\$18,9000	\$0.00	14,300.00	4,700.00	0.00	19,000.00	(\$50.00)	14300.00	4,885.
	Grand Totals	\$18,950.00	\$0.00	14,300.00	4,700.00	0.00	19,000.00	(\$50.00)	14300.00	4,885.

#### **Filters**

- **Project** the Project ID. You can look up ( $\triangleright$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Show Detail whether 🔽 or not the report should include Account Category information.

- **Reference #** a) the Project ID and b) the Cost Code.
- **Description** a) the Project Title and b) the Cost Code description and (if Show Details is on) the Account Category.
- **Current Budget** the current budget (EAC) amount for the Cost Code (and Account Category).
- **Pending Budget CO Amount** the amount on Pending Change Orders for the Cost Code (and Account Category).
- **Original Amount** the original amount on all Commitments for the Cost Code (and Account Category).

- **Approved COs** the amount on Approved CCOs for the Cost Code (and Account Category).
- **Pending COs** the amount on Pending CCOs for the Cost Code (and Account Category).
- **Total w/Pending** the sum of Original Amount plus Approved CCOs plus Pending CCOs for the Cost Code (and Account Category).
- Remaining to Commit the Current EAC amount plus the Pending Budget CO amount minus Total w/Pending amount for the Cost Code (and Account Category).
- This Allocation the amount of the current Commitment or CCO for the Cost Code (and Account Category)
- **Paid** the sum of Approved Pay Requests for the Cost Code (and Account Category).

**Note**: all dollar amount columns are subtotaled by Account Category and Cost Code then totaled by Project. There is a Grand Total at the bottom of the list.

## Commitment By Cost Code

This report lists the Cost Codes on Commitments.

Commitme	ent Cost Code							
Project	%	<u> </u>	VEND	OR	(any)		~	
Cost Code	SHOW DETAIL		In Su	JBCONTRA			N	
							Acme Co	nstruction
						Commit	nent by C	ost Code
Reference #	Description	Type Status	Original Amount	Approved COs	Revised Amount	Pending COs	Total w/ Pending	Actuals
GC003	Northern Lights Plaza							
0001	16000 Electrical Able Electric Corp	Committed	14,300.00	4,700.00	19,000.00	0.00	19,000.00	4,885.00
16000	Electrical	Contract/Subcontract	12,800.00	3,700.00	16,500.00	0.00	16,500.00	4,185.00
	SUB		12,800.00	3,700.00	16,500.00	0.00	16,500.00	4,185.00
16050	Electrical Materials	Contract/Subcontract	1,500.00		1,500.00		1,500.00	700.00
	SUB		1,500.00		1,500.00		1,500.00	700.00
16120	Wires and Cables	Contract/Subcontract	0.00	1,000.00	1,000.00	0.00	1,000.00	
	SUB		0.00	1,000.00	1,000.00	0.00	1,000.00	
0002	02070 Paving Coho Asphalt and Concrete	Committed	20,000.00	8,418.75	28,418.75	0.00	28,418.75	0.00

#### Filter

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor on the Commitment. You can select a specific vendor or keep the **(any)** default.
- Include Children whether  $\overline{\mathbb{V}}$  or not the report should include child projects of whatever projects match the Project filter.
- Show Detail whether 🔽 or not the report should include Account Category information.
- In Subcontract the Commitment by which to filter the report. You can select a specific Commitment from the drop-down or keep the (any) default.
- **Cost Code** the Cost Code associated with the Commitment Item. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.

#### Columns

- **Reference #** a) the Project ID and b) the Commitment Doc number and c) the Cost Code on the Commitment.
- **Description/Vendor** a) the Project Description and b) the Commitment Description and c) the Vendor on the Commitment and d) the Cost Code description and e) the Account Category.
- **Type** the Commitment's subtype.
- Status the Commitment's document status.
- **Original Amount** the Original Amount for a) the Commitment and b) the Cost Code and c) the Account Category.
- Approved COs the amount on approved CCOs related to a) the Commitment and b) the Cost Code and c) the Account Category.
- Revised Amount the Original amount plus approved CCO amount for a) the Commitment and b) the Cost Code and c) the Account Category.
- **Pending COs** the amount on CCOs which are pending for a) the Commitment and b) Cost Code and c) Account Category.
- **Total w/Pending** the Revised amount plus the Pending amount for a) the Commitment and b) the Cost Code and c) the Account Category.
- Actuals the Actuals paid for a) the Commitment and b) the Cost Code and c) the Account Category.

**Note**: grand totals for all dollar amount columns appear at the bottom of the list.

# Commitment Log

DIECT	% I⊽ (all va	alid) 💌	VEN			I (any) I (any)		•		CIFIC # UP BY	(any) •					
		W STATUS				F SHOW	/ TYPE	_			Run Report					
) 🗎 🖻	] ⊕ ⊕	1 /1   Ik 🖑 🥰	100%	-   4	Colli	aborate •	🌽 Sign • 🛛	🖶 🚼 🆻	nd	•						
1																
															sfDem	o Rep
															Commitm	nent L
									Value			Approve	d Payment Reque	sts	Pending Paymer	nt Reques
	Project - Doc #	Description	Vendor		Туре	Stetus	Original Amount	Approved COs	Revised Amount	Pending COs	Total w/ Pending	Amount Requested	Retention Amount	Net Paid	Request Amount	Reter
	GC003 - 0002	02070 Paving	Coho Asphalt Concrete	and	FP	м	20,000.00	8,418.75	28,418.75	0.00	28,418.75	0.00	0.00	0.00	13,270.00	1,32
	XX001 -	100 Ton Chiller/Evaporator			PO	1	12,054.00		12,054.00		12,054.00					
	GC003 - 0004	15000 Mechanical	Universal Med	chanical	FP	м	73,500.00		73,500.00		73,500.00					
	GC003 - 0003	15000 Mechanical - Trane CGACD104 100 Ton 460V Chille	Universal Mee	chanical	PO	м	12,054.00		12,054.00		12,054.00					
,		16000 Electrical			FP	1	0.00		0.00		0.00					
		16000 Electrical	Able Electric		FP	м	14,300.00	4,700.00	19,000.00	0.00	19,000.00	5,350.00	465.00	4,885.00	0.00	
		16000 Electrical	Able Electric		LS	1	0.00		0.00		0.00					
							131,908.00	13,118.75	145,026.75	0.00	145,026.75	5,350.00	465.00	4,885.00	13,270.00	1,32
							131,908.00	13,118.75	145,026.75	0.00	145,026.75	5,350.00	465.00	4,885.00	13,270.00	1,32
	Stetus Descri			escription			Count									
	I In Pro	cess 3	FP C	ontract Fixe	ed Price	e	4									
	M Comm	nitled 4	PO P	urchase O			2									

#### This report lists Commitment documents.

#### Filters

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor on the Commitment. You can select a specific vendor or keep the **(any)** default.
- **Specific #** the Doc number and Description of the Commitment. You can select a specific Commitment, if you have also entered a specific Project ID or mask, or keep the **(any)** default.
- Status the Commitment document status. You can select a specific status or keep the (all valid) default.
- **Type** the Commitment's subtype. You can select a specific subtype or keep the (any) default.
- Group By the criteria by which to group the results. You can select None, Project, Vendor, Specialty or Pay Item.
- Show Status whether *v* or not the report should show the Status column.
- Show Type whether *I* or not the report should include the Type column.

#### Columns

- **Doc #** the Commitment document number.
- **Description** the Commitment's Description.
- **Vendor** the vendor on the Commitment.
- **Type** (if filter is on) the Commitment's subtype, in code. **Note**: Subtypes are described at the end of the report, with counts of how many Commitments have each subtype.

Туре	Description	Count
PO	Purchase Order	1
FP	Sub: Fixed Price	6
CP	Sub: Cost Plus	6

• **Status** (if filter is on) – the Commitment's document status, in code.

**Note**: Status codes are described at the end of the report, with counts of how many Commitments have each status.

Status	Description	Count
М	Committed	12
Р	Pending	1

- Original Amount the Commitment's Original amount.
- **Approved COs** the amount on approved CCOs related to the Commitment.
- **Revised Amount** the Original amount plus approved CCO amount.
- **Pending COs** the amount on CCOs which are pending.
- **Total w/Pending** the Revised amount plus the Pending amount.
- **Amount Requested** the amount requested on an approved Pay Request associated with the Commitment.
- **Retention Amount** the retention amount on the approved Pay Request.
- Net Paid the payment amount on the approved Pay Request.
- **Request Amount** the amount requested on a pending Pay Request.
- **Retention Amount** the retention amount on the pending Pay Request.

**Note**: all dollar amount columns are subtotaled by project and totaled at the bottom of the list.

## Commitment Summary

This report summarizes the Commitment Log, the CCO Log, the Pay Request Detail Log and the Compliance Log reports.

Commitment	t Summary							
Project	% ☑ Show Compli			VENI	DOR	(any) ✓ SHOW DE		
		ANCE				Run Report		
							Δ	me Construction
								tment Summary
GC003 - North	ern Lights Plaza		_	Value	_	Approved	Ur Payment Requests	Iversal Mechanical - IN03 Pending Payment
Bentant		-	0.1.1		Pendina		Retention	Requests
Project - Doc #	Description	Type Status	Amount	Approved Revised COs Amount		w/Pending Requested	Amount Net Paid	Request Retention Amount Amount
0004 Change Orders	Northern Lights Plaza	FP Committed	73,500.00	73,500.00		73,500.00		
Change Orden	5		_	Schedule	Impact			
Doc No	Description	Status	Source	Abbioven	Approved	Estimated Amount	Quote Amount	Amount
					Total:	0.00	0.00	0.00
Pay Requests				_		Requested	Retention	Net
Ref#	Type Status Involce D		Lien Appro Walver	oved Approver	Line #	Amount	Amount	Amount
Compliance								
Compliance Doc Description	Туре/ID	Compliance D	escription	Compliance Type	Project	Required By	Expiration Status	Last Alert
Universal Mech			escription	General Llability Insuran		nequired by	Warning: Expired	3/11/2007 W
15000 Mechani	cal Vendor Commitme	nt 0004		Executed Contract Retu	med GC-00	3	Waming: Required, r met	9/14/2010 W
15000 Mechani	cal Vendor Commitme	nt 0004		Workmans Comp Insura	ince GC-00	3	Released	

#### **Filters**

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor on the Commitment. You can select a specific vendor or keep the **(any)** default.
- Show Detail whether *I* or not the report should include Pay Request Item information line by line.
- Show Compliance —whether *I* or not the report should include Compliance information line by line

#### Columns

#### Commitments

- **Project-Doc #** the Commitment document number.
- **Description** the Commitment's Description.
- **Type** the Commitment's subtype, in code.
- Status the Commitment's document status.
- Value: Original Amount the Commitment's Original amount.
- Value: Approved COs the amount on approved CCOs related to the Commitment.
- Value: Revised Amount the Original amount plus approved CCO amount.
- Value: Pending COs the amount on CCOs which are pending.
- Value: Total w/Pending the Revised amount plus the Pending amount.
- Approved Payment Requests: Amount Requested the amount requested on an approved Pay Request associated with the Commitment.
- Approved Payment Requests: Retention Amount the retention amount on the approved Pay Request.
- Approved Payment Requests: Net Paid the payment amount on the approved Pay Request.
- **Pending Payment Requests: Request Amount** the amount requested on a pending Pay Request.
- **Pending Payment Requests: Retention Amount** the retention amount on the pending Pay Request.

#### Change Orders

- **DocNo** the CCO document number.
- **Description** the CCO title.
- Status the CCO's document status.
- **Source** the Source of the change.
- Approved Date the date on which the CCO was approved.
- Schedule Impact: Requested the number of days on the CCO's Schedule Impact: Req field.
- Schedule Impact: Approved the number of days on the CCO's Approved Days field.
- Estimate Amount the Total Estimate amount on the CCO's Detail tab.
- **Quote Amount** the Total Quote amount on the CCO's Detail tab.
- Amount the Amount on the CCO's Detail tab.

**Note**: all dollar amount columns are subtotaled by Commitment and then project and then totaled.

#### Pay Requests

- Ref # the Pay Request document number.
- **Type** the document subtype, in code.
- Status the document status of the Pay Request.
- Invoice Date the Invoice date on the Pay Request.
- Final/Pre F for final payment or PP for pre-payment.
- Lien Waivers the number of lien waivers received or expected for the Commitment.
- Approved –the date the Pay Request was approved.
- **Approver** the person who approved the Pay Request.
- Lines (if Show Detail checkbox is off) the number of lines in the Pay Request.
- Line # (if Show Detail checkbox is on) the Item number of the Pay Request line.
- **Requested Amount** the requested amount on each Pay Request Item.
- Retention Amount –the retention amount on each Pay Request Item.
- Net Pay Amount –the amount to be paid to the vendor for each Pay Request Item.

**Note**: project totals for Request Amount, Retention Amount and Net Pay Amount appear at the end of each project list.

#### Compliance

- **Doc Description** a) the vendor name and ID or b) the Commitment or Pay Request header information.
- **Type/ID** the Doc type associated with the compliance item and its ID or Doc number.
- **Compliance Description** the Description as entered on the Compliance tab.
- **Compliance Type** the description of the Compliance type.
- Project the Project ID associated with the compliance requirement.
- **Required By** the date by which the compliance requirement is/was required.
- **Expiration** the date on which the compliance requirement expires or expired.
- **Status** the status of the compliance requirement.

• Last Alert – the latest date on which a compliance alert was sent out and also whether an out-of-compliance trigger is warning (w) or blocking payment (!).

## Compliance Log

This report lists compliance tracking for active vendors.

mpliance Log					
ROJECT %	<u>&gt;</u>	VENDOR		8	<u>.</u>
OMPLIANCE TY(ALL)	$\checkmark$	DOC TYPE	(all	Doc Types)	
	COMMITMENTS				
Run Re					
					Acme Constructio
					Acme Constructio
					Compliance Lo
	Compliance trackir	ng for Active Vendors for All Proje	cts		
Doc Description	Compliance Type-Descritption	Required By	Expiration	Status	Lest Alert
Able Electric Corp - AB01				(555) 555-1212	
Vendor	General Liability Insurance			Warning: Expired	5/25/2007 W
	Workmans Comp Insurance		1/1/2014	Expired	6/7/2014 !
0001 - 16000 Electrical GC-00	3 - 16000 Electrical				
Vendor Commitment	Executed Contract Returned			Warning: Req, not met	1/4/2012 W
	Workmans Comp Insurance			Req but not Effective	6/7/2014 I
Coho Asphalt and Concrete -	V040			(555) 555-1212	
Vendor	Workmans Comp Insurance(8923354	8)	12/31/2004	Expired	4/25/2007
	General Liability Insurance(9095385-4	*		Expired	4/25/2007
0002 - 02070 Paving GC-003 -	02070 Paving				
Vendor Commitment	Workmans Comp Insurance		7/9/2006	Warning: Expired	4/25/2007 W
	Executed Contract Returned			Warning: Req, not met	1/4/2012 W
Universal Mechanical - IN03				(555) 555-1212	
Vendor	General Liability Insurance			Warning: Expired	3/11/2007 W
	003 - 15000 Mechanical			contraction and an and an and an and an and an and an	01112001
Vendor Commitment	Executed Contract Returned			Warning: Req, not met	9/14/2010 W
	Workmans Comp Insurance			Released	

#### **Filters**

- Project the Project ID. You can look up ( >>>> a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor. You can look up ( $\nearrow$ ) a specific vendor or enter a specific vendor name or leave blank for all vendors.
- **Compliance Type** the Compliance type. You can select a specific Compliance type or keep the **(ALL)** default.
- **Doc Type** You can select the CCO, Change Order, Commitment, Pay Request, or Vendor Doc type or keep the **(all Doc Types)** default for all the specified Doc types.
- **Open Commitments** whether  $\overline{\mathbf{v}}$  or not the report should only include compliance on Commitments that are open.

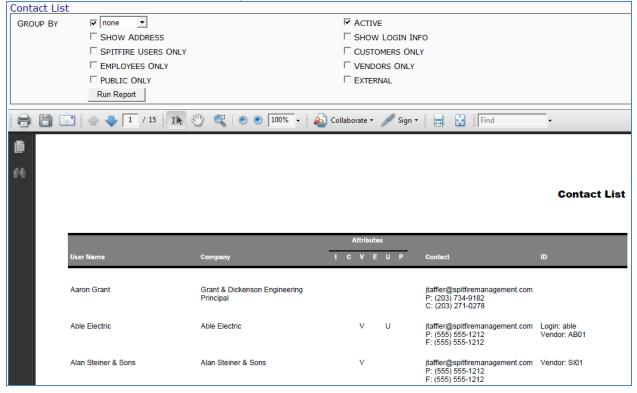
• Out of Compliance Only - whether  $\overline{\lor}$  or not the report should include only compliances requirements that are out of compliance.

#### Columns

- **Doc Description** a) the vendor name and ID and b) the compliance level c) the Commitment or Pay Request header information.
- **Compliance Type Description** the description of the Compliance type.
- **Required By** the date by which the compliance requirement is/was required.
- **Expiration** the date on which the compliance requirement expires or expired.
- **Status** a) the vendor's phone number and b) the status of the compliance requirement.
- Last Alert the latest date on which a compliance alert was sent out and also whether an out-of-compliance trigger is warning (w) or blocking payment (!).

## **Contact List**

This report lists Contacts.



Filters	
•	<b>Group By</b> – the criteria by which to group the results. You can select <b>None</b> or <b>Company</b> .
•	Active – whether the report should include active Contacts only ✓ or all Contacts.
•	<ul> <li>Show Address – whether  or not the report should include the Contact's address.</li> <li>Note: the address and ID/Login info cannot be shown at the same time.</li> </ul>
•	Show Login Info – whether <i>I</i> or not the report should include login information for the Contact. <b>Note</b> : this information does not appear if the Address is shown.
•	<b>Spitfire Users Only</b> - whether <i>rackstail</i> or not the report should only list Spitfire users (i.e., those who can log in to Spitfire).
•	<b>Customers Only</b> – whether $\overrightarrow{v}$ or not the report should only list Contacts who are designated as Customers.
•	Employees Only – whether 🔽 or not the report should only list Contacts who are designated as Employees.
•	<b>Vendors Only</b> – whether <i>v</i> or not the report should only list Contacts who are designated as Vendors.
•	<b>Public Only</b> - whether <i>I</i> or not the report should only list Contacts that are marked as public.
•	<b>External</b> – whether <i>c</i> or not the report should only list non-Spitfire users.
Columns	
•	User Name – the user name of the Contact.

- **Company** the company associated with the Contact.
- Attributes if the Contact is Integrated, a Customer, a Vendor, an Employee, a User and/or Public.
- Address (if so filtered) the Contact's mailing address.
- **Contact** the Contact's email address and phone numbers.
- **ID** the Contact's login ID and Vendor or Customer ID.

## Document Items (by Responsible Party)

This report lists document Items for a particular Doc type, grouped by project.

	ent Items	by Respo	nsible Party					
DOCUM		Commitme	nt 💌	OPEN/CLOSED	Both 💌			
DUE	I	3/17/2011	3/17/2011	RESPONSIBLE	Q			
PROJEC	т	%		Г	SHOW REMARKS			
		Run Report						
86	1 🖬 4	1	/ 2 🛛 🕅 🖑 🍕 💿	🖲 100% 🗸 🔬 Colla	aborate 🔹 🥒 Sign 🔹 📑 🔛 Find	•		
Ē								
_								
64							sf	Demo Report
Commitm								
							Commi	itment Items
	DOC#	ltem	Description	Note	Responsible	Type Di		itment Items <sub>Status</sub>
		ltem Northern Light		Note	Responsible	Type D		
				Note	Responsible Chris Demo	Type D		
	GC-003 - I	Northern Light	s Plaza	Note		Type Di		Status
	GC-003 - I 0001	Northern Light 0001	s Plaza Planning	Note	Chris Demo	Type Di		Status Open
	GC-003 - 1 0001 0001	Northern Light 0001 0002	s Plaza Planning Pull Wiring		Chris Demo Chris Demo	Type D		Status Open Open

#### Filters

- Document Type the Doc type. This filter is required before you click the Run Report button.
- **Open/Closed** the state of the document. You can select **Open**, **Closed** or **Both**.
- **Due** the date range for when the document is/was due. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Responsible** the person Responsible for the Item. You can look up (
- **Project** the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Show Remarks whether *v* or not the report should include Item remarks (with date, time and name stamp).

- **Doc #** the document number of the document containing the Item.
- Item the Item number.
- **Description** the Item Description.

- Note the Item Remark.
- **Responsible** the Contact responsible for the Item.
- **Type** the Item Type in code.
- **Due** the Item's Due date.
- **Completed** the Item's Completed date.
- Status the Item status.

## **Document Log**

This report lists Spitfire documents. When applicable, documents are grouped by project and then Doc type, preceded by those documents that are not part of any project.

	ocument Log									
DOCUMENT T DUE CLOSED CONTACT STATUS				Open/Closs Created Project Reference Company Subtype	□       	sed 2/5/2013 (all) (any)	<ul> <li>▶ 2/5/2013</li> <li>▶</li> <li>▶</li> <li>▶</li> <li>▶</li> <li>▶</li> </ul>			
Doc #	Description	From	Responsible	Date	Due	Closed Status	Schedule Impact	Docun Cost Impact	nent Days Open	Log Days Late
GC-202 - H	(C Store									
RFQ										
0001-0										
	0001 Quote from Margie and Sons	Margie and Sons	William Flint	2/4/2010	2/9/2010	2/4/2010 Awarded		\$14,425	0	-5
	0001 Quote from Margie and Sons 0002 Quote from Able Electric	Margie and Sons Able Electric	William Flint Spitfire Construction William Flint Spitfire Construction	2/4/2010 2/4/2010	2/9/2010 2/9/2010	2/4/2010 Awarded 2/4/2010 Rejected		\$14,425 \$15,950	0	-5 -5
0001-( GC-500 - N	-	-	Spitfire Construction William Flint							
0001-0	0002 Quote from Able Electric	-	Spitfire Construction William Flint				D		0	
0001-( GC-500 - ) Budget 0001	0002 Quote from Able Electric	Able Electric Chris Demo	Spitfire Construction William Flint	2/4/2010		2/4/2010 Rejected	0	\$15,950	0	-5
0001-( GC-500 - ) Budget 0001	2002 Quote from Able Electric Northwind Office Building Initial Budget	Able Electric Chris Demo	Spitfire Construction William Flint	2/4/2010		2/4/2010 Rejected	D	\$15,950	0	-5
0001-0 GC-500 - N Budget 0001 SC-100 - V	0002 Quote from Able Electric Northwind Office Building Initial Budget Veyerhauser Waferboard Plant	Able Electric Chris Demo	Spitfire Construction William Flint	2/4/2010 2/4/2013		2/4/2010 Rejected	O	\$15,950	0	-5

#### Filters

- **Document Type** the Doc type. You can select a specific Doc type or keep the **(all Doc Types)** default.
- **Open/Closed** the state of the document. You can select **Open**, **Closed** or **Both**.
- **Due** the date range for when the document is/was due. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- **Created** the date range for when the document was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Closed** the date range for when the document was closed. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Project** the Project ID. You can look up ( $\cancel{P}$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Show Notes whether 🔽 or not the report should include the notes from the document's Note tab.
- **Reference** the reference associated with the document. You can select a specific reference or keep the **(all)** default.
- **Contact** the Contact associated with the document. You can look up ( ) a specific Contact or leave blank for all Contacts.
- Company the Company associated with the document. You can look up ( >>>) a specific Company or leave blank for all Companies.
- Status the document's status. You can select a specific status if you have indicated a specific Document Type or keep the (any) default.
- Subtype the Doc type's subtype. You can select a specific subtype or keep the (any) default.
   Note: you should select a Document Type before you select the Subtype.

- **Doc #** a) the Project ID and b) the Doc type and c) the document number.
- Description a) the Description of the project and b) the document Description.
- From the From contact on the document.
- **Responsible** the Responsible contact on the document.
- **Date** the document's Date.
- **Due** the document's Due date.
- Closed the document's Closed date.
- **Status** the document's status.
- Schedule Impact the number of days on the document's Schedule Impact: Req field.
- Cost Impact the cost or expense amount on the document.
- **Days Open** the number of days the document is/was open (from date of creation to close date or today if not yet closed).

• **Days Late** – the number of days after (expressed in positive numbers) or prior to (expressed in negative numbers) the document's Due date.

#### At the end of the report you will also find

Open/Closed	Count
Open	272
Closed	36
Total No. Of Documents listed	308

- **Open/Closed** the state of the documents.
- **Count** how many documents are open or closed.

## Document Performance by Company

This report lists Vendor and Customer companies and performance information about documents on which they are source contacts.

Docume	nt Performance by Company					
PROJECT		DOCUMENT TYP				
11	ENT DATE 3/17/2011 3/17/2011	CLOSED	□ 3/17/2011	1		
COMPAN	γ <u></u>		Run Report			
88	) 🖃 👍 🔶 🔟 / 1 🛛 🚯	🥰 💿 💿 🔟 - 🔬	Collaborate 👻 🥖	🖉 Sign 🕶 😸 🔂	Find	•
66					sfDon	no Report
			_			-
				ocument Perfe		
			Avg.Days		Avg.Day	
	Company	Quantity	Open	Number Late	Closed	Still Open
	Able Electric	24	7	3	3	3
	Engineering Partners, Inc.	2				
	Lighting Ventures	1				
	Lohan Electrical	2				
<b>6</b>	Servco Engineering	2				
	Worldwide Electrical	3	8			

#### **Filters**

- **Project** the Project ID. You can look up (♠) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Document Type** the Doc type. You can select a specific Doc type or keep the **(all Doc Types)** default.

- **Document Date** the date range for the documents' Date field. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Closed** the date range for when the document was closed. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Company** the company name. You can look up (→) a specific company or leave blank for all companies.

- **Company** the Vendor or Customer company that is a source contact on the document.
- **Quantity** the number of open and closed documents associated with the company.
- Avg. Days Open the number of days, on average, that each document is or has been open.
- Number Late the number of documents past their Due date.
- Avg. Days Late: Closed the number of days, on average, that closed documents were past their Due date.
- Avg. Days Late: Still Open the number of days, on average, that open documents are past their Due date.

# Equipment Profitability\*

#### This report displays revenue and expenses associated with equipment.

Equip	ment Pro	ofitabi	lity								
Proj	ECT	EQ001	<u>,                                    </u>		Cos	TCODE	%				
					Acc	ount Cate	%				
Post	TING PERI	0%			Fro	m Date	6/17/2014	6/17/2014			
		Run F	Report								
										sfTrainin	g Report
									Equi	pment Pro	fitability
				Date	Period	Acct Cat	Vendor		Units		
	Project EQUIPMEN	Type	Description		Period Type:AUT(		Vendor	Invoice	Units	Expense	Revenue
	EQ001	TM	Project Equipment Usage	4/9/2004	200404	EQ REVCOV			2.00	350.00	
	20001		r roject Equipment obuge	4/3/2004	200101	24.12.000			2.00	000.00	
	EQ001	тм	Project Equipment Usage	4/9/2004	200404	EQ REVCOV			3.00	375.00	
	EQ001	ТМ	Project Equipment Usage	4/9/2004	200404	EQ REVCOV			3.00	825.00	
	EQ001	GL	Monthly Equipment	6/9/2004	200404	EQ DEPR				5,345.00	
			Depreciation								
	EQ001	GL	Monthly Equipment Depreciation	6/9/2004	200404	EQ DEPR				3,245.00	
			Depreciation								
	EQ001	GL	Monthly Equipment Depreciation	6/9/2004	200404	EQ DEPR				1,236.00	
	EQ001	AP	SH01 Shell Oil Company	4/5/2004	200404	EQ FOG	V090	929292		12,345.00	

- **Project** the Project ID. You can look up ( $\bigwedge$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Cost Code** the Cost Code associated with the project budget. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.
- Account Category the Account Category associated with the equipment Item. You can enter a specific Account Category or use the % mask for multiple Account Categories.
- **Posting Period** a posting period in the format *yyyymm*. You can enter a specific posting period or use the % mask for multiple posting periods.
- From Date the date range during which the revenue or expenses were recorded. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- **Project** the Project ID of the project containing the equipment Item.
- **Type** the type or source of the revenue or expense (GL = General Ledger, TM = time and material, AP = Accounts Payable, PA = Project Charge)
- **Description** a description of the revenue or expense.
- Date the date the revenue or expense was recorded.
- **Period** the fiscal period.
- Acct Cat the Account Category of the revenue or expense.
- Vendor the vendor associated with the revenue or expense.
- **Invoice** the vendor invoice number from the invoice on which the expense was recorded.
- Units the number of units of the equipment Item.
- **Expense** the expense amount for the equipment item.
- **Revenue** the revenue amount for the equipment item.

**Note**: all unit, expense and revenue columns are subtotaled by project and then totaled at the bottom of the list.

50004 70741	40.00	404.004.00	4 550 00
EQ001 TOTAL:	40.00	134,264.00	1,550.00
	3.00		825.00
	3.00		375.00
	2.00		350.00
GC003 TOTAL:	8.00	0.00	1,550.00
A001 TOTALS:	48.00	134,264.00	3,100.00
NET EQUIPMENT:			-131,164.00

# Meeting Minutes

This report displays information from the specified Meeting Minutes document(s). **Note**: many sites prefer to use an Attachment template instead of this report.

	GC003 -	Doc No	☑ 0017 🗨	
DJECT	Show Remarks	DOC NO	,	1
	M SHOW REMARKS		Run Report	
				Meeting Minut
				sfTraining Rep
Project:	GC-003 Northern Lights Office	ce Bldg		
Subject:	Weekly meeting 17			
Location:	Conference Room			
Status:	Agenda	Due Date: 1/17/2010		
Duration:	45			
-				
Notes				
	meeting. We are furnishing the pizza.			
	meeting. We are furnishing the pizza.			
Weekly				
Weekly	Bruce Willis			
Weekly Attendees	Bruce Willis Demo Employee			
Weekly	Bruce Willis			
Weekly Attendees I	Bruce Willis Demo Employee	Due	Status	
Weekly Attendees I I to	Bruce Willis Demo Employee Jon Taffler	Due	Status	
Weekly Attendees I I Old B	Bruce Willis Demo Employee Jon Taffler em Responsible	Due 8/27/2012	Status Open	
Weekly Attendees I I Old B 17	Bruce Willis Demo Employee Jon Taffler em Responsible usiness			
Weekly Attendees I I Old B 17	Bruce Willis Demo Employee Jon Taffler em Responsible usiness 7-1 Lighting Ventures	8/27/2012		
Weekly Attendees I I Old B 17	Bruce Willis Demo Employee Jon Taffler em Responsible usiness 7-1 Lighting Ventures rription : Review utility changes	8/27/2012 Completed		
Weekly Attendees I I Old B 17 Desc	Bruce Willis Demo Employee Jon Taffler em Responsible usiness 7-1 Lighting Ventures ription : Review utility changes 12/3/2003 Chris Demo	8/27/2012 Completed		

- **Project** the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Doc No** the Meeting Minutes document number. You can select a specific Doc No. or keep the **(any)** default.
- Show Remarks whether *v* or not the report should include the remarks from the document's Items.

This report list only Item information in columns. Before that, it displays the following information:

- The Project ID and description of the Project.
- The **Subject** of the Meeting Minutes document.
- The **Location** of the meeting, as entered on the document's Details tab.
- The document Status.
- The document's **Due Date**.
- The **Duration** of the meeting, as entered on the document's Details tab.
- Any notes from the **Notes** tab.
- The list of **Attendees** and whether they were present at the meeting, as entered in the document's Attendees tab.

#### Items

- Item a) the Item number and b) the Description of the Item.
- **Responsible** the party responsible for the Item.
- **Due** the Item's Due date.
- Status the status of the Item.

# **Open Routing**

This report lists documents that are in the user's Home Inbox and are still pending.

Obsi D	-	10	C				<b>`</b>
SER Chris Dem	EMPTY DUE	۵ Dates	Company		Hern (	R NEW	
		DATES			USER C		PAGE
	DE ROUTING		Project	%		2	
DOCTYPE (all Doc Ty	/pes)	•	DUE	2/5/20	13		)13
Run Rep	ort						
							<b>A A A A</b>
							Open Routing
							Open Routing sfTraining Report
			Due documents for a Specific User				sfTraining Report
Description	Doc	No Туре	Due documents for a Specific User Project	Received	Due	Viewed	•
User : Chris Demo			Project	Received			sfTraining Report
	Doc 12345	No Type Submittal	•	Received	Due 2/3/2013		sfTraining Report
User : Chris Demo			Project Project GC-003: Northern Lights	Received			sfTraining Report
User : Chris Demo FO conduit connection details	12345	Submittal	Project Project GC-003: Northern Lights Office Bidg Project GC-003: Northern Lights	Received	2/3/2013	2/3/2013	sfTraining Report Ref Company Able Electric
User : Chris Demo FO conduit connection details Forecast 0001	12345 0001	Submittal Forecast	Project Project GC-003: Northern Lights Office Bidg Project GC-003: Northern Lights Office Bidg	Received	2/3/2013 2/3/2013	2/3/2013 2/4/2013	sfTraining Report Ref Company Able Electric Spliffre Construction
User : Chris Demo FO conduit connection details Forecast 0001 Budget 0002	12345 0001 0002	Submittal Forecast Budget	Project Project GC-003: Northern Lights Office Bidg Project GC-003: Northern Lights Office Bidg Project GC-201: KC Store Project GC-500: Northwind Office	Received	2/3/2013 2/3/2013 2/4/2013	2/3/2013 2/4/2013 2/4/2013	sfTraining Report Ref Company Able Electric Spitfre Construction Spitfre Construction
User : Chris Demo FO conduit connection details Forecast 0001 Budget 0002 16000 Electrical Bids	12345 0001 0002 0001	Submittal Forecast Budget Bid Package	Project Project GC-003: Northern Lights Office Bidg Project GC-003: Northern Lights Office Bidg Project GC-201: KC Store Project GC-500: Northwind Office Building	Received	2/3/2013 2/3/2013 2/4/2013 2/4/2013	2/3/2013 2/4/2013 2/4/2013 2/4/2013	Able Electric Spitfire Construction Spitfire Construction Spitfire Construction

- User the Spitfire user with pending documents in the Inbox.
   You can look up ( ) a specific user or leave blank for all users.
- Company the Company associated with the document. You can look up ( >>>) a specific company or leave blank for all companies.
- Show Empty Due Dates whether 🗹 or not the report should include documents with no Route Due date.
- Each User on New Page whether 🗹 or not the report should group each user starting on a separate page.
- Include Routing whether or not the report should include the sequence number and "from" person of the routing.
   Note: this information does not show up if the Each User on New Page filter is also used.
- Project the Project ID. You can look up ( A) a specific project or enter a specific Project ID or use the % mask for multiple projects
- **DocType** the Doc type. You can select a specific Doc type or keep the **(all Doc Types)** default
- **Due** the Route Due date range. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates. Enter a date in the format mm/dd/yy (e.g., 09/16/11).

### TIP

The delivery notification feature for emails is set through the EMailText | RequestReadReceipt rule. For more information see the <u>Rules</u> and <u>Rule Values</u> technical white paper.

- **Description** a) the Spitfire user and b) the Description of the document.
- **Doc No.** the document's number.
- **Type** the document's Doc type.
- Project the Project ID and Description
- **Received** the date on which the document entered the user's Inbox or when an email/fax was sent (if the routee is a Via Email or Via Fax routee).
- **Due** the route Due date.
- Viewed the date on which the document was opened by the user at the current route sequence or when a Via Email routee sent a reply.
   Note: If a Via Email routee has the delivery notification feature enabled and an email client that sends a usable delivery notification, the Viewed date will indicate that notification date.
- **Ref Company** the company or vendor associated with the document.

# Pay Request Detail Log

This report lists Pay Request lines in detail.

Pay F	Request D	Detail Log										
PRO	IECT	%		VEND	OR	(any)		-				
GRO	UP BY	(none) 💌		STATU	JS	(All Valid)	-					
Сом	MITMENT	(any) 💌		APPR	OVED	3/17/2011	3/17/2011					
		COPEN LIENS	ONLY			SHOW DETA	IL					
		Run Report										
8			1 🖪 🖑 🤻 🦲	) 💿 100%	🔹 🄬 Coll	aborate 🔹 🥖 S	ign • 🖶	Find	T			
66											sfDemo F	Report
										Pav	Request Deta	il I on
										Fuy	lequest beta	in Log
										Fuy	icquest Beta	in Log
	Fo	or all dates to present	dates for All Projects for A	ll Status for al	l Vendors					Fuy		in Log
		-	-	ll Status for al	l Vendors	Final Lien			Request	Retention	Net Pay	in Eog
	Re	ef#Line#	Desc Type	ll Status for al Status	l Vendors Invoice Date		Approved	Approver	Request Amount	_		in Eog
	Re	ef#Line#	-			Final Lien /Pre Waivers				Retention	Net Pay	in Eog
	Re	ef#Line# roject : GC-003 - No	Desc Type		Invoice Date	Final Lien /Pre Waivers	Approved Able Elect			Retention	Net Pay	LUG
	Re Pro <u>00</u>	ef#Line# roject : GC-003 - No	Desc Type	Status	Invoice Date	Final Lien /Pre Waivers -			Amount	Retention Amount	Net Pay Amount	LUG
	Re Pro <u>00</u>	of # Line # roject : GC-003 - No 1001	Desc Type orthern Lights Plaza	Status	Invoice Date	Final Lien / Pre Waivers -			Amount 5,350.00	Retention Amount 465.00	Net Pay Amount 4,885.00	LUG
	Re Pro 000	ef # Line # roject : GC-003 - No 001 101-0001 0001	Desc Type orthern Lights Plaza 16000-Planning	Status 16000 Elec	Invoice Date	Final Lien /Pre Waivers -			Amount 5,350.00 2,500.00	Retention Amount 465.00 250.00	Net Pay Amount 4,885.00 2,250.00	LUG
	Re Pro 000 000	ef # Line # roject : GC-003 - No 001 001-0001 0001 0002	Desc Type orthern Lights Plaza 16000-Planning	Status 16000 Elec Approved	Invoice Date	Final Lien /Pre Waivers -	Able Elect	ric	Amount 5,350.00 2,500.00 750.00	Retention Amount 465.00 250.00 75.00	Net Pay Amount 4,885.00 2,250.00 675.00	LOG
	Re Pro 000 000	ef # Line # roject : GC-003 - No 001 001-0001 0001 0002 001-0001	Desc Type brthern Lights Plaza 16000-Planning 16000-Pull Wiring	Status 16000 Elec Approved	Invoice Date	Final Lien /Pre Walvers -	Able Elect	ric	Amount 5,350.00 2,500.00 750.00 3,250.00	Retention Amount 465.00 250.00 75.00 325.00	Net Pay Amount 4,885.00 2,250.00 675.00 2,925.00	Log

#### **Filters**

- **Project** the Project ID. You can look up ( $\triangleright$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor requesting payment. You can select a specific vendor or keep the **(any)** default.
- **Group By** the criteria by which to group the results. You can select **None** or **Vendor**.
- Status the Pay Request's document status. You can select a specific status and keep the (All Valid) default.
- Commitment the Commitment for which there is a Pay Request. You can select a specific Commitment (if you have entered a specific Project ID or mask) or keep the (any) default.
- **Approved** the date range of when the Pay Request was approved. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Open Liens Only** whether **I** or not the report should list Pay Requests with open liens only.
- Show Detail whether or not to show information about Pay Request lines.
   Note: if Show Detail is off, this report is very similar to the Pay Request Log.

- **Ref #** a) the Commitment document number and b) the Pay Request document number.
- Line # the Pay Request Item's number.
- Desc -the Description of the Commitment/Pay Request Item.
- **Type** the document subtype.
- **Status** a) the Description of the Commitment and b) the document status of the Pay Request.
- Invoice Date the Invoice date on the Pay Request.
- Final/Pre F for final payment or PP for pre-payment.
- Lien Waivers the number of lien waivers received or expected for the Commitment.
- **Approved** a) the Vendor on the Commitment and b) the date the Pay Request was approved.
- **Approver** the person who approved the Pay Request.
- Request Amount a) the requested amount on the Pay Request and b) the requested amount on each Pay Request Item.
- Retention Amount a) the retention amount on the Pay Request and b) the retention amount on each Pay Request Item.

 Net Pay Amount – a) the total amount to be paid to the vendor on the Pay Request b) the amount to be paid to the vendor for each Pay Request Item.

**Note**: project totals for Request Amount, Retention Amount and Net Pay Amount appear at the end of each project list.

# Pay Request Log

This report lists Pay Requests in summary.

Pay Request	Log %		VENDOR	✓ (any)	_			
PROJECT GROUP BY	(none) 🔻		STATUS	(All Valid)	•			
COMMITMENT	(any) 💌		APPROVED	3/17/2011 3/17/201	11			
		ILY		Run Report				
	1 / 1	IN 🖑 🤻 💿	• 100% - 🄬	Collaborate 🔹 🥖 Sign 🔹	🐳 🛃 Find	•		
<b>B</b>								
66							ef	Demo Report
								Request Log
							Payl	Kequest Log
F	Ref# Type	e Status li	Final nvoice Date / Pre	Lien Waivers Approved	Approver	Request Amount	Retention Amount N	Net Pay Amount
	Ref # Typ Project : GC-003 - Norti		Final nvoice Date / Pre	Lien Waivers Approved	Approver		Retention Amount N	Net Pay Amount
F			Final nvoice Date / Pre	Lien Waivers Approved <u>Coho Asphailt a</u>			Retention Amount N	Net Pay Amount
F	Project : GC-003 - Norti	nern Lights Plaza	Final nvoice Date / Pre 7/12/2009	Waivers Approved			Retention Amount M	Net Pay Amount 11,943.00
F	Project : GC-003 - Norti 0002	nern Lights Plaza 02070 Paving	nvoice Date / Pre	Waivers Approved		Amount	Amount M	
۲ (	Project : GC-003 - Norti 0002	nern Lights Plaza 02070 Paving	nvoice Date / Pre	Waivers Approved		Amount 13,270.00	Amount N 1,327.00	11,943.00
ז 2 2	Project : GC-003 - North 0002 0002-0001 FP	nern Lights Plaza 02070 Paving Pending	nvoice Date / Pre	Waivers Approved Coho Asphalt a - Able Electric		Amount 13,270.00	Amount N 1,327.00	11,943.00
2 2 2 2 2 2	Project : GC-003 - Norti 0002 0002-0001 FP 0001	nern Lights Plaza 02070 Paving Pending 16000 Electrical	nvoice Date / Pre 7/12/2009	Waivers         Approved           Coho Asphalt a         -           -         -           Able Electric         -           -         6/9/2006	and Concrete	Amount 13,270.00 13,270.00	Amount 1,327.00	11,943.00 11,943.00
2 2 2 2 2 2	Project : GC-003 - Norti 0002 0002-0001 FP 0001 0001-0001	hern Lights Plaza 02070 Paving Pending 16000 Electrical Approved	nvoice Date / Pre 7/12/2009 6/11/2009	Waivers         Approved           Coho Asphalt a         -           -         -           Able Electric         -           -         6/9/2006	and Concrete Jon Taffler	Amount 13,270.00 13,270.00 3,250.00	Amount 1 1,327.00 1,327.00 325.00	11,943.00 11,943.00 2,925.00
2 2 2 2 2 2	Project : GC-003 - Norti 0002 0002-0001 FP 0001 0001-0001	hern Lights Plaza 02070 Paving Pending 16000 Electrical Approved	nvoice Date / Pre 7/12/2009 6/11/2009	Waivers         Approved           Coho Asphalt a         -           -         -           Able Electric         -           -         6/9/2006	and Concrete Jon Taffler	Amount 13,270.00 13,270.00 3,250.00 2,100.00	Amount 1,327.00 1,327.00 325.00 140.00	11,943.00 11,943.00 2,925.00 1,960.00

- **Project** the Project ID. You can look up (*P*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** the vendor requesting payment. You can select a specific vendor or keep the **(any)** default.
- **Group By** the criteria by which to group the results. You can select **None** or **Vendor**.
- **Status** the Pay Request's document status. You can select a specific status or keep the **(All Valid)** default.
- Commitment the Commitment for which there is a Pay Request. You can select a specific Commitment (if you have entered a specific Project ID or mask) or keep the (any) default.
- **Approved** the date range of when the Pay Request was approved. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

• **Open Liens Only** – whether  $\overline{\mathbf{v}}$  or not the report should list Pay Requests with open liens only.

### Columns

- **Ref #** a) the Commitment document number and b) the Pay Request document number.
- **Type** the subtype of the Commitment, listed in code.
- **Status** a) the Description of the Commitment and b) the document status of the Pay Request.
- Invoice Date the Invoice date on the Pay Request.
- Final/Pre F for final payment or PP for pre-payment.
- Lien Waivers the number of lien waivers received or expected for the Commitment.
- **Approved** a) the Vendor on the Commitment and b) the date the Pay Request was approved.
- **Approver** the person who approved the Pay Request.
- Request Amount the requested amount on the Pay Request.
- **Retention Amount** the retention amount on the Pay Request.
- Net Pay Amount the amount to be paid to the vendor.

nent Detail DECT %		COMMITMEN				PAYMENT REQUES	57%	
M DATE	➡ 8/9/2011	VENDOR	(any)	-			INCLUDE RET	ENTION
📋 🖃 🛖 👆 🚺 / 2	: 1 🖑 🤻 💿 💿	100% - 🧯	🛓 Collaborate 🕶 🍃	🖉 Sign 🕶 😽	Find			
								Demo Rep
							Pay	/ment De
			Filter summar	y: Payments Applied				
Payl	< Reference Numbers -> Reg Invoice/Voucher	Check	Date	Net Amount	Retention Amount	Check Amount	Total Amount	Cleared
Able Electric - AB01	req invoice/voucher	CHECK	Dele	Amount	Amount	Amount	Amount	Cicaled
16000 Electrical - 000	1							
0001	0001-0001		07/08/2011	\$2,925.00	\$325.00		\$3,250.00	
	000834		06/09/2004	\$2,925.00				
		005006	06/30/2004	\$2,925.00		\$2,925.00		07/15/2004
		1	Checks	\$2,925.00	\$0.00			
			Balance:	\$0.00				
	000835	005000	06/09/2004		\$325.00			
		005008	06/30/2004 Checks		\$325.00 \$325.00	\$325.00		
			Balance:	\$0.00	\$325.00			
	2 Vouchers			\$2,925.00	\$325.00		\$3,250.00	
	2 10001013	2	Checks Paid	\$2,925.00	\$325.00		\$3,250.00	
		2	Balance:	\$0.00	\$0.00		\$0.00	
	0004 0000		08/08/2011	\$1,960.00	\$140.00		\$2,100.00	
0002	0001-0002			\$1,960.00				
0002	0001-0002		02/15/2007	\$1,900.00				
0002		005007	02/15/2007 06/30/2004	\$1,960.00		\$1,960.00		
0002						\$1,960.00		

# **Payment Detail**

This report lists payments to vendors.

#### Filters

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Commitment** the Commitment for which payments have been made. You can enter a specific Commitment Doc number or use the % mask for multiple Commitments.
- **Payment Request** The Payment Request against which payment has been made. You can enter a specific Pay Request Doc number or use the % mask for multiple Pay Requests.
- From Date the date range of when the Pay Request was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Vendor** the vendor receiving payment. You can select a specific vendor or keep the **(any)** default.
- Include Retention whether I or not to include retention information on the report.

- Pay Req the Pay Request's document number.
- Invoice/Voucher a) the Pay Request's Invoice number and b) the Voucher's number.
- Check the check number.
- **Date** a) the date the Pay Request was created and b) the date the voucher was created and c) the date the check was created.
- Net Amount a) the Net Amount on the Pay Request and b) the net amount on the voucher.
- **Retention Amount** the Retention amount on the Pay Request and b) the Retention amount on the voucher.
- Check Amount the amount on the check.
- Total Amount the total amount on the Pay Request.
- **Cleared** the date the check cleared.

# **Project CO Log**

#### This report lists the Change Orders for your projects. **Note:** Change Orders that are **In Process** are not included.

Char	ige Order L	og										
PRO	JECT	%		OPE	N/CLOSED	Both 💌						
DUE		☐ 3/17/2011 3/17/201	1	CRE	ATED	3/17/201	11 3/1	7/2011				
CLO	CLOSED 🗆 3/17/2011 3/17/2011 ST/				TATUS 🔽 (any) 💌							
СНА	NGE SOURCE	l (any)	•			Run Repo	ort					
							a					
H		1 / 1 Ik	🖑 🔍	100%	🗸 🛛 🍋 Col	llaborate 👻 💡	Sign 🗸	🖶 🔂	Find	•		
66												
- 10 C												mo Report
											Proj	ect CO Log
						Sched	ule Impact				Revenue	
	CO #	Description	Created	Due	Status	Req	Appr	Estimate	Quote	Cost	Amount	Profit
	GC003	: Northern Lights Plaza								575,000.00	750,000.00	175,000.00
	0001	Change Order 000	3/15/2011	3/22/2011	Approved	2		17,000.00		12,400.00	22,875.00	10,475.00
									Subtotal:	\$12,400.00	\$22,875.00	\$10,475.00
	GC003	1:				1				\$587,400.00	\$772,875.00	\$185,475.00
	Count	Status	Net Amout									
		1 Approved	10,475.00	_								
		1 Grand Total :	10,475.00	-								

### Filters

- **Project** the Project ID. You can look up (*P*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Open/Closed** the state of the Change Order. You can select **Open**, **Closed** or **Both**.
- **Due** the date range of when the Change Order is/was due. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Created** the date range of when the Change Order was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Closed** the date range of when the project was closed. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- Status the Change Order's document status. You can select a specific status or keep the (any) default.
- **Change Source** the Change Order's Source as indicated on the document's Details tab.

- **CO #** the Change Order's document number.
- **Description** the Change Order's description.
- **Created** the date on which the Change Order was created.
- **Due** the Change Order's Due date.

- Status the Change Order's document status.
- Schedule Impact: Req the number of Schedule Impact: Req days as indicated in the Change Order's Details tab.
- Schedule Impact: Appr the number of Approved days as indicated in the Change Order's Details tab.
- Estimate the total Estimate amount on the Change Order.
- **Quote** the total Quote amount on the Change Order.
- Cost a) the original EAC amount for the project and b) the expense amount on each Change Order.
   Note: The costs of all Change Orders on a project are subtotaled.
- Revenue Amount a) the original Contract value of the project and b) the revenue amount on each Change Order.
   Note: The revenue of all Change Orders on a project are subtotaled.
- Profit a) the difference between the revenue and the cost for the project and b) the difference between the Change Order revenue and the Change Order cost.
   Note: The profit of all Change Orders on a project are subtotaled.

At the end of the report you will also find

Count	Status	Net Amout
1	Approved	238.80
1	Pending	152.20
2	Grand Total :	391.00

- **Count** the number of Change Orders with a specific status.
- Status the status of the Change Orders.
- Net Amount the total profit of the Change Orders by status. A Grand Total provides the sum of all Net Amounts.

# Project CO Request Form

This report displays a Change Order Request. **Note**: many sites prefer to use an Attachment template instead of this report.

IECT	%				
	1	R	Doc No	🔽 (any) 🗨	
	Run Report				
				Change	Drder Request
				Change	Sidel Request
10260 St	W Greenburg Road		Print D	)ate	2/5/2013 10:26:05 AM
Suite 200	)		Chang	e Order Number	0001
Portland, 50345269	OR, 97223,			e Order Date ect's Project #	2/2/2013 12:00:00 AM
5034526				Change Order No.	
			Contra	ict	NO0101
Project	Northern Lights Office Bldg Northern Lights			act Date	11/5/2004 12:00:00 AM CCC
	1000 Electric Lane		Compa	any id	ccc
	Portland, OR, 10504				
The eer	tract is changed as follows				
	al electrical work to meet city's n	ew requirements			
Additiona	are electrical work to meet city an	ew requirementa.			
The orig	jinal Project Contract Amount	(Guaranteed Maximum Cost) wa	s		750,000.00
Project	Net Change by previously aut	horized Change Orders			
The Pro	ject Contract Amount (Guaran	teed Maximum Cost) prior to this	s Change Order was		750,000.00
The Pro	ject Contract Amount (Guaran	teed Maximum Cost) will be incre	eased by this Chang	e Order	2,925.00
The new	/ Project Contract Amount (Gu	iaranteed Maximum Cost) includi	ing this Change Orde	er	752,925.00
The Pro	ject Contract Time will be affe	cted by			0 days

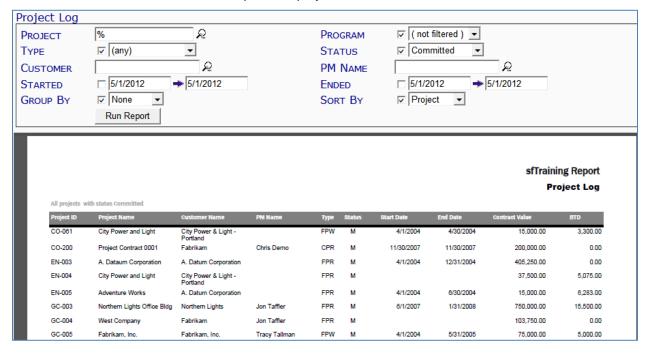
- **Project** the Project ID. You can look up ( $\swarrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Doc No** the Change Order document number. You can select a specific Doc No. or keep the **(any)** default.

This report does not list information in columns, but rather displays the following information on the Request Form.

- The address and phone numbers of your Company Division.
- The Print Date.
- The Change Order Number.
- The Change Order Date.
- The Architect's Project #.
- The Owner's Change Order No.
- The Contract number.
- The Contract Date.
- The Company ID.
- The Project Title and address.
- The Change Order's Scope.
- The original Project Contract Amount.
- Previous Project Net Changes.
- The Project Contract Amount prior to the Change Order.
- The **amount** of the Change Order.
- The Project Contract Amount after the Change Order.
- The **number of days** by which the Project Contract Time will be affected.
- The name and address of the Architect.
- The name and address of the **Contractor**.
- The name and address of the **Owner**.
- **Approved By** name and date sections for the Architect, Contractor and Owner.

# **Project Log**

This report lists projects.



- Project the Project ID. You can look up (>>>) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Program** the program by which to filter. Programs are discounted if you keep the (not filtered) default or if you uncheck the checkbox. You can also select a specific program from the drop-down or (no program) to find only programs that are not in any program.
- **Type** the document's SubType. You can select a specific SubType or keep the **(any)** default.
- **Status** the document status of the Project Setup. You can select a specific status or keep the **(any)** default.
- Customer the Customer on the Project Setup. You can look up ( ) a specific Customer or leave blank for all Customers.
- PM Name the name of the Project Manager on the project. You can look up ( ) a specific name or leave blank for all names.
- **Started** the date range of when the project was started. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- Ended the date range of when the project was (or is scheduled to be) finished. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Group By** the criteria by which to group the results. You can select **None** or **Customer**.
- Sort By the column by which to sort the results. You can select **Project**, Start Date or End Date.

- Project ID the Project ID of the project.
- Project Name the Description of the Project Setup document.
- Customer Name the name of the Customer for the project.
- **PM Name** the name of the project manager on the project.
- **Type** the project subtype, in code. Note: Subtypes are summarized at the end of the report, with counts of how many projects have each subtype.

Туре	Description	Count
		77
CPR		9
E	Equipment	1
FPR		9
GC	General Contractor	24
TMR		11

• **Status** – the document status of the Project Setup document, in code.

**Note**: Status codes are described at the end of the report, with counts of how many project have each status.

Status	Description	Count
I	In Process	13
м	Committed	4

- **Start Date** the Project Current Start Date.
- End Date the Project Current Finish Date.
- **Contract Value** the total current revenue amount for the project.
- **BTD** the total Billed To Date amount.

# Project Vendor List

		This report lists ve	endor information.				
Project Vend PROJECT MEMBER OF SORT BY	dor List %  √ (all roles)  √ Company ▼	SPECIALTY / ZIP	CSI 🔽 (any) % Run Report	•			
	🛾 🕆 🗣 🚺 / 7 🛛 🖈	🖑 🤻 🖲 🖲 🔟 🗸	🔓 Collaborate 🔹 🥒 Sign 🔹 📑 🚦	Find			
69							Demo Report t Vendor List
	Subcontractor	Address	Contact	CSI List	Rating	Compliance	Contracts (open)
	Able Electric	111 Meandering Lane Lakeridge, OR 99999	jtaffler@spitfiremanagement.com P: (555) 555-1212 F: (555) 555-1212	16000 Electrical,16200 Electrical Power	95		2 (2)
	Alan Steiner & Sons	1456 Silver Brook Place Groton, CT 06880	jtaffler@spitfiremanagement.com P: (555) 555-1212 F: (555) 555-1212		50	V	
	Alpine Riggers	6546 Yeti St Sasquatch, WA 98999	jtaffler@spitfiremanagement.com P: (555) 555-1212 F: (555) 555-1212		75	v*	
<b>%</b>	AMT Mechanical	123 Mechanical Road Armonk, NY 10504	jtaffler@spitfiremanagement.com P: (555) 555-1212 F: (555) 555-1212	15000 Mechanical	50	r	

#### Filters

- **Project** the Project ID. You can look up ( $\cancel{2}$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Speciality / CSI the CSI-related specialty associated with the vendor. You can select a specific specialty or keep the (any) default.
- Member Of the role, given to vendors, by which to limit the report. You can select a specific role or keep the (all roles) default.
- **Zip** the ZIP code of the vendor address. You can enter a specific ZIP code or use the % mask for multiple ZIP codes.
- Sort By the column by which to sort the results. You can select Company, Rating (desc), or Specialty.

- Subcontractor the vendor company.
- Address the vendor address.
- **Contact** a) the primary contact at the vendor company and b) the phone and fax number of the contact.
- **CSI List** the CSI code(s) and description(s) given to the vendor through the Contact record in Company Detail view.
- **Rating** the Rating given to the vendor on the Vendor document's Details tab.
- **Compliance** whether ( $\checkmark$ ) or not the vendor is in compliance.

• **Contracts (open)** – a) the number of Commitments for the vendor and b) how many of those Commitments are open.

# Projects Nearby\*

This report displays information about projects within a specified location or radius.

Project Log				
SINCE 1/1/2000		LOCATED NEAR Chicago		
LATITUDE 41.8781136		LONGITUDE -87.6297982		
WITHIN MILES	500	Run Report		
			sfDe	emo Report
			Projec	cts Nearby
	Projects located with	in 500 miles of Chicago since 1/1/2000		
Project	Project Customer	Project Site Address	Project Ends	Distance (mi)
GC-006 City Hall Renovation	Flemming Development	121 N La Salle St Chicago, IL 60602	11/30/2012	0.5
GC-005 Fabrikam Manufacturing Facility	Fabrikam, Inc.	3500 Lemp Avenue St. Louis, MO 63118	2/25/2013	264.9

### Filters

- Since the project start date since when to include in the report.
- Located Near a location entered as *Project ID* or anything else that Google Maps will accept as an address (e.g. *ZIP code; Airport code; city, state*, etc.) When you tab out, the Latitude and Longitude will be filled out automatically.
- Latitude an exact latitude point.
- Longitude an exact longitude point.
- Within Miles the number of miles near the indicated location to be considered the radius for this report. You can enter decimals.

- **Project** the ID and name of the project.
- Project Customer the name of the customer of the project.
- **Project Site Address** the site address of the project, as entered on the Project Setup document's Addr tab.
- Project Ends the Project's end date

# Proposed CO Request Form (Proposed Change Order)

This report displays a Proposed Change Order Request. **Note**: many sites prefer to use an Attachment template instead of this report.

roposed Cha	ange Order				
PROJECT	GC003	R	Doc No	✓ (any) ▼	
	Run Report				
				Proposed	Change Order
				Proposed	Change Order
10260.61	/ Greenburg Road			Print Date	2/5/2013 11:22:43 AM
Suite 200	V Greenburg Road			Change Order Number	0001
Portland, 50345269	OR, 97223,			Change Order Date Architect's Project #	2/5/2013 4:10:13 AM
50345269				Owner Change Order No.	
Project	Northern Lights Office Bldg	1		Contract Contract Date	NO0101 11/5/2004 12:00:00 AM
	Northern Lights	, ,		Company Id	CCC
	1000 Electric Lane Portland, OR, 10504				
The cont	ract is changed as follows				
The origi	inal Project Contract Amou	int (Guaranteed Maximum Cost)	was		750,000.00
Project N	let Change by previously a	uthorized Change Orders			
The Proj	ect Contract Amount (Gua	anteed Maximum Cost) prior to	this Change Ord	ler was	750,000.00
The Proj	ect Contract Amount (Gua	anteed Maximum Cost) will be i	ncreased by this	Change Order	
The new	Project Contract Amount (	Guaranteed Maximum Cost) inc	luding this Chan	ge Order	750,000.00
The Proj	ect Contract Time will be a	ffected by			0 days

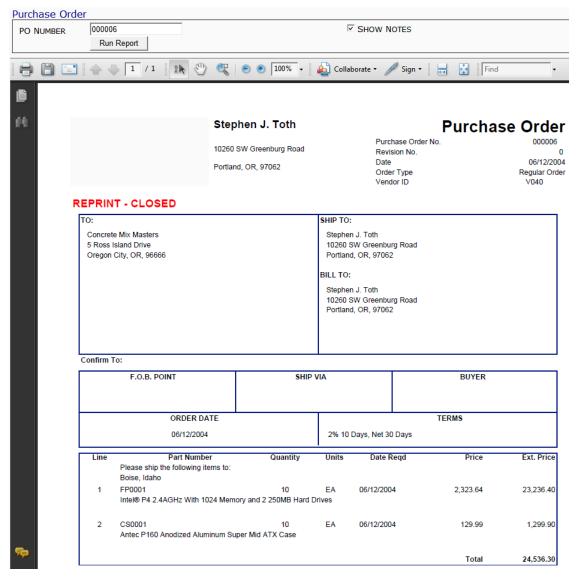
- **Project** the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Doc No** the Change Order document number. You can select a specific Doc No. or keep the **(any)** default.

This report does not list information in columns, but rather displays the following information on the Request Form.

- The address and phone numbers of your Company Division.
- The Print Date.
- The Proposed Change Order Number.
- The Proposed Change Order Date.
- The Architect's Project #.
- The Owner's Change Order No.
- The Contract number.
- The Contract Date.
- The Company ID.
- The Project Title and address.
- The Propose Change Order's **Scope**.
- The original Project Contract Amount.
- Previous Project Net Changes.
- The **Project Contract Amount prior** to the Proposed Change Order.
- The **amount** of the Proposed Change Order.
- The **Project Contract Amount after** the Proposed Change Order.
- The **number of days** by which the Project Contract Time will be affected.
- The name and address of the Architect.
- The name and address of the **Contractor**.
- The name and address of the **Owner**.
- **Approved By** name and date sections for the Architect, Contractor and Owner.

## **Purchase Order**

This report shows Purchase Orders created through Microsoft Dynamics SL.



- PO Number the number of the Purchase Order. This filter is
   required before you click the Run Report button.
- Show Notes whether  $\overline{V}$  or not the report should include the notes from the document's Note tab.

This report does not list information in columns, but rather displays the following information on the Purchase Order.

- Name and address of the Ship To person.
- Name and address of the **Bill To** person.
- Name and address of the **To** company.
- The Purchase Order No.
- The Revision No.
- The **Date** of creation.
- The Purchase Order Type.
- The Vendor ID of the vendor.
- The F.O.B. (Freight on Board) Point
- The Ship Via location.
- The Buyer.
- The Order Date.
- The **Terms** of the Purchase Order.
- The details (Line number, Part Number, Quantity, Units, Date Required, Price and Extended Price) of the Purchase Order.
- The Total amount of the Purchase Order.

# **Receipt Log**

This report lists data for Received (approved) Receipt documents.

Receipt Log										
PROJECT	%			VENDOR	🔽 (any)	•	C	OMMITMENT	✓ (any) ▼	
Түре	✓ <all:< p=""></all:<>	>	-	CREATED F	ком 🖂 8/9/2011	➡ 8/9/2011			SHOW DET	۹Ľ
	Run F	Report								
882		1 / 2	IN 🖑 🥰	• 100%         •	🔬 Collaborate 🔹 🥖	Sign 🕶 😸 🛃	Find			
				••		sign ⊕ 🖬	J. ma			
醉										sfDemo Rep
										Receipt L
		DocNo	Vendor	Line	Description		Order Qty	Received	Net	Final Receiver
			N 41 11 14	2						
			Northern Light: Able Electric		lectrical					
		0006	Able Electric							
				0001	Wall sconces		25.0000	25.000	15.0000	
					Receipt#		On	10.000		
					0004 0005		08/09/2011 08/09/2011	10.000 15.000		Aaron Grant * Chris Demo
					0000		00/03/2011	13.000		China Denio
				0002	Overhead fixtures		10.0000	10.000	0.0000	*
					Receipt#		On			
					0005		08/09/2011	10.000		* Chris Demo
		0003	Universal Me	chanical 15000 l	Aechanical - Trane C	GACD104 100				
				Ton 46	OV Chiller					
				0001	TRANE CGACD104 RECIPROCATING A		1.0000	1.000	0.0000	
					Receipt#		On			
					0001		09/18/2011	1.000		Andy Carothers

#### Filters

- **Project** the Project ID. You can look up (*P*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Vendor the Vendor on the Commitment associated with the Receipt document. You can select a specific Vendor or keep the (any) default.
- **Commitment** the Commitment associated with the Receipt. You can select a specific Commitment or keep the **(any)** default.
- **Type** the subtype of the Commitment associated with the Receipt. You can select a specific Type or keep the **<all>** default.
- **Created From** the date range for when the Receipt was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- Show Detail whether *I* or not to show information about Receipt Items.

- **DocNo** the Commitment's document number.
- **Vendor** the Vendor on the Commitment associated with the Receipt document.
- Line the Item number for an Item on the Commitment.
- **Description** a) the Description on the Commitment and b) the Description for an Item on the Commitment.
- Order Qty the number of Units for the Commitment Item.
- Received a) the total number of Units received for the Commitment Item and b) the number of Units received on each particular Receipt document.
- Net the number of Units ordered minus the number received.
- **Final** whether (\*) or not the Receipt document represents the final receipt of the Item.
- **Receiver** the Received By person on the Receipt document.

# **RFI Log**

	This rep	ort lists	data fo	or RFI	documents.
--	----------	-----------	---------	--------	------------

-I Log											
UE	6/17/2014	* 6/17/2014	Cr	REATED	6/1	7/2014		/2014			
LOSED	6/17/2014	* 6/17/2014	PF	ROJECT	%		<u></u>	2			
	□ SHOW NOTES				SHO	W PRIOR	t				
EFERENCE	(all)	~	Co	ONTACT			8	2			
OMPANY		<u> </u>	S	TATUS	(All)	~					
			S	OURCE #	%						
	Run Report										
									sfTrainir	ng Re	port
									sfTrainir	ng Re	port RFI
			R	Bata		Olarad 84		Schedule	Cost	Days	RFI
Dec # GC-003 - N	Description	From	Responsible	Date	Due	Closed St	atus	Schedule Impact		-	RFI
	Description Iorthern Lights Office BI Changed Lateral Size and Spec's		Responsible Chris Demo Spitfine Construction	Date 6/17/2014	Due 10/7/2015		atus		Cost	Days	RFI
GC-003 - N	Iorthern Lights Office Bl Changed Lateral Size and	dg	Chris Demo			O		Impact	Cost Impact	Days Open	RFI Days Late
GC-003 - N 1001.0	Iorthern Lights Office Bl Changed Lateral Size and Spec's Rerouting of FO Cable per	<b>dg</b> Able Electric Jack McSwag Spitfire Construction	Chris Demo Spitfire Construction Kim Ambercrombie	6/17/2014	10/7/2015	0  0	pen	Impact	Cost Impact	Days Open 0	RFI Days Late
GC-003 - N 1001.0 1002.0 1003.0	Iorthern Lights Office Bl Changed Lateral Size and Spec's Rerouting of FO Cable per change in Laterals	dg Able Electric Jack McSwag Spitfire Construction Chris Demo Spitfire Construction	Chris Demo Spitfire Construction Kim Ambercrombie Spitfire Construction Jason Sunderson	6/17/2014 6/17/2014	10/7/2015 6/13/2014	0  0	pen pen	Impact 2	Cost Impact	Days Open O	RFI Days Late -477 4
GC-003 - N 1001.0 1002.0	Iorthern Lights Office Bl Changed Lateral Size and Spec's Rerouting of FO Cable per change in Laterals	dg Able Electric Jack McSwag Spitfire Construction Chris Demo	Chris Demo Spitfire Construction Kim Ambercrombie Spitfire Construction Jason Sunderson	6/17/2014 6/17/2014	10/7/2015 6/13/2014	0  0	pen pen	Impact 2	Cost Impact	Days Open O	RFI Days Late -477 4

- **Due** the date range for the RFI's Due date. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Created** the date range for when the RFI was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Closed** the date range for when the RFI was closed. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Project** the Project ID. You can look up ( $\triangleright$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Show Notes** whether or not to include the notes from the RFI's Info tab.
- Show Prior whether or not to include prior revisions.
- **Reference** the reference associated with the RFI. You can select a specific reference or keep the **(all)** default.
- Contact the Responsible contact on the RFI. You can look up () a Contact or leave blank for all Contacts.

- Company the company associated either with the RFI's Source Contact (From person) or with the Responsible person. You can look up ( ) a Company or leave blank for all Companies.
- Status the RFI's document status. You can select **Open**, **Closed** or keep the **(any)** default.
- Source # the source number on the RFI. You can enter a specific number or use the % mask for multiple source numbers.

- **Doc #** the RFI's document number.
- **Description** the RFI's Description.
- **From** the From person on the RFI.
- **Responsible** the Responsible person on the RFI.
- Date the RFI's Date.
- **Due** the RFI's Due date.
- **Closed** the RFI's Closed date.
- Status the RFI's document status.
- Schedule Impact the number of days on the RFI's Schedule Impac field, as entered on the document's Details tab.
- **Cost Impact** the dollar amount on the RFI's Cost Impact field, as entered on the document's Details tab.
- **Days Open** the number of days the RFI is/was open (from date of creation to close date or today if not yet closed).
- **Days Late** the number of days after (expressed in positive numbers) or prior to (expressed in negative numbers) the document's Due date.

# **RFQ** Log

This report lists data for RFQ documents.

PROJECT SUBCONTRACT	% ▼ (any) ▼		VENDOR IS OPEN	Any -		-				
STATUS	v (any)	•	DATED	3/18/2	011 🛶 3/1	8/2011				
			GROUP BY	none	-					
	Run Report			,	_					
882	- 🕂 1 / 3	IN 🖑 🔍 💿 🖲	100% - 🎄	🕽 Collaborate 🔻	🥖 Sign 🔹	🖶 🛃 F	ind •			
									sfDem	o Report
-										•
										io Report RFQ Log
						h	npect			•
6	cNo Doc Date	Description	Status	Source	Vendor		npact Probability	Estimate		•
Do	cNo Doc Date oject : GC-003 - No		Status	Source	Vendor			Estimate		RFQ Log
Do	oject : GC-003 - No	thern Lights Plaza		Source Architect Change	Vendor Able Electric			Estimate		RFQ Log



- Vendor the Vendor on the RFQ. You can select a specific vendor or keep the (any) default.
- Subcontract the Commitment associated with the RFQ. You can select a specific Commitment (if you have entered a specific Project ID or mask) or keep the (any) default.
- **Is Open** whether the report should include open or closed RFQ documents. You can select **Any**, **Yes** or **No**.
- **Status** the RFQ's document status. You can select a specific status or keep the **(any)** default.
- **Dated** the date range for the RFQ documents' Date field. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- Include Children whether *v* or not the report should include child projects of whatever projects match the Project filter
- **Group By** the criteria by which to group the results. You can select **None** or **Vendor**.

- **DocNo** the RFQ's document number.
- **Doc Date-Description** a combination of the RFQ's Doc Date and Description.
- **Status** the RFQ's document status.
- **Source** the Source for the RFQ, as entered on the document's Details tab.

- Vendor the Vendor on the RFQ.
- **Impact: Days** the number of days the RFQ will impact the schedule, as entered on the document's Details tab.
- Impact: Probability the percentage probability the RFQ will impact the project, as entered on the document's %Prob field on the Document Header.
- Estimate the RFQ's Estimate amount.
- **Risk** The RFQ's Amount times Probability.
- Amount the RFQ's Total Amount.

## Site Conditions Log

This report lists the weather conditions recorded for project sites.

Site Co PROJE	Conditions ECT	S log % Run Report		DATE	□ 7/1/20	111 🔷 🛹 7/3	31/2011					
8			' IN 🖑	🥰 💿 🖲 🔟 -	Collaborate 🕶	🖉 Sign 🕶		Find		•		
i 1					Reading	s - All						f <b>Demo Report</b> Conditions Log
		Record	led	Description	Visibility (mi) Te	mperature (F) F	eels Like De	w Point	Humidity	Wind Direction	Wind (mph)	Barometer
		1 : Templates onne, OR (97760) as	observed at Re	dmond (awos), OR by weath	ner.gov							
		6/10/2006	2:56 PM	Partly Cloudy	10	60	59	42	52 %	Variab	7	30.00
		10/23/2006	8:56 AM	Fair	10	31	26	27	85 %	South	5	30.00
		3/15/2007	8:56 AM	Fair	10	21	21	16	81 %	Southe	3	30.00

### Filters

- Project the Project ID. You can look up (AR) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Date** the date range indicating when the weather condition data was gathered. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- **Recorded** the date and time that the weather conditions were recorded.
- **Description** a short description of the weather.
- Visibility (mi) the visibility in miles.
- **Temperature** the temperature at the recorded time.
- Feels Like what the temperature felt like due to wind chill or humidity.

- **Dew Point** the dew point.
- **Humidity** the humidity percentage.
- Wind Direction the direction of the wind, or variable.
- Wind (mph) the speed of the wind as miles per hour.
- Barometer the barometric reading.

# Submittal Item Log

This report lists all Submittal Items created through Submittal, Submittal Package or Submittal Item Register documents.

Submittal Item	i Log										
PROJECT	%		ITEM STATE	All Open	•						
ITEM STATUS	🔽 (any) 💌		COST CODE	%							
SPEC	%		ITEM TYPE		•						
LEAD DAYS			RESPONSIBLE		R						
	INCLUDE NOTES			□ INCLUDE H	ISTORY						
SORT BY	Item Number 💌			Run Report							
	🔶 🕹 🚺 / 2 🛛 🚺	🖑 🥰	🖲 🖲 🔟 100% 🗸 🔬 🕻	Collaborate 👻 🥖	Sign 🔹 😝 💱	Fin	d	-			
()											
60											sfDemo Report
								Subr	nitter	Owne	Submittal Item Lo
Item #	Source Spec/Para:Rev	cc	Description	Туре	Responsible	Stat	Due	Req	Rcv		Revw Stat Doc Stat Doc
GC003 - N	Northern Lights Plaza	_									
00001	33000/B:0	03000	Cast in place concrete	Samples	Coho Asphalt and Concrete	0	4/30/2011		9/04	11/16	9/05
00002	78000/F:1	16000	Entrance Lights	Mockup	Able Electric Corp	0	5/01/2011		9/04	11/16	9/05
00003	78000/A:1	16000	Basement Subpanel	Shop Drawings	Able Electric Corp	0	5/02/2011			11/16	9/05
00004	33000/J:2	03000	Cast in place concrete	Product Data	Coho Asphalt and Concrete	0	4/23/2011			11/16	9/05

- Project the Project ID. You can look up (AR) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Item State the state of the Submittal Item according to the Requested, Received, Submitted, and Reviewed dates. You can select a state (including Approved and All Open and Approved) or keep the All Open default.
- Item Status the status of the Submittal Item. You can select a specific status or keep the (any) default.
- Cost Code the Cost Code associated with the Submittal Item. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.
- **Spec** the specification number associated with the Submittal Item. You can enter a specific Spec or use the % mask for multiple Specs.

- **Item Type** the Item Type of the Submittal Item. You can select a specific Item Type or leave blank for all Item Types.
- Lead Days the number of days looking forward by which to limit the report. You can enter any number from 0 to 32768.
   Note: numbers less than zero effectively turn off the filter.
- **Responsible** the person Responsible for the Submittal Item. You can look up ( $\swarrow$ ) a person or leave this blank for all persons.
- **Include Notes** whether or not to include the Notes associated with the Submittal Item.
- Include History whether **I** or not to include the previous versions of Items with multiple versions (such as those with a status of Revise/Resubmit.)
- Sort By the column by which to sort the results. You can select Item Number, Source Number or Spec + Para.

- Item # the Submittal Item number.
- Source the Submittal Item's Source.
- **Spec/Para:Rev** the Submittal Item's Spec, Para and Rev information.
- **CC** the Cost Code associated with the Submittal Item.
- **Description** the Description of the Submittal Item.
- **Type** the Item Type of the Submittal Item.
- **Responsible** the company Responsible for the Submittal Item.
- **Stat** the status of the Submittal Item, shown in code.
- Due the Submittal Item's Due date.
- Submitter: Req the Submittal Item's Requested date.
- Submitter: Rcv the Submittal Item's Received date.
- **Owner Rep: Subm** the Submittal Item's Submitted date.
- Owner Rep: Revw the Submittal Item's Reviewed date.
- **Submittal: Stat** the document status of the Submittal that includes the Submittal Item.
- **Submittal: Doc** the Document number of the Submittal that includes the Submittal Item.
- **Package: Stat** the document status of the Submittal Package that includes the Submittal Item.
- **Package: Doc** the document status of the Submittal Package that includes the Submittal Item.

# **Transmittal Log**

This report lists transmittal cover sheets that have been created on document Route Detail tabs.

g							
%			DOC TYPE	(all Doc Types)	•		
Sent 👻			ROUTEE	(all contacts)	•		
8/5/2011			CREATED	8/5/2011	11		
Run Report							
4 🕹 🚺	/1 🗈 🖑	<b>Q</b>	• • 100% •	🔓 Collaborate 🔹 🥖 Sign 🔹 🗮	Find	•	
							-
							sfTraining Report
							Transmittal Log
003 (Northern Li	ights Office Bldg)						
nt	Created	No.	To - Contact	To - Company	<b>D</b> ос Туре	Doc No	Description
/2011 9:05:08 1	5/7/2005 9:03:49 AM	4	Northern Lights	Northern Lights	Certificates and Approval	1003	Liability Insurance Certificate to Owner
/2011 9:09:34 I	5/7/2005 9:08:09 AM	5	Northern Lights	Northern Lights	Certificates and Approval	1004	Worker's Comp Insurance Certificate to Owner
	% Sent ■ 8/5/2011 Run Report 003 (Northern Li st v/2011 9:05:08	%6           Sent ▼           8/5/2011           Run Report           1 / 1	%       Sent       8/5/2011       8/5/2011       8/5/2011       Run Report       1     1       Image: Construct of the second sec	%     DOC TYPE       Sent     ▼       Ø/5/2011     ●       Ø/5/2011     ●       Run Report     CREATED         1     /     1       Image: Created     No.       To - Contact       /2011 9:05:08     5/7/2005 9:03:49       AM     AM       /2011 9:09:34     5/7/2005 9:03:09         Northern Lights	%       Doc TYPE       (all Doc Types)         Sent        ROUTEE       (all contacts)         8/5/2011       8/5/2011       8/5/2011       8/5/2011         Run Report       CREATED       8/5/2011       8/5/2011         Image: Sent with the sent sent sent sent sent sent sent sen	%     DOC TYPE     (all Doc Types)       Sent     ROUTEE     (all contacts)       Ø/5/2011     Ø/5/2011     Ø/5/2011       Run Report     Ø/5/2011     Ø/5/2011	%       DOC TYPE       (all Doc Types)         Sent          Ø/5/2011       Ø/5/2011         Ø/5/2011       Ø/5/2011         Run Report          CREATED       Ø/5/2011         Ø/5/2011       Ø/5/2011



- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Doc Type** the document type. You can select a specific Doc type or keep the **(all Doc Types)** default.
- Sent/Unsent whether the transmittal cover sheet has been sent (routed). You can select Sent, Unsent or Both.
- **Routee** the person receiving the transmittal cover sheet. You can select a specific routee or keep the **(all contacts)** default.
- Sent the date range indicating when the transmittal cover sheet was sent. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Created** the date range indicating when the transmittal cover sheet was created. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- Sent the date on which the transmittal cover sheet was sent.
- **Created** the date on which the transmittal cover sheet was created.
- No. the number assigned to the transmittal cover sheet.
- **To Contact** the person for whom the transmittal cover sheet was created.
- **To Company** the company for which the transmittal cover sheet was created.
- **Doc Type** the Doc type of the document on which the transmittal cover sheet was created.

- **Doc No** the Doc number of the document on which the transmittal cover sheet was created.
- **Description** the Description of the document on which the transmittal cover sheet was created.

# Vendor List

This report lists vendors that match filtered criteria.

/endor List									
LOCATION %		C	SI	%			]		
RATING 0				🗹 Fo	r Proj	ECTS			
RANGE 11/1/2010	) 📃 🗰 5/1/2012		JSED	0					
LARGEST JOB 0		N	ENDOR TYPE	( any	)	•			
SOURCE ( any )	•	F	EGION	( any	) 🔽				
UNION (any)	▼	N	INORITY	( any	)	-			
SORT BY Company	· ·			Run	Report				
							ef	Training D	Conort
							sf	fTraining F Vendo	
	-	s with contract data since i	Nov 1, 2010 and sorted	by Company				Vendo	
Subcontractor	Project Vendors Contact Email / Phone	swith contract data since Subtype Source	Nov 1, 2010 and sorted Vendor ID		in Compl.	< Total	Sf Contrac #	Vendo ⊲s-→	
Subcontractor Able Electric Lakeridge, OR 99999	Contact	Subtype			in		- Contra	Vendo ⊲s->	r List % cco
Able Electric	Contact Email / Phone jsunderson@ableelec.com	Subtype Source	Vendor ID AB01	Rating	in	Total	— Contrac #	Vendo cts> Largest \$18,275	r List % cco
Able Electric Lakeridge, OR 99999 Active Electric	Contact Email / Phone jsunderson@ableelec.com	Subtype Source	Vendor ID AB01 16000 Electrical	Rating 95	in Compi.	Total \$34,575	– Contrac # 3	Vendo cts.→ Largest \$16,275 \$0	vr List % cco
Able Electric Lakeridge, OR 99999 Active Electric Marysville, WA 98271 Adventure Works Asbestos Remov	Contact Email / Phone jsunderson@ableelec.com P: (666) 656-1212 awar@ssresources.com	Subtype Source Subcontractor	Vendor ID AB01 16000 Electrical 16000 Electrical	Rating 95 0	in Compi.	Total \$34,575 \$0	Contrac # 3 0	Vendo tis> Largest \$18.275 \$0 \$0 \$0	or List % cco 0 %

- Location the vendor's city or state. You can enter a specific state code or ZIP code (e.g., NY or 96666) or use the mask after the city (e.g., Portland%).
- **CSI** the CSI code associated with the vendor, through its Contact Details. You can enter a specific code or use the % mask for multiple codes.
- **Rating** the rating associated with the vendor, as established in the Vendor document. You can enter an exact number to set the minimum rating desired.
- For Projects whether *I* or not to include only vendors that are Project Purchasing.
- **Range** the date range indicating when Commitments for the vendor were created. You can unselect the checkbox for all dates or enter specific start and end dates.
- **Used** the number of times the vendor has already been used. You can enter an exact number to set the minimum times used desired.

- Largest Job the largest dollar amount for a job done by the vendor. You can enter an exact number to set the minimum amount desired.
- Vendor Type the vendor's subtype, as established on the Vendor document. You can select a vendor type from the drop-down or keep the (any) default.
- **Source** the vendor source, from the Source code set. You can select a source from the drop-down or keep the **(any)** default.
- **Region** the region associated with the vendor's Company Detail. You can select a region from the drop-down or keep the **(any)** default.
- **Union** the union associated with the vendor's Company Detail. You can select a union from the drop-down or keep the **(any)** default.
- **Minority** the minority classification associated with the vendor's Company Detail. You can select a minority from the drop-down or keep the **(any)** default.
- Sort By how to sort the report. You can select Company, Contract Value or CCO %.

- **Subcontractor** the name of the vendor and the vendor's City, State, ZIP code.
- **Contact Email/Phone** the vendor's email address and telephone number.
- **Subtype Source** a) the vendor's subtype and b) the vendor's source.
- Vendor ID a) the Vendor's ID and b) the CSI code and short description associated with the vendor.
- Rating the vendor's rating.
- In Compl. if the vendor is in compliance ( $\checkmark$ ).
- **Contracts: Total** the total dollar amount of the vendor's contracts.
- Contracts: # the number of contracts with the vendor.
- **Contracts: Largest** the largest dollar amount contract with the vendor.
- %CCO the percentage of current Commitment values attributable to CCOs for the vendor.

# **Executive Reports**

# **FAC** Review

This report lists approved Forecasts that no longer match the posted forecast in Microsoft Dynamics SL.

FAC R						_				
PROJE	CT % Run Rep	ort		CATEGORY	Expense	•				
8	₿ ⊒   4 ↓	1 / 1	🖞 🥰   💿 🖲	100% -	Collaborate 🕶	ß	Sign 🕶 😝 🚺	Find	Ŧ	
<u>ال</u>										
66										
										FAC Review
	_				Last Forecast					FAC Review
	Project	– Posted	Amount	Net Difference	Manual Lines		As of	Period	Other Changes	Pending Forecasts
	CO-200	\$10,476.50	\$10,110.50	(\$366.00)	3		7/24/2007 10:55:15 AM 7/24/2007 10:56:59 AM	200707	CO: 6/18/2007 12:00:00 AM BR: 3/5/2007 11:13:09 AM	
	GC-006	\$375,897.65	\$390,580.65	\$14,683.00	3	S: F:	2/26/2008 3:36:07 PM 2/26/2008 3:42:12 PM	200802	CO: 12/14/2007 11:51:45 AM BR: 3/22/2007 1:37:17 PM	
	GC-010	\$3,138.84	\$3,135.04	<b>(</b> \$3.80)		S: F:	6/4/2007 7:04:17 PM 6/4/2007 7:07:56 PM	200705	CO: 3/26/2007 12:00:00 AM BR: 3/19/2007 4:14:40 PM	
	GC-101	\$1,550.26	\$1,338.26	(\$212.00)		S: F:	5/3/2007 1:21:25 PM 5/3/2007 1:22:15 PM	200704	CO: BR: 3/16/2007 11:58:41 AM	
	Issue		Count							
	Posting Mismatche	es	0							
	Forecast Mismatch		4							
	Manual Forecast L		6							
	Late Change Order Late Budget Revisi		0							
	Late Dauget Revisi		v							

### **Filters**

- **Project** the Project ID. You can look up (*A*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Category** the type of Forecast information for the report. You can select Expense or Revenue.

- **Project** the Project for which there is a forecast.
- **Posted** the current posted amount.
- Amount the amount on the last forecast.
- Net Difference the last forecast amount minus the posted amount.
- **Manual Lines** the number of lines manually added to the forecast.
- As Of the date and time at which the most recent forecast was started (S) and approved (F).

- Period the fiscal period to which the forecast was posted.
- Other Changes the date and time on which changes to the forecast were made by Change Orders (CO) and Budget Revisions (BR).
- Pending Forecasts the number of pending forecasts.

At the end of the report, you will also find:

Issue	Count
Posting Mismatches	0
Forecast Mismatches	4
Manual Forecast Lines	6
Late Change Orders	0
Late Budget Revisions	0

- **Issue** the issue being tracked.
- **Count** the number of incidents for the issue.

# Forecast Summary

This report lists forecast summaries.

cast Sum	%		L E V		Full Detail	-			Run Re	port		
DJECT	70		LEVE	:L /		<u> </u>			- Kull Ke	port		
	] 🛧 🐥 📑	1 / 8 🛛 🚯 🖑 🥰 💿	100%	🔹 🄬 Colla	aborate 👻 🥖 Sig	in 🖌 🔛	Find	•				
										sfTraini	sfTraining Rep	
										Forecast \$	Summ	
	CostCode	Description	UOM	Contract	EAC Amount	EAC Units	Actual	Committed	FTC	FAC	Variance	
	GC-003											
	00-000	Northern Lights Office Bldg				As	of 6/10/2006 2:	41:18 PM		Approved 8/19/20	11 1:15:0	
	00000		LS									
		Project		\$750,000.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$	
		REVENUE		\$750,000.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$	
			LS									
	01000	General Conditions		\$0.00	\$16,250.00	0.00	\$11,618.20	\$11,618.20	(\$6,986.40)	\$16,250.00		
		_LABOR		\$0.00	\$7,500.00	0.00	\$0.00	\$0.00	\$7,500.00	\$7,500.00		
		_MTRL PERM		\$0.00	\$0.00	0.00	\$11,618.20	\$11,618.20	(\$23,236.40)	\$0.00		
		_OTHER		\$0.00	\$8,750.00	0.00	\$0.00	\$0.00	\$8,750.00	\$8,750.00	;	
			LS									
	01700	Contract Closeout		\$0.00	\$0.00	0.00	\$215.00	\$0.00	(\$215.00)	\$0.00		
		_MTRL PERM		\$0.00	\$0.00	0.00	\$215.00	\$0.00	(\$215.00)	\$0.00		
			LS									
	02000	Site Work		\$0.00	\$73,875.00	0.00	\$12,693.70	\$425.00	\$60,756.30	\$73,875.00		
		_EQ RENTAL		\$0.00	\$5,125.00	0.00	\$1,550.00	\$0.00	\$3,575.00	\$5,125.00		
		_LABOR		\$0.00	\$18,750.00	0.00	\$1,550.00	\$0.00	\$18,750.00	\$18,750.00		
		MTRL EXPEND		\$0.00	\$0.00	0.00	\$101.00	\$0.00	(\$101.00)	\$0.00		
		MTRL PERM		\$0.00	\$50,000.00	0.00	\$10,726.00	\$425.00	\$38,849.00	\$50,000.00	:	
		_OTHER		\$0.00	\$0.00	0.00	\$16.72	\$0.00	(\$16.72)	\$0.00	:	
		EQ PARTS		\$0.00	\$0.00	0.00	\$299.98	\$0.00	(\$299.98)	\$0.00	\$	
		REVENUE		\$0.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$	
	02050		LS									
	02050	Demolition		\$0.00	\$0.00	0.00	\$875.00	\$0.00	(\$875.00)	\$0.00	:	
		_LABOR		\$0.00	\$0.00	0.00	\$875.00	\$0.00	(\$875.00)	\$0.00	s	
		GC-202		\$750,000.00	\$575,000.00	0.00	\$32,726.65	\$34,667.95		\$575,000.00	\$	

### **Filters**

- **Project** the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- Level the level of detail for the report. You can select Full Detail, Cost Code Summary or Project Summary.

- **Cost Code** a) the Project ID and b) the Cost Code for the forecast line.
- **Description** a) the description of the project and b) the description of the Cost Code and c) the description of the Account Category.
- UOM unit of measure, in code.
- **Contract** the project's contract amount.
- EAC Amount the project's budgeted estimate at completion amount.
- EAC Units the project budget's estimate at completion units.
- Actual the project budget's actual amount.
- **Committed** the project budget's committed amount (according to Microsoft Dynamics for integrated sites).
- FTC the project budget's forecast to completion amount.
- FAC the project budget's forecast at completion amount.
- Variance the FAC minus EAC amount

## Production Analysis

This report lists cost codes and information related to Production Units.

JECT	%	R		Cos	T CODE	%						Run Re	port					
								Production Anni	ysis es af								raining Re tion Anal	
				Budget						Åe	tunis to Date				ETC		FAC	i.
WBS Code		Dollars	MH	Units	UOM	Unit Cost	MH/Unit	Cost	MH	Units	Unit Cost	Cost Fector	MH/Unit	Pred Fector	Dollars/Unit	MH/Unit	Dollars/Unit	MH/Uoi
305355: Pil	ing - Stl. H	\$97,450.03		157,660	LB	\$0.62	0.0	\$95,349.32		0					\$0.01			
	mo 60"& 8" Pipes	\$196,051.06	7,166.0	6,002	LF	\$32.66	12	\$54,605.65	7,618.0	3,900	\$14,00	\$0.43	2.0	1.64	\$67.29		same	530
508041: NL System	P - Remove Fender	\$1,210.91	120.0	1	LS	\$1,210.91	120.0	\$1,259.37	53.0	1	\$1,259.37	\$1.04	53.0	0.44	(\$484.60)	#Error		
508042: Re Plate	move Railing & Toe	\$3,824.65	240.0	800	LS	\$4.78	0.3	\$0.00	0.0	0							same	sar
508045 Ab	atement & Assist	\$139,213.00	2,720.0	160	EA	\$870.08	17.0	\$110,726.30	613.5	160	\$692.04	\$0.80	3.8	0.23	\$284,867.00	#Error		
520060: Ph	2 - Drive Steel H-Piles	\$131,066.34	1,700.0	19	EA	\$6,898.23	89.5	\$28,367.33	797.0	19	\$1,493.02	\$0.22	41,9	0.47	\$1,026,990.1	#Error		
520080: Dri	ive Steel Pipe Piles	\$34,010.00	2,400.0	26	EA	\$1,308.08	92.3	\$14,741.84	555.0	7	\$2,267.98	\$1.73	85.4	0.92	\$988.11	94.6		
520081; G3	& 4 - Weld Test Piles	\$11,336.00	800.0	26	EA	\$436.00	30.8	\$0.00	0.0	0								
526020' Tin	nber Work	\$202,709.30	12,740.0	1	LS	\$202,709.30	12,740.0	\$201,742.84	7,766.5	1	\$205,860.04	\$1.02	7,925.0	0.62	\$48,323.00	248,675.0		
526021: G3	& 4 - Set Precast	\$28,342.00	2,000.0	2	EA	\$14,171.00	1,000.0	\$1,473.58	58.0	0					\$13,434.21	971.0		
526121: G3 Walkways &	i & 4 - Install & Rails	\$8,502.00	600.0	2	LS	\$4,251.00	300.0	\$0.00	0.0	0						**		
526160: G3	& 4 - Tying Rebar	\$9,866.00	700.0	2	EA	\$4,933.00	350.0	\$0.00	0.0	0						**		
536021: G3	& 4 - Pour Concrete	\$7,700.00	560.0	450	CY	\$17.11	1.2	\$0.00	0.0	0						**		
544040: EN	ICO Wheaton	\$151,673.56	300.0	1	LS	\$151,673.56	300.0	\$0.00	0.7	0	\$0.00	\$0.00	2.0	0.01		**		
544042: NL Shapes	P - Install Steel	\$98,976.27	6,242.0	1	LS	\$98,976.27	6,242.0	\$29,686.30	1,106.9	1	\$49,477.17	\$0.50	1,844.8	0.30	\$173,224.93	12,837.8	same	sar

## Filters

- **Project** the Project ID. You can look up (*P*) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Cost Code** the Cost Code associated with the Production Unit. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.

- WBS Code the Cost Code number and description.
- Budget:Dollars the EAC amount
- **Budget: MH** the sum of the EAC Man Hours for the Cost Code
- Budget: Units the total EAC Units for the Cost Code
- Budget: UOM the Cost Code line's Unit of Measure
- Budget: Unit Cost the Budget amount divided by the Budget Units
- **Budget: MH/Unit** the Budget Man Hours divided by the Budget Units
- Actuals to Date: Cost Actual costs accumulated on this Cost Code for all Account Categories
- Actuals to Date: MH Actual Man Hours accumulated on this Cost Code for all labor-type Account Categories

- Actuals to Date: Units the Units Produced (from Production Unit documents or posted Forecasts)
- Actuals to Date: Unit Cost Actual to Date Costs divided by Actual to Date Units
- Actuals to Date: Cost Factor Actuals to Date Unit Cost divided by Budget Unit Cost
- Actuals to Date: MH Units Actual to Date Man Hours divided by Actual to Date Units
- Actuals to Date: Prod Factor Actual to Date MH Units divided by Budget MH/Unit
- ETC: Dollars/Unit Estimate To Complete (EAC) amount divided by Units.
- ETC: MH/Unit EAC Man Hours divided by Units
- FAC: Dollars/Unit FAC (Forecast to Completion) amount divided by Units. Says same if the FAC equals the EAC
- FAC: MH/Unit the FAC Man Hours divided by Units.

# Project Actual Costs

This report displays the actual costs posted on a project. It is available for sites integrated with Microsoft Dynamics SL only.

ject Actual	COSTS													
OJECT	%		Q				PERIO	D	□ 2/1	12/2013	-	2/12/20	13	
		DR DETAIL							R B	JRDEN [	DETAIL	,		
												-		
	Run R	eport												
												Breice	t Actua	Cast
					roject CC	002 - Fede	ral Office	Building				Projec	Actua	COSL
				-	Toject GC-	002 - Feat	arai Onice	building						
												erage		
WBS ID		Posted	Prior C Units		Current i Units	Period Arnount	Pl		Per D Units		We		Mo	
WBS ID WIP CNSTRCT		Posteu	Units	Amount	Units	Amount	Units	Amount	UNIS	Amount	Units	Amount	Units	Amount
	PETCULE	4/4/2004			0.00	105.00								
	PETCULE	4/4/2004			0.00	420.00								
	PETCULE	4/5/2004			0.00	105.00								
	PETCULE	4/5/2004			0.00	420.00								
	Ref 000895	4/25/2004			0.00	27.50		V040 Coho Vi	ineyard					
WIP CN	ISTRCT	Totals	0.000	0.00	0.000	1,077.50	0.000	1,077.50	0.000	0.03	0.000	0.19	0.000	0.
010	00 - General C	onditions Totals		\$0.00		\$20.236.84		\$20.236.84		0.52		3.62		15.3
01700 - Contract Cl	oseout							120,200,01						
MTRL PERM														
F	Ref 000894	4/25/2004			0.00	215.00		V060 Humong	gous Insuran	ice				
_MTRL	PERM	Totals	0.000	0.00	0.000	215.00	0.000	215.00	0.000	0.01	0.000	0.04	0.000	0.
01	700 - Contract	t Closeout Totals		\$0.00		\$215.00		\$215.00		0.01		0.04		0.
02050 - Demolition														
LABOR														
-	DWILSON	4/9/2004			0.00	17.50		Timesheet Wo	ork Crew					
	DWILSON	4/9/2004			0.00	70.00		Timesheet Wo						
	DSLEPPY	4/9/2004			0.00	70.00		Timesheet We						
E	DSLEPPY	4/9/2004			0.00	17.50		Timesheet We	ork Crew					
E	DWILSON	4/9/2004			8.00	280.00		Timesheet We	ork Crew					
E	DWILSON	4/9/2004			2.00	70.00		Timesheet We	ork Crew					
	DSLEPPY	4/9/2004			8.00	280.00		Timesheet We						
	DSLEPPY	4/9/2004			2.00	70.00		Timesheet We						
	DWILSON	4/14/2004			0.00	40.00		Weekly Labor						
	DWILSON	4/14/2004			0.00	80.00		Weekly Labor						
	DWILSON	4/14/2004			8.00	280.00		Weekly Labor						
	DWILSON BOR	4/14/2004 Totals	0.000	0.00	4.00	140.00	32.000	Weekly Labor 1,415.00	0.001	0.04	0.006	0.25	0.025	1.
		rotats_	0.000	0.00	02.000	1,410.00	32.000	1,410.00	0.001	0.04	0.000	0.20	0.020	1.

## **Filters**

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Period** the date range indicating the period during which actual costs should be included. You can select the checkbox to enter specific start and end dates.
- Labor Detail whether *v* or not to include detail rows for Account Categories designated as Labor class.

• **Burden Detail** – whether *I* or not to include detail rows for Account Categories designated as Labor Burden class.

## .Columns

- **WBS** a)the Cost Code number and description and b) the Account Category
- **ID** reference information from the accounting transaction.
- **Posted** the date the actual cost was posted.
- **Prior Costs: Units** the prior units for the Account Category.
- **Prior Costs: Amount** the prior amount for the Account Category.
- **Current Period: Units** the units in the current period for the Account Category
- **Current Period: Amount** the amount in the current period for the Account Category
- **PTD: Units** the units in the Project To Date for the Account Category.
- **PTD: Amount** the amounts in the Project To Date for the Account Category.
- Average Per Day: Units the average of units per day (within the date range) for the Account Category.
- Average Per Day: Amount the average of amounts per day (within the date range) for the Account Category.
- Average Week: Units the average of units per week (within the date range) for the Account Category.
- Average Week: Amount the average of amounts per week (within the date range) for the Account Category.
- Average Month: Units the average of units per month (within the date range) for the Account Category.
- Average Month: Amount the average of amounts per month (within the date range) for the Account Category.

**Note**: The Account Categories and Cost Codes are subtotaled and all numeric columns are totaled at the end of the report.

# Project Cost By Account

t Cost By Account Ca	regory		0/					
ст 🧖		COST COE	E % ▼ (ALL)					
MER			INISH D [ 8/17/2011	# 8/17/2011	_			
Run Report	1							
	/ 7   (m))	🖑 🔍 💿 🖲 100% 🗸						
🗒 🖃 🛖 🕹 5	/7 🚺	🖑 🤻 💿 🖲 100% -	실 Collaborate 👻 🥖	Sign 🕶 拱 🛃	Find	*		
						_		
						Pi	roject Cost B	y Accol
Account Category	Cost Code	Name	EAC	Actual	Committed	Uncommitted	FAC	Varie
Project : GC-004	Wester	n Plaza, SPC Consulting					Contract Value:	\$103,750
_MTRL PERM	01025	Accounting	\$500.00	\$5,890.00	\$0.00	(\$5,390.00)	\$0.00	\$500
	01050	Field Engineering	\$2,000.00	\$119.90	\$0.00	\$1,880.10	\$0.00	\$2,000
	01210	Preconstruction Meetings	\$2,000.00	\$2,323.64	\$0.00	(\$323.64)	\$0.00	\$2,000
_MTRL PERM		Totals :	\$5,500.00	\$10,657.18	\$0.00	(\$5,157.18)	\$0.00	\$5,500
GC-004			\$39,000.00	\$13,897.18	\$0.00	\$25,102.82	\$33,500.00	\$5,50
Project : GC-005	5 Fabrika	m Manufacturing Facility,	Fabrikam, Inc.				Contract Value:	\$75,00
WIP CNSTRCT	00000	Project	\$0.00	(\$2,681.67)	\$0.00	\$2,681.67	\$0.00	\$
	01000	General Conditions	\$0.00	\$1,077.50	\$0.00	(\$1,077.50)	\$0.00	\$
	02000	Site Work	\$0.00	\$1,050.00	\$0.00	(\$1,050.00)	\$0.00	\$0
	03000	Concrete	\$0.00	\$525.00	\$0.00	(\$525.00)	\$0.00	\$0
	14000	Scaffolding	\$0.00	\$380.63	\$0.00	(\$380.63)	\$0.00	\$(
WIP CNSTRCT	14000	Totals :		\$351.46				
	01000	General Conditions	<b>\$0.00</b> \$5,000.00	\$351.46	\$0.00 \$0.00	(\$351.46) \$3,950.00	\$0.00 \$5,000.00	\$0 \$0
_LADUR								
	02000	Site Work	\$7,500.00	\$1,050.00	\$0.00	\$6,450.00	\$7,500.00	\$0
	02000							

#### This report lists project amounts by Account Category.

#### Filters

- **Project** the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Cost Code** the Cost Code associated with the Account Category. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.
- Customer the Customer associated with the project.
- **Division** your company division. You can select a specific division or (ALL) for all divisions or (Auto) for your own division.
- **Project Date** the date range indicating the project Start Date. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Project Finish Date** the date range indicating the project Finish Date. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.

- PM Name the name of the Project Manager on the project.
   You can look up ( ) a specific name or leave blank for all names.
- Summary Only whether  $\overline{\mathbf{V}}$  or not the report should exclude Cost Code information.

#### Columns

- Account Category the Account Category by project.
- **Cost Code** the Cost Codes associated with the Account Category.
- Name the description of the Cost Code.
- **EAC** the Estimate at Completion amount for the Account Category or Account Category/Cost Code combination.
- Actual the Actual amount for the Account Category or Account Category/Cost Code combination.
- **Committed** the Committed amount for the Account Category or Account Category/Cost Code combination.
- **Uncommitted** the uncommitted amount for the Account Category or Account Category/Cost Code combination.
- **FAC** the Forecast at Completion amount for the Account Category or Account Category/Cost Code combination.
- Variance the EAC minus the FAC amount.

# **Project WIP**

This report details the value of work-in-progress as of a specific fiscal period.

iject WIP KOJECT		S CLOSED T Report	HIS FY			TO PERIO		01012 USE F	AC			c	OMPANY DIVE		• w Custo	MER		CONTR		Stipulated Su WITH ACTUA		•	
300	•	4 / 75	Ik	0		93.5%	🔬 Colle	borate •	🖉 Sign •	8	Find		*										
											WIF Repo	rt for 12/21	150 for projects m	storing 2_115									
													WE.						Corners YTD	2.4.8		Pres FT	
				first.	Cornel					Antoni		peder	Hergin					100					
21-11-007	Property	Aurea -	Ð	Dete:	480.762	EAC 445,150	Harge 35.612	8.0 %	Earned 577	Certra 500	0.11 %	0.0%	29	E2M	FTG 444.650	Eurility 400.233	Ning M	125 Er	Cents 500		Rav	Carts	_
21-11-007		and the second	100079		149.552	139.769		7.0%	12.278	11,476	8.21 %		602		128,293	137.274	12	22	11.476	-11.476			
21-11-007		A	100079	6/11	50,787	46.170		10.0 %			0.00 %	0.0 %			46.170	50,787							
21-11-008		and the	100117		182,341	169,765		8.0 %	6,967	6.458	1.00 %		506		143,301	176.374	i i i	47	6,458	-6,458			
21-11-008		Statute - Chinese	100117	4/11	240.459	136.731	11.738	24.5	41.571	30.205	20.00 %	0.0%	3.286		90.443	106.898	41.	71	38.285	-38,285			
21-11-008	42	Station of Street	100117	4/11	160.772	140.063	11.909		26.913	24,925	16.74 %	0.0%	1.900		123,938	133.059	25.	112	24,925	-24,925			
		Sec. 1	100117		69.669	64.245		0.4%	258	238	0.37 %		20		64.007	59,412		238		-238			
			200221		62,003	Dista.			32.114	29,743									238				
21-11-008	2000	and the second second		1.22								0.0%	2.374		204.212	220.554	32	154	29.745	-29.740			
21-11-008	2000	the part	100117	4/11	252.668	233.952	10.716	5.0 %	32.114	20.740	12.71 10												
1 - CERERON	64	Contraction of the local division of the loc	100117		252.668	233.952 21.761		10.0 %	3.299	3.000	13.79 %		299		10.761	20.630	3.	299	3,000	-3,000			

Filters	
	<ul> <li>Project – the Project ID. You can look up ( &gt;&gt;&gt;) a specific project or enter a specific Project ID or use the % mask for multiple projects.</li> </ul>
	• <b>To Period</b> – The fiscal period, in the format <i>yyyymm</i> , indicating the end of the range for the report. The start of the project is used as the start of the range.
	<ul> <li>Company Division – the company division. You can select a specific division code, (ALL) for all divisions or (Auto) for your own division.</li> </ul>
	<ul> <li>Project Type – the Project Setup's subtype. You can select a specific subtype or keep the (any) default.</li> </ul>
	<ul> <li>Jobs Close This FY – whether or not the report should include only jobs closed in the current fiscal year.</li> </ul>
	<ul> <li>Use FAC – whether</li></ul>
	<ul> <li>Show Customer – whether  or not the report should include the Customer name under each Project name.</li> </ul>
	• With Actuals This FY – whether <i>I</i> or not the report should include actuals in the current fiscal year.
Columns	
	• <b>Project ID</b> – the Project ID.
	• <b>Project Name</b> – the description of the project (and, if the filter is on, the name of the Customer).
	• <b>PM ID</b> – the ID code of the Project Manager.
	• Start Date – the month/year indicating the project's Start date.
	<ul> <li>Current Contract – the contract value of the job, including all approved Change Orders, up to and including the indicated fiscal period.</li> </ul>
	<ul> <li>EAC – the project's Estimate At Completion amount for the indicated fiscal period.</li> </ul>
	• Margin – the Contract amount minus the EAC amount.
	• % - the Margin divided by EAC.
	• <b>Rev Earned</b> – the contract value times percent spent.
	<ul> <li>Actual Costs – the Actual expenses up to and including the indicated fiscal period.</li> </ul>

- Calc'ed % Compl the Actual Costs / EAC.
- **Decl'ed % Compl** the Declared % Completed.
- Margin Earned revenue earned minus actual costs.
- **Billed** the amount billed up to and including the indicated fiscal period

- **ETC** the project's Estimate To Complete amount as of the indicated fiscal period.
- Backlog contract value minus revenue earned.
- Over Billings Billed minus revenue earned, if greater than zero.
- Under Billings Revenue earned minus billed, if greater than zero.
- **Current YTD: Actual Rev** the indicated fiscal year-to-date actual revenue amount.
- Current YTD: Actual Costs the indicated fiscal year-to-date actual cost amount.
- **Current YTD: Margin** the YTD: Actual Rev amount minus the YTD Actual Costs amount.
- **Prior FY: Actual Rev** the prior fiscal year actual revenue amount.
- **Prior FY: Actual Costs** the prior fiscal year actual cost amount.
- **Prior FY: Margin** the prior Actual Rev amount minus the prior Actual Costs amount.

**Note**: amount columns are subtotaled by Contact Type and Company Division and then totaled at the bottom of the list.

At the end of the report you will also find

ID	PM Name	Count
100033	Chris Demo	22
100014	Ben Johs	139

- ID the Project Manager's ID.
- **PM Name** the name of the Project Manager
- **Count** the number of projects for the Project Manager.

# User Routing Metrics

## This report lists Contacts to whom document have been routed.

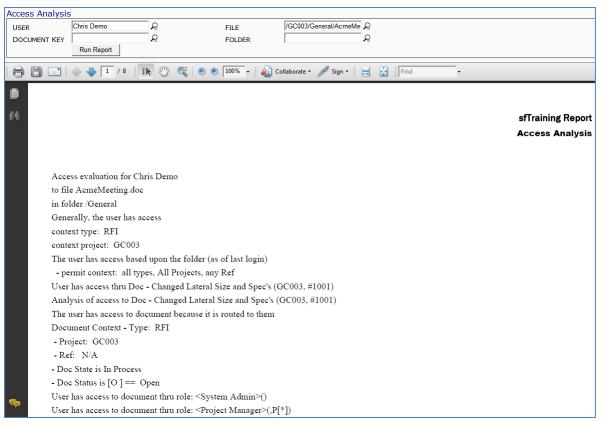
User Routing	Metrics								
USER		R		PROJECT	%				
CREATED	8/25/2011	* 8/25/2011		ROLE	(all roles)	)		•	
DOC TYPE		-			Run Repor	t			
88	-	/ 2 🛛 🗈 🖑	¢ 0	🖲 🚺 100% 🗸 🛛 🔬 Co	ollaborate 👻 🥖	🖉 Sign 👻	<b>→</b>	Find	•
_									
69								sfDe	mo Report
							Use	r Routing	Metrics
				For all documents.					
Name		Web	Route	Default		<- Doci	iments ->		Avg Days
		User	Via	Responsibility	Created	Open	Pending	Overdue	To Act
Aaron G			E-Mail	Engineering Consultant		0	1		
Jay Ada	ms ployee JADAMS	Yes	Web	Project Staff	0	0	1		
	phalt and Concrete		Web	Paving Sub	0	0	0		0
			(conditional)	r uning oub		0	0		Ū.
	dor V040	No.	14/-1-	Design of Management	200	070	447	45	
Chris De	emo ployee DEMO	Yes	Web	Project Manager	299	276	117	15	-1
Lin	NOYEE DEMO								
	Filters	:							
	T Inter 6						( 🔿		
		•		- the Contact. blank for all C		n look u	р (🎮) а	specific (	Contact or
		•		ect – the Project ter a specific P cts.					
			All da	<b>ted</b> – the date ates are used υ	intil you c	lick on	the chec	kbox, at <sup>•</sup>	
			you c	can select or er	nter speci	fic start	and end	l dates.	
				<ul> <li>a role pertain or keep the (all</li> </ul>			ict. You	can sele	ct a specifi
			Cont	<b>Type</b> – the doo act. You can s types.					
	Columns								
	oorannie		Nom	• a) the Cont	oot'o non	oo ond l	a) tha Ca	ntoot'o t	
		•	Nam	e – a) the Cont	actshan	ne and i	b) the CC	mact's t	ype and ID
		•		User – whether re user who ca				e Contac	t is a
			Rout	e Via – the Co	ntact's de	efault R	oute Via	setting.	
								-	neibility oc
		·		ult Responsib blished in the C					nsionity as
			03101						

- **Created** the number of documents created by the Contact.
- **Open** the number of documents created by the Contact that are still open.
- **Pending** the number of documents that are pending a route action by the Contact.
- **Overdue** the number of pending documents that are past their due date.
- Avg Days to Act the average number of days it takes the Contact to take action on the document's route.

# **The Admin Reports**

# Access Analysis

This report indicates if and why a user has access to a particular file, document or folder.



## **Filters**

- User the Spitfire user. This filter is required before you click the Run Report button. One of the remaining filters is also required. You can look up (2) a specific user or leave blank for all users.
- File the file being analyzed. You can look up (∞) a specific file or leave blank for all files.
- **Document Key** the GUID for a document. You can paste the GUID for the document in this field.
- Folder the folder being analyzed. You can look up (∞) a specific folder or leave blank for all folders.

## Columns

This report does not use columns. Instead, sentences explain why the user has or does not have access to the particular file, document or folder followed by a list of roles capabilities assigned to the user.

#### Examples

Access evaluation for Elizabeth Keyser-Rubble

in folder /HardCopyOutput

The folder does not provide access (as of last login)

Access evaluation for Chris Demo
to <mark>file AcmeMeeting.doc</mark>
in folder /General
Generally, the user has access
context type: RFI
context project: GC003
The user has access based upon the folder (as of last login)
<ul> <li>permit context: all types, All Projects, any Ref</li> </ul>
User has access thru Doc - Changed Lateral Size and Spec's (GC003, #1001)
Analysis of access to Doc - Changed Lateral Size and Spec's (GC003, #1001)
The user has access to document because it is routed to them
Document Context - Type: RFI
- Project: GC003
- Ref: N/A
- Doc State is In Process
- Doc Status is [O] = Open
User has access to document thru role: <system admin="">()</system>
User has access to document thru role: < Project Manager>(,P[*])
User has access to document thru role: <superintendent>()</superintendent>
User has access to document thru role: <superintendent>()</superintendent>
Additional access within this context:
Role <everyone>(): CSTM  Internal Staff=R U</everyone>
Role <everyone>(): DOC   Can change document status (if collaborator)=R</everyone>
Role <everyone>(): DOC   Document Routees=I</everyone>

# **Archive List**

This report shows how many files are deemed archive-able within a given range of months.

GE(MONTHS)	13		IF UPDATED	3		
ax KB	8096			Run Report		
					sfTra	aining Report
					31110	anning respond
						Archive List
_	File Name	Project	Folder	Rev #	Cataloged	KB
			Folder /Filled Templates	Rev#		
_		GC003		Rev# 1 1	Cataloged	КВ
_	Submittal FO conduit connection details.doc	GC003 GC003	/Filled Templates	Rev# 1 1	Cataloged 8/5/2003	KB 0.0
_	Submittal FO conduit connection details.doc RFI Changed Lateral Size and Spec's.doc	GC003 GC003 GC003	/Filled Templates /Filled Templates	Rev# 1 1 1	Cataloged 8/5/2003 9/6/2003	КВ 0.0 0.0

## Filters

- Age (Months) the minimum age in months for a file without revisions to be included in the report. You can enter a specific number or keep the default of 13.
- If Updated the minimum age in months for a file with revisions to be included in the report. You can enter a specific number or keep the default of **3**.
- **Max KB** the maximum total size of the files in the report. You can enter a specific size or keep the default of **8096**.

- File Name the name of the file.
- **Project** the Project ID.
- Folder the folder that contains the file.
- **Rev #** the file revision.
- **Cataloged** the date this file version was cataloged.
- **KB** the file size.

# Capability Matrix

This report indicates which role capabilities and permissions have been assigned to which roles.

Capability Matrix	(											
	🔉 🕂 🚺 /	' 14 🛛 IN 🖑 🔍 🛛	100%	🗸 🔬 Colla	borate 🕶 🥒 S	Sign 👻 🔚	Find					
				: "er	<i></i>							
14 E												
					С	apability	Matrix					
			Accounting	Architect	Engineering Consultant	Everyone	GC	Owner	Plan Room Visitor	Project Assistant	Project Manager	Project Staff
	CSTM	Customizable 1			oonsultuit	:	:		VISICO	Assistant	manaBor	
		Customizable 2										
		Customizable 3										
		Internal Staff									R	R
	DOC	Attach File From Template										
		Can add attachments to a closed document									RS	
		Can be designated as another users proxy								R		
		Can change document status (if collaborator)								R	R	R
		Can control exclusive access										
		Can Delete an entire document completely										
		Can edit workflow			<u>.</u>				<u>.</u>			
		Can modify Pay Control										
		Can move items among folders									Allow	Allow
		Can override Retention										
		Can Resend Fax/Email									Allow	
		Can see all items that have the same company										
		Can set document status to Approved									R	
		Can set document status to committed / pending										
<b>F</b>		Change Order linking										
01		Checkout files or see status									RIUDS	RU

## Filters

This report does not use filters.

## Columns

- Untitled the capability module (CSTM, DOC, LIST etc.).
- *Untitled* the role capability.

The remaining columns are the roles. If a role includes the capability, the cell will indicate the permissions for that capability.

# Configuration Changes

This report lists your customization, code and rule changes between version snapshots taken on two dates.

Configuratior	n Changes.rd												
START DATE	2011-12-29	13:44:50 - E	Before V4.2 Upgra	de(4.1.4379.282	27) 🔹								
FINAL DATE	2012-03-27	14:54:08 - 0	Completed publish	of 4.2.4469.231	43 💌								
	CUSTOMIZ	ATION											
	CODES												
	Rules												
	Run Report	1											
													H
Version		not Note			Snapshot Taken			pshot (		nged	Until		
4.1.4379.28227		.2 Upgrade			Dec 29, 2011 13:44			29, 2011					
4.2.4469.23143	Complete	d publish of 4.2.44	469.23143		Mar 27, 2012 14:54		Mar	27, 2012	14:54				
PART CUSTOMIZ	ATION												1
ltemName	Capability	Container/ Filter	Label	Lookup	Format	Limit	Sen	Rq Flag	RO	Vis	Act	Distr	
Doc Detail - Stand		T HUET	Laber	Lookup	TOTIKA	Linix	JEY	T tag	NO	113	nux	Dist	
Subtype			Contract Type					0	F	т	т	т	
Subtype			Туре					0	F	т	т	т	
Doc Item Detail - 9	Standard for RFQ												- 1
OriginalQuote								0	F	т	т	т	
OriginalQuote								0	F	F	т	т	
Project Exec Sum	mary for (No Doc Type)(	No Doc Type)											
ShowCOL		0						0	F	F	т	т	
ShowCOL		0						0	F	F	F	т	

## Filters

- **Start Date** the earlier of the two configuration dates to compare. You must select a date/time from the drop-down.
- **Final Date** the later of the two configuration dates to compare. You must select a date/time from the drop-down.
- **Customization** whether  $\overrightarrow{v}$  or not the report should include customization changes.
- Code whether  $\overline{\lor}$  or not the report should include code changes.
- **Rules** whether **v** or not the report should include rule changes.

- Version the software build number.
- **Snapshot Note** a note referencing when the snapshot was taken.
- Snapshot Taken the date and time the snapshot was taken.
- **Snapshot Unchanged Until** the date until the snapshot changed or the current date.

The rows that follow are color-coded to show the information from the start snapshot and then the final snapshot.

**Note**: if the Customization filter was checked, the following information appears. This information corresponds to the Customization tool on the System Admin Dashboard.

#### Part Customization

- **ItemName** a) customization part name with Doc type and b) customization item name.
- Capability the capability for the customized field.
- **Container/Filter** *internal use only.*
- Label the label for the customized field.
- **Lookup** the name of the (advanced) lookup for the customized field.
- Format the (advanced) format of the customized field.
- Limit the number of characters allowed for the customized field.
- Seq the (advanced) sequence of a customized tab field.
- **Rq Flag** the (advanced) Rq Flag for the customized field.
- **RO** whether (T) or not (F) the customized field is read-only.
- Vis whether (T) or not (F) the customized field is visible.
- Act whether (T) or not (F) the customized field is active.
- **Distr** whether (T) or not (F) the customization is distributed by Spitfire.

#### **Customization Item By Part**

- **Display Item** a) the customization part and b) the customization item.
- **Type** the type of customization item: data entry (T), grid column (C), option (P) or filter (F).
- DataMember the table (alias) name of the customization item.
- DataField the fieldname for the customization item.
- DefaultLabel the default label for the customization field.
- **Default Visible** whether the customization field is visible (True) or not (False) by default.

**Note**: if the Codes filter was checked, the following information appears. This information corresponds to the Code Maintenance tool on the System Admin Dashboard.

#### Code Set

- SetName the code set name.
- **SetType** the code set's type.
- **CodeFlag** the code set's flag.
- AllowEdit whether (True) or not (False) the code set row can be edited.
- AllowAdd whether (True) or not (False) the code set allows new codes to be added.
- AllowNextSet whether (True) or not (False) the code set allows for a next set.
- CodeSize the size of the code set.

#### **Doc Type-Specific Code Sets**

- **Code** a) the code set and Doc type and b) the actual code.
- **Description** the description of the code.
- NextSet the name of a next code set.
- Flag whether (True) or not (False) this code has a flag.
- Active whether (True) or not (False) the code is active.

#### Code List

- **Code** a) the name of the code set and b) the codes within the code set.
- **Description** the description of the code.
- Active whether (True) or not (False) the code is active.
- **OnAdd** whether (True) or not (False) the code is commonly used for new data.

**Note**: if the Rules filter was checked, the following information appears. This information corresponds to the Rules Maintenance tool on the System Admin Dashboard.

#### **Rule Item**

- **Test Value** a) the name of the rule group and b) the name of the rule.
- Filter Value the filter value for the rule.
- **Result Value** the result value for the rule.
- Is SF whether (True) or not (False) the rule is a Spitfire default.

## Doc Type Code Sets

This report lists codes as established in the Code Maintenance tool for your Doc types.

	e Code Sets NT TYPE ☑ (all Do	oc Types)	SET NAME 🔽 (ALL)	•	
	Run Re	port			
88	) 🖃 🔶 🖊	1 / 24 IN 🖑 🥰 💿 (	🖲 🚺 🔹 🥼 Collaborate 👻 🥒 Sign	👻 🖶 🔂 Find	•
ľ					
66					offensionin of Dourset
					sfTraining Report
					Doc Type Code Sets
	Code	Description	Next Set	Code Flag	Active
	Common Do	cStatus			
	0	Open		False	True
	С	Closed		False	True
	Shared by 37	Document Types		Number of Codes	= 2
	Common Ad	drType			
	F	From/Author		True	True
	т	То		True	True
	Shared by 50	Document Types		Number of Codes	= 2
	Common Att	rТуре			
	IN	Instruction	InstructionType	False	True
	Shared by 57	Document Types		Number of Codes	= 1
	Common Iter	nType			
				False	True
		Document Types		Number of Codes	= 1
	Common Iter	nStatus			
	0	Open		False	True
	С	Closed		False	True
	Shared by 50	Document Types		Number of Codes	= 2

## **Filters**

- **Document Type** the Doc type. You can select a specific Doc type or keep the default **(all Doc Types)** for all Doc types.
- Set Name the name of the Doc type-relevant code set.

- Code a) the name of the code set prefixed by either the word "Common" or the Doc type and b) the codes in the code set.
   Note: each code grouping is followed by the number of Doc types that share the code set and the number of codes in the set.
- **Description** the description of each code.
- Next Set the name of another code set selected by the code.
- **Code Flag** whether (True) or not (False) there is a flag set for the code.
- Active whether (True) or not (False) the code is active.

# Email Alerts by Address

This report lists email routees whose emails have not been sent (due to no email address or email being bounced back, etc.)

		1	SHOW EXAMPLE		□ SHOW DOCUME
	💭 •   🧼 🧅 🚺 / 20   🦲	9 🖲 100% +   🚔 🔛   [m	•		
				Email Aler	s By Address
	lame	Company	Address	Duept	res. Period
- 22	andy's Floor Service	Vandy's Floor Service	contract contract the set state	2	
	.8H Airoo	L&H Airco	The share and search the	2	
	/ C Metal, Inc.	M C Metal, Inc.	station decorriger and		
	lausch Granite Products	Rausch Granite Products	the second second second		
	Tampa Bay Electric	Tampa Bay Electric			6 6/22 - 7/20
	ohnsco	Johnsco	Conditional and		
	Carman-hoff & Associates	Carman-hoff & Associates	Contraction (Base Contraction (Base)		
	landi-Lift, Inc.	Handi-Lift, Inc.	and the other states of the		
	Sulf Coast South Enterprises	Gulf Coast South Enterprises	a series of the second second second		
	Sip & Company	Sip & Company	Co. Concernation for the second		
	Penhall Company	Perihali Company	Contraction of the second s		
	Fine Protection Company	Fire Protection Company	Contraction Contraction	1	
	emberg Electric Company, Inc.	Lemberg Electric Company, Inc.	and the second second second		0 6/6 - 8/24
- 23	Dity Electric Company	City Electric Company	and the grant of the last		
B	Buckhead Cleaning And Janitorial Services	Buckhead Cleaning And Janitorial Services	town of the state of the state		6/27 - 7/27
	Innie Mechanical	Annie Mechanical	Canadi Company and		7/7 - 8/12
N N	Aast & Brunk Inc.	Mast & Brunk Inc.	and the second second second		5/18 - 7/28
3	ludson Contracting	Judson Contracting	where the suggest we do not a set	3	7/19 - 8/23
	Aeadowlands Fire Protect	Meadowlands Fire Protect	contraction and provide the local	1	6/15 - 8/23
	White Plains Glass & Mirror	White Plains Glass & Mirror	Michigan and	1	8/15 - 8/22
	Animas Plumbing And Heating	Animas Plumbing And Heating	cost comparison professional		6/28 - 8/22
3	and Contracting, LLC	Jind Contracting, LLC	Contract strangements of the		5/19 - 8/16
all Alerts	by Address				
ERT TO	Run Report	•	SHOW EXAMPLE		SHOW DOCUM
	\$-	9 🖲 100% • 🔚 🚼 🛛 🕅	•		
	iame	Company	Address	Email Aler	ts By Address
N	lasco Stone & Tile	Nasco Stone & Tile	ANNAGCATOONIARLE.COM		5/19 - 6/21
	When Document	Title		500	Alerted
		(24100499, #10)			ute Kulp
	6/21 Materials (	(24110111, #14)			
	6/34 Materials /				ule Kulp
	6/21 Materials ( 8/2 Invitation to	o Bid - Tile Work (28110128, #0004)			ulie Kulp ulie Kulp ny Malacara
¢				3 Line	ute Kulp
0	8/2 Invitation to	o Bid - Tile Work (28110128, #0004)	11.4731 get128404.40.138	3 Line	ule Kulp ey Malacara
~	8/2 Invitation to courtesy Janitorial Service Inc. When Document 8/22 01070 Clev	to Bid - Tile Work (28110128, #0004) Courtesy Janitorial Service Inc.	11.0710.000	3 Line 5 d	elle Kulip ey Malacara 1 8/22 - 8/22 Martini de Kulip
~	8/2 Invitation to Jourtesy Janitorial Service Inc. Withen Document 8/22 01070 Cite 8/22 General Lit	o Bid - Tile Work (28110128, #0004) Courtesy Janitorial Service Inc.	11.8 <sup>-1</sup> 11 (pr. <sup>1</sup> .1910), pr. 118	3 Linin 5 d 3	ale Kug ny Malacana 1 8/22 - 8/22 Alerted
	8/2 Invitation to Jourtesy Janitorial Service Inc. Withen Document 8/22 01070 Cite 8/22 General Lit	to Bid - Tile Work (28110128, #0004) Courtesy Janitorial Service Inc.		3 Lann 5 3 3 3	en Malacana en Malacana 1 8/22 - 8/22 Mented Spätre
	8/2 Invitation to     tourtesy Janitonial Service Inc.     10/2/2 On070 Cleic     8/22 On070 Cleic     8/22 Workmans     countryside Glass & Mirror, Inc     When Document	to Bid - Tile Work (28110128, #0004) Courtesy Janitorial Service Inc. Time anup (24110246, #16) lability (24110246, #090680) Countryside Glass & Mirror, Inc Time	DCHOLLCONG*HM*HAY1785.COM	3 Lann 5 3 3 3	de Kulp ny Malactara Notice Marted Spätre Spätre
	B/2 Invitation to     Courtesy Janitorial Service Inc. <u>When Document     B/22 01070 Clec     B/22 01070 Clec     B/22 Workmans     countryside Glass &amp; Mirror, Inc     <u>When Document     6/22 Invitation to </u> </u>	to Bid - Tile Wrok (28110128, #0004) Courtesy Janitonial Service Inc. Time anup (24110246, #16) Iability (24110246, #090689) 8 Comp (24110246, #090690) Countryside Glass & Mirror, Inc Time to Bid - Glass & Glazing (27110303, #0003	DCHOLLCONG*HM*HAY1785.COM	3 Line 5 4 3 3 3	Ann Kung Malakaran 1 8/22 - 8/22 Attented Spattre Spattre 1 7/1 - 7/1 Alerted
	8/2 Invitation to     tourtesy Janitorial Service Inc.     When Document     8/22 General Li     8/22 General Li     8/22 Workmans     tourntyside Glass & Mirror, Inc     When Document     6/22 Invitation to     7/1 08/400 Glas	to Bid - Tile Work (28110128, #0004) Courtesy Janitorial Service Inc. Time anup (24110246, #16) lability (24110246, #090680) Countryside Glass & Mirror, Inc Time	DCHOLLCONG*HM*HAY1785.COM	3 Land 5 3 3 3 3 3 5 4 5 4 5 4	Alex Kulge avy Matacara 1 0/22 - 8/22 Alexted Spattre Spattre 1 7/1 - 7/1 Alexted

#### **Filters**

- Alert To the name of the person receiving alerts about undeliverable email. You can select a specific person or keep the (any) default for all persons.
- Show Example whether I or not to include messages returned by the server, such as

dsmdc-mail-imta-03 rejected your message to the following e-mail addresses:
VANDYFLOORING2@MCHSI.COM< mailto.VANDYFLOORING2@MCHSI.COM>
dsmdc-mail-inta-03 gave this error: < vandyflooring2@mchsi.com> recipient rejected - POL008
The e-mail address you entered couldn't be found. Please check the recipient's e-mail address and try to resend the message. If the problem continues, please contact your helpdesk.
Diagnostic information for administrators:
Generating server; bigfish, com
VANDYFLOORING2@MCHSI.COM dsmdc-mail-imta-03 #550 5.1.1 < vandyflooring2@mchsi.com> recipient rejected - POL008 ##
Original message headers:
Received, from mai/T1-eh1-R.bigfah.com (26.52.181.170) by CH1EHSOBE013 bigfah.com (10.43.70.63) with Microsoft SMTP Server Id U41.295-27.1002-244 2014-2543-244900

Show Documents – whether M or not to include information about the documents being routed.
 Note: because this filter can slow down the creation of the report, we suggest that you use the Alert To filter along with Show Documents.

## Columns

- Name the name of the via email routee.
- **Company** the company associated with the via email routee.
- Address the email address to which the document was routed.
- **Exceptions** the number of times an email did not reach the via email routee.
- **Period** the period of time (in days) during which email did not reach the routee.

If Show Documents filter is on (see second picture on previous page):

- When the date on which the document was routed.
- **Document Title** the description, Project ID and Doc number of the document being routed.
- **SEQ** the Seq # of the via email routee.
- Alerted the person who received alerts about non-deliverable email.

# Full Text Indexing

ull Text	Indexing			tertt inderting zer		
un rext	SHOW FILE TYPES		SHOW QUEUE		□ SHC	W COLUMNS
	Run Report		· ·			
88	📑 🔶 🕂 /1 🛛	🖑 🥰 🖲 🖲 100% - 🤞	🛓 Collaborate 🔹 🥖 Sign 👻	🖶 🔂 Find	•	
•						~ P .
ne -					9	sfDemo Report
					Full	Text Indexing
	Provider	Types Filter	Version	sfATC OCR State	When	Count
	Microsoft Corporatio	on 39 (hidden)	12.0.6828.0	Errors	04/09/2008 16:	08 2
	Microsoft Corporatio	on 10 (hidden)	2008.0.7600.16385	Recently Processed	04/09/2008 17:	27 22
	Microsoft Corporation	on 1 (hidden)	12.0.8929.0			
	Spitfire	6 sfATC OCR	4.1.4254.23933			
		Description	Cols Change Ti	acking Last Crawl	Start E	nd
	FileCatalog					
		xsfFileVersionInfo	2 OFF	FULL CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfFileVersion	1 OFF	FULL CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfFile	7 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
	sfDocCatalog					
	Siboccatalog					
		xsfAttribute	2 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfFileAttach	1 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfComment	1 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfMeetingAttendee	2 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfDocRevision	7 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfDocItem	5 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfDocAddr	2 OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
		xsfRoute xsfDocHeader	3 OFF 11 OFF	FULL_CRAWL FULL_CRAWL	08/23/2011 12:29 08/23/2011 12:29	08/23/2011 12:29

#### This report summarizes the SQL full text indexing being used.

## Filters

- Show File Types whether 🔽 or not to include file type information on the report.
- Show Queue whether 🗹 or not to include files within sfPMS that have not yet been indexed.
- Show Columns whether 🗹 or not to include column information on the report.

- **Provider** the provider of the OCR functionality.
- **Types** the number of file types.
- **Filter** the full-text filter name or (hidden) if you do not have adequate SQL permission.
- Version the version of the full-text filter.
- **sfATC OCR State** the processing state for files in the Spitfire OCR queue.
- When the date and time of the oldest file in the queue.

- **Count** the number of files in the queue for this state.
- Description a) the text index name and b) the Spitfire table name.
- **Cols** the number of columns in the table being indexed.
- Change Tracking whether the index is being updated in real time (ON) or not (OFF).
- Last Crawl the last time the full text index was built.
- Start the date and time on which the crawl was started.
- **End** the date and time on which the crawl finished.

## **Integrity Check**

This report lists, and allows you to repair, issues with your system. You can ask Spitfire Support to set up a SSRS subscription to run this report automatically on a weekly basis.

Integ	grity Check				
	AUTO REPAIR		SHOW AUDIT DATA		
	HIDE WARNINGS	IC TYPE	(any)	-	
	Run Report				
8	🗒 🖃   🔶 🖡 / 1 🛛 🗈 🖑 🤻	ی کی 🔹 🔹 🔊	Collaborate 🔹 🥖 Sign 🔹 📑 🔂	Find	
ľ					
66					sfDemo Report Integrity Check
	Fact				
	Vendor Doc Lightning Ventures, Inc. (V213) source	contact is not primary contact			
	Customer Contact Jim Powerhouse has no company	record link			
	Vendor Lighting Ventures has no maintenance doc li	nk			
	1 companies linked to maintenance docs				
	3 missing document titles have been set to default				
	0 vendors contacts linked to company				
	0 contacts linked to existing company				
	Corrections discarded; Analysis Required: 0 second	s			



- Auto Repair whether 🗹 or not to have the system repair as many of the listed issues as possible.
- Show Audit Data whether or not to include the First Changed, Last Changed and Change Count columns (see next section).
- Hide Warnings whether S or not to hide warning messages from the report.
- IC Type the type of integrity check. You can select a specific type or keep the (any) default for all types.

#### Columns

• **Fact** – the integrity issue.

# **Login History**

This report lists information about logins into the system along with additional usage metrics.

ogin Histor	y								
Level	User Detail	-		PE	RIOD	3/12/2012	2 🚽 🚽 3/23/2012	2 📃	
User	Í	Q		Ro	IE	(all roles)			-
OBER	SHOW CH					Run Report			_
	B SHOW CF	TANGES				Run Repon			
							efTra	ining Report	
								•••	
							Log	in History	
		User Access betwee	n 3/12/2012 12:00:00	AM and 3/2	3/2012 12:00:00	AM			
			Session		vg Response				
Login	Logout	Contact Name	Length (hrs) R	equests	Time (secs)	Sessions	Notes		
Chris Demo						LastLogin	3/28/2012 10:30:24 AM		
3/16/2012 12:27	3/16/2012 12:43	Chris Demo	0.27	24	1.50	Lust Login	012012012 10:00:2474		
3/16/2012 12:53	3/16/2012 14:51		1.97	2	0.06				
3/16/2012 14:54	3/16/2012 15:09		0.25	24	1.13				
3/21/2012 8:32	3/21/2012 13:29		4.94	0					
3/23/2012 10:11	3/23/2012 10:54		0.71	35	1.18				
3/23/2012 14:09	3/23/2012 14:50		0.69	52	0.98				
3/23/2012 14:59	3/23/2012 17:17		2.30	4	0.13				
3/16/2012 12:27	3/23/2012 17:17		11.12	141	1.11	7			
Spitfire						Last Login	3/28/2012 11:03:07 AM		
3/16/2012 12:27	3/16/2012 22:24	Spitfire	9.94	345	0.19				
3/17/2012 4:10	3/17/2012 22:28		18.30	544	0.19				
3/18/2012 4:10	3/18/2012 22:29		18.32	574	0.18				
3/19/2012 4:10	3/19/2012 22:29		18.31	595	0.18				
3/20/2012 4:10	3/20/2012 22:27		18.28	585	0.18				
3/21/2012 4:10	3/21/2012 22:29		18.32	580	0.18				
3/22/2012 4:10	3/22/2012 22:29		18.32	599	0.18				
3/23/2012 4:10	3/23/2012 22:27		18.28	658	0.21			_	
3/16/2012 12:27	3/23/2012 22:27		138.07	4480	0.19	8			

## **Filters**

- Level the kind of information to be listed on the report. You can select User Summary, User Detail or Daily Summary from the drop-down.
- **Period** the date range for the login report. You can keep the default dates, select or enter specific start and end dates or uncheck the checkbox for all dates.
- **User** the Spitfire user for whom you want the login report. You can select an Active Contact from the lookup.
- **Role** the Spitfire role. You can select a role from the dropdown or keep the (all roles) default.
- Show Changes whether 🗹 or not to include the number of changes made by the user in the report.

## Columns

**Note**: if the User Summary filter was selected, the following information appears.

• Login – the date and time the user first logged in during the specified date range.

- Logout the last date and time the user logged out during the specified date range.
- Contact Name the name of the Spitfire user who logged in.
- Session Length (hrs) the total number of hours for the login sessions.
- **Requests** the number of web application requests processed on behalf of the user.
- Avg Response Time (secs) the average time for the system to respond.
- Changes Saved (if the Show Changes checkbox is checked) the number of saves during the login session.
- Sessions how many sessions (log in and log out) occurred during the specified date range.
- Notes additional information.

**Note**: if the User Detail filter was selected, the following information appears.

- Login a) the name of the Spitfire user and b) the date and time that person logged in.
- **Logout** the date and time the user logged out.
- Contact Name the name of the Spitfire user who logged in.
- Session Length (hrs) the length of the login session.
- **Requests** the number of web application requests processed on behalf of the user.
- Avg Response Time (secs) the average time for the system to respond
- Changes Saved (if the Show Changes checkbox is checked) the number of saves during the login session.
- **Sessions** how many sessions (log in and log out) occurred during the specified date range.
- Notes additional information.

**Note**: if the Daily Summary filter was selected, the following information appears.

- **Login** the time of the first login of each date.
- Logout the time of the last login of each date.
- Contact Name the number of users logged in during the login / logout period.
- Session Length (hrs) the total amount of time the system was used by the users.
- Requests total number of web application requests processed on behalf of all users.
- Avg Response Time (secs) the average time for the system to respond.

- Changes Saved (if the Show Changes checkbox is checked) the number of saves during the login session.
- Sessions how many sessions (log in and log out) occurred during the specified date range.
- **Notes** the maximum number of concurrent logins during the specified date range.

# Next Doc Status Matrix

This report lists the document statuses that are available for each document status as established through the NextDocStatus rules.

TYPE	Project Se	etup	-				Run Report	
	, ,		_					
				Nové D	a Status Mar	<b>4 1 1 1</b>		
				Next D	oc Status Ma	trix		
Project	t Satur			Next D	oc Status Ma	trix		
Project	t Setup			Next D	oc Status Ma	trix		
Project	t Setup	c	D	Next D	oc Status Ma	trix N		
Project	t Setup	C Canceled	D Completed	Next Do				
Project	t Setup In Process>			I	M	N		
		Canceled		I In Process	M Committed	N Plan		

#### Filter

• **Doc Type** – the document type. You must select a specific Doc type.

#### Columns

The report appears as a chart. On the far right is a column of the status codes that are defined in the NextDocStatus rule group for the Doc type, next to a column with descriptions of the codes. The remaining columns are the status codes that appear as result values in the NextDocStatus rules.

The chart shows which statuses follow the right-hand statuses.

- = same status
- \* In Process
- AC Approved and Closed
- C Closed
- P Pending

# Outbound Email Pending

This report lists the documents that the system has queued to route via email (or fax), but has not yet sent as well as any documents pending workflow actions.

OJECT	96	R	_		Run Report		_	_
						Out	Construct	ion Report il Pending
DocTitle		Doc Type	Seq	То	Via		From	Acted
	<ul> <li>Review Date (2004-0010, #000)</li> <li>Freque, 2.2, Wartiny Comparis</li> <li>1001-00000</li> </ul>	Invitation to Bid RFQ	2	Seria: American 22 Mariny Canonia	E no email E no email	5/20/2010 8/13/2010		5/10/2010 8/4/2010
	artise (RTA) Drawings - Final Bio (#8010)	Invitation to Bid	3:2	Dense American	Encernall	6/10/2010	of Federal	8/11/2010
Ready to Adv	ettes (FD) Drawings - Final Bill (4000)	Invitation to Bid	3.2	Artumate Ind	E no email	6/10/2010	strong	8/11/2010

#### Filter

• **Project** – the Project ID. You can look up ( $\nearrow$ ) a specific project or enter a specific Project ID or use the % mask for multiple projects.

- **Doc Title** the title/description of the document, including the project number and document number.
- **Doc Type** the document's Doc type.
- Seq the Seq number of the route, including stages.
- To the name of the routee to receive the email.
- **Via** the method of routing (E=email or F=fax) followed by either the email address or fax number.
- **Due** the route due date for the document.
- From the name of the previous routee.
- Acted the date the previous routee sent the document on.

# Rule Configuration

This report lists rules and rule values that have been manually added to the system.

Rule	Configuration			
		ESCRIPTION	Run Report	
8	🗒 🖃 👍 🐥 🚺 / 4	IN 🖑 🥰 💿 🖲 100% -	🔬 Collaborate 🔹 🥒 Sign 🔹 📑 🙀	Find
<b>I</b>				
8				sfTraining Report
				Rule Configuration
	Te	st Value	Filter	Result
	CodeSetRedirect		DocTypeKey	DocTypeKey
		DocReference	Vendor	Commitment
		Subtype	Bid	Project Setup
		SubType	Project Setup	Project Setup
	ComplianceNotification	nText	ComplianceTypeKey	String
		Notification	Automobile Ins	Please be aware that we reserve the right to withhold payment until all items are received.
	CustomerBlock			String
		Status-H		Customer is on Credit Hold.
		Status-O		WARNING! Customer is designated as a One- Time Customer.
	DocItemConfig		DocTypeKey	String
		AutoCopyWhen:RR	Submittal	1
_		AutoCopyWhen:RR	Submittal Package	1
		AutoCopyWhen:RR	Submittal Register	1
		PDFMerge	Submittal Package	REF-\$\$\$PECIFICATION\$\$(\$\$PARAGRAPH\$\$)- Rev#\$\$REVISIONNUMBER\$\$

## Filter

• Show Rule Description – whether  $\checkmark$  or not to include descriptions of the rules in the report.

- Test Value the test rule with the rule group.
- Filter a) the type of filter and b) the filter value for each rule.
- **Result** a) the type of result value and b) the result value for each rule.

# User Capability Detail

This report lists the role capabilities and permissions granted to Contacts.

User Capabil	lity Detail									
User		<u>م</u>	Role	ſ	✓ (all role	es)		-		
CAPABILITIES	Granted -		ONE CAPAE	עדד ווא	(anv)					
CALADIEI HED			ONE CALL			. 1				1
	✓ Logins O	NLY			Run Rep	port				
		Gran	nted Capabilities for Syste	em Users						
	Role	Description	Assignments	and	Conditions					
	Project Staff:Do	oc Creator		2	2 Docum	nent Types				
		Doc Creator								
	DOC	Can change document status (if collaborator)			Read					
	DOC	Can move items among folders			Allow					
	DOC	Checkout files or see status			Read					
	DOC	Control Document Attachments			NA					
	DOC	Control the folders that contain items			Read					
	PAGE	Add Files			Read					
	PAGE	Attach existing Files and sfDocs to Documents			Read	Add	Update	Delete		
	PAGE	Can Load an alternate route			Allow					
	PAGE	Document Access				Add				
	PART	Maintain Catalog and Report folders			Read					
_				10 cap	abilities for	Project Stat	ff:Doc Creato	r		
Kim	n Akers			3 Role	25					
Kin	n Ambercrombie [kima	ab@acme.com]								
	Everyone			1						
		Everyone								
	DOC	Can change document status (if collaborator)			Read					
	DOC	Document Routees				Add				
	DOC	Owns documents created, routed, global			Created					
	PAGE	Document Viewer (jVue)			Read					
	PAGE	Home Dashboard			Allow					
	PAGE	Report viewer			Allow					
	PAGE	Virtual Popup Pages			Read					
	PART	Watchdog Alerts			Allow					
	SYS	Require Spitfire Dashboard			Required	_				
				9 cap	abilities for	Everyone				

## **Filters**

- User the Contact. You can look up (A) a specific Contact or leave blank for all Contacts.
- **Role** the Spitfire role. You can select a specific role or keep the **(all roles)** default.
- **Capabilities** how capabilities are to be handled in the report. You can select **None** if you want no mention of capabilities for each role, **Granted** if you want a list of specific capabilities granted for each role and **Available** if you want a count of how many capabilities are available for each role.
- One Capability a specific role capability. You can select a specific capability or keep the (any) default for all capabilities.
- Logins Only whether 🗹 or not to include only those Contacts who have login IDs.

## Column

Role – a) the role assigned to the Contact and b) the module to which the capability belongs (if the filter is on).
 Note: the number of roles for each Contact is indicated at the end of each Contact grouping.

- **Description** a) a description of the role and b) a description of the capability (if the filter is on).
- **Assignments** the number of times the role has been assigned to the Contact.
- Conditions a) conditions by which the role is limited and b) the permissions on the capability.
   Note: the number of capabilities for each role is indicated at the end of each role grouping.

# User Role Matrix

This report shows which Contacts have been given specific roles and how many times (because roles limited by conditions can be granted more than once.)

User Role N	4embership Mat	rix			
	BY PROJECT	T	CONTACT	R	
Role	Project Mana	ger 💌		Run Report	
		_	User Role Matrix		4
User	Project Manage				
Andrew C	Carothers 5				
Chris Der	mo 11				
Jay Flueg	gel 1				
Jon Taffle	er 4	_			
Tracy Tal	lman 3				

User R	lole Membership	Matrix	(					
	✓ By Pr	OJECT		Contact				
Role	✓ Project	t Manager	-		Run Report			
	User	Project		User Role Matrix				
		Manager						
	Andrew Carothers (GC003)	1						
	Andrew Carothers (GC101) Andrew Carothers (GC201)	1						
	Andrew Carothers (GC201) Andrew Carothers (GC202)	1						
	Andrew Carothers (GC500)	1						
	Chris Demo	1						
	Chris Demo (CO200)	1						
	Chris Demo (GC007)	1						
	Chris Demo (GC010)	1						
	Chris Demo (GC101)	1						

	•		whether 💌 or not to list a row per project for each nown in the second picture above).				
	•		Contact/Spitfire user. You can look up (A) a ct or leave blank for all contacts.				
	•	must select a role	pitfire role for which to list user and count. You a role from the drop-down before clicking the t button.				
Colu	umns						
0010	•	<b>User</b> – the name filter is on.	of the Contact, follo	owed by Project I	D if the		
	<ul> <li>Role – the number of times the user has been granted the specified role.</li> <li>Note: All system roles appear as columns. If they do not fit or one page, the next page will continue the role columns.</li> </ul>						
v	Vork						
Accomplis							
Accompne		Pata					
		port lists some stat lar date.	istics on work acco	mpilsned in Spitti	re on a		
FOR DATE 2011-	08-29	START TIME 00:01					
	CLUDE DOC TYPE STATS 1 Report	DAYS	FILE TYPE STATS				
	🍌 🚺 / 1 🛛 🚺 🖑 🧠 🤅	🖲 🚺 🔹 🄬 Collaborate 🔹 🥢	Sign - 😽 🚼 Find				
<b>B</b> 64			complished between Aug 29				
Qty	Work Acco O Audited data changes	mplished	Qty Gr 1 Application Startups	eneral Events	Seconds 0.0000		
	3 Documents created		5 External Contact Sy		1.5660		
	3 Route events created, 1 marked vie	ewed, 0 acted upon, 0	1 External Contact Sy		0.0000		
	notifications	. /	1 Project ID Changes		0.1760		
			1 Reports		8.7760		
Qty		Project	s Created by User				
	1 Project Setup docs by Chris Demo	•	•				
	1 Total Projects Created by User						
Qty	Docs by	/ User	Qty	Docs by Type			
	3 docs by Chris Demo		1 Project Setup				
3	3 Total Docs by Type		1 Budget				
			1 Submittal Register	- T			
			3 Total Catalogued by	Туре			

Filters

#### Filters

- For Date the start date on which to report. You can enter a date in the format *yyyy-mm-dd*.
- **Start Time** the starting time on which to report. You can enter a time in 24-hour notation (*hh:mm*).
- End Time the ending time on which to report. You can enter a time in 24-hour notation (*hh:mm*).
- **Days** the number of days, including the start date, on which to report.
- Include Doc Type Stats whether 🗹 or not to include information by Doc type.
- Include File Type Stats whether 🗹 or not to include information by File type.

#### Columns

- Work Accomplished: Qty the number of instances of the work accomplished.
- Work Accomplished a list of various tasks accomplished.
- General Events: Qty the number of instances of the listed events.
- General Events a list of events.
- Seconds the average time (in seconds) taken for each event.
- **Projects Created by User: Qty** the number of projects created by the currently logged in user.
- **Projects Created by User** the name of the user followed by the Project ID and time for each project created.
- Docs by User: Qty the number of documents created by the user.
- **Docs by User** the name of the user who created the document.
- **Docs by Type: Qty** the number of documents created by the user broken down by type.
- **Docs by Type** the Doc type of the document.
- Catalogue by User: Qty the number of files Catalogued by the user.
- Catalogue by User the name of the user, followed by the file size.
- Catalogued by Type: Qty the number of files by type.
- Catalogued by Type the file types followed by file size.

**Note:** each grouping is totaled at the end of the group.