Technical White Paper

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.

www.spitfiremanagement.com

Version 4.4

Revision Number: 4.4.07.25.2014

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

ph. 914.273.0809
fax: 914.273.4208

www.spitfiremanagement.com

Table of Contents

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.

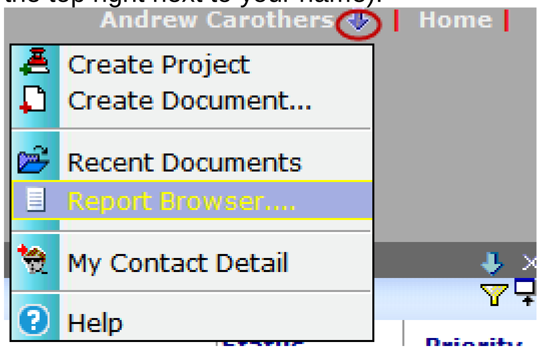
Keep in mind that access to reports depends on a user's permission level, as established through the Report Folders tool on the System Admin Dashboard. (For more information, see the *Focus on System Administration* guide.)

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

The Report Browser

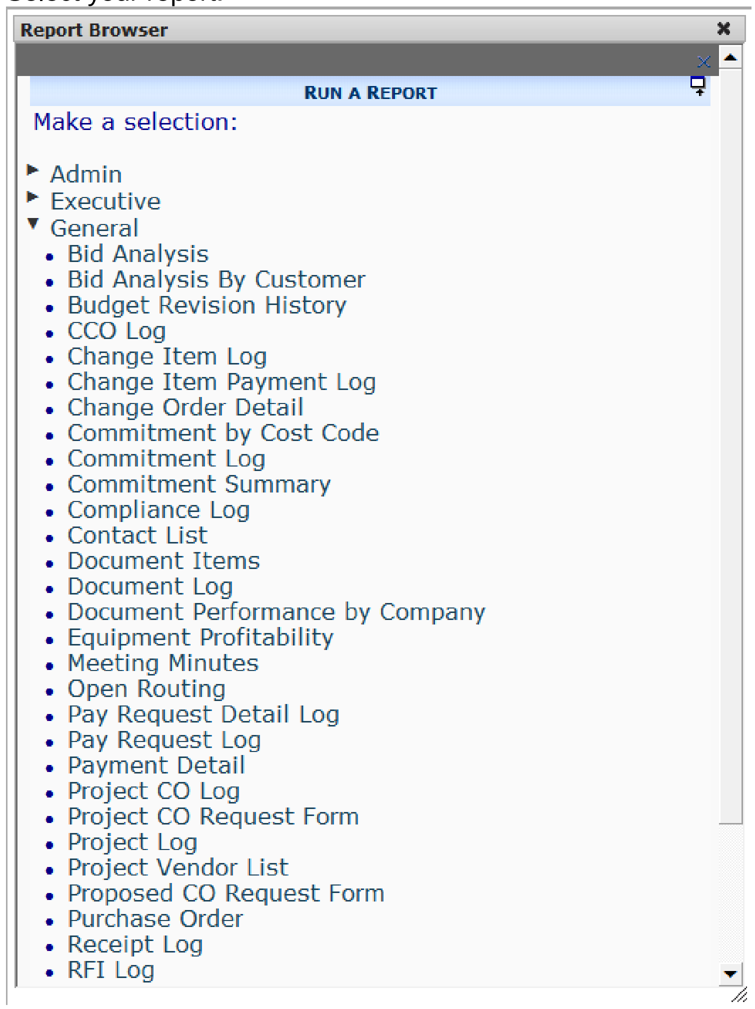
While some reports can be viewed from a corresponding document, all reports are available through the Report Browser to those who have permission to see them.
Note: for best results, do not open more than one report at a time.

To view reports:

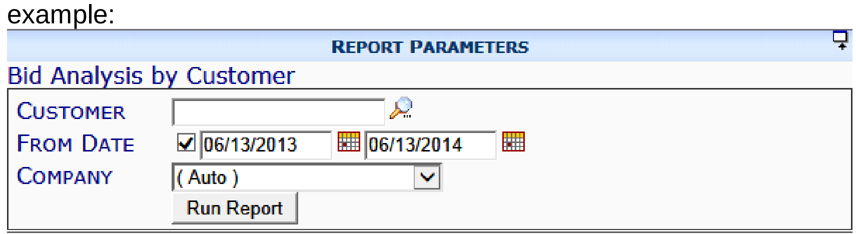
1. Select the **Report Browser** off the Site Options menu (found on the top right next to your name):


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.



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



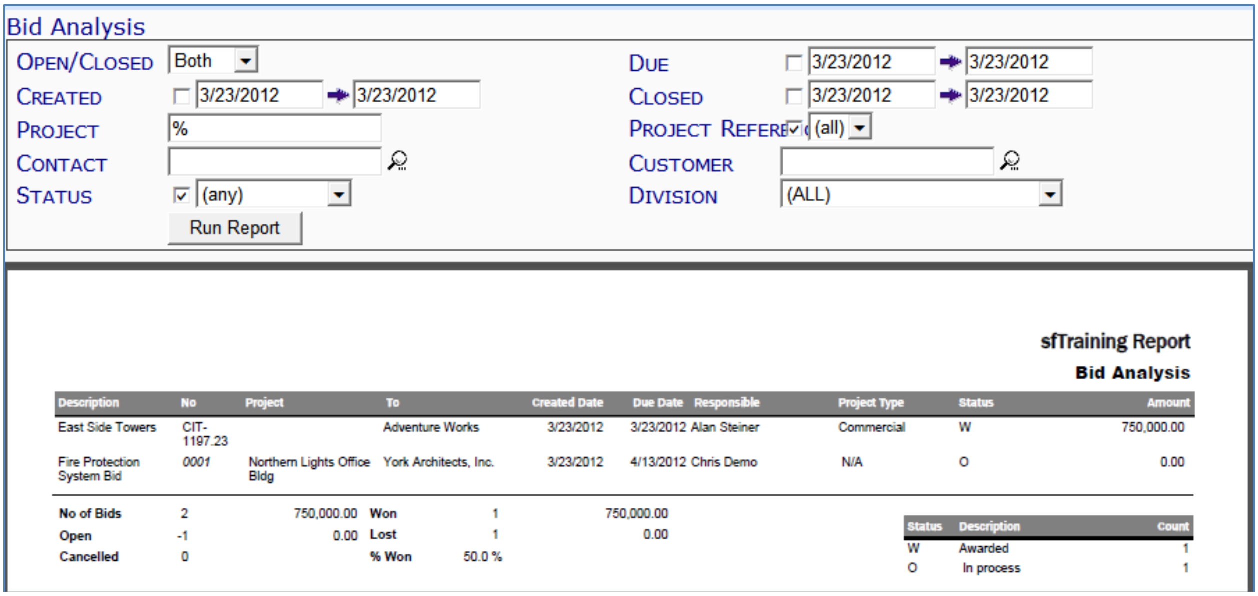
5. Click Run Report. You should click this button even if you have not used the filters..

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).



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 ( ) 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
O	In process	1

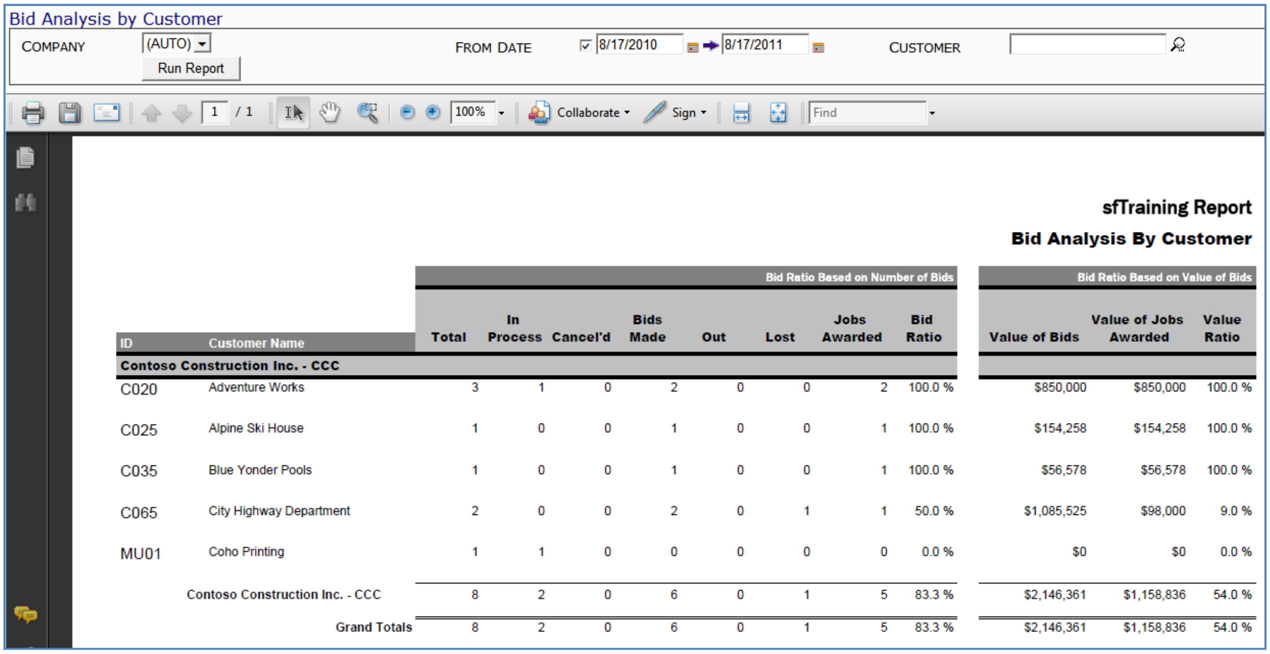
- **Amount** – the total amount on the Bid document.

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

This report lists bids made to customer companies.


Bid Analysis by Customer

COMPANY (AUTO) Run Report

FROM DATE 8/17/2010 → 8/17/2011

CUSTOMER

1 / 1 100% Collaborate Sign Find

sfTraining Report

Bid Analysis By Customer

ID	Customer Name	Total	In Process	Cancel'd	Bids Made	Out	Lost	Jobs Awarded	Bid Ratio	Value of Bids	Value of Jobs Awarded	Value Ratio
		Bid Ratio Based on Number of Bids								Bid Ratio Based on Value of Bids		
Contoso Construction Inc. - CCC												
C020	Adventure Works	3	1	0	2	0	0	2	100.0 %	$850,000	$850,000	100.0 %
C025	Alpine Ski House	1	0	0	1	0	0	1	100.0 %	$154,258	$154,258	100.0 %
C035	Blue Yonder Pools	1	0	0	1	0	0	1	100.0 %	$56,578	$56,578	100.0 %
C065	City Highway Department	2	0	0	2	0	1	1	50.0 %	$1,085,525	$98,000	9.0 %
MU01	Coho Printing	1	1	0	0	0	0	0	0.0 %	$0	$0	0.0 %
	Contoso Construction Inc. - CCC	8	2	0	6	0	1	5	83.3 %	$2,146,361	$1,158,836	54.0 %
	Grand Totals	8	2	0	6	0	1	5	83.3 %	$2,146,361	$1,158,836	54.0 %

Filters

- **Customer** – the customer company receiving your bid. You can look up ( ) 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.

Columns

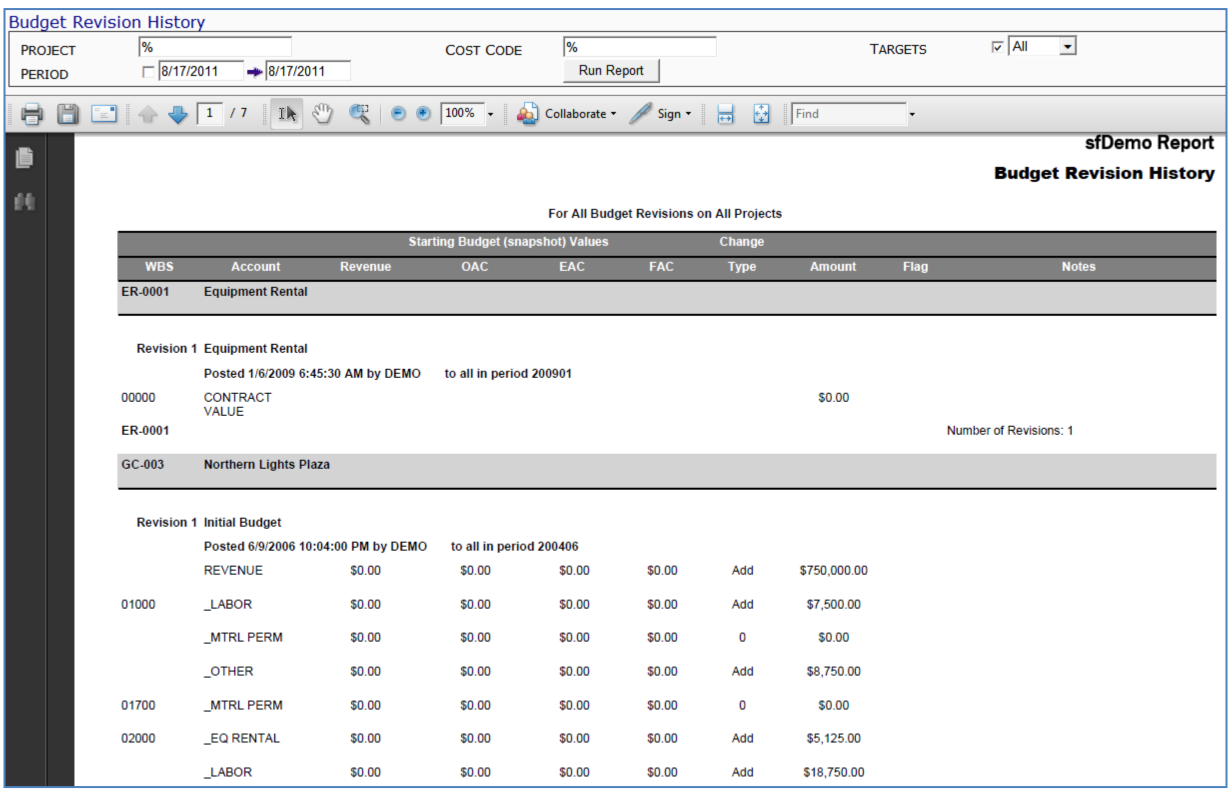
- **ID** – the Customer ID of the customer.
- **Customer Name** – the name of the customer.
- **Total** – the number of Bid documents created for the customer.
- **In Process** – the number of Bid documents with a document status of In Process.
- **Cancel'd** – the number of Bid documents with a document 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.



		Starting Budget (snapshot) Values				Change			
WBS	**Account**	**Revenue**	**OAC**	**EAC**	**FAC**	**Type**	**Amount**	**Flag**	**Notes**
ER-0001	Equipment Rental								
Revision 1	Equipment Rental								
	Posted 1/6/2009 6:45:30 AM by DEMO	to all in period 200901							
00000	CONTRACT VALUE						$0.00		
ER-0001									Number of Revisions: 1
GC-003	Northern Lights Plaza								
Revision 1	Initial Budget								
	Posted 6/9/2006 10:04:00 PM by DEMO	to all in period 200406							
	REVENUE	$0.00	$0.00	$0.00	$0.00	Add	$750,000.00		
01000	_LABOR	$0.00	$0.00	$0.00	$0.00	Add	$7,500.00		
	_MTRL PERM	$0.00	$0.00	$0.00	$0.00	0	$0.00		
	_OTHER	$0.00	$0.00	$0.00	$0.00	Add	$8,750.00		
01700	_MTRL PERM	$0.00	$0.00	$0.00	$0.00	0	$0.00		
02000	_EQ RENTAL	$0.00	$0.00	$0.00	$0.00	Add	$5,125.00		
	_LABOR	$0.00	$0.00	$0.00	$0.00	Add	$18,750.00		

Filters

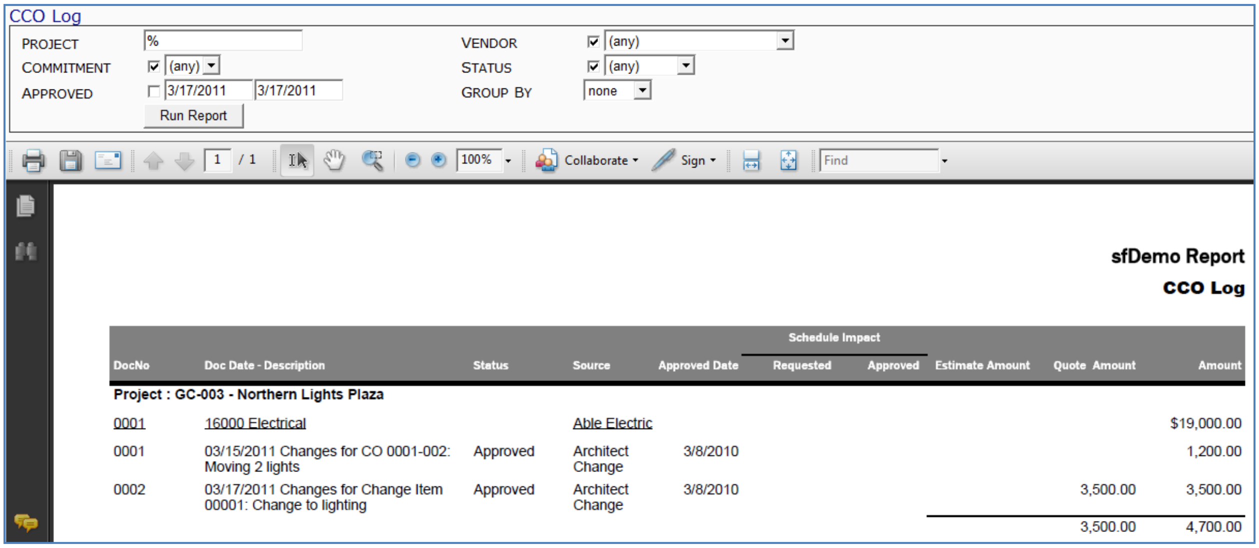
- **Project** – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Cost Code** – the Cost Code associated with the budget row. You can enter a specific Cost Code or use the % mask for multiple Cost Codes.
- **Targets** – the budget “bucket” where the revision was posted. You can select **All, Original, EAC,** or **FAC**.
- **Period** – 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

- **WBS** – 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.



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 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**.

Columns

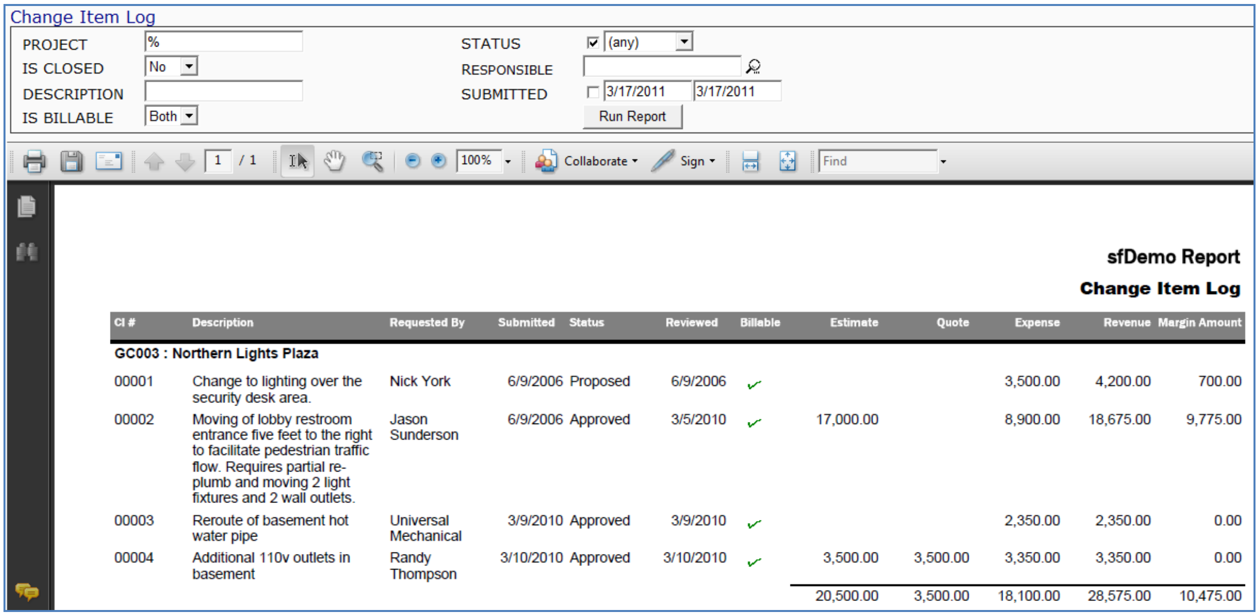
- **DocNo** – a) the Commitment document number and b) the CCO document number.
- **Doc Date – Description** – the CCO Date followed by the CCO title.
- **Status** – the CCO's document status.
- **Source** – a) the CCO's vendor and b) Source of change.
- **Approved Date** – the date on which the CCO 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 Item Log

PROJECT %
IS CLOSED No
DESCRIPTION
IS BILLABLE Both
STATUS (any)
RESPONSIBLE
SUBMITTED 3/17/2011 3/17/2011
Run Report

sfDemo Report

Change Item Log

CI #	Description	Requested By	Submitted	Status	Reviewed	Billable	Estimate	Quote	Expense	Revenue	Margin Amount
GC003 : Northern Lights Plaza											
00001	Change to lighting over the security desk area.	Nick York	6/9/2006	Proposed	6/9/2006	✓			3,500.00	4,200.00	700.00
00002	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.	Jason Sunderson	6/9/2006	Approved	3/5/2010	✓	17,000.00		8,900.00	18,675.00	9,775.00
00003	Reroute of basement hot water pipe	Universal Mechanical	3/9/2010	Approved	3/9/2010	✓			2,350.00	2,350.00	0.00
00004	Additional 110v outlets in basement	Randy Thompson	3/10/2010	Approved	3/10/2010	✓	3,500.00	3,500.00	3,350.00	3,350.00	0.00
							20,500.00	3,500.00	18,100.00	28,575.00	10,475.00

Filter

- **Project** – the Project ID. You can look up () 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 () 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**.

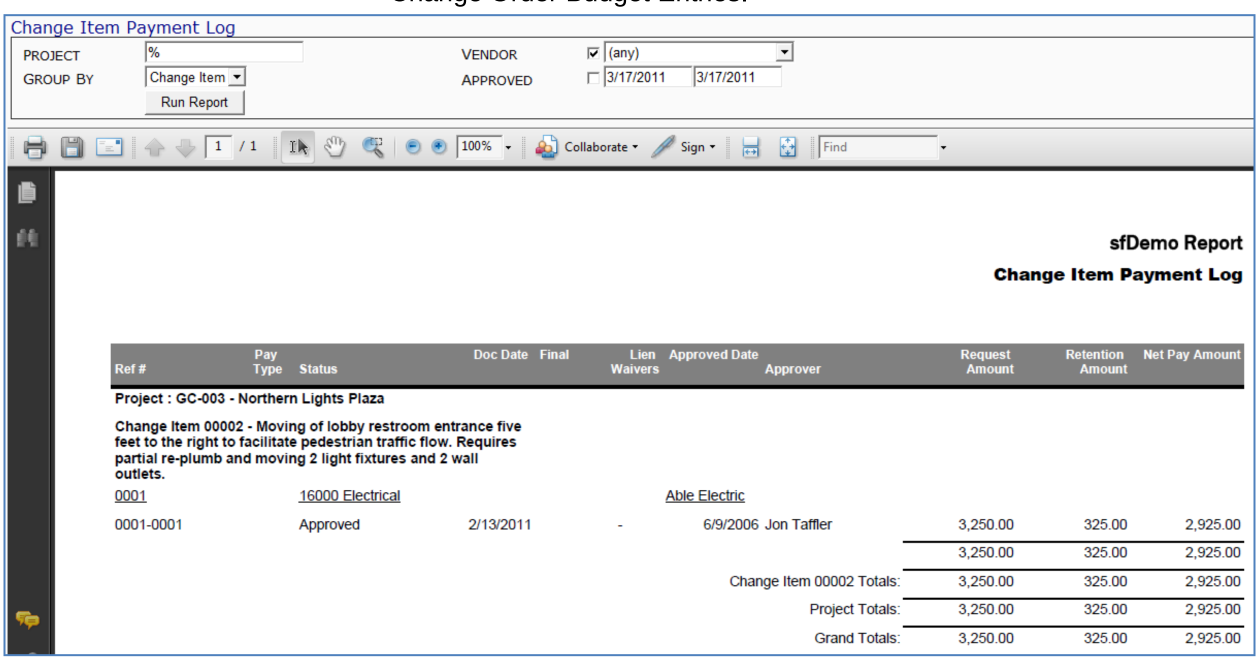
Columns

- **CI # -** 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 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.

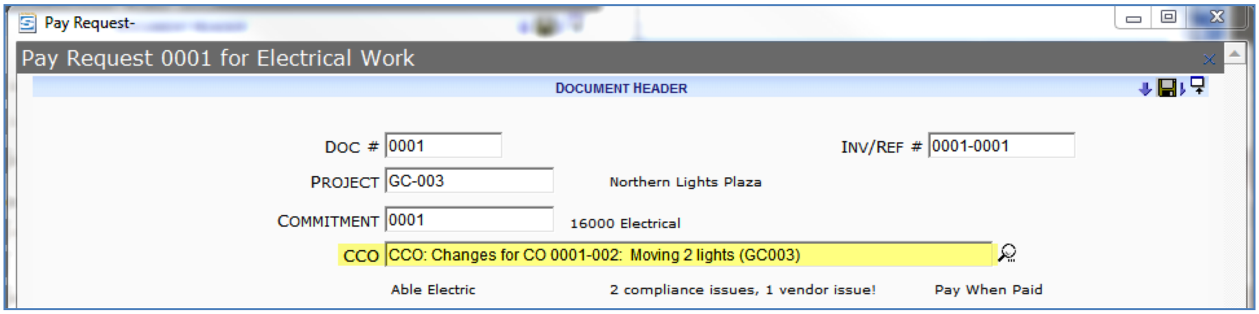

Change Item Payment Log

PROJECT %
GROUP BY Change Item
Run Report
VENDOR (any)
APPROVED 3/17/2011 3/17/2011

sfDemo Report
Change Item Payment Log

Ref #	Pay Type	Status	Doc Date	Final	Lien Waivers	Approved Date	Approver	Request Amount	Retention Amount	Net Pay Amount
Project : GC-003 - Northern Lights Plaza										
Change Item 00002 - 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.										
0001		16000 Electrical				Able Electric				
0001-0001		Approved	2/13/2011		-	6/9/2006	Jon Taffler	3,250.00	325.00	2,925.00
								3,250.00	325.00	2,925.00
							Change Item 00002 Totals:	3,250.00	325.00	2,925.00
							Project Totals:	3,250.00	325.00	2,925.00
							Grand Totals:	3,250.00	325.00	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).



Filter

- **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 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.

Columns

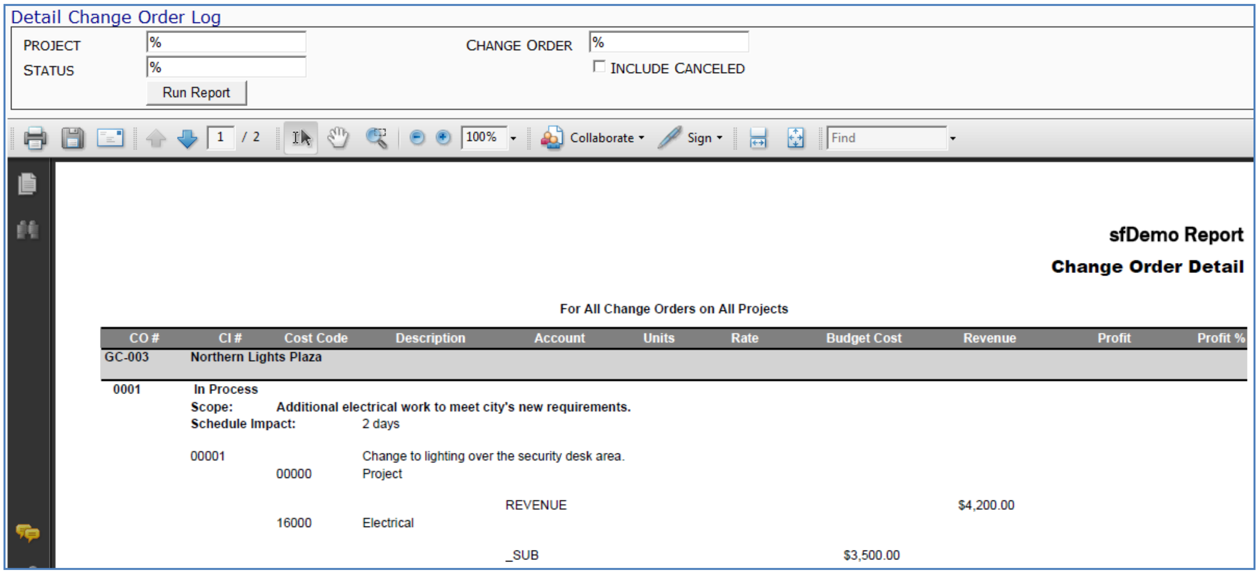
- **Ref #** - a) the Project ID and description and b) the Change Item number and description OR Vendor name, depending on **Group By** filter and c) the document number of the Commitment being changed by the CCO and d) the associated Pay Request's document number.
- **Pay Type** – the subtype of the 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

This report lists Change Orders.



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.
- **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 ☑ or not the report should include Change Orders that have been canceled.

Columns

- **CO #** - a) the Project ID and b) the Change Order's document number.
- **CI #** - 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 Lights Office Bldg								
	16120	Wires and Cables						
			_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 Change Order 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 Additional Changes - Total		**$1,900.00**	**$2,925.00**	**$1,025.00**	**35.04 %**
			Potential 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).

Commitment Budget Comparison

PROJECT GC003

☑ SHOW DETAIL

Run Report

sfDemo Report

Commitment Budget Comparison

Category Detail for budget lines related to commitment #0001 on Project GC003

Reference #	Description	Current Budget	Pending Budget CO Amount	Original Amount	Approved COs	Pending 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	4,185.00
	16000	17950.00	0.00	12800.00	3,700.00	0.00	16,500.00	1450.00	12800.00	4,185.00
16050	Electrical Materials									
	_SUB	0.00	0.00	1500.00	0.00	0.00	1,500.00	-1500.00	1500.00	700.00
	16050	0.00	0.00	1500.00	0.00	0.00	1,500.00	-1500.00	1500.00	700.00
16120	Wires and Cables									
	_SUB	1000.00	0.00	0.00	1,000.00	0.00	1,000.00	0.00	0.00	0.00
	16120	1000.00	0.00	0.00	1,000.00	0.00	1,000.00	0.00	0.00	0.00
GC003	Project Totals	$18,950.00	$0.00	14,300.00	4,700.00	0.00	19,000.00	($50.00)	14300.00	4,885.00
	Grand Totals	$18,950.00	$0.00	14,300.00	4,700.00	0.00	19,000.00	($50.00)	14300.00	4,885.00

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.
- **Show Detail** - whether ☑ or not the report should include Account Category information.

Columns

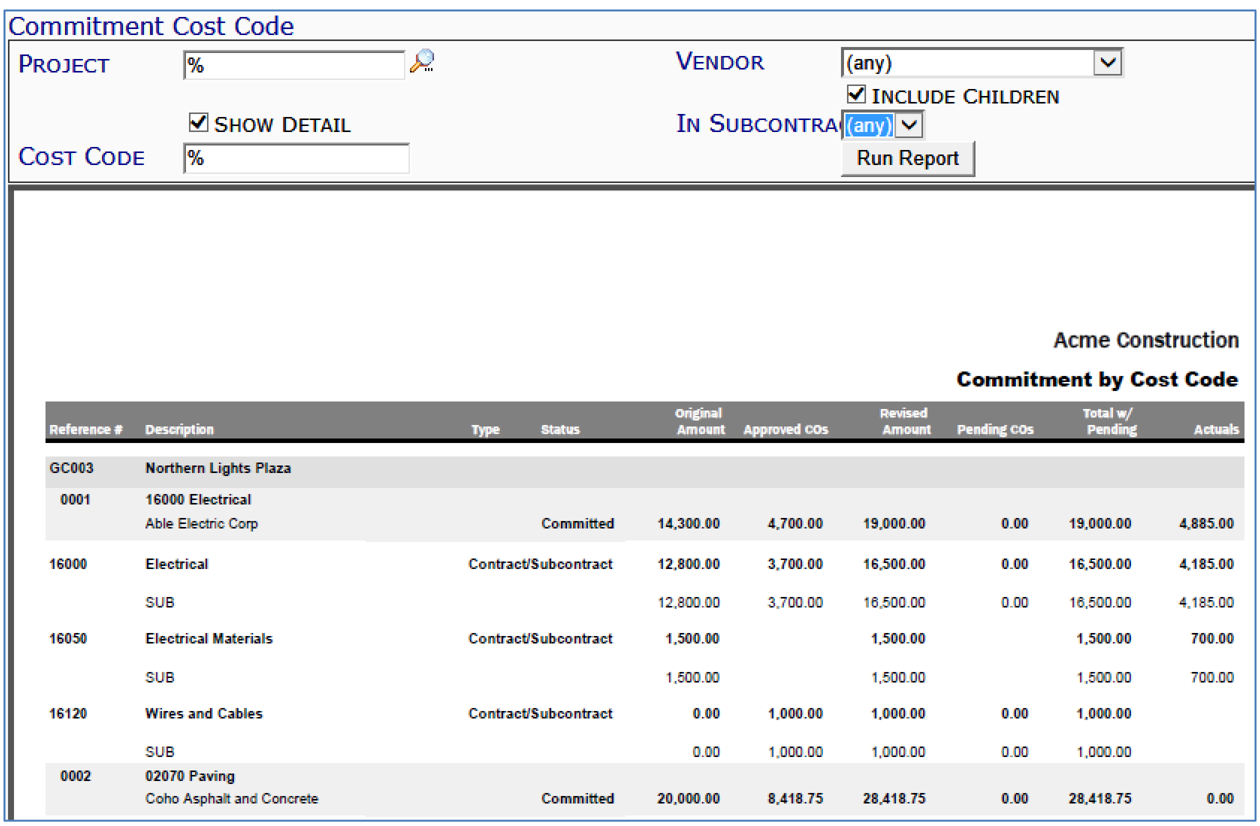
- **Reference #** - a) the Project ID and b) the Cost Code.
- **Description** – a) the Project Title and b) the Cost Code description and (if Show Details is on) the Account Category.
- **Current Budget** – the current budget (EAC) amount for the Cost Code (and Account Category).
- **Pending Budget CO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



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 () 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 ☑ 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.

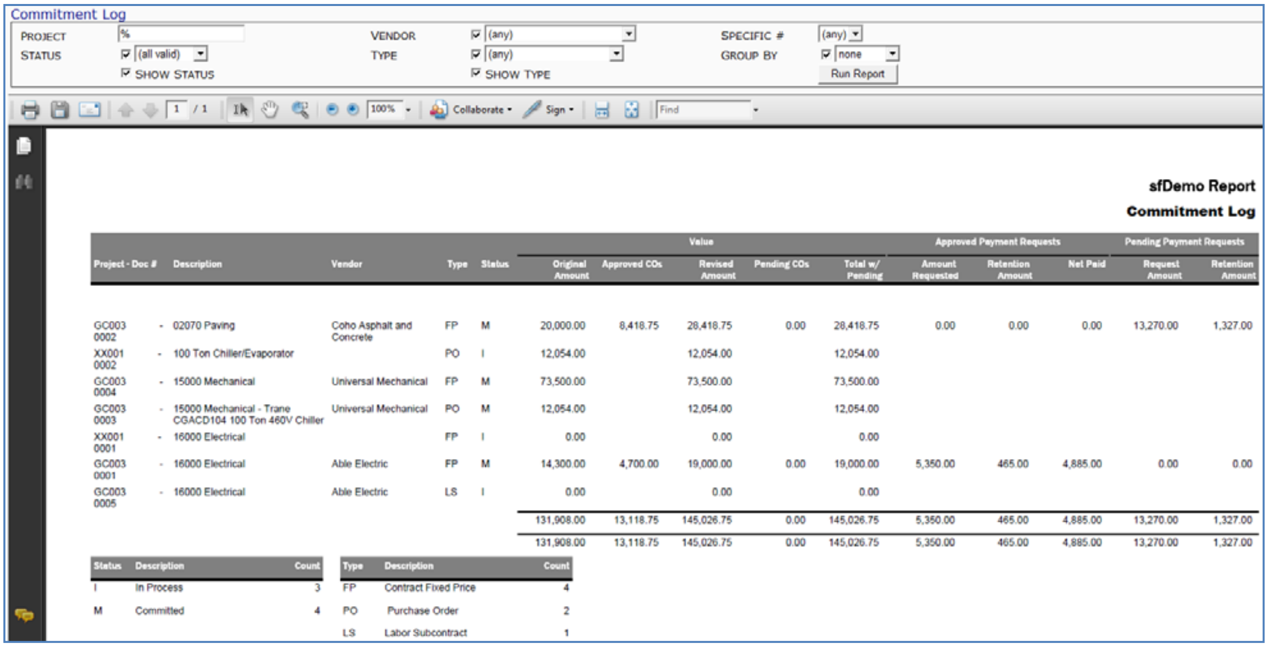
Columns

- **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

This report lists Commitment documents.



Commitment Log

PROJECT % VENDOR (any) SPECIFIC # (any)
STATUS (all valid) TYPE (any) GROUP BY none
SHOW STATUS SHOW TYPE Run Report

sfDemo Report

Commitment Log

Project - Doc #		Description	Vendor	Type	Status	Value: Original Amount	Value: Approved COs	Value: Revised Amount	Value: Pending COs	Value: Total w/ Pending	Approved Payment Requests: Amount Requested	Approved Payment Requests: Retention Amount	Approved Payment Requests: Net Paid	Pending Payment Requests: Request Amount	Pending Payment Requests: Retention Amount
GC003 0002	-	02070 Paving	Coho Asphalt and Concrete	FP	M	20,000.00	8,418.75	28,418.75	0.00	28,418.75	0.00	0.00	0.00	13,270.00	1,327.00
XX001 0002	-	100 Ton Chiller/Evaporator		PO	I	12,054.00		12,054.00		12,054.00					
GC003 0004	-	15000 Mechanical	Universal Mechanical	FP	M	73,500.00		73,500.00		73,500.00					
GC003 0003	-	15000 Mechanical - Trane CGACD104 100 Ton 460V Chiller	Universal Mechanical	PO	M	12,054.00		12,054.00		12,054.00					
XX001 0001	-	16000 Electrical		FP	I	0.00		0.00		0.00					
GC003 0001	-	16000 Electrical	Able Electric	FP	M	14,300.00	4,700.00	19,000.00	0.00	19,000.00	5,350.00	465.00	4,885.00	0.00	0.00
GC003 0005	-	16000 Electrical	Able Electric	LS	I	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	1,327.00
						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	1,327.00

Status	Description	Count
I	In Process	3
M	Committed	4

Type	Description	Count
FP	Contract Fixed Price	4
PO	Purchase Order	2
LS	Labor Subcontract	1

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 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 or not the report should show the Status column.
- **Show Type** – whether 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.

Type	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.

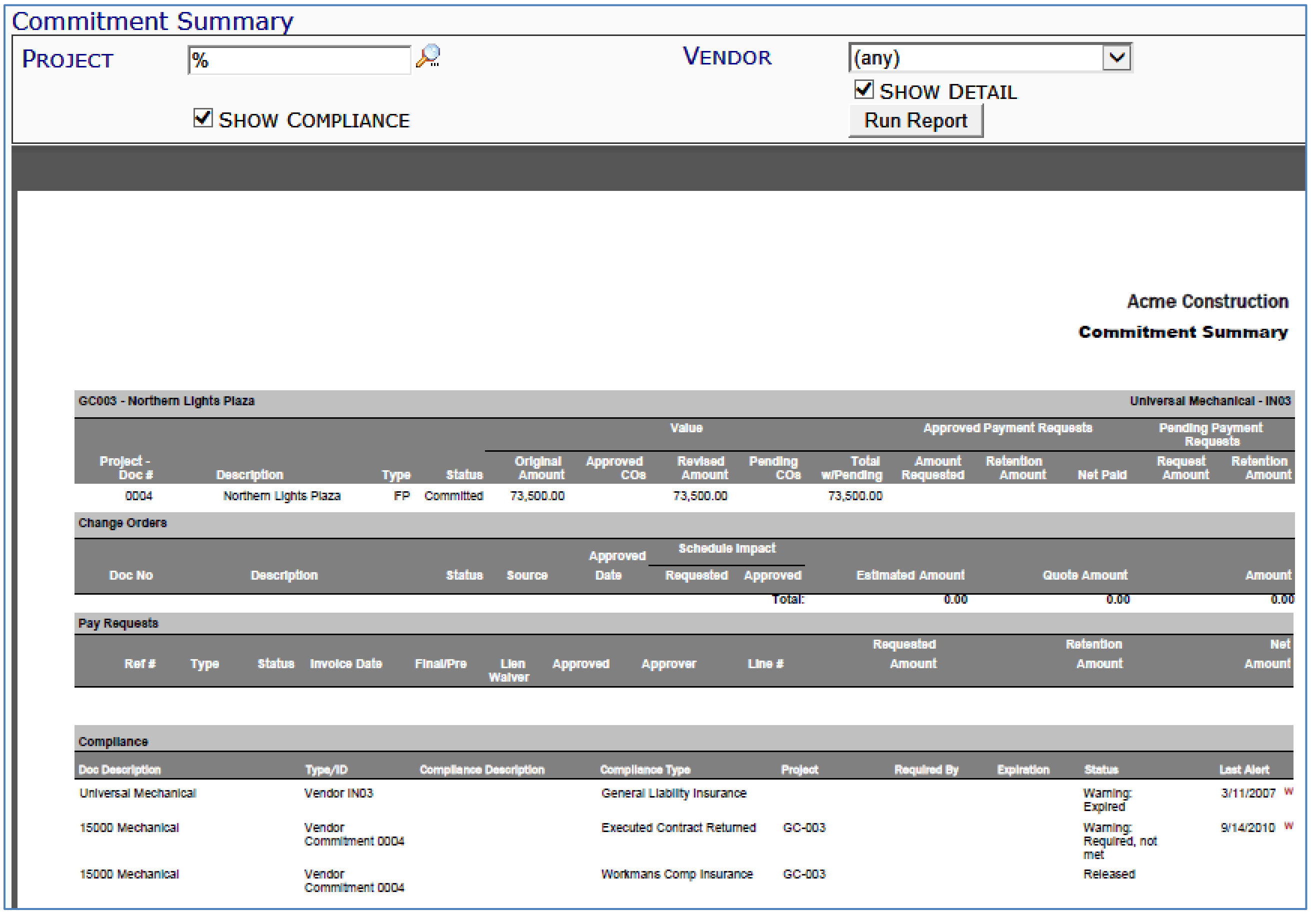
Status	Description	Count
M	Committed	12
P	Pending	1

- **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 Summary

PROJECT %

VENDOR (any)

SHOW DETAIL

SHOW COMPLIANCE

Run Report

Acme Construction

Commitment Summary

GC003 - Northern Lights Plaza — Universal Mechanical - IN03

				Value					Approved Payment Requests			Pending Payment Requests	
Project - Doc #	Description	Type	Status	Original Amount	Approved COs	Revised Amount	Pending COs	Total w/Pending	Amount Requested	Retention Amount	Net Paid	Request Amount	Retention Amount
0004	Northern Lights Plaza	FP	Committed	73,500.00		73,500.00		73,500.00					

Change Orders

					Schedule Impact				
Doc No	Description	Status	Source	Approved Date	Requested	Approved	Estimated Amount	Quote Amount	Amount
						Total:	0.00	0.00	0.00

Pay Requests

Ref #	Type	Status	Invoice Date	Final/Pre	Lien Waiver	Approved	Approver	Line #	Requested Amount	Retention Amount	Net Amount

Compliance

Doc Description	Type/ID	Compliance Description	Compliance Type	Project	Required By	Expiration	Status	Last Alert
Universal Mechanical	Vendor IN03		General Liability Insurance				Warning: Expired	3/11/2007 W
15000 Mechanical	Vendor Commitment 0004		Executed Contract Returned	GC-003			Warning: Required, not met	9/14/2010 W
15000 Mechanical	Vendor Commitment 0004		Workmans Comp Insurance	GC-003			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 on the Commitment. You can select a specific vendor or keep the **(any)** default.
- **Show Detail** – whether ☑ or not the report should include Pay Request Item information line by line.
- **Show Compliance —**whether ☑ 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.

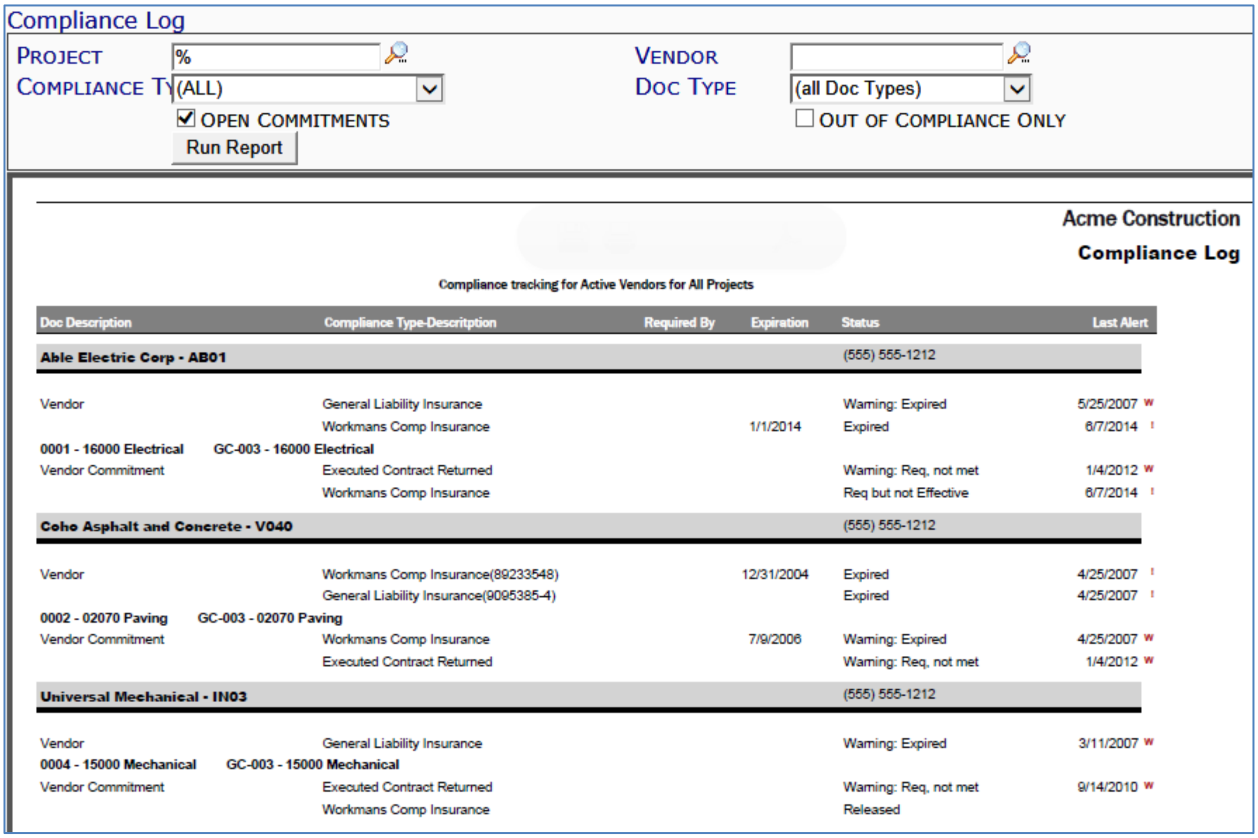
Compliance

- **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.



Compliance Log

PROJECT % VENDOR
COMPLIANCE TY (ALL) DOC TYPE (all Doc Types)
☑ OPEN COMMITMENTS ☐ OUT OF COMPLIANCE ONLY
Run Report

Acme Construction
Compliance Log

Compliance tracking for Active Vendors for All Projects

Doc Description	Compliance Type-Descritption	Required By	Expiration	Status	Last 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-003 - 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 !
Coho Asphalt and Concrete - V040				(555) 555-1212	
Vendor	Workmans Comp Insurance(89233548)		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
0004 - 15000 Mechanical	**GC-003 - 15000 Mechanical**				
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 (🔍) 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 ☑ or not the report should only include compliance on Commitments that are open.

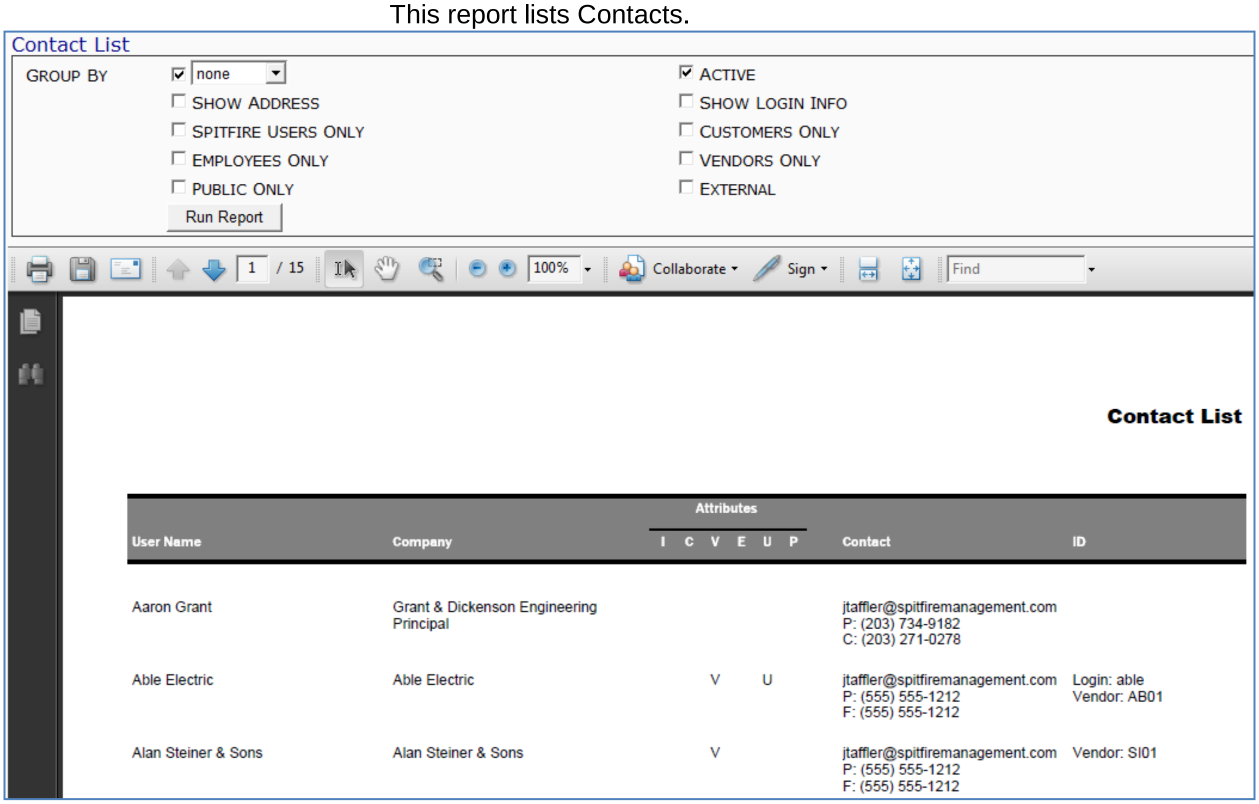
- **Out of Compliance Only** - whether ☑ or not the report should include only compliances requirements that are out of compliance.

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

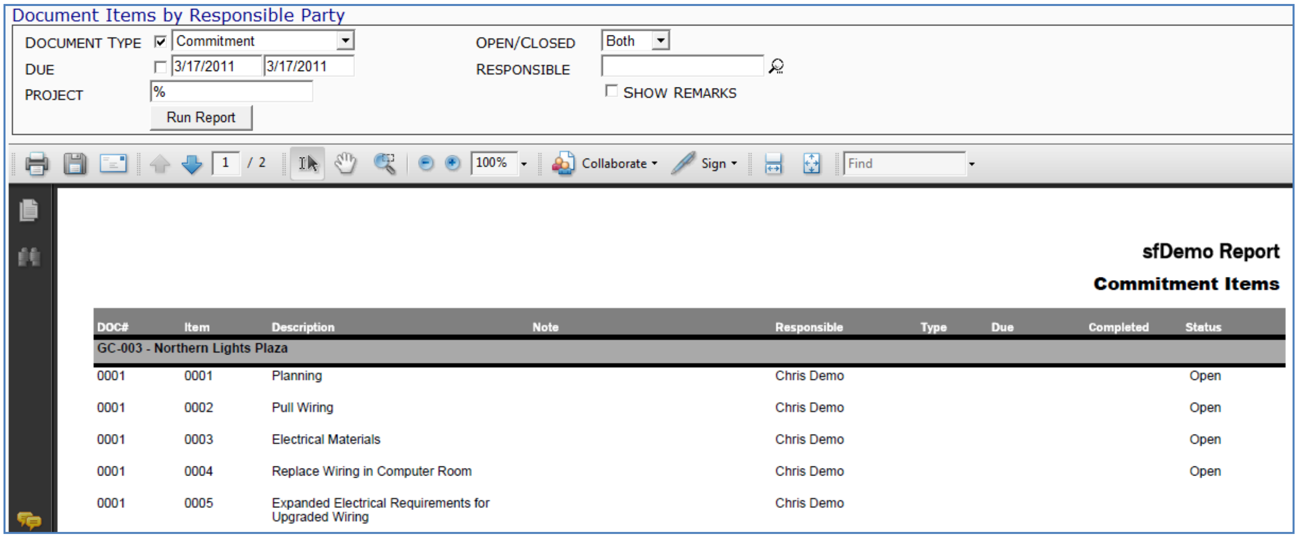
- **Group By –** the criteria by which to group the results. You can select **None** or **Company**.
- **Active** – whether the report should include active Contacts only or all Contacts.
- **Show Address** – whether or not the report should include the Contact's address.
  Note: the address and ID/Login info cannot be shown at the same time.
- **Show Login Info** – whether or not the report should include login information for the Contact.
  Note: this information does not appear if the Address is shown.
- **Spitfire Users Only** - whether or not the report should only list Spitfire users (i.e., those who can log in to Spitfire).
- **Customers Only** – whether 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.
- **Vendors Only** – whether or not the report should only list Contacts who are designated as Vendors.
- **Public Only** - whether or not the report should only list Contacts that are marked as public.
- **External** – whether 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 **I**ntegrated, a **C**ustomer, a **V**endor, an **E**mployee, a **U**ser and/or **P**ublic.
- **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.



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 ( ) a person or leave this blank for all persons.
- **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 ☑ or not the report should include Item remarks (with date, time and name stamp).

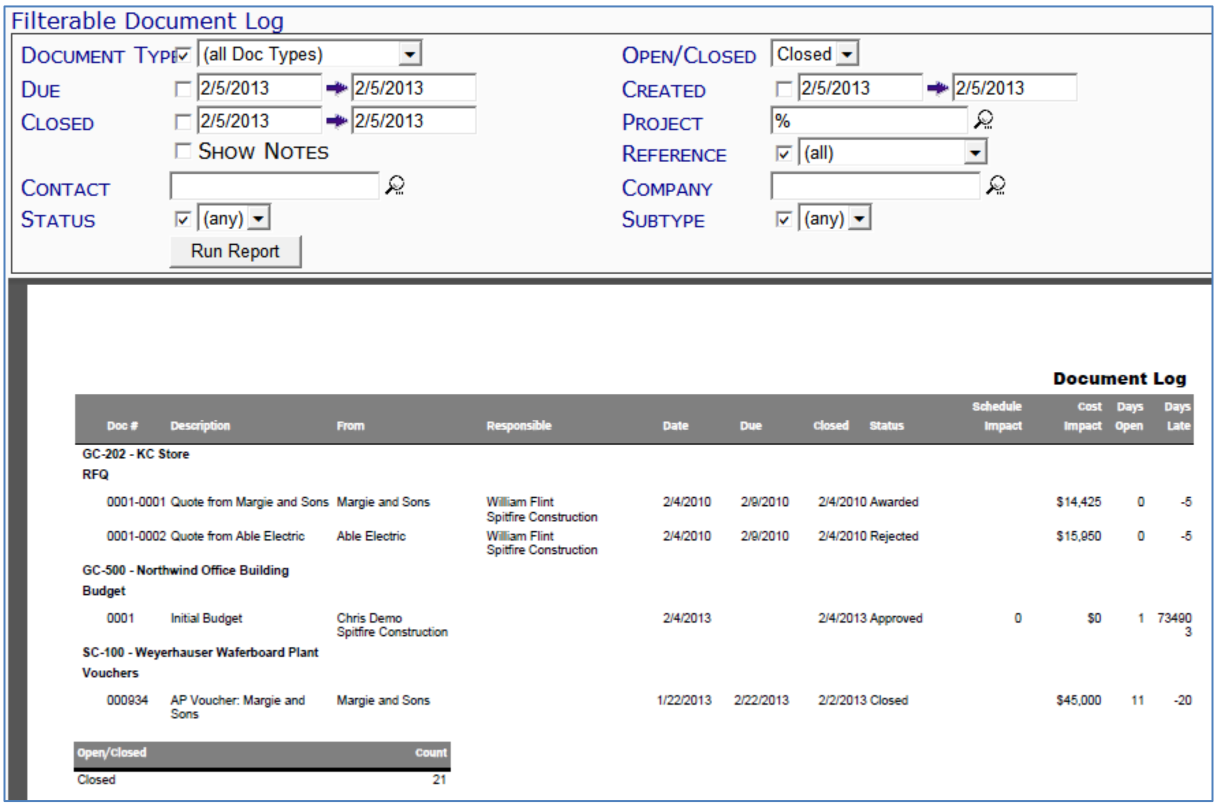
Columns

- **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.



Doc #	Description	From	Responsible	Date	Due	Closed	Status	Schedule Impact	Cost Impact	Days Open	Days Late
GC-202 - KC Store											
RFQ											
0001-0001	Quote from Margie and Sons	Margie and Sons	William Flint Spitfire Construction	2/4/2010	2/9/2010	2/4/2010	Awarded		$14,425	0	-5
0001-0002	Quote from Able Electric	Able Electric	William Flint Spitfire Construction	2/4/2010	2/9/2010	2/4/2010	Rejected		$15,950	0	-5
GC-500 - Northwind Office Building											
Budget											
0001	Initial Budget	Chris Demo Spitfire Construction		2/4/2013		2/4/2013	Approved	0	$0	1	73490 3
SC-100 - Weyerhauser Waferboard Plant											
Vouchers											
000934	AP Voucher: Margie and Sons	Margie and Sons		1/22/2013	2/22/2013	2/2/2013	Closed		$45,000	11	-20

Open/Closed	Count
Closed	21

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 () 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.

Columns

- **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.

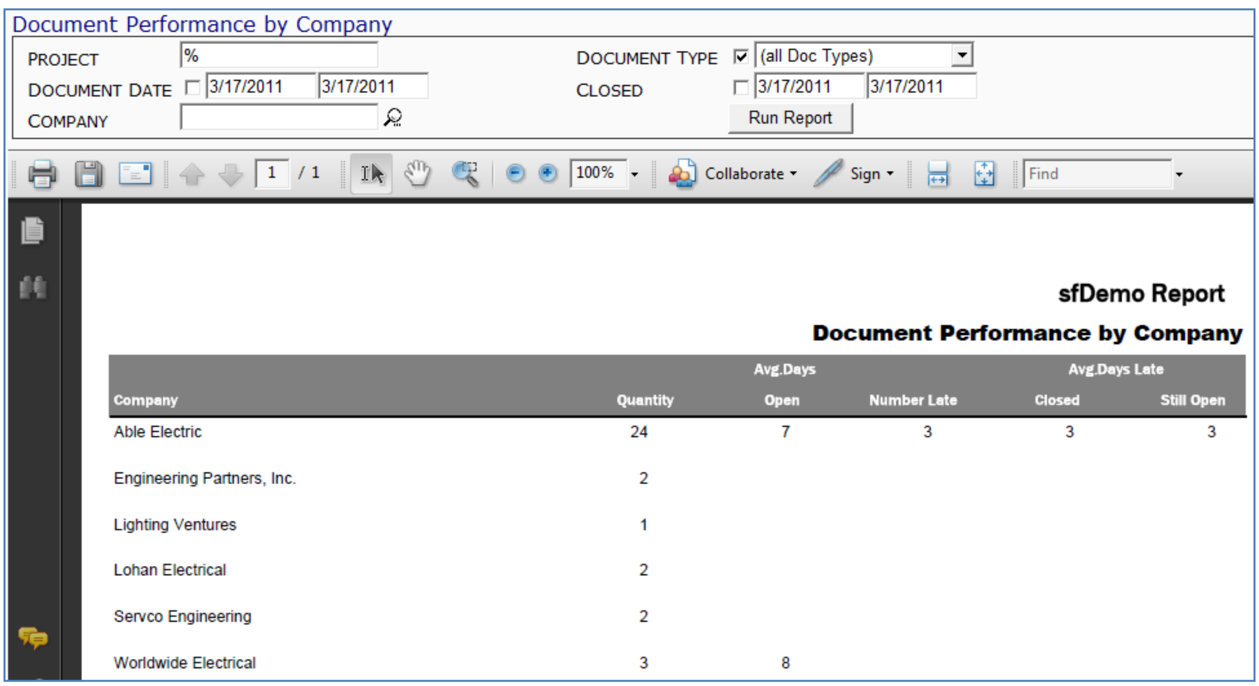
At the end of the report you will also find

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.



Company	Quantity	Avg.Days Open	Number Late	Avg.Days Late Closed	Avg.Days Late Still Open
Able Electric	24	7	3	3	3
Engineering Partners, Inc.	2				
Lighting Ventures	1				
Lohan Electrical	2				
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.

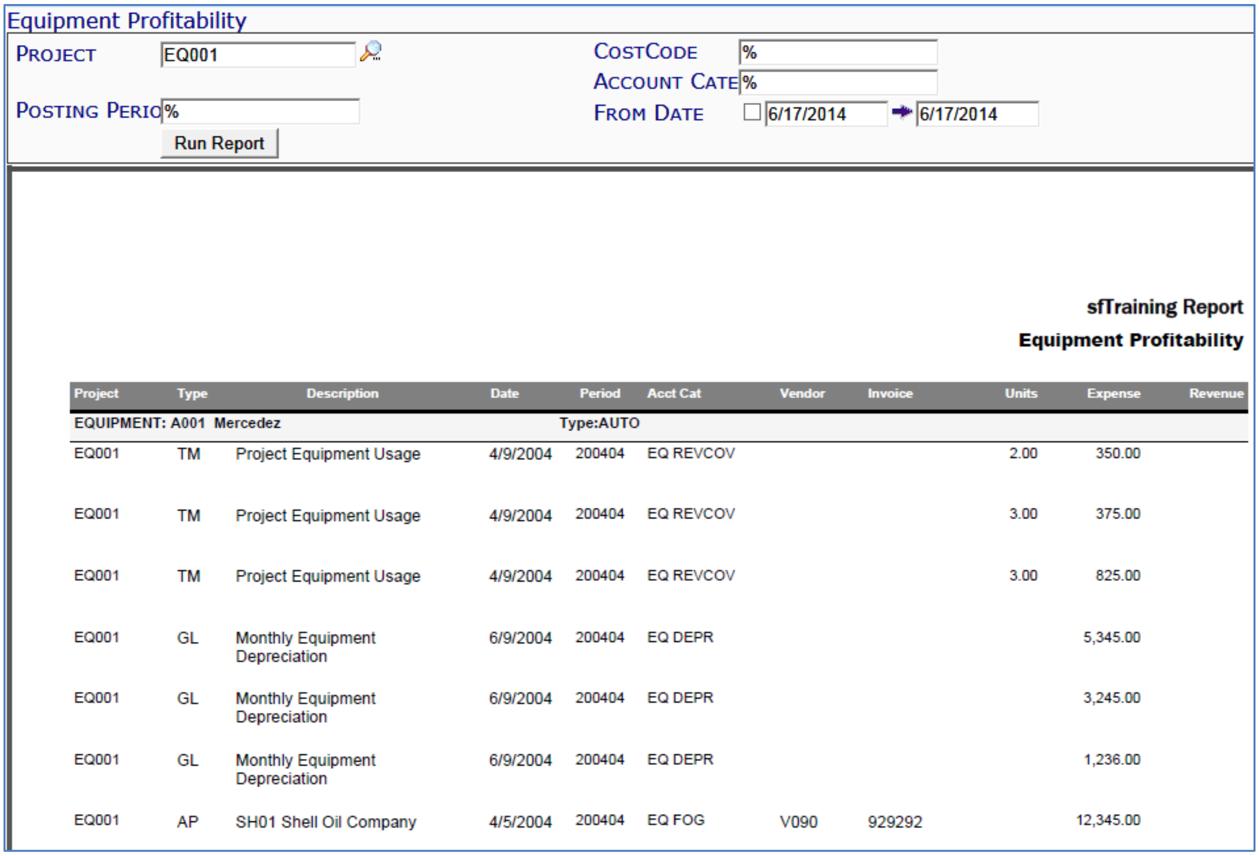
- **Document Date** – the date range for the documents' Date field. All dates are used until you click on the checkbox, at which point you can select or enter specific start and end dates.
- **Closed** – the date range for when the document was closed. All dates are used until you click on the checkbox, 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.

Columns

- **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.



Equipment Profitability

PROJECT EQ001

POSTING PERIOD %

COSTCODE %

ACCOUNT CATE %

FROM DATE 6/17/2014 6/17/2014

Run Report

sfTraining Report

Equipment Profitability

Project	Type	Description	Date	Period	Acct Cat	Vendor	Invoice	Units	Expense	Revenue
EQUIPMENT: A001 Mercedez				Type:AUTO						
EQ001	TM	Project Equipment Usage	4/9/2004	200404	EQ REVCOV			2.00	350.00	
EQ001	TM	Project Equipment Usage	4/9/2004	200404	EQ REVCOV			3.00	375.00	
EQ001	TM	Project Equipment Usage	4/9/2004	200404	EQ REVCOV			3.00	825.00	
EQ001	GL	Monthly Equipment Depreciation	6/9/2004	200404	EQ DEPR				5,345.00	
EQ001	GL	Monthly Equipment Depreciation	6/9/2004	200404	EQ DEPR				3,245.00	
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	

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.
- **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.

Columns

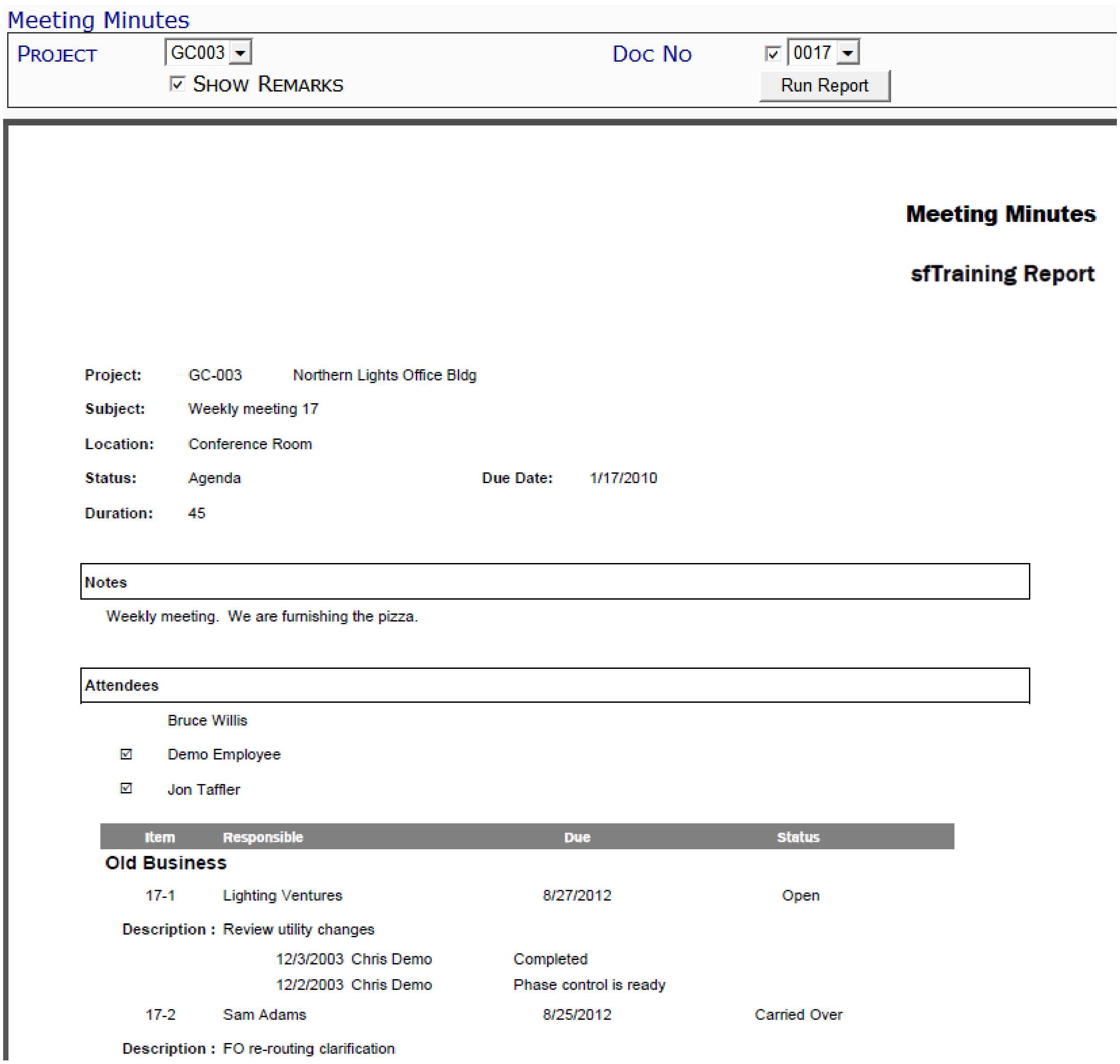
- **Project** – the Project ID of the project containing the equipment Item.
- **Type –** the type or source of the revenue or expense (GL = General Ledger, TM = time and material, AP = Accounts Payable, PA = Project Charge)
- **Description –** a description of the revenue or expense.
- **Date** – the 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.

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.



Meeting Minutes

PROJECT GC003 | Doc No 0017

SHOW REMARKS | Run Report

Meeting Minutes

sfTraining Report

Project:	GC-003	Northern Lights Office Bldg		
Subject:	Weekly meeting 17			
Location:	Conference Room			
Status:	Agenda		**Due Date:**	1/17/2010
Duration:	45			

Notes

Weekly meeting. We are furnishing the pizza.

Attendees

Bruce Willis

Demo Employee

Jon Taffler

Item	Responsible	Due	Status
Old Business			
17-1	Lighting Ventures	8/27/2012	Open
Description :	Review utility changes		
	12/3/2003 Chris Demo	Completed	
	12/2/2003 Chris Demo	Phase control is ready	
17-2	Sam Adams	8/25/2012	Carried Over
Description :	FO re-routing clarification		

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.
- **Doc No** – the Meeting Minutes document number. You can select a specific Doc No. or keep the **(any)** default.
- **Show Remarks** – whether or not the report should include the remarks from the document's Items.

Columns

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

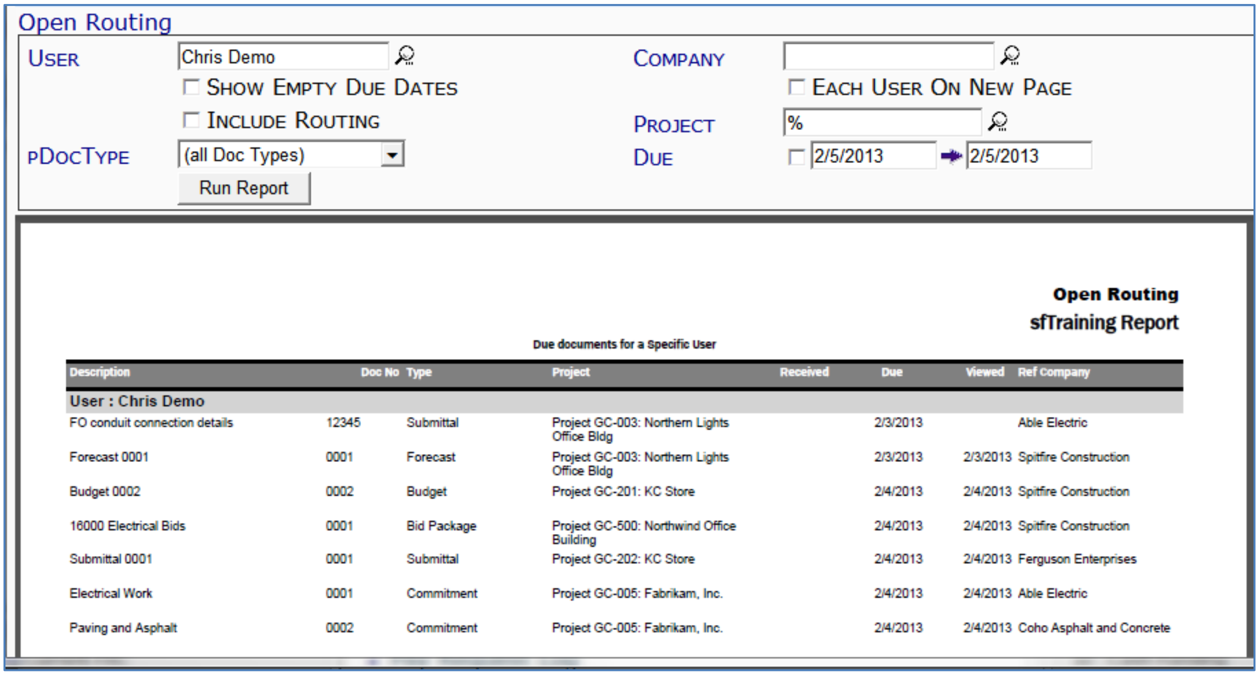
- The Project ID and description of the **Project**.
- The **Subject** of the Meeting Minutes document.
- The **Location** of the meeting, as entered on the document's Details tab.
- The document **Status**.
- The document's **Due Date**.
- The **Duration** of the meeting, as entered on the document's 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.



Description	Doc No	Type	Project	Received	Due	Viewed	Ref Company
User : Chris Demo							
FO conduit connection details	12345	Submittal	Project GC-003: Northern Lights Office Bldg		2/3/2013		Able Electric
Forecast 0001	0001	Forecast	Project GC-003: Northern Lights Office Bldg		2/3/2013	2/3/2013	Spitfire Construction
Budget 0002	0002	Budget	Project GC-201: KC Store		2/4/2013	2/4/2013	Spitfire Construction
16000 Electrical Bids	0001	Bid Package	Project GC-500: Northwind Office Building		2/4/2013	2/4/2013	Spitfire Construction
Submittal 0001	0001	Submittal	Project GC-202: KC Store		2/4/2013	2/4/2013	Ferguson Enterprises
Electrical Work	0001	Commitment	Project GC-005: Fabrikam, Inc.		2/4/2013	2/4/2013	Able Electric
Paving and Asphalt	0002	Commitment	Project GC-005: Fabrikam, Inc.		2/4/2013	2/4/2013	Coho Asphalt and Concrete

Filters

- **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 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).

Columns

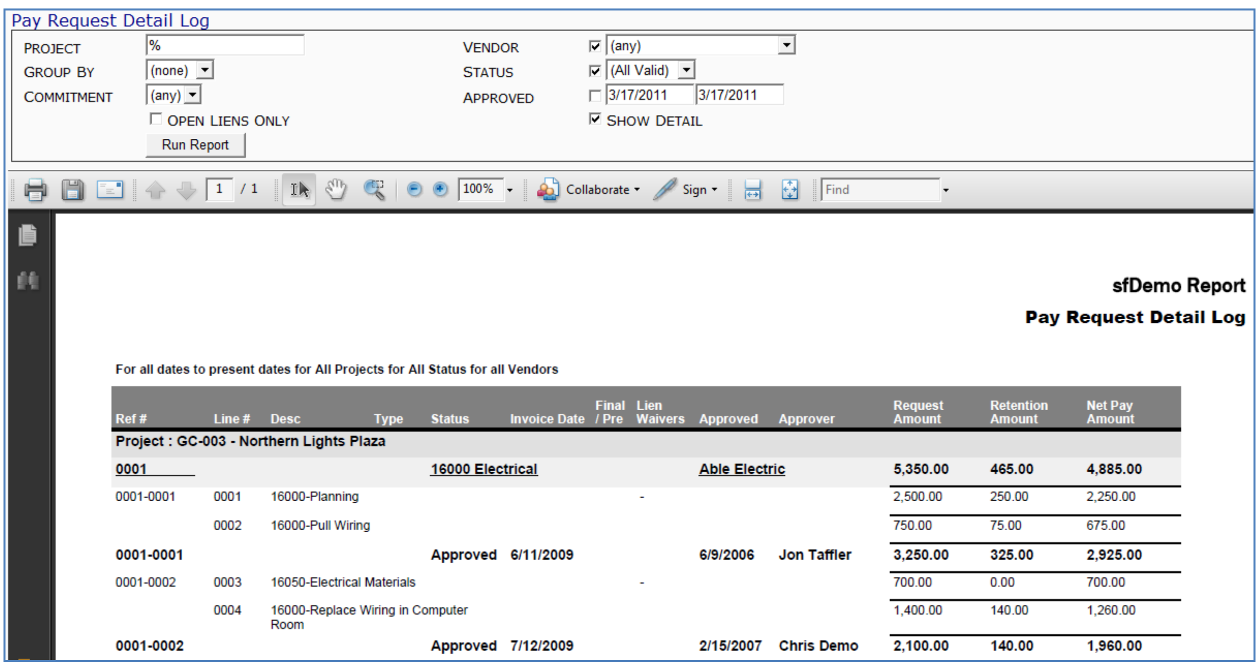
TIP

The delivery notification feature for emails is set through the EMailText | RequestReadReceipt rule. For more information see the *Rules and Rule Values* 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 Request Detail Log

PROJECT %
GROUP BY (none)
COMMITMENT (any)
OPEN LIENS ONLY
Run Report

VENDOR (any)
STATUS (All Valid)
APPROVED 3/17/2011 3/17/2011
SHOW DETAIL

sfDemo Report

Pay Request Detail Log

For all dates to present dates for All Projects for All Status for all Vendors

Ref #	Line #	Desc	Type	Status	Invoice Date	Final / Pre	Lien Waivers	Approved	Approver	Request Amount	Retention Amount	Net Pay Amount
Project : GC-003 - Northern Lights Plaza												
0001				**16000 Electrical**				**Able Electric**		**5,350.00**	**465.00**	**4,885.00**
0001-0001	0001	16000-Planning					-			2,500.00	250.00	2,250.00
	0002	16000-Pull Wiring								750.00	75.00	675.00
0001-0001				**Approved**	**6/11/2009**			**6/9/2006**	**Jon Taffler**	**3,250.00**	**325.00**	**2,925.00**
0001-0002	0003	16050-Electrical Materials					-			700.00	0.00	700.00
	0004	16000-Replace Wiring in Computer Room								1,400.00	140.00	1,260.00
0001-0002				**Approved**	**7/12/2009**			**2/15/2007**	**Chris Demo**	**2,100.00**	**140.00**	**1,960.00**

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.
- **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 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.

Columns

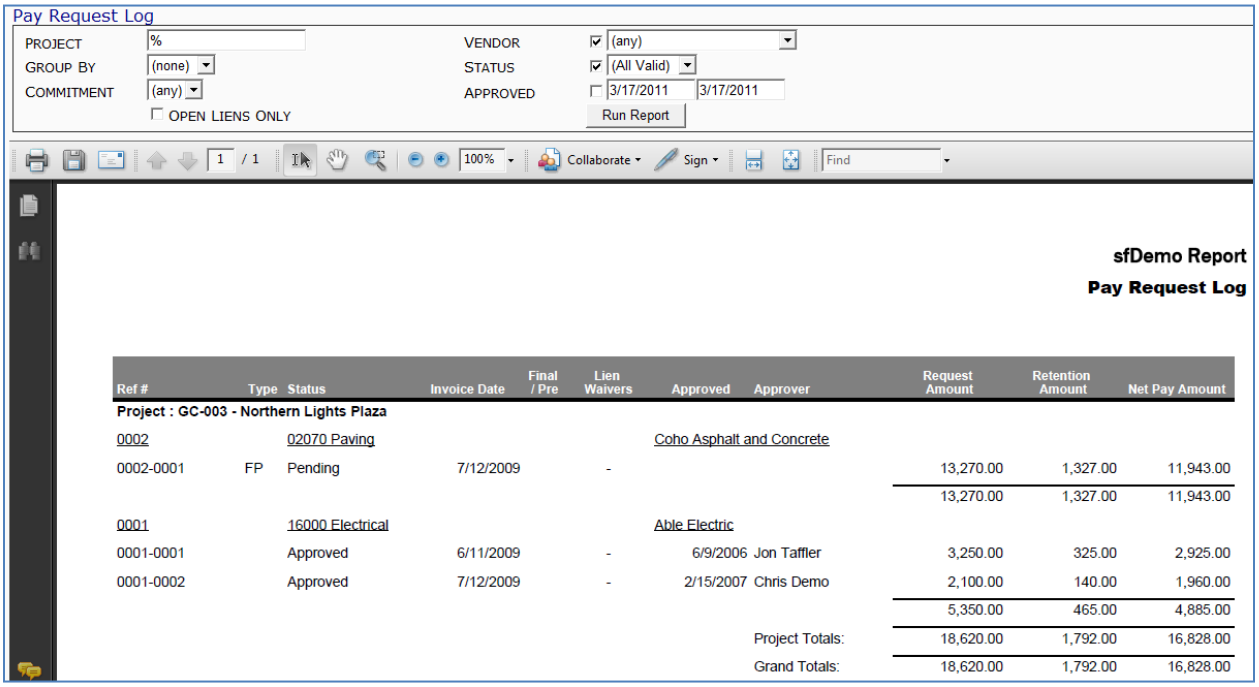
- **Ref #** - a) the Commitment document number and b) the Pay Request document number.
- **Line #** - the Pay Request Item's number.
- **Desc** –the Description of the Commitment/Pay Request Item.
- **Type** – the document subtype.
- **Status** – a) the Description of the Commitment and b) the document 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.



sfDemo Report
Pay Request Log

Ref #	Type	Status	Invoice Date	Final / Pre	Lien Waivers	Approved	Approver	Request Amount	Retention Amount	Net Pay Amount
Project : GC-003 - Northern Lights Plaza										
0002		02070 Paving				Coho Asphalt and Concrete				
0002-0001	FP	Pending	7/12/2009		-			13,270.00	1,327.00	11,943.00
								13,270.00	1,327.00	11,943.00
0001		16000 Electrical				Able Electric				
0001-0001		Approved	6/11/2009		-	6/9/2006	Jon Taffler	3,250.00	325.00	2,925.00
0001-0002		Approved	7/12/2009		-	2/15/2007	Chris Demo	2,100.00	140.00	1,960.00
								5,350.00	465.00	4,885.00
							Project Totals:	18,620.00	1,792.00	16,828.00
							Grand Totals:	18,620.00	1,792.00	16,828.00

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.
- **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.

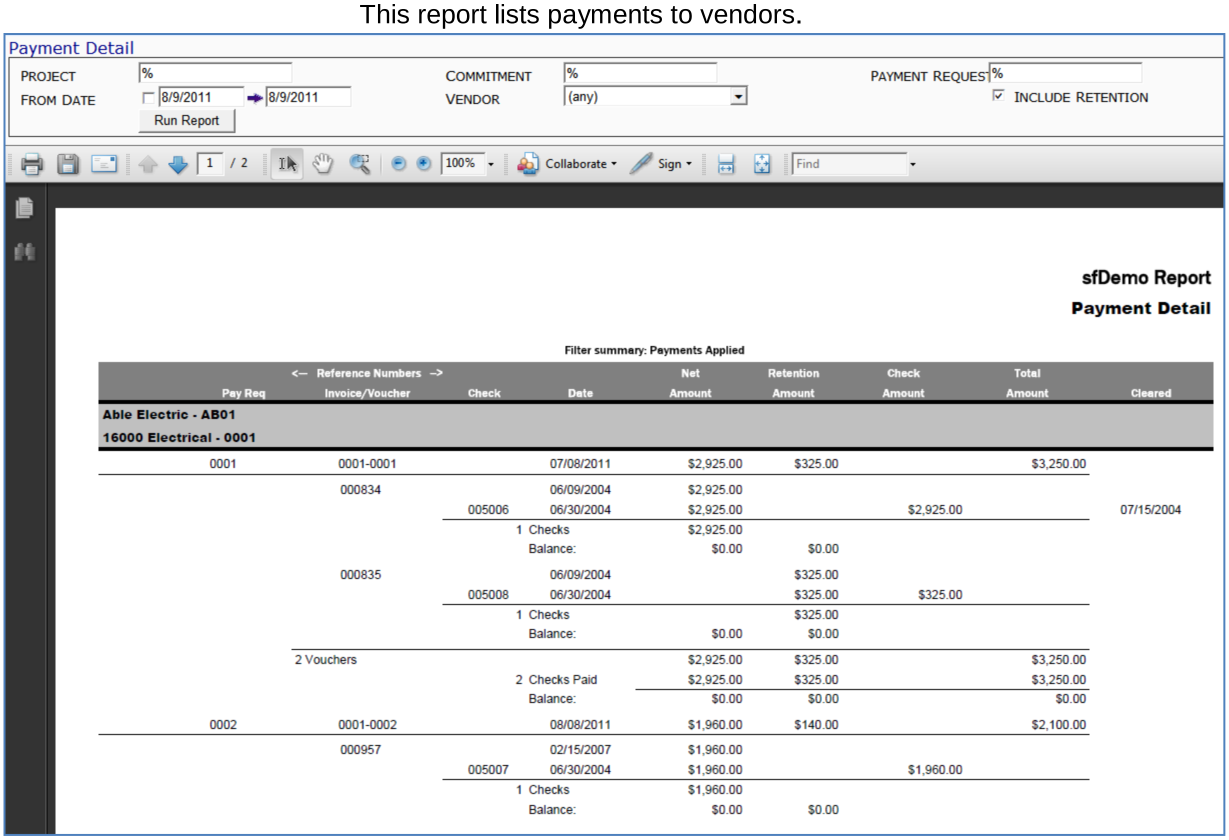
- **Open Liens Only** – whether ☑ or not the report should list Pay Requests with open liens only.

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.

Payment Detail

This report lists payments to vendors.



Filters

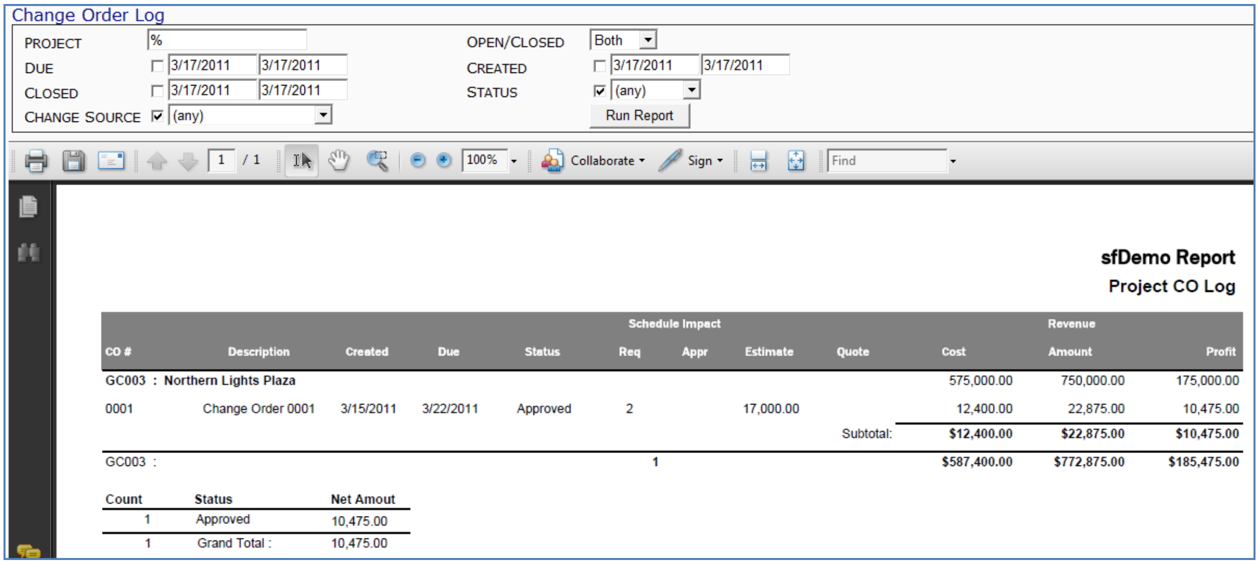
- **Project** – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Commitment** – the Commitment for which payments have been made. You can enter a specific Commitment Doc number or use the % mask for multiple Commitments.
- **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 or not to include retention information on the report.

Columns

- **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.



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.
- **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.

Columns

- **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.

Change Order

PROJECT %

Run Report

Doc No (any)

Change Order Request

10260 SW Greenburg Road
Suite 200
Portland, OR, 97223,
5034526981
5034526990

Project Northern Lights Office Bldg
Northern Lights
1000 Electric Lane
Portland, OR, 10504

Print Date	2/5/2013 10:26:05 AM
Change Order Number	0001
Change Order Date	2/2/2013 12:00:00 AM
Architect's Project #	
Owner Change Order No.	
Contract	NO0101
Contract Date	11/5/2004 12:00:00 AM
Company Id	CCC

The contract is changed as follows

Additional electrical work to meet city's new requirements.

The original Project Contract Amount (Guaranteed Maximum Cost) was	750,000.00
Project Net Change by previously authorized Change Orders	
The Project Contract Amount (Guaranteed Maximum Cost) prior to this Change Order was	750,000.00
The Project Contract Amount (Guaranteed Maximum Cost) will be increased by this Change Order	2,925.00
The new Project Contract Amount (Guaranteed Maximum Cost) including this Change Order	752,925.00
The Project Contract Time will be affected by	0 days

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.
- **Doc No** – the Change Order document number. You can select a specific Doc No. or keep the **(any)** default.

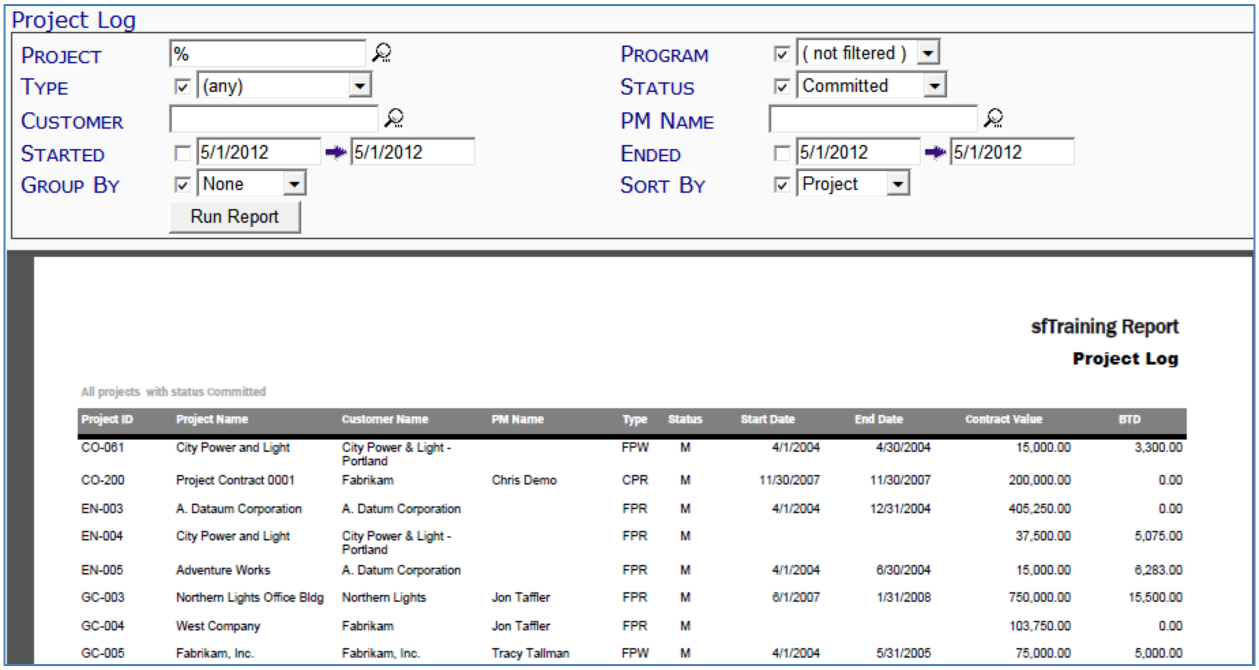
Columns

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 ID	Project Name	Customer Name	PM Name	Type	Status	Start Date	End Date	Contract Value	BTD
CO-061	City Power and Light	City Power & Light - Portland		FPW	M	4/1/2004	4/30/2004	15,000.00	3,300.00
CO-200	Project Contract 0001	Fabrikam	Chris Demo	CPR	M	11/30/2007	11/30/2007	200,000.00	0.00
EN-003	A. Dataum Corporation	A. Datum Corporation		FPR	M	4/1/2004	12/31/2004	405,250.00	0.00
EN-004	City Power and Light	City Power & Light - Portland		FPR	M			37,500.00	5,075.00
EN-005	Adventure Works	A. Datum Corporation		FPR	M	4/1/2004	6/30/2004	15,000.00	6,283.00
GC-003	Northern Lights Office Bldg	Northern Lights	Jon Taffler	FPR	M	6/1/2007	1/31/2008	750,000.00	15,500.00
GC-004	West Company	Fabrikam	Jon Taffler	FPR	M			103,750.00	0.00
GC-005	Fabrikam, Inc.	Fabrikam, Inc.	Tracy Tallman	FPW	M	4/1/2004	5/31/2005	75,000.00	5,000.00

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.
- **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.**

Columns

- **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.

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

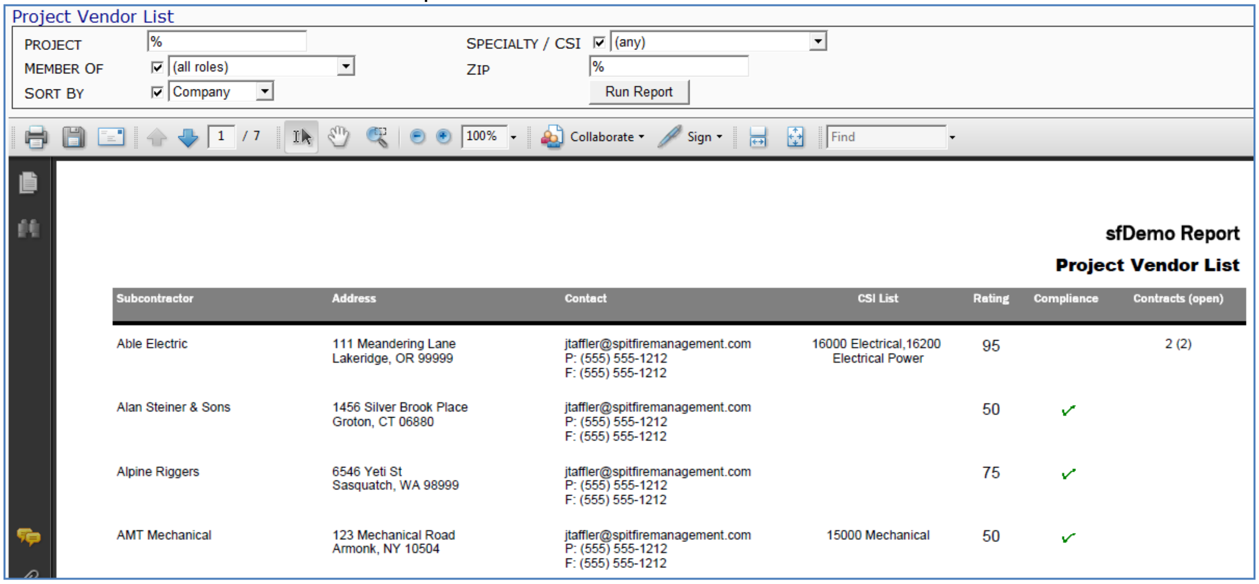
- **Status** – the document status of the Project Setup document, in code.
  Note: Status codes are described at the end of the report, with counts of how many project have each status.

Status	Description	Count
I	In Process	13
M	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 vendor information.



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.
- **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.**

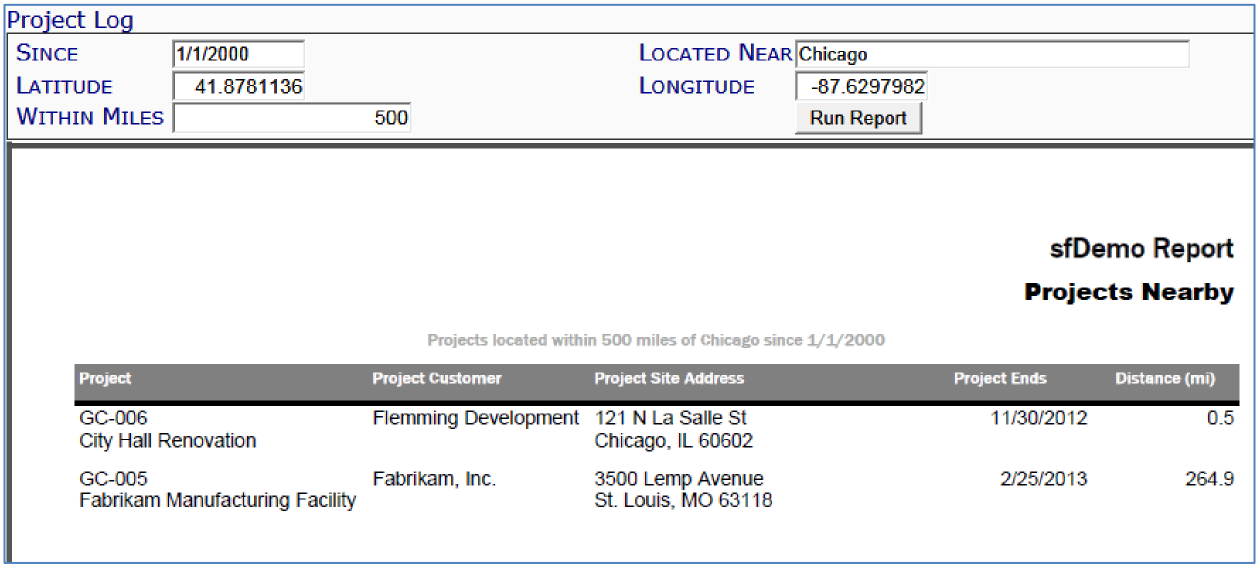
Columns

- **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 ( ) 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.



Filters

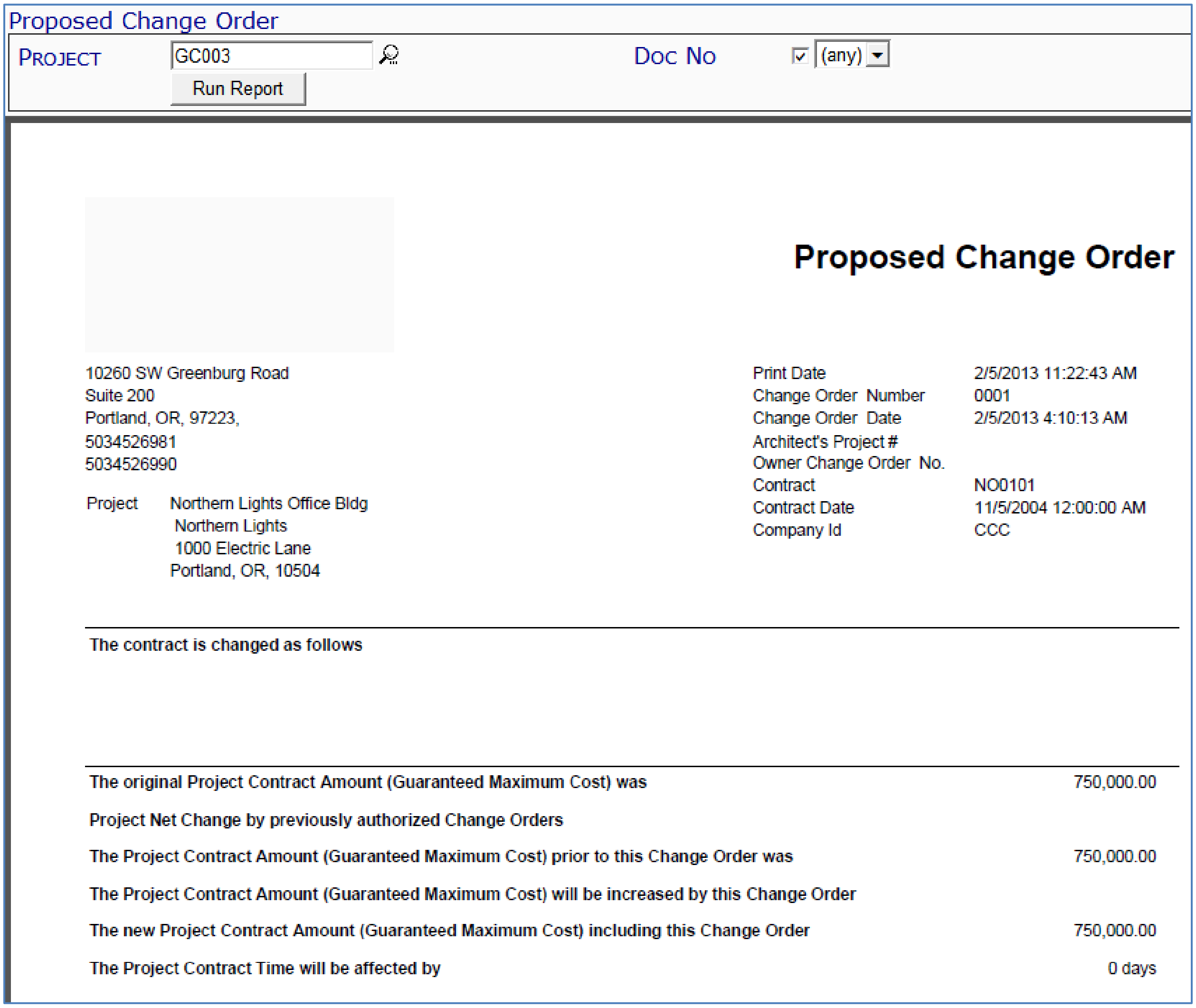
- **Since** – the project start date since when to include in the report.
- **Located Near** – a location entered as *Project ID* or anything else that Google Maps will accept as an address (e.g. *ZIP code; Airport code; city, state*, etc.) When you tab out, the Latitude and Longitude will be filled 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.

Columns

- **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.



Proposed Change Order

PROJECT GC003 Doc No (any)

Run Report

Proposed Change Order

10260 SW Greenburg Road
Suite 200
Portland, OR, 97223,
5034526981
5034526990

Project Northern Lights Office Bldg
Northern Lights
1000 Electric Lane
Portland, OR, 10504

Print Date	2/5/2013 11:22:43 AM
Change Order Number	0001
Change Order Date	2/5/2013 4:10:13 AM
Architect's Project #	
Owner Change Order No.	
Contract	NO0101
Contract Date	11/5/2004 12:00:00 AM
Company Id	CCC

The contract is changed as follows

The original Project Contract Amount (Guaranteed Maximum Cost) was	750,000.00
Project Net Change by previously authorized Change Orders	
The Project Contract Amount (Guaranteed Maximum Cost) prior to this Change Order was	750,000.00
The Project Contract Amount (Guaranteed Maximum Cost) will be increased by this Change Order	
The new Project Contract Amount (Guaranteed Maximum Cost) including this Change Order	750,000.00
The Project Contract Time will be affected by	0 days

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.
- **Doc No** – the Change Order document number. You can select a specific Doc No. or keep the **(any)** default.

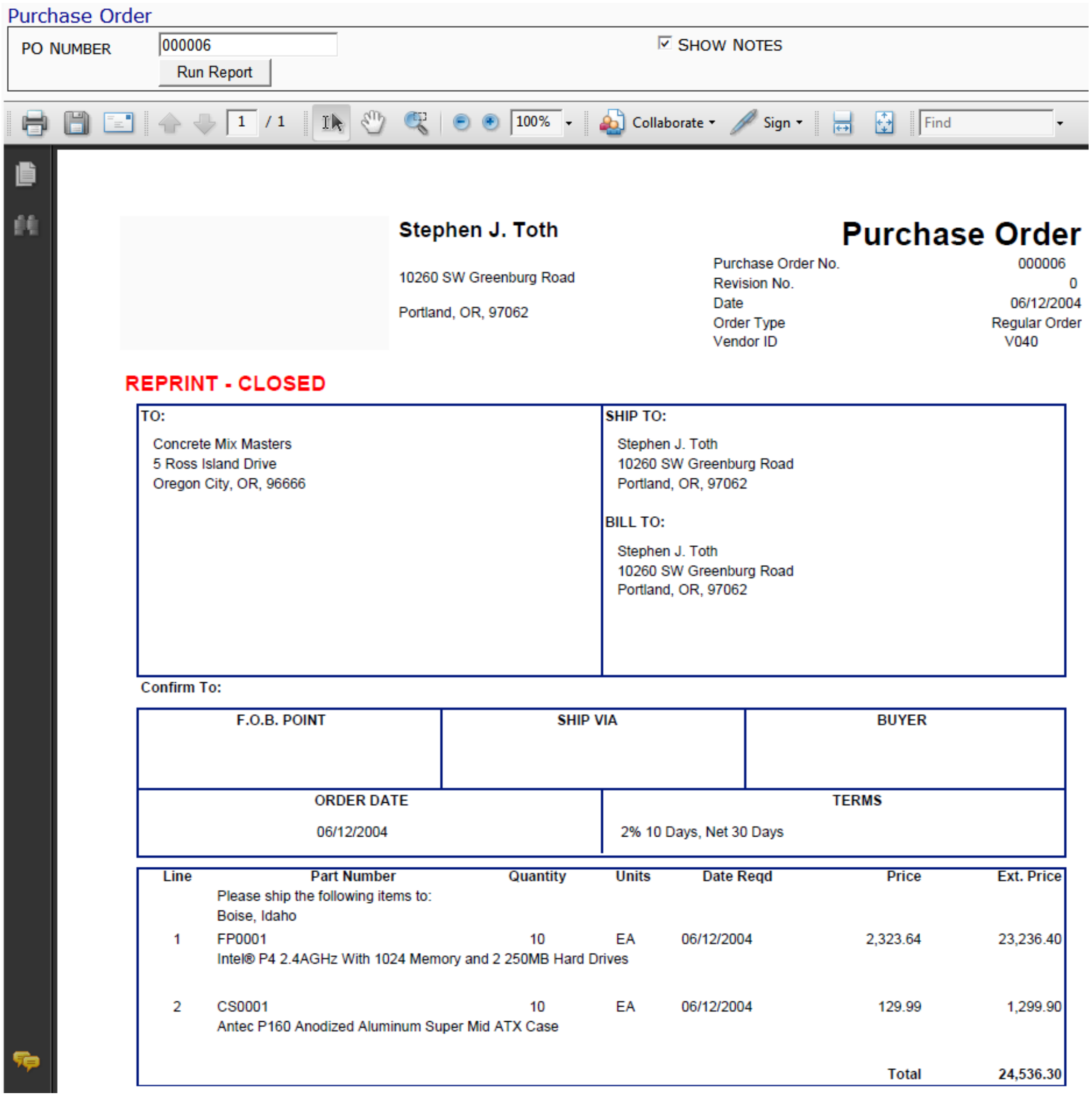
Columns

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.



Purchase Order

PO NUMBER 000006 Run Report

☑ SHOW NOTES

Stephen J. Toth

10260 SW Greenburg Road

Portland, OR, 97062

Purchase Order

Purchase Order No.	000006
Revision No.	0
Date	06/12/2004
Order Type	Regular Order
Vendor ID	V040

REPRINT - CLOSED

TO:	SHIP TO:
Concrete Mix Masters 5 Ross Island Drive Oregon City, OR, 96666	Stephen J. Toth 10260 SW Greenburg Road Portland, OR, 97062 BILL TO: Stephen J. Toth 10260 SW Greenburg Road Portland, OR, 97062

Confirm To:

F.O.B. POINT	SHIP VIA	BUYER

ORDER DATE	TERMS
06/12/2004	2% 10 Days, Net 30 Days

Line	Part Number	Quantity	Units	Date Reqd	Price	Ext. Price
	Please ship the following items to: Boise, Idaho					
1	FP0001 Intel® P4 2.4AGHz With 1024 Memory and 2 250MB Hard Drives	10	EA	06/12/2004	2,323.64	23,236.40
2	CS0001 Antec P160 Anodized Aluminum Super Mid ATX Case	10	EA	06/12/2004	129.99	1,299.90
					Total	24,536.30

Filters

- **PO Number** – the number of the Purchase Order. This filter is required before you click the Run Report button.
- **Show Notes** - whether ☑ or not the report should include the notes from the document's Note tab.

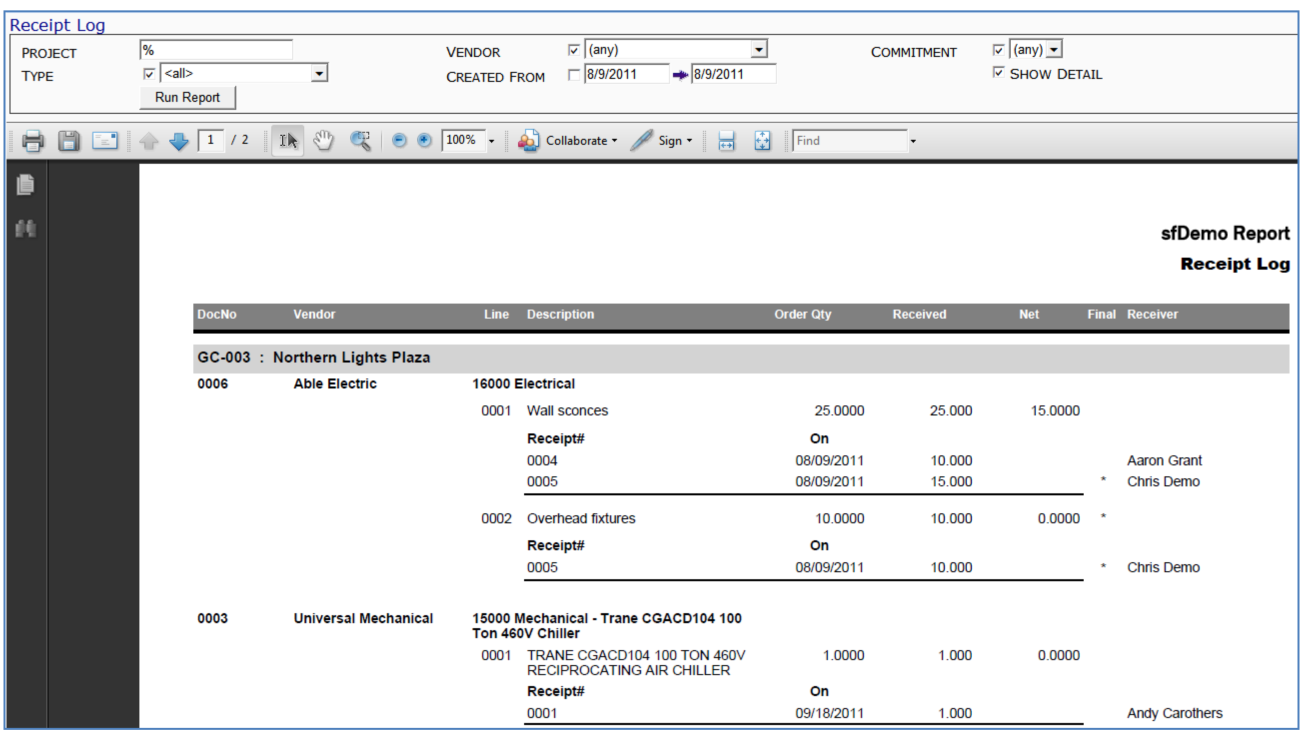
Columns

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.



Filters

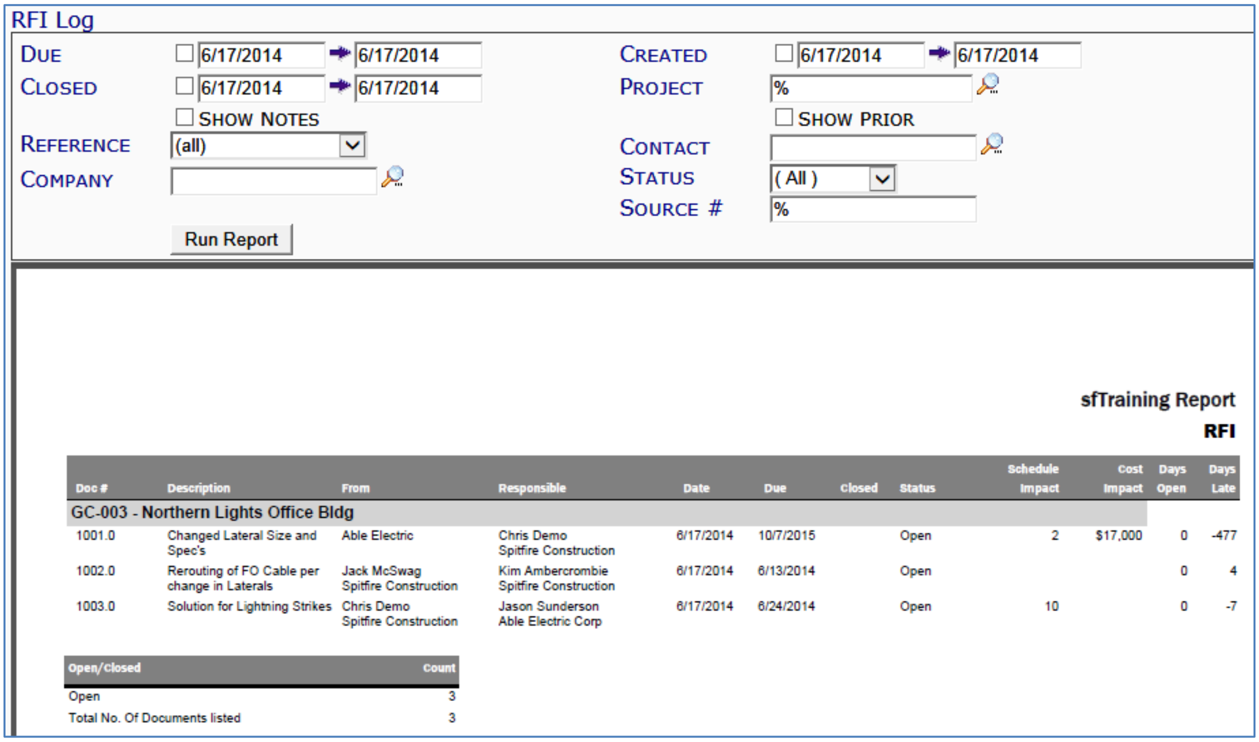
- **Project** – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Vendor** – the Vendor on the Commitment associated with the Receipt document. You can select a specific Vendor or keep the **(any)** default.
- **Commitment** – 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 ☑ or not to show information about Receipt Items.

Columns

- **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 report lists data for RFI documents.



Filters

- **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 ( ) 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.

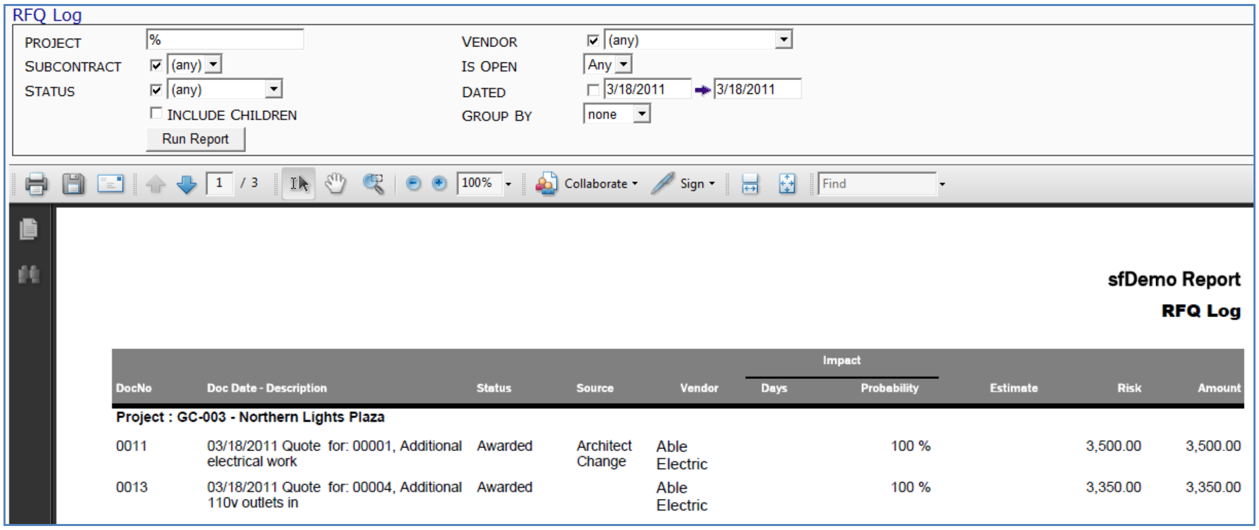
- **Company** – the company associated either with the RFI's Source Contact (From person) or with the Responsible person. You can look up () a Company or leave blank for all Companies.
- **Status** – the RFI's document status. You can select **Open**, **Closed** or keep the **(any)** default.
- **Source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

Columns

- **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.



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 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 ☑ 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**.

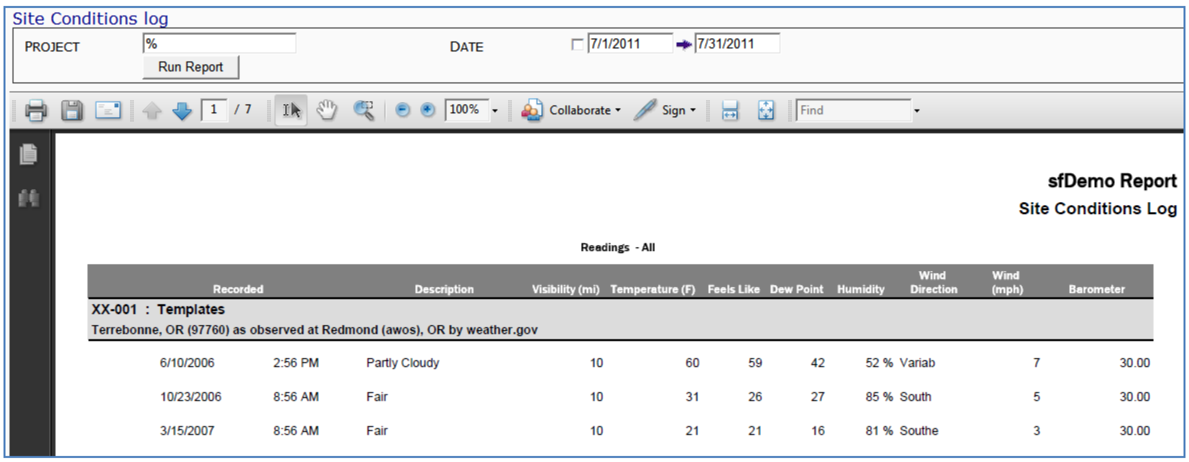
Columns

- **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.



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.
- **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.

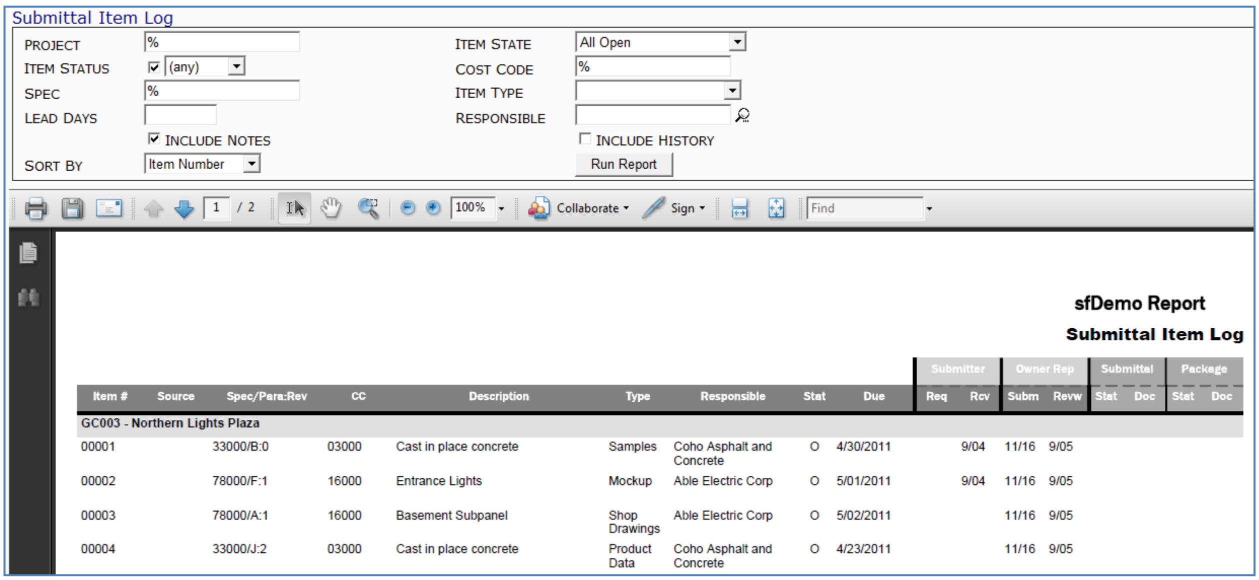
Columns

- **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.



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.
- **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.

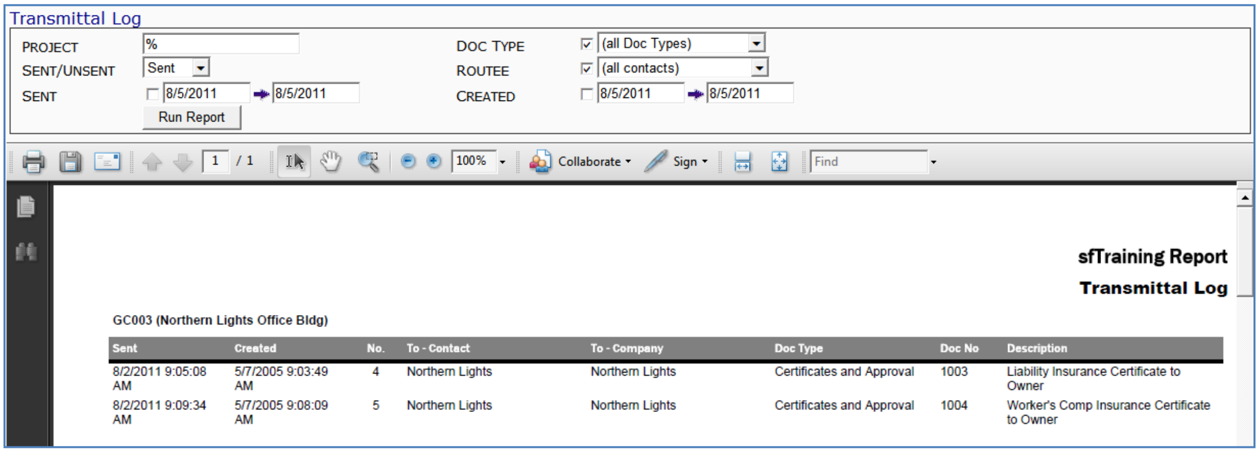
- **Item Type** – the Item Type of the Submittal Item. You can select a specific Item Type or leave blank for all Item Types.
- **Lead Days** – the number of days looking forward by which to limit the report. You can enter any number from 0 to 32768. **Note**: numbers less than zero effectively turn off the filter.
- **Responsible** – the person Responsible for the Submittal Item. You can look up ( ) 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 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**.

Columns

- **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.



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.
- **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.

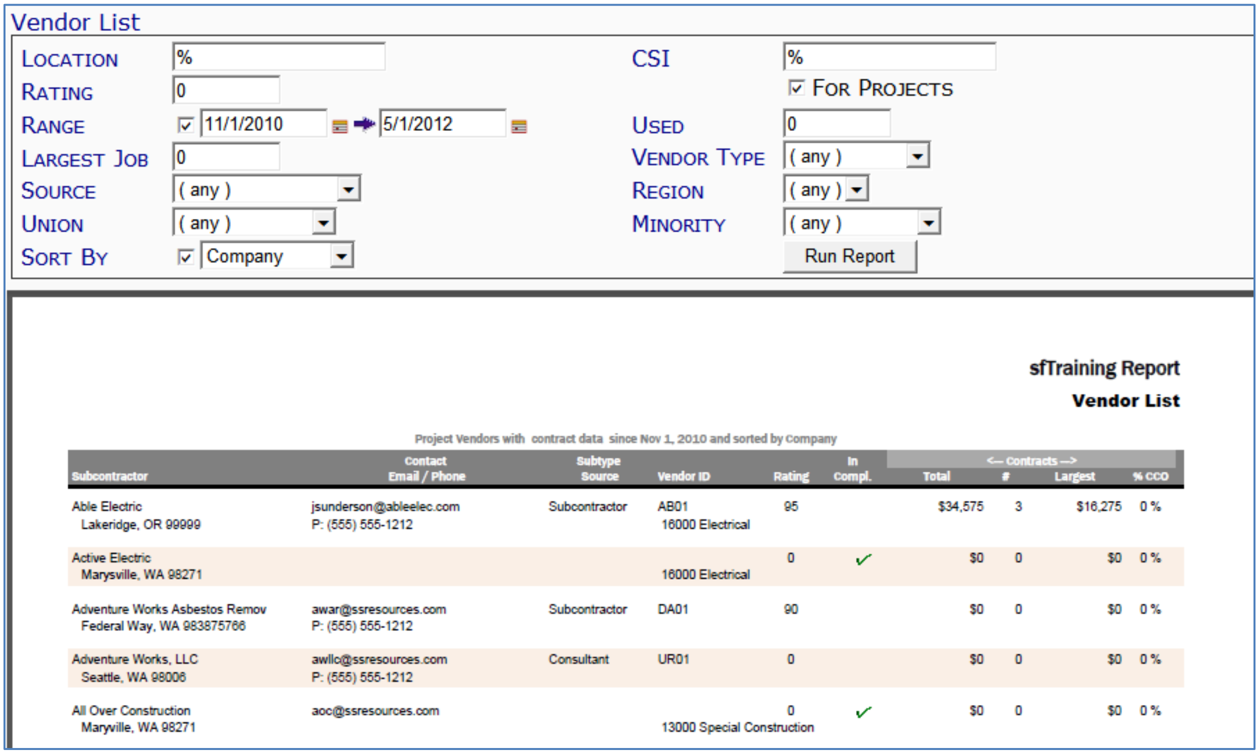
Columns

- **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.



Filters

- **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 ☑ 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 %.**

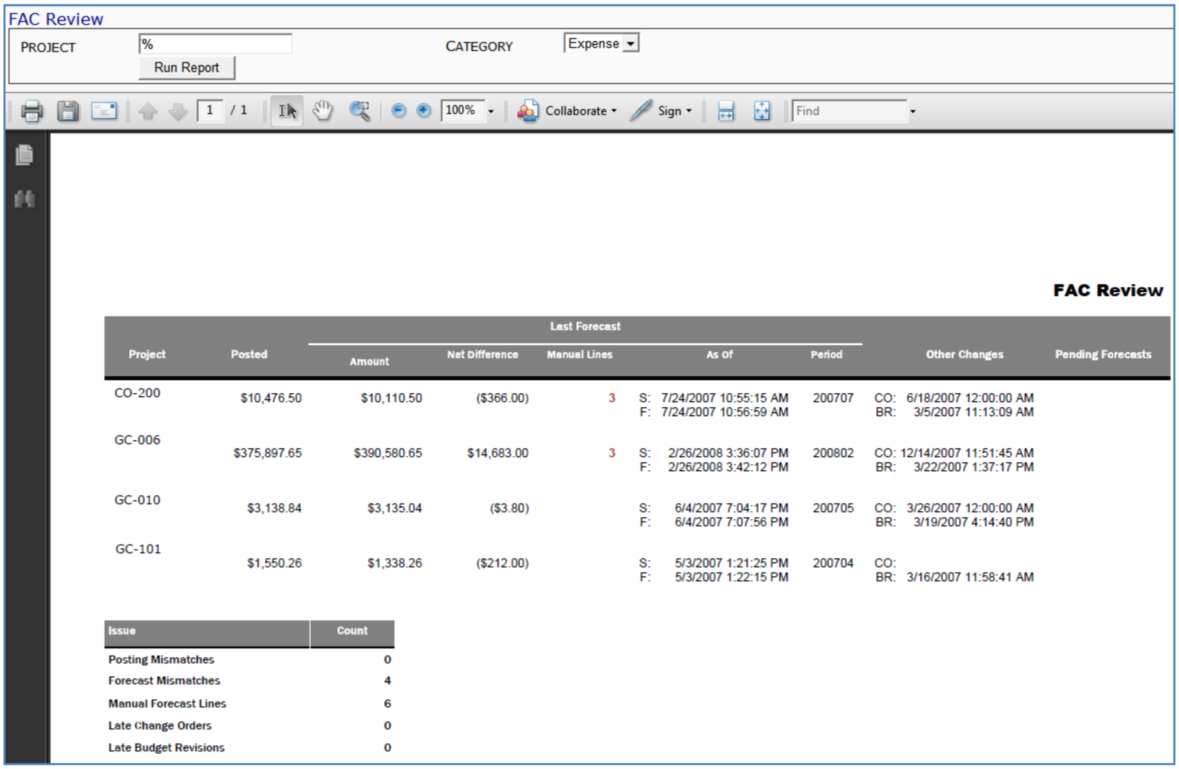
Columns

- **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 (✔).
- **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 Review

PROJECT %

Run Report

CATEGORY Expense

FAC Review

Project	Posted	Last Forecast					Other Changes	Pending Forecasts
		Amount	Net Difference	Manual Lines	As Of	Period		
CO-200	$10,476.50	$10,110.50	($366.00)	3	S: 7/24/2007 10:55:15 AM F: 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: 2/26/2008 3:36:07 PM F: 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	($3.80)		S: 6/4/2007 7:04:17 PM F: 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: 5/3/2007 1:21:25 PM F: 5/3/2007 1:22:15 PM	200704	CO: BR: 3/16/2007 11:58:41 AM	

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

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.
- **Category** – the type of Forecast information for the report. You can select Expense or Revenue.

Columns

- **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.

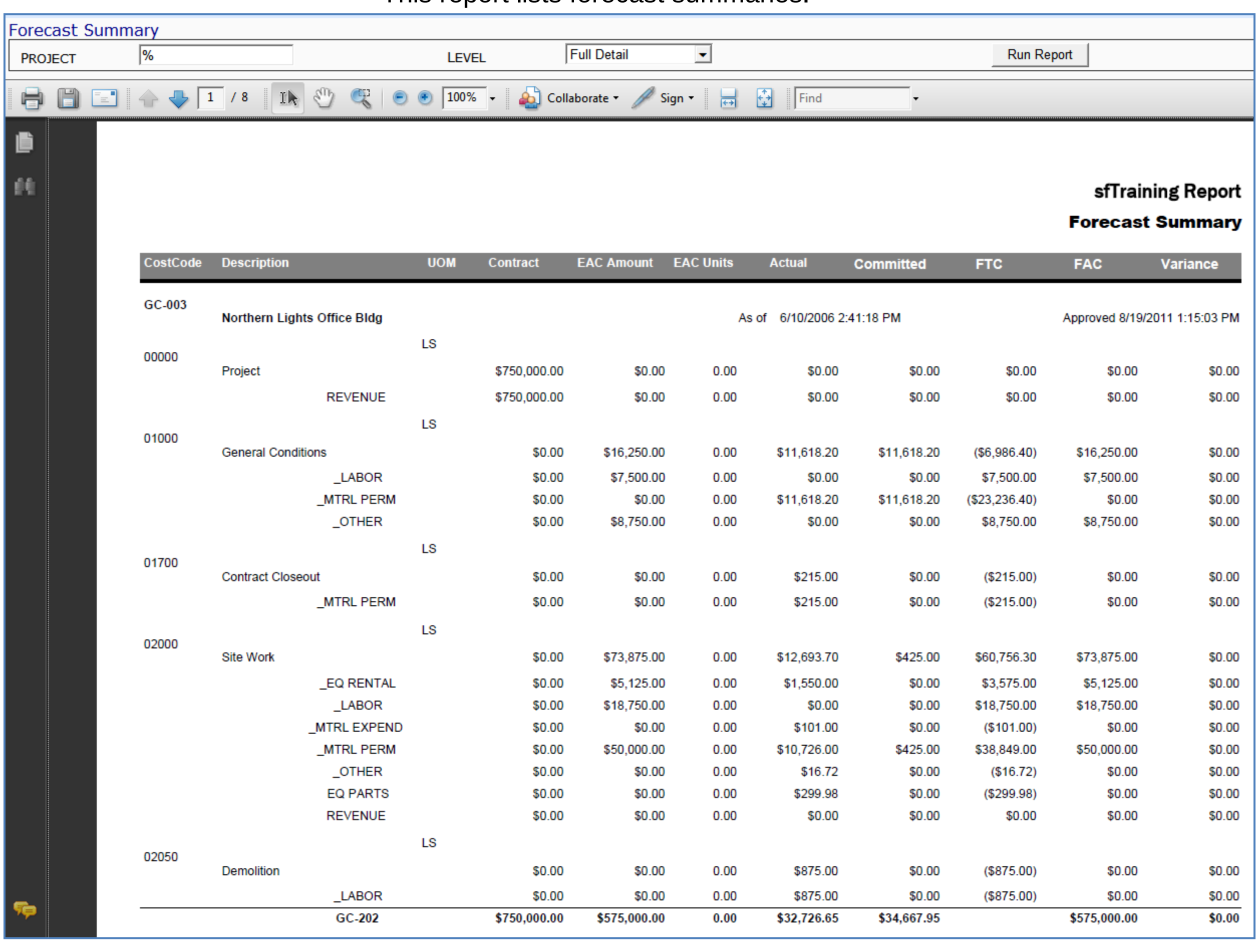
At the end of the report, you will also find:

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.



sfTraining Report

Forecast Summary

CostCode	Description	UOM	Contract	EAC Amount	EAC Units	Actual	Committed	FTC	FAC	Variance
GC-003	Northern Lights Office Bldg				As of	6/10/2006 2:41:18 PM			Approved 8/19/2011 1:15:03 PM	
00000		LS								
	Project		$750,000.00	$0.00	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	$0.00
01000		LS								
	General Conditions		$0.00	$16,250.00	0.00	$11,618.20	$11,618.20	($6,986.40)	$16,250.00	$0.00
	_LABOR		$0.00	$7,500.00	0.00	$0.00	$0.00	$7,500.00	$7,500.00	$0.00
	_MTRL PERM		$0.00	$0.00	0.00	$11,618.20	$11,618.20	($23,236.40)	$0.00	$0.00
	_OTHER		$0.00	$8,750.00	0.00	$0.00	$0.00	$8,750.00	$8,750.00	$0.00
01700		LS								
	Contract Closeout		$0.00	$0.00	0.00	$215.00	$0.00	($215.00)	$0.00	$0.00
	_MTRL PERM		$0.00	$0.00	0.00	$215.00	$0.00	($215.00)	$0.00	$0.00
02000		LS								
	Site Work		$0.00	$73,875.00	0.00	$12,693.70	$425.00	$60,756.30	$73,875.00	$0.00
	_EQ RENTAL		$0.00	$5,125.00	0.00	$1,550.00	$0.00	$3,575.00	$5,125.00	$0.00
	_LABOR		$0.00	$18,750.00	0.00	$0.00	$0.00	$18,750.00	$18,750.00	$0.00
	_MTRL EXPEND		$0.00	$0.00	0.00	$101.00	$0.00	($101.00)	$0.00	$0.00
	_MTRL PERM		$0.00	$50,000.00	0.00	$10,726.00	$425.00	$38,849.00	$50,000.00	$0.00
	_OTHER		$0.00	$0.00	0.00	$16.72	$0.00	($16.72)	$0.00	$0.00
	EQ PARTS		$0.00	$0.00	0.00	$299.98	$0.00	($299.98)	$0.00	$0.00
	REVENUE		$0.00	$0.00	0.00	$0.00	$0.00	$0.00	$0.00	$0.00
02050		LS								
	Demolition		$0.00	$0.00	0.00	$875.00	$0.00	($875.00)	$0.00	$0.00
	_LABOR		$0.00	$0.00	0.00	$875.00	$0.00	($875.00)	$0.00	$0.00
	GC-202		**$750,000.00**	**$575,000.00**	**0.00**	**$32,726.65**	**$34,667.95**		**$575,000.00**	**$0.00**

Filters

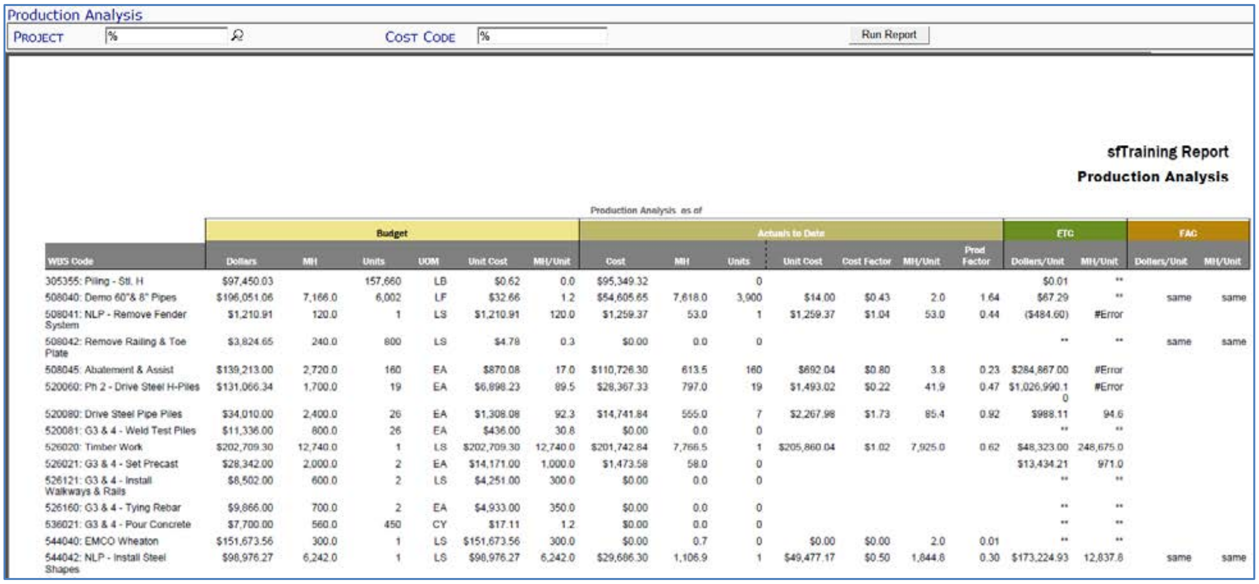
- **Project** – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **Level** – the level of detail for the report. You can select **Full Detail**, **Cost Code Summary** or **Project Summary**.

Columns

- **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.



Production Analysis

PROJECT % COST CODE % Run Report

sfTraining Report

Production Analysis

Production Analysis as of

	Budget						Actuals to Date							ETC		FAC	
WBS Code	Dollars	MH	Units	UOM	Unit Cost	MH/Unit	Cost	MH	Units	Unit Cost	Cost Factor	MH/Unit	Prod Factor	Dollars/Unit	MH/Unit	Dollars/Unit	MH/Unit
305355: Piling - Stl. H	$97,450.03		157,660	LB	$0.62	0.0	$95,349.32		0					$0.01	**		
508040: Demo 60"& 8" Pipes	$196,051.06	7,166.0	6,002	LF	$32.66	1.2	$54,605.65	7,618.0	3,900	$14.00	$0.43	2.0	1.64	$67.29	**	same	same
508041: NLP - Remove Fender System	$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: Remove Railing & Toe Plate	$3,824.65	240.0	800	LS	$4.78	0.3	$0.00	0.0	0					**	**	same	same
508045: Abatement & 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 0	#Error		
520080: Drive 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: Timber 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 & 4 - Install Walkways & 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: EMCO 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: NLP - Install Steel Shapes	$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	same

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.
- **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.

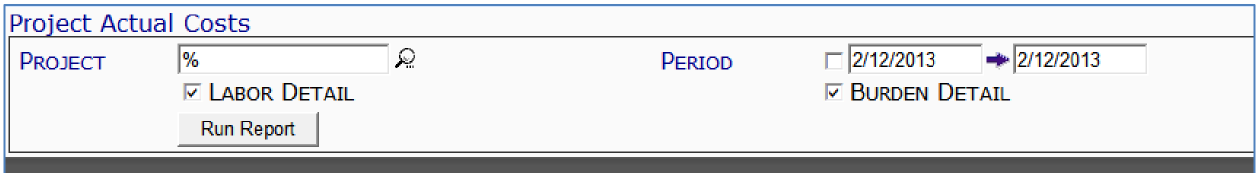
Columns

- **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.



Project Actual Costs

Project GC-002 - Federal Office Building

			Prior Costs		Current Period		PTD		Average Per Day		Average Week		Average Month	
WBS	ID	Posted	Units	Amount	Units	Amount	Units	Amount	Units	Amount	Units	Amount	Units	Amount
WIP CNSTRCT														
	ECPETCULE	4/4/2004			0.00	105.00								
	ECPETCULE	4/4/2004			0.00	420.00								
	ECPETCULE	4/5/2004			0.00	105.00								
	ECPETCULE	4/5/2004			0.00	420.00								
	Ref 000895	4/25/2004			0.00	27.50	V040 Coho Vineyard							
	WIP CNSTRCT	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	0.84
	01000 - General Conditions Totals			$0.00		$20,236.84		$20,236.84		0.52		3.62		15.74
01700 - Contract Closeout														
_MTRL PERM														
	Ref 000894	4/25/2004			0.00	215.00	V060 Humongous Insurance							
	_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	0.17
	01700 - Contract Closeout Totals			$0.00		$215.00		$215.00		0.01		0.04		0.17
02050 - Demolition														
_LABOR														
	EDWILSON	4/9/2004			0.00	17.50	Timesheet Work Crew							
	EDWILSON	4/9/2004			0.00	70.00	Timesheet Work Crew							
	EDSLEPPY	4/9/2004			0.00	70.00	Timesheet Work Crew							
	EDSLEPPY	4/9/2004			0.00	17.50	Timesheet Work Crew							
	EDWILSON	4/9/2004			8.00	280.00	Timesheet Work Crew							
	EDWILSON	4/9/2004			2.00	70.00	Timesheet Work Crew							
	EDSLEPPY	4/9/2004			8.00	280.00	Timesheet Work Crew							
	EDSLEPPY	4/9/2004			2.00	70.00	Timesheet Work Crew							
	EDWILSON	4/14/2004			0.00	40.00	Weekly Labor							
	EDWILSON	4/14/2004			0.00	80.00	Weekly Labor							
	EDWILSON	4/14/2004			8.00	280.00	Weekly Labor							
	EDWILSON	4/14/2004			4.00	140.00	Weekly Labor							
	_LABOR	Totals	0.000	0.00	32.000	1,415.00	32.000	1,415.00	0.001	0.04	0.006	0.25	0.025	1.10

Printed 2/12/2013 1:19:38 PM Page 5 of 14

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.
- **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 ☑ or not to include detail rows for Account Categories designated as Labor class.

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

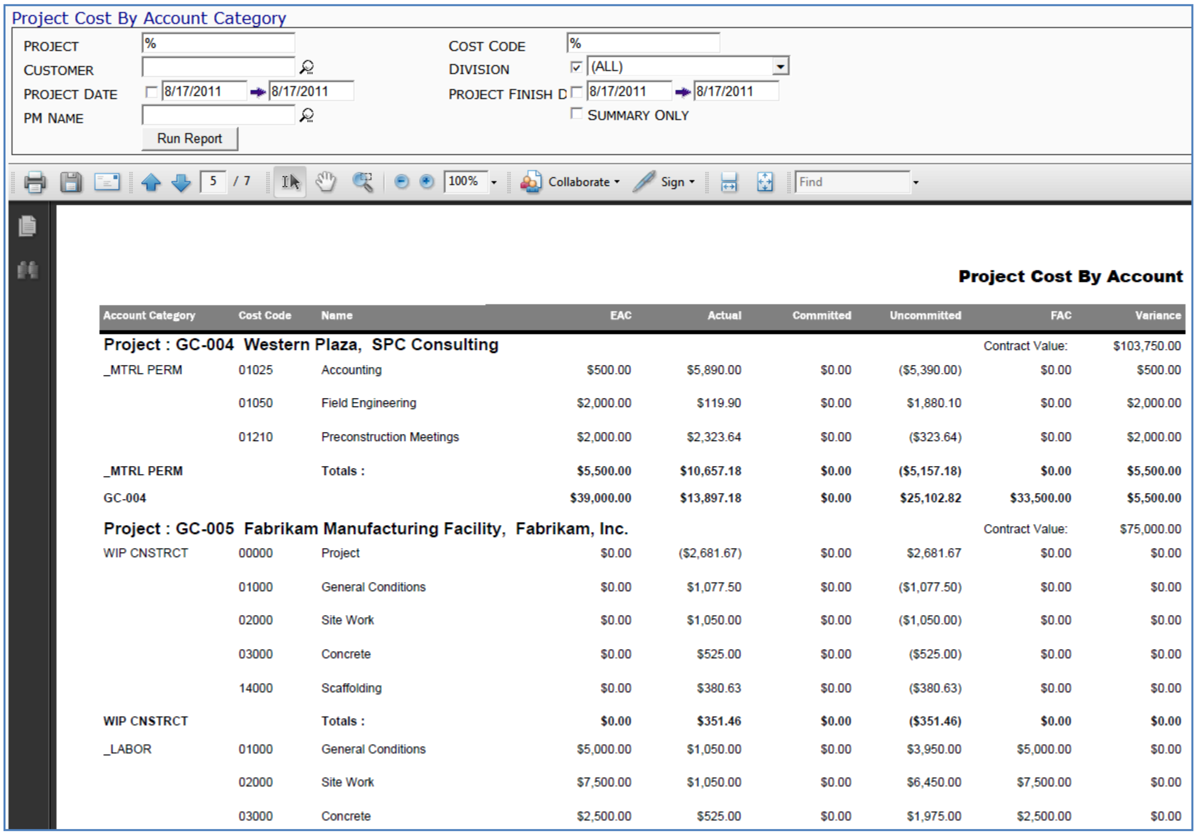
.Columns

- **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

This report lists project amounts by Account Category.



Project Cost By Account

Account Category	Cost Code	Name	EAC	Actual	Committed	Uncommitted	FAC	Variance
Project : GC-004 Western Plaza, SPC Consulting							Contract Value:	$103,750.00
_MTRL PERM	01025	Accounting	$500.00	$5,890.00	$0.00	($5,390.00)	$0.00	$500.00
	01050	Field Engineering	$2,000.00	$119.90	$0.00	$1,880.10	$0.00	$2,000.00
	01210	Preconstruction Meetings	$2,000.00	$2,323.64	$0.00	($323.64)	$0.00	$2,000.00
_MTRL PERM		**Totals :**	**$5,500.00**	**$10,657.18**	**$0.00**	**($5,157.18)**	**$0.00**	**$5,500.00**
GC-004			**$39,000.00**	**$13,897.18**	**$0.00**	**$25,102.82**	**$33,500.00**	**$5,500.00**
Project : GC-005 Fabrikam Manufacturing Facility, Fabrikam, Inc.							Contract Value:	$75,000.00
WIP CNSTRCT	00000	Project	$0.00	($2,681.67)	$0.00	$2,681.67	$0.00	$0.00
	01000	General Conditions	$0.00	$1,077.50	$0.00	($1,077.50)	$0.00	$0.00
	02000	Site Work	$0.00	$1,050.00	$0.00	($1,050.00)	$0.00	$0.00
	03000	Concrete	$0.00	$525.00	$0.00	($525.00)	$0.00	$0.00
	14000	Scaffolding	$0.00	$380.63	$0.00	($380.63)	$0.00	$0.00
WIP CNSTRCT		**Totals :**	**$0.00**	**$351.46**	**$0.00**	**($351.46)**	**$0.00**	**$0.00**
_LABOR	01000	General Conditions	$5,000.00	$1,050.00	$0.00	$3,950.00	$5,000.00	$0.00
	02000	Site Work	$7,500.00	$1,050.00	$0.00	$6,450.00	$7,500.00	$0.00
	03000	Concrete	$2,500.00	$525.00	$0.00	$1,975.00	$2,500.00	$0.00

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.
- **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.

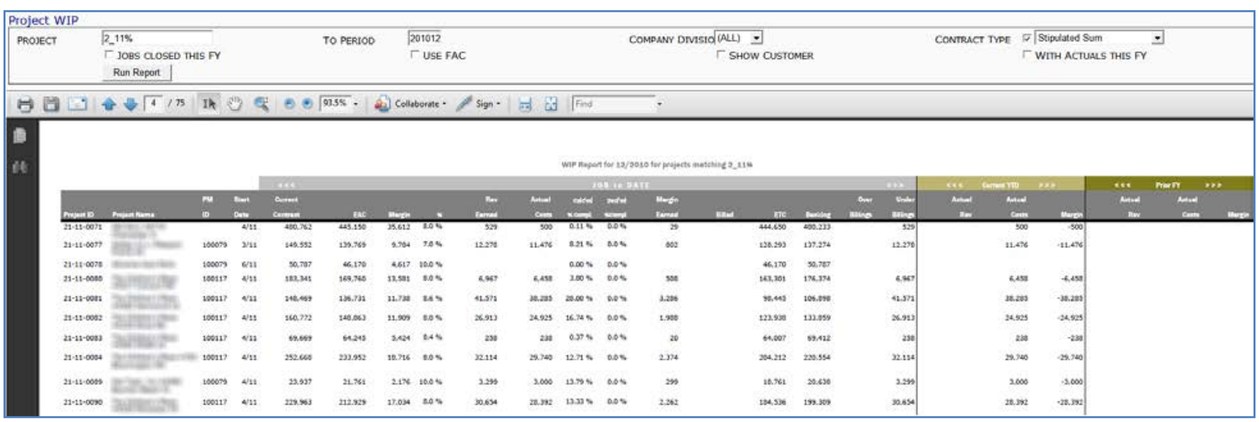
- **PM Name** – the name of the Project Manager on the project. You can look up () a specific name or leave blank for all names.
- **Summary Only** – whether or not the report should exclude Cost Code information.

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.



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.
- **To Period** – The fiscal period, in the format *yyyymm*, indicating the end of the range for the report. The start of the project is used as the start of the range.
- **Company Division** – the company division. You can select a specific division code, **(ALL)** for all divisions or **(Auto)** for your own division.
- **Project Type** – the Project Setup's subtype. You can select a specific subtype or keep the **(any)** default.
- **Jobs Close This FY**– whether ☑ or not the report should include only jobs closed in the current fiscal year.
- **Use FAC** – whether ☑ or not the report should use Forecast At Completion amounts instead of EAC.
- **Show Customer** – whether ☑ or not the report should include the Customer name under each Project name.
- **With Actuals This FY** – whether ☑ or not the report should include actuals in the current fiscal year.

Columns

- **Project ID** – the Project ID.
- **Project Name** – the description of the project (and, if the filter is on, the name of the Customer).
- **PM ID** – the ID code of the Project Manager.
- **Start Date** – the month/year indicating the project's Start date.
- **Current Contract** – the contract value of the job, including all approved Change Orders, up to and including the indicated fiscal period.
- **EAC** – the project's Estimate At Completion amount for the indicated fiscal period.
- **Margin** – the Contract amount minus the EAC amount.
- **% -** the Margin divided by EAC.
- **Rev Earned** – the contract value times percent spent.
- **Actual Costs** – the Actual expenses up to and including the indicated fiscal period.
- **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.

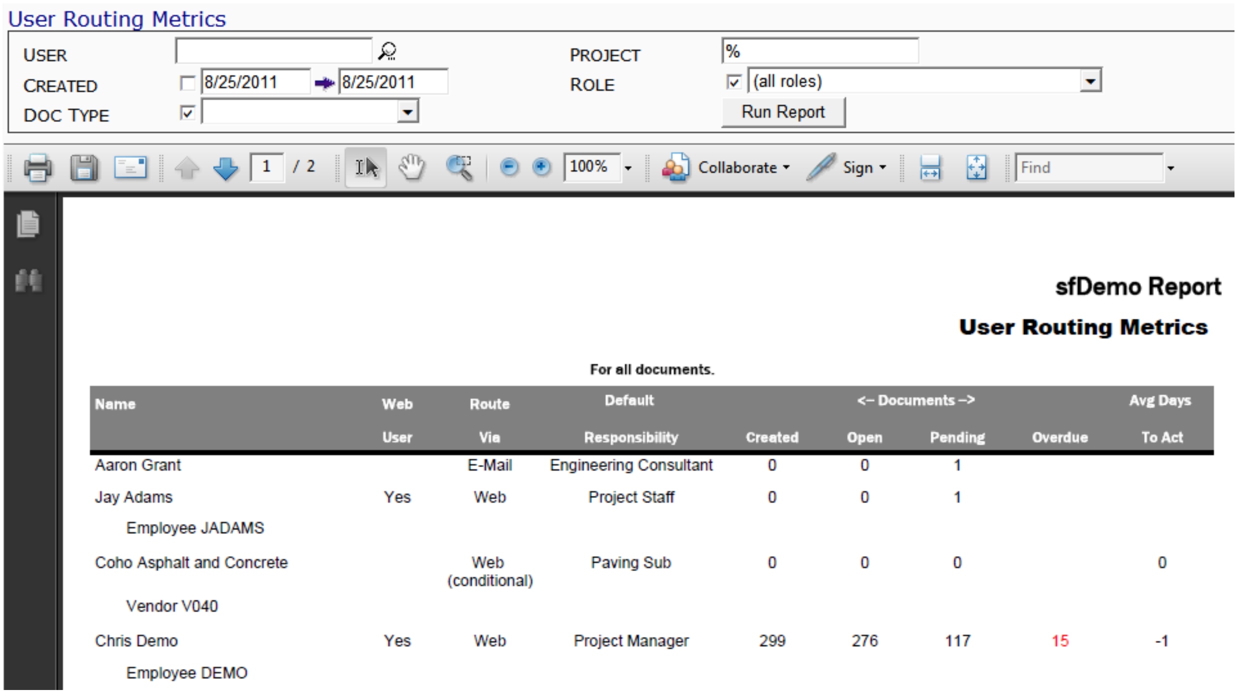
At the end of the report you will also find

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.



Filters

- **User** – the Contact. You can look up () a specific Contact or leave blank for all Contacts.
- **Project** – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.
- **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.
- **Role** – a role pertaining to the Contact. You can select a specific role or keep the **(all roles)** default.
- **Doc Type** – the document type of documents routed to the Contact. You can select a specific Doc type or leave blank for all Doc types.

Columns

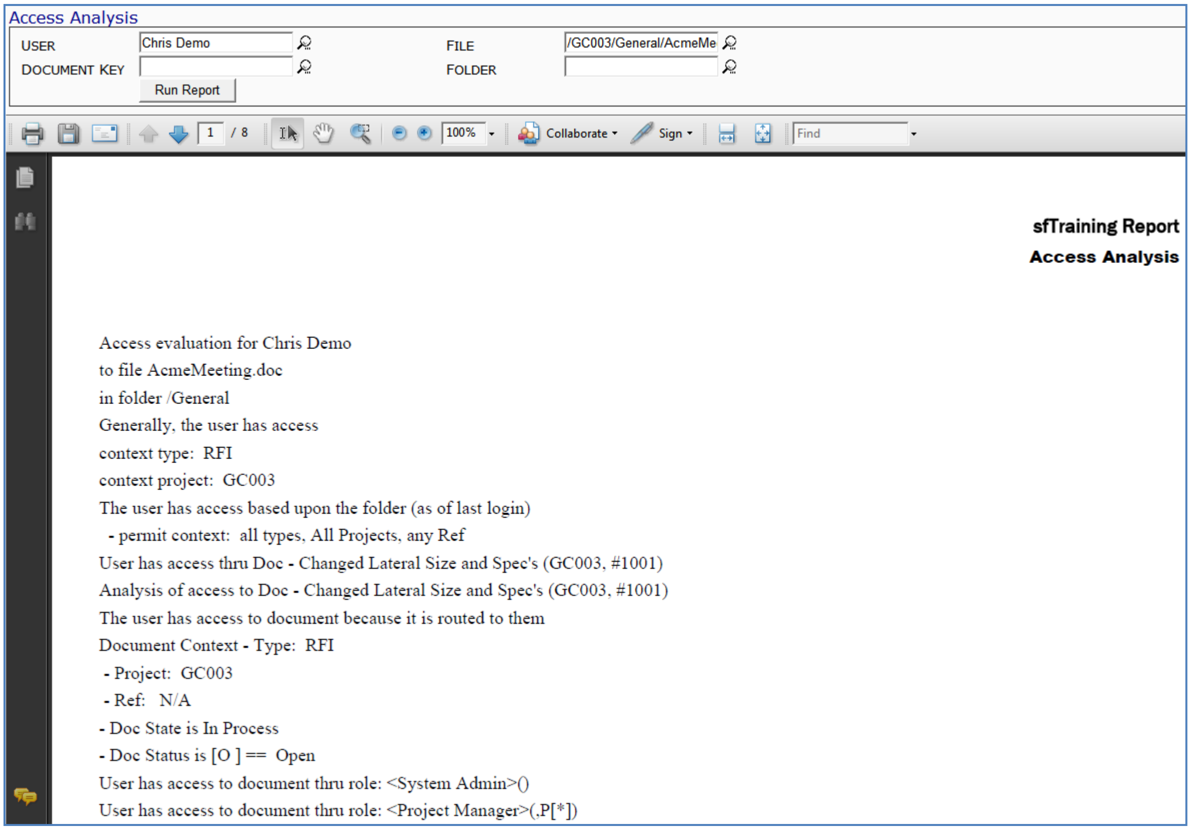
- **Name** – a) the Contact's name and b) the Contact's type and ID.
- **Web User** – whether (YES) or not (blank) the Contact is a Spitfire user who can log into Spitfire.
- **Route Via** – the Contact's default Route Via setting.
- **Default Responsibility** – the Contact's default responsibility as established in the Contact Detail's Connection tab.

- **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 () 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.

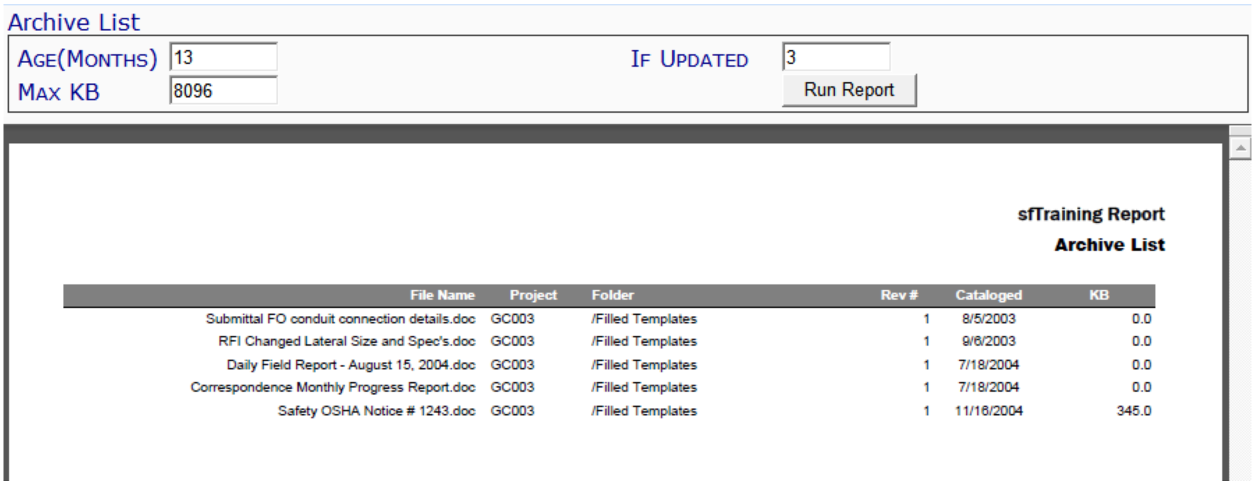
Examples

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 file AcmeMeeting.doc
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)
 - permit context: all types, All Projects, any Ref
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>()
User has access to document thru role: <Project Manager>(,P[*])
User has access to document thru role: <Superintendent>()
User has access to document thru role: <Superintendent>()
Additional access within this context:
Role <Everyone>(): CSTM| Internal Staff=R U
Role <Everyone>(): DOC | Can change document status (if collaborator)=R
Role <Everyone>(): DOC | Document Routees=I

Archive List

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



Archive List

AGE(MONTHS) 13 IF UPDATED 3

MAX KB 8096 Run Report

sfTraining Report

Archive List

File Name	Project	Folder	Rev #	Cataloged	KB
Submittal FO conduit connection details.doc	GC003	/Filled Templates	1	8/5/2003	0.0
RFI Changed Lateral Size and Spec's.doc	GC003	/Filled Templates	1	9/6/2003	0.0
Daily Field Report - August 15, 2004.doc	GC003	/Filled Templates	1	7/18/2004	0.0
Correspondence Monthly Progress Report.doc	GC003	/Filled Templates	1	7/18/2004	0.0
Safety OSHA Notice # 1243.doc	GC003	/Filled Templates	1	11/16/2004	345.0

Filters

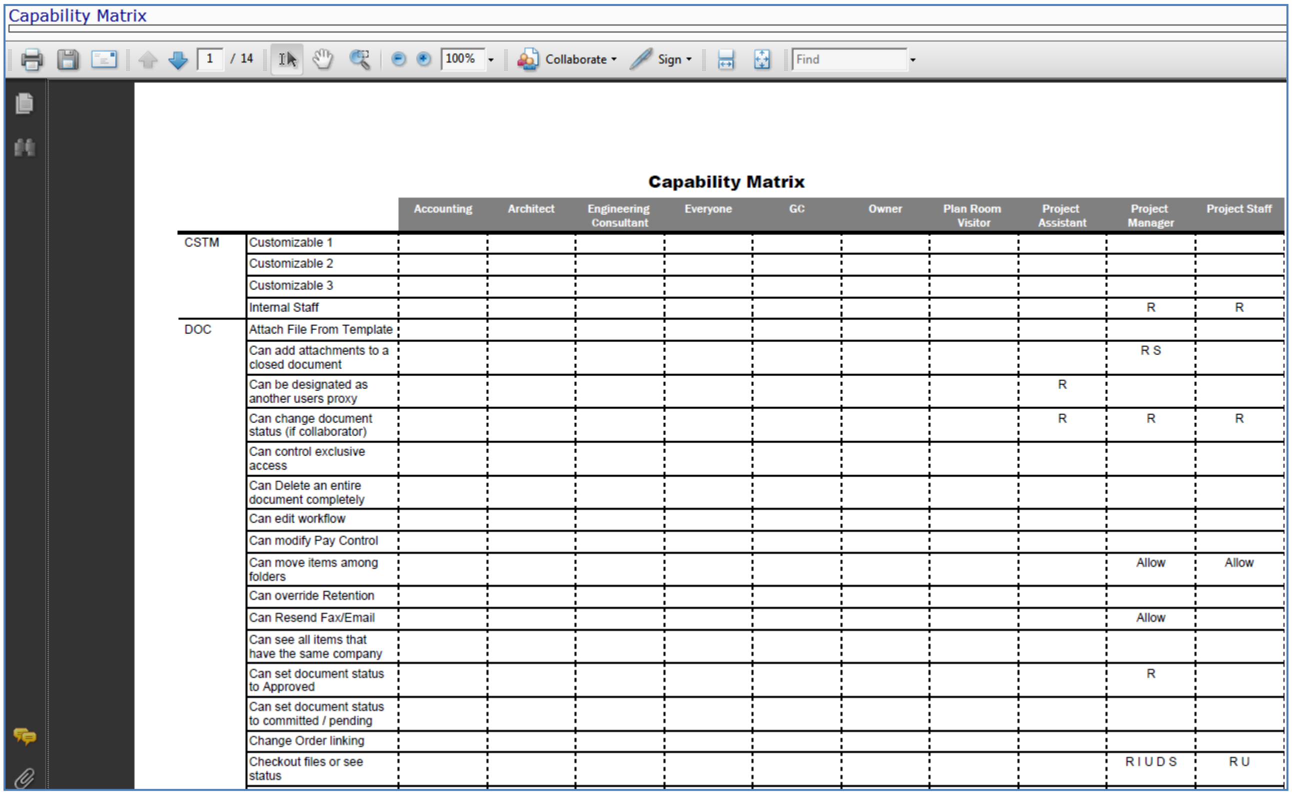
- **Age (Months)** – the minimum age in months for a file without revisions to be included in the report. You can enter a specific number or keep the default of **13**.
- **If Updated** – the minimum age in months for a file with revisions to be included in the report. You can enter a specific number 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**.

Columns

- **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

		Accounting	Architect	Engineering Consultant	Everyone	GC	Owner	Plan Room Visitor	Project Assistant	Project Manager	Project Staff
CSTM	Customizable 1										
	Customizable 2										
	Customizable 3										
	Internal Staff									R	R
DOC	Attach File From Template										
	Can add attachments to a closed document									R S	
	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										
	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										
	Change Order linking										
	Checkout files or see status									R I U D S	R U

Filters

This report does not use filters.

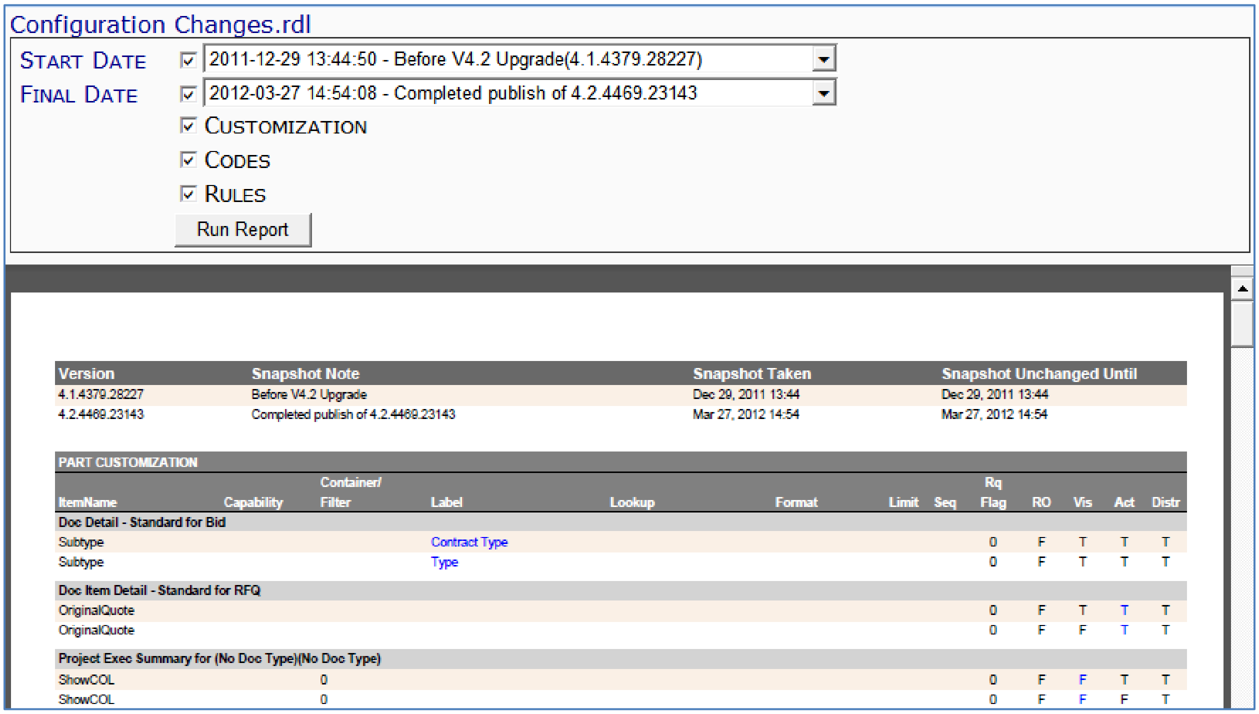
Columns

- *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.



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 ☑ or not the report should include customization changes.
- **Code** - whether ☑ or not the report should include code changes.
- **Rules** - whether ☑ or not the report should include rule changes.

Columns

- **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.

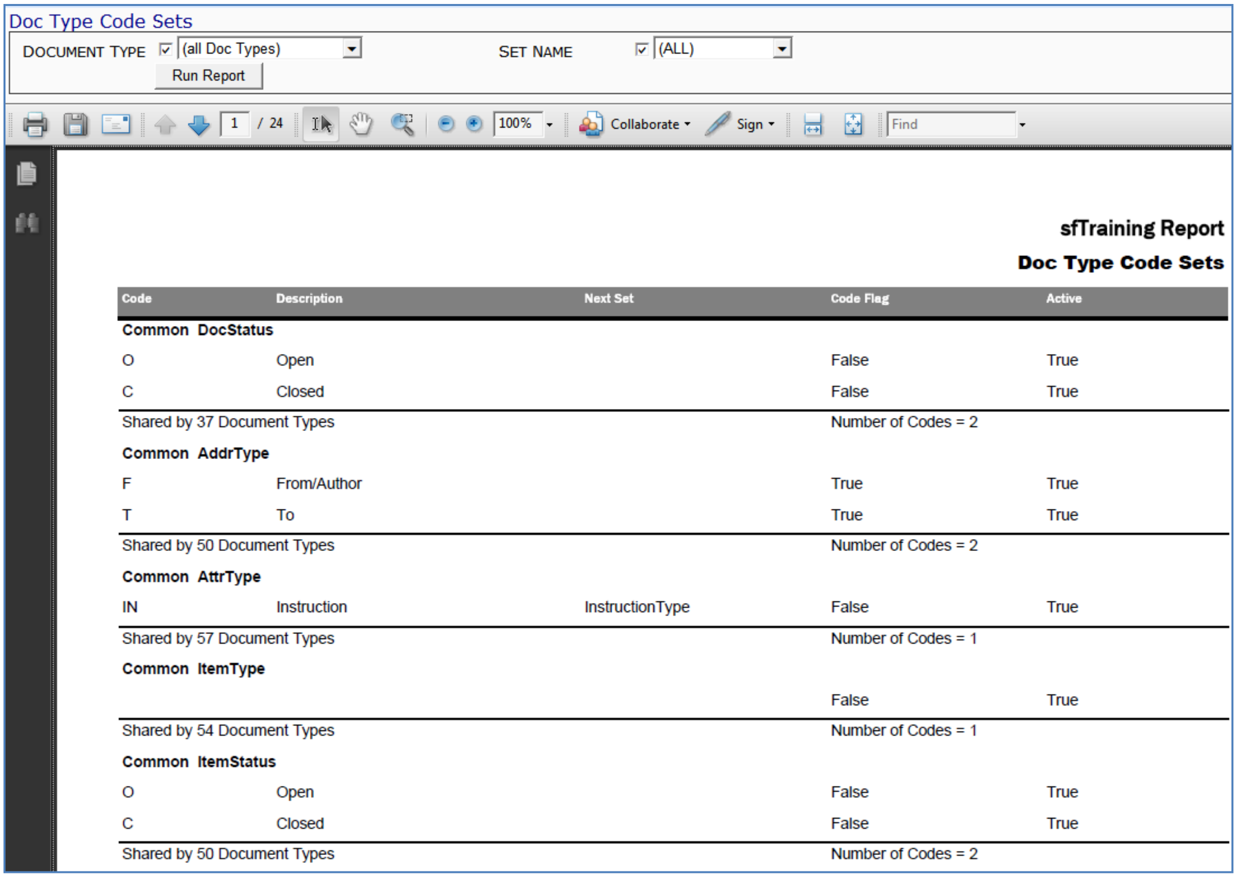
Note: if the Rules filter was checked, the following information appears. This information corresponds to the Rules Maintenance tool on the System Admin Dashboard.

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.



sfTraining Report

Doc Type Code Sets

Code	Description	Next Set	Code Flag	Active
Common DocStatus				
O	Open		False	True
C	Closed		False	True
Shared by 37 Document Types			Number of Codes = 2	
Common AddrType				
F	From/Author		True	True
T	To		True	True
Shared by 50 Document Types			Number of Codes = 2	
Common AttrType				
IN	Instruction	InstructionType	False	True
Shared by 57 Document Types			Number of Codes = 1	
Common ItemType				
			False	True
Shared by 54 Document Types			Number of Codes = 1	
Common ItemStatus				
O	Open		False	True
C	Closed		False	True
Shared by 50 Document Types			Number of Codes = 2	

Filters

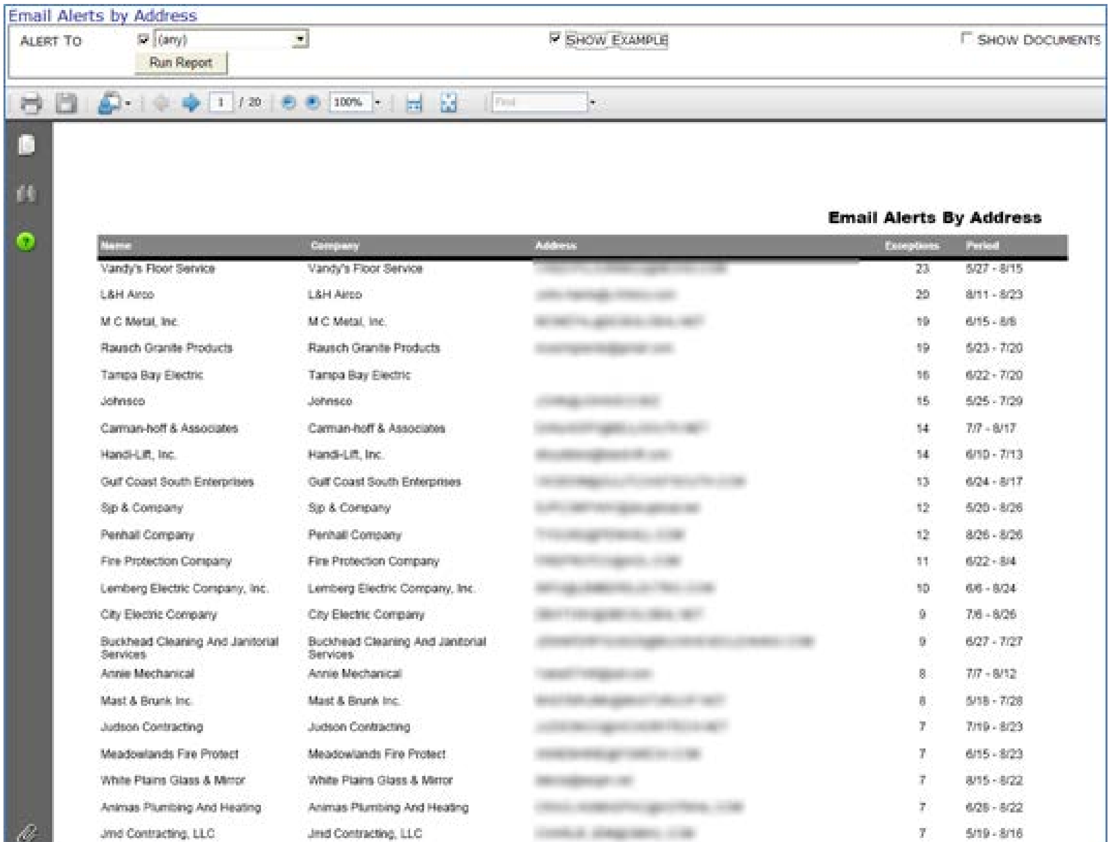
- **Document Type** – the Doc type. You can select a specific Doc type or keep the default **(all Doc Types)** for all Doc types.
- **Set Name** – the name of the Doc type-relevant code set.

Columns

- **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.)

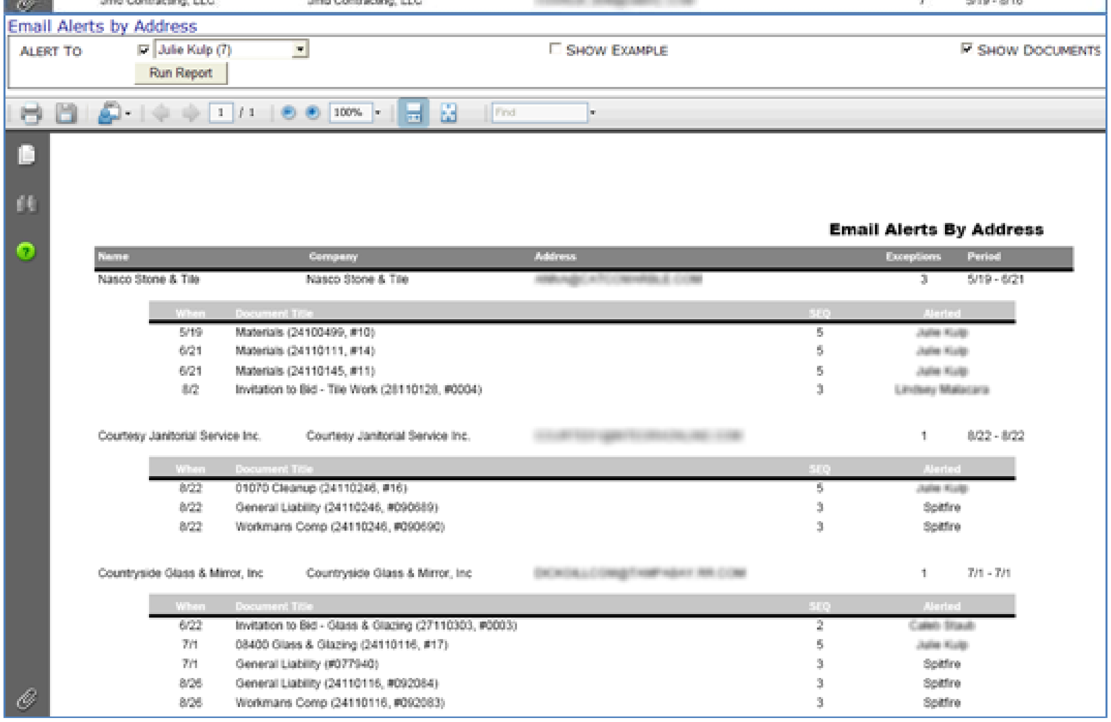


Email Alerts by Address

ALERT TO (any) · Run Report · SHOW EXAMPLE · SHOW DOCUMENTS

Email Alerts By Address

Name	Company	Address	Exceptions	Period
Vandy's Floor Service	Vandy's Floor Service	[illegible]	23	5/27 - 8/15
L&H Airco	L&H Airco	[illegible]	20	8/11 - 8/23
M C Metal, Inc.	M C Metal, Inc.	[illegible]	19	6/15 - 8/6
Rausch Granite Products	Rausch Granite Products	[illegible]	19	5/23 - 7/20
Tampa Bay Electric	Tampa Bay Electric		16	6/22 - 7/20
Johnsco	Johnsco	[illegible]	15	5/25 - 7/29
Carman-hoff & Associates	Carman-hoff & Associates	[illegible]	14	7/7 - 8/17
Handi-Lift, Inc.	Handi-Lift, Inc.	[illegible]	14	6/10 - 7/13
Gulf Coast South Enterprises	Gulf Coast South Enterprises	[illegible]	13	6/24 - 8/17
Sjp & Company	Sjp & Company	[illegible]	12	5/20 - 8/26
Penhall Company	Penhall Company	[illegible]	12	8/26 - 8/26
Fire Protection Company	Fire Protection Company	[illegible]	11	6/22 - 8/4
Lemberg Electric Company, Inc.	Lemberg Electric Company, Inc.	[illegible]	10	6/6 - 8/24
City Electric Company	City Electric Company	[illegible]	9	7/6 - 8/26
Buckhead Cleaning And Janitorial Services	Buckhead Cleaning And Janitorial Services	[illegible]	9	6/27 - 7/27
Annie Mechanical	Annie Mechanical	[illegible]	8	7/7 - 8/12
Mast & Brunk Inc.	Mast & Brunk Inc.	[illegible]	8	5/18 - 7/28
Judson Contracting	Judson Contracting	[illegible]	7	7/19 - 8/23
Meadowlands Fire Protect	Meadowlands Fire Protect	[illegible]	7	6/15 - 8/23
White Plains Glass & Mirror	White Plains Glass & Mirror	[illegible]	7	8/15 - 8/22
Animas Plumbing And Heating	Animas Plumbing And Heating	[illegible]	7	6/28 - 8/22
Jmd Contracting, LLC	Jmd Contracting, LLC	[illegible]	7	5/19 - 8/16



Email Alerts by Address

ALERT TO Julie Kulp (7) · Run Report · SHOW EXAMPLE · SHOW DOCUMENTS

Email Alerts By Address

Name	Company	Address	Exceptions	Period
Nasco Stone & Tile	Nasco Stone & Tile	[illegible]	3	5/19 - 6/21

When	Document Title	SEQ	Alerted
5/19	Materials (24100499, #10)	5	[illegible]
6/21	Materials (24110111, #14)	5	[illegible]
6/21	Materials (24110145, #11)	5	[illegible]
8/2	Invitation to Bid - Tile Work (28110128, #0004)	3	[illegible]

Name	Company	Address	Exceptions	Period
Courtesy Janitorial Service Inc.	Courtesy Janitorial Service Inc.	[illegible]	1	8/22 - 8/22

When	Document Title	SEQ	Alerted
8/22	01070 Cleanup (24110246, #16)	5	[illegible]
8/22	General Liability (24110246, #090689)	3	Spitfire
8/22	Workmans Comp (24110246, #090690)	3	Spitfire

Name	Company	Address	Exceptions	Period
Countryside Glass & Mirror, Inc	Countryside Glass & Mirror, Inc	[illegible]	1	7/1 - 7/1

When	Document Title	SEQ	Alerted
6/22	Invitation to Bid - Glass & Glazing (27110303, #0003)	2	[illegible]
7/1	08400 Glass & Glazing (24110116, #17)	5	[illegible]
7/1	General Liability (#077940)	3	Spitfire
8/26	General Liability (24110116, #092084)	3	Spitfire
8/26	Workmans Comp (24110116, #092083)	3	Spitfire

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 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-imta-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 mail71-ch1-R.bigfish.com (216.32.181.170) by
 CH1EHSOBE013.bigfish.com (10.43.70.63) with Microsoft SMTP Server id
 14.1.225.22; Thu, 7 Jul 2011 18:38:12 +0000
```

- **Show Documents** – whether 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

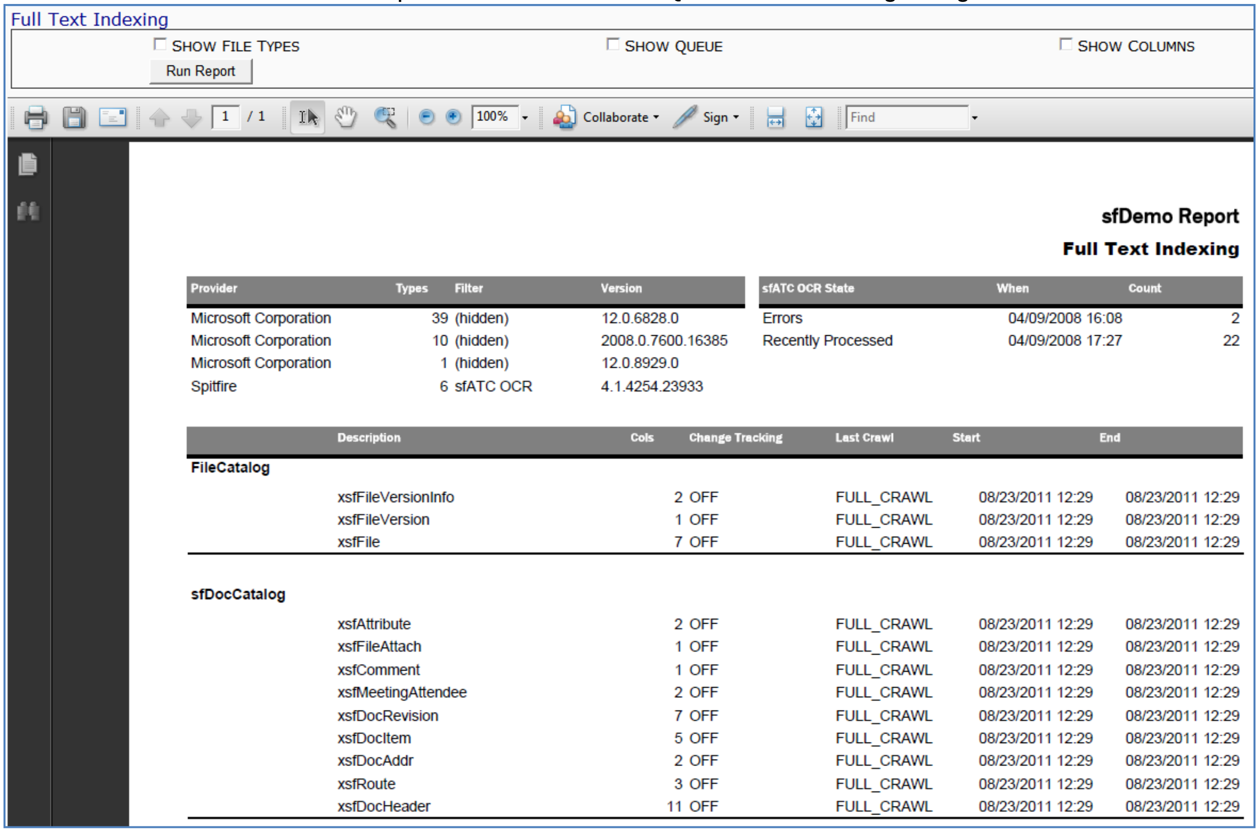
- **Name** – the name of the via email routee.
- **Company** – the company associated with the via email routee.
- **Address** – the email address to which the document was routed.
- **Exceptions** – the number of times an email did not reach the via email routee.
- **Period** – the period of time (in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

This report summarizes the SQL full text indexing being used.



Full Text Indexing

☐ SHOW FILE TYPES ☐ SHOW QUEUE ☐ SHOW COLUMNS

Run Report

sfDemo Report

Full Text Indexing

Provider	Types	Filter	Version
Microsoft Corporation	39	(hidden)	12.0.6828.0
Microsoft Corporation	10	(hidden)	2008.0.7600.16385
Microsoft Corporation	1	(hidden)	12.0.8929.0
Spitfire	6	sfATC OCR	4.1.4254.23933

sfATC OCR State	When	Count
Errors	04/09/2008 16:08	2
Recently Processed	04/09/2008 17:27	22

	Description	Cols	Change Tracking	Last Crawl	Start	End
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						
	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	3	OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29
	xsfDocHeader	11	OFF	FULL_CRAWL	08/23/2011 12:29	08/23/2011 12:29

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.

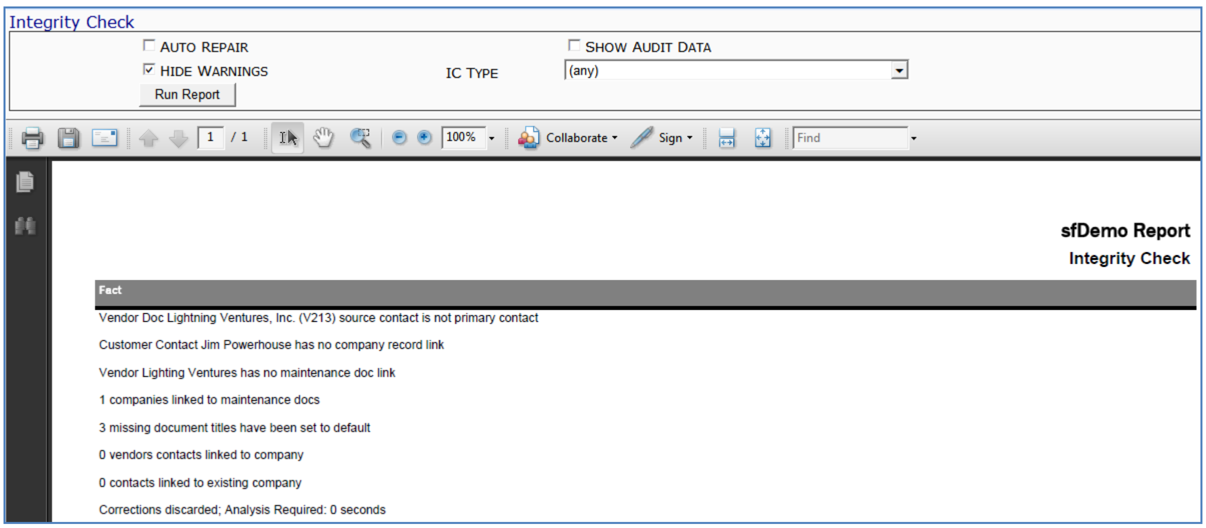
Columns

- **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.



Filters

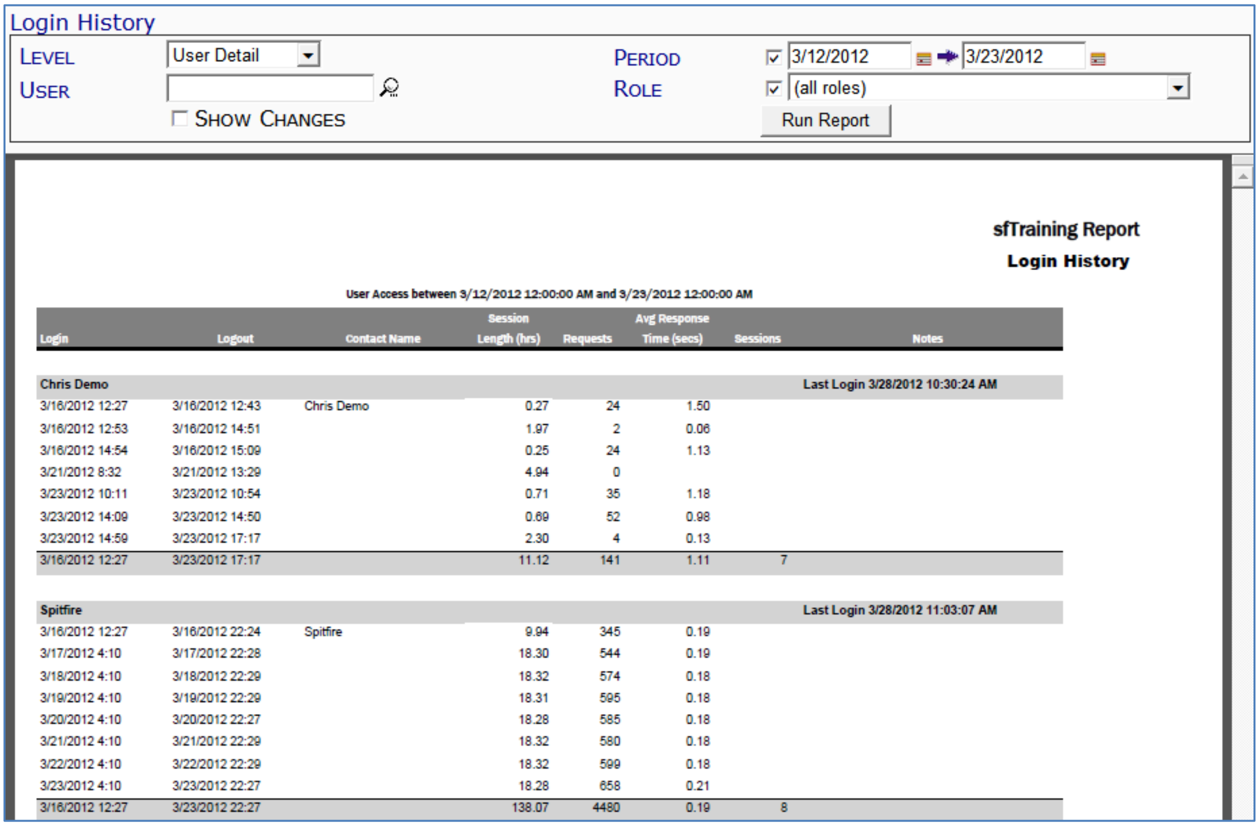
- **Auto Repair** – whether ☑ or not to have the system repair as many of the listed issues as possible.
- **Show Audit Data** – whether ☑ or not to include the First Changed, Last Changed and Change Count columns (see next section).
- **Hide Warnings** – whether ☑ or not to hide warning messages from 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.



Login History

LEVEL User Detail

USER

SHOW CHANGES

PERIOD 3/12/2012 → 3/23/2012

ROLE (all roles)

Run Report

sfTraining Report

Login History

User Access between 3/12/2012 12:00:00 AM and 3/23/2012 12:00:00 AM

Login	Logout	Contact Name	Session Length (hrs)	Requests	Avg Response Time (secs)	Sessions	Notes
Chris Demo							Last Login 3/28/2012 10:30:24 AM
3/16/2012 12:27	3/16/2012 12:43	Chris Demo	0.27	24	1.50		
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 drop-down 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.

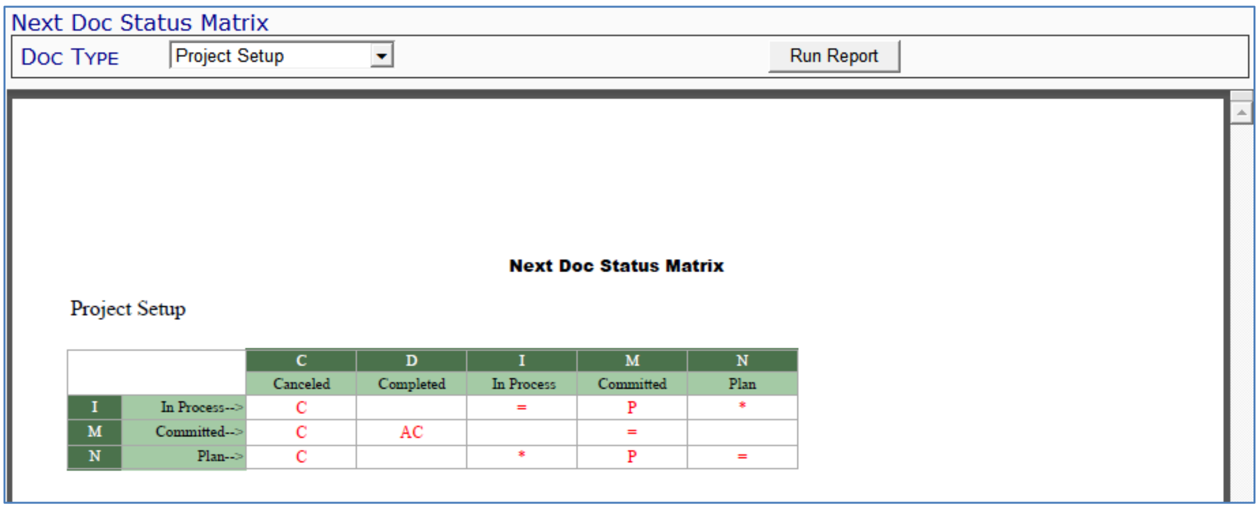
Note: if the Daily Summary filter was selected, the following information appears.

- **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.



		C	D	I	M	N
		Canceled	Completed	In Process	Committed	Plan
I	In Process-->	C		=	P	*
M	Committed-->	C	AC		=	
N	Plan-->	C		*	P	=

Filter

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

Columns

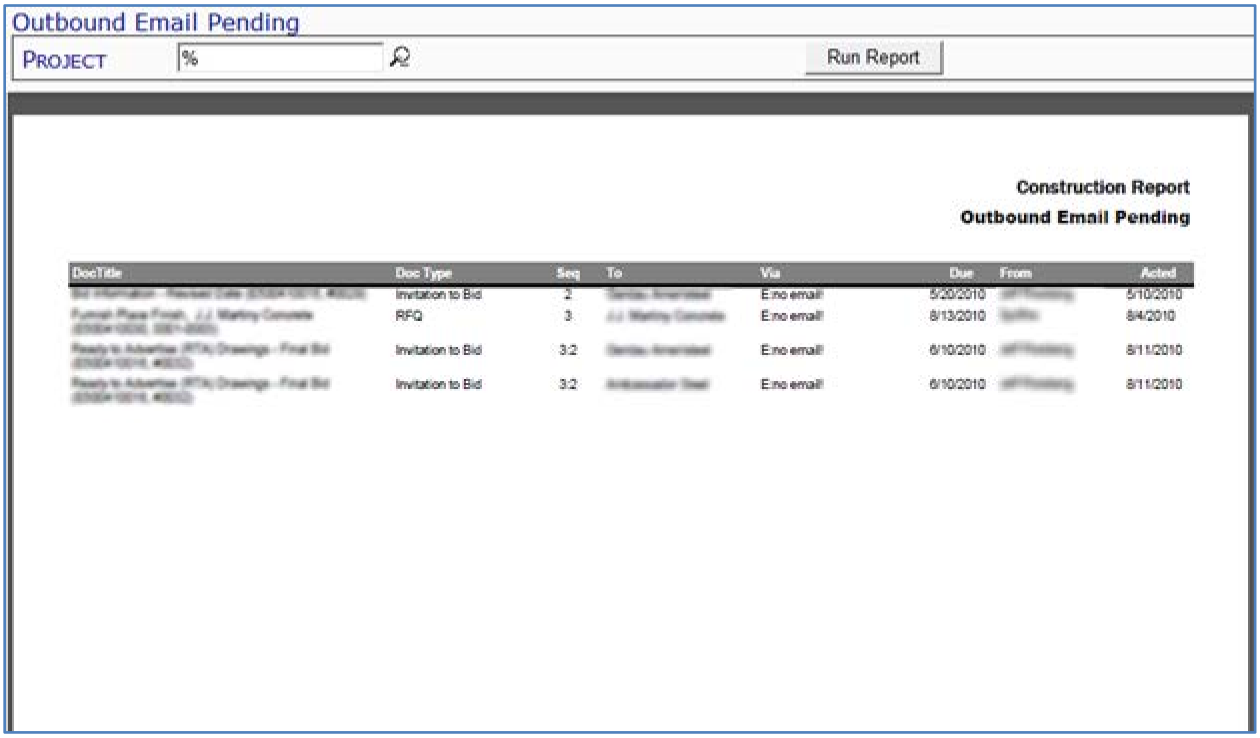
The report appears as a chart. On the far right is a column of the status codes that are defined in the NextDocStatus rule group for the Doc type, next to a column with descriptions of the codes. The remaining columns are the status codes that appear as result values in the NextDocStatus rules.

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**.



Filter

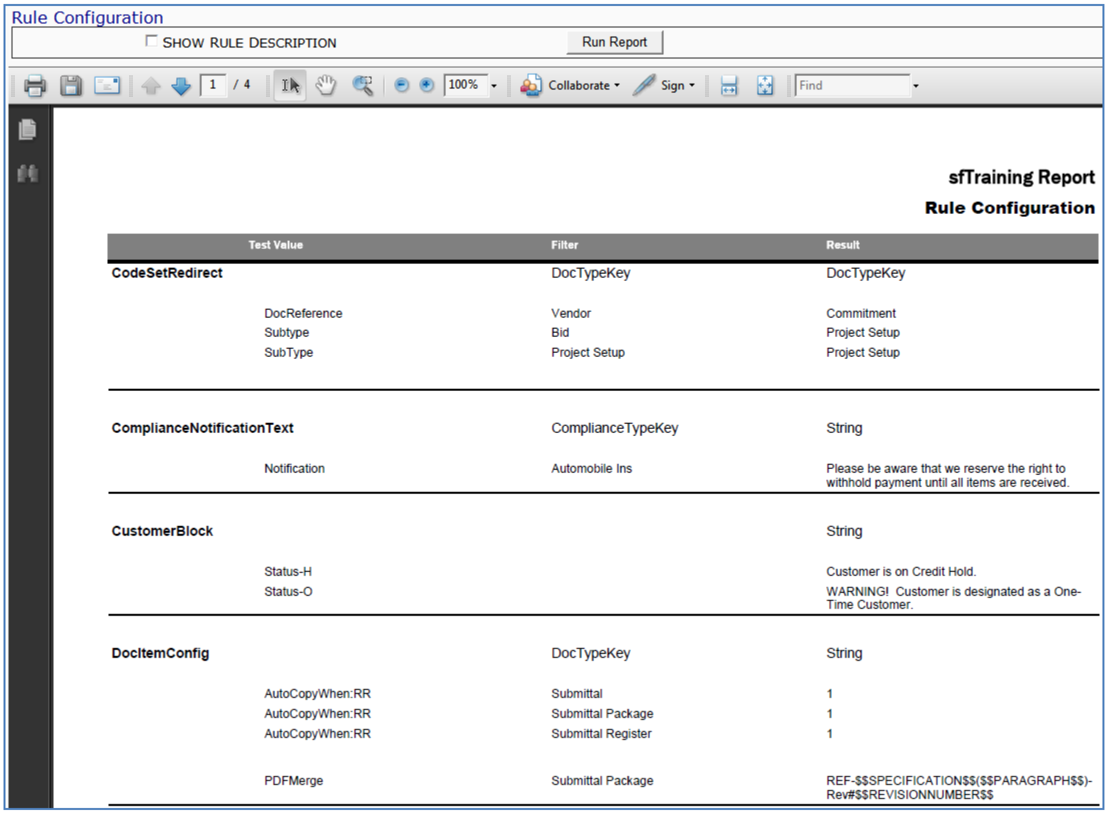
- **Project** – the Project ID. You can look up () a specific project or enter a specific Project ID or use the % mask for multiple projects.

Columns

- **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
SHOW RULE DESCRIPTION Run Report

sfTraining Report
Rule Configuration

Test Value		Filter	Result
CodeSetRedirect		DocTypeKey	DocTypeKey
	DocReference	Vendor	Commitment
	Subtype	Bid	Project Setup
	SubType	Project Setup	Project Setup
ComplianceNotificationText		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-$$SPECIFICATION$$($$PARAGRAPH$$)-Rev#$$REVISIONNUMBER$$

Filter

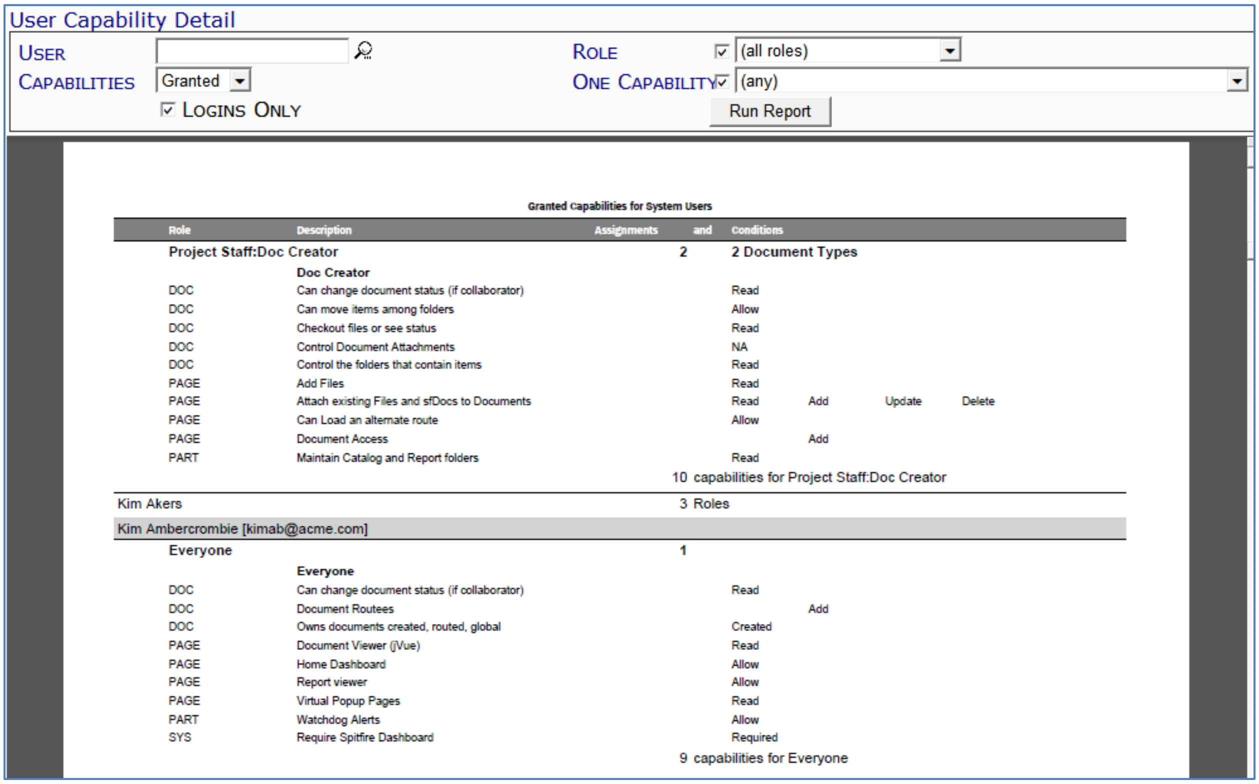
- **Show Rule Description** – whether or not to include descriptions of the rules in the report.

Columns

- **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 Capability Detail

USER [ ]　ROLE ☑ (all roles)
CAPABILITIES Granted　ONE CAPABILITY ☑ (any)
☑ LOGINS ONLY　Run Report

Granted Capabilities for System Users

Role	Description	Assignments	and	Conditions			
Project Staff:Doc Creator		2		2 Document 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	capabilities for Project Staff:Doc Creator				
Kim Akers		3	Roles				
Kim Ambercrombie [kimab@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	capabilities for Everyone				

Filters

- **User** – the Contact. You can look up () 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

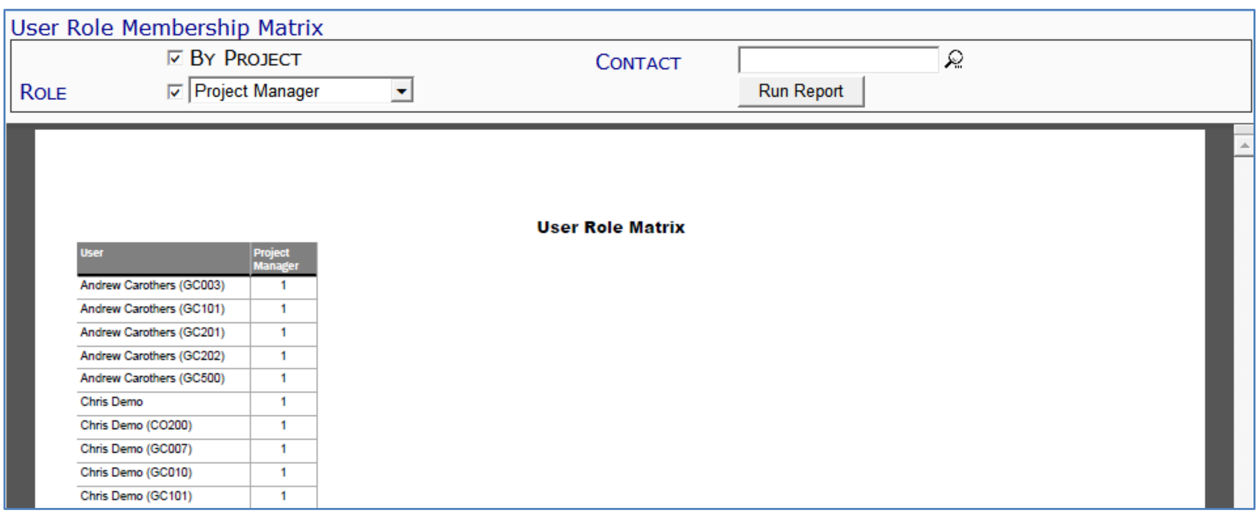
- **Role** – a) the role assigned to the Contact and b) the module to which the capability belongs (if the filter is on).
  Note: the number of roles for each Contact is indicated at the end of each Contact grouping.

- **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	Project Manager
Andrew Carothers	5
Chris Demo	11
Jay Fluegel	1
Jon Taffler	4
Tracy Tallman	3



User	Project Manager
Andrew Carothers (GC003)	1
Andrew Carothers (GC101)	1
Andrew Carothers (GC201)	1
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

Filters

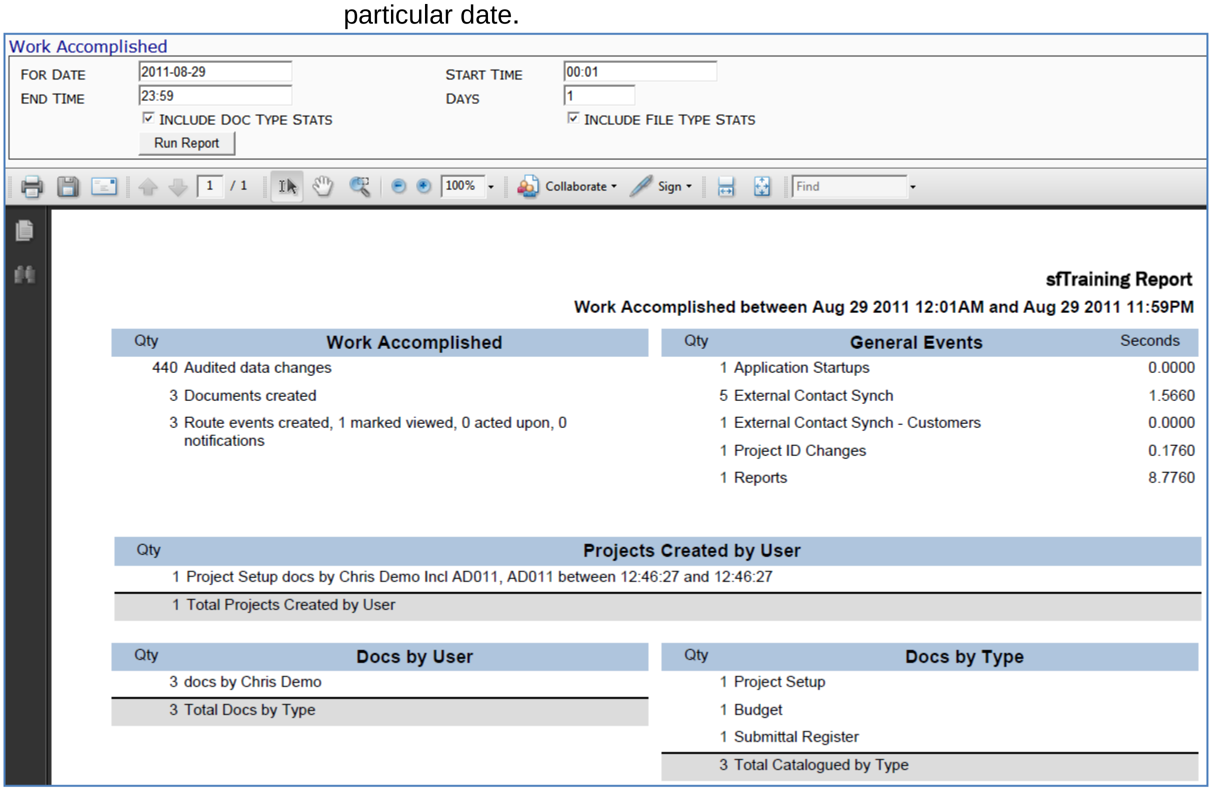
- **By Project** – whether ☑ or not to list a row per project for each Contact (as shown in the second picture above).
- **Contact –** the Contact/Spitfire user. You can look up ( ) a specific Contact or leave blank for all contacts.
- **Role –** the Spitfire role for which to list user and count. You must select a role from the drop-down before clicking the Run Report button.

Columns

- **User** – the name of the Contact, followed by Project ID if the filter is on.
- *Role* – the number of times the user has been granted the specified role.
  Note: All system roles appear as columns. If they do not fit on one page, the next page will continue the role columns.

Work Accomplished

This report lists some statistics on work accomplished in Spitfire on a particular date.



Work Accomplished

FOR DATE 2011-08-29 START TIME 00:01
END TIME 23:59 DAYS 1
☑ INCLUDE DOC TYPE STATS ☑ INCLUDE FILE TYPE STATS
Run Report

sfTraining Report
Work Accomplished between Aug 29 2011 12:01AM and Aug 29 2011 11:59PM

Qty	Work Accomplished
440	Audited data changes
3	Documents created
3	Route events created, 1 marked viewed, 0 acted upon, 0 notifications

Qty	General Events	Seconds
1	Application Startups	0.0000
5	External Contact Synch	1.5660
1	External Contact Synch - Customers	0.0000
1	Project ID Changes	0.1760
1	Reports	8.7760

Qty	Projects Created by User
1	Project Setup docs by Chris Demo Incl AD011, AD011 between 12:46:27 and 12:46:27
1	Total Projects Created by User

Qty	Docs by User
3	docs by Chris Demo
3	Total Docs by Type

Qty	Docs by Type
1	Project Setup
1	Budget
1	Submittal Register
3	Total Catalogued by Type

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.