Viewing Changes through sfChest

This technical white paper is designed for Spitfire Project Management System users. It describes sfChest, Spitfire's change history and search tool.

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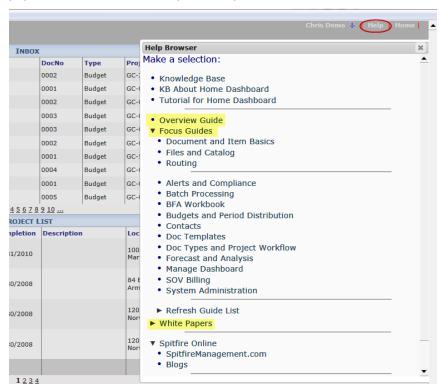
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Introduction

This technical white paper describes sfChest, Spitfire's change history and search tool. sfChest can be used to see when changes were made and by whom to documents, Contacts and rules.

This technical white paper assumes you have a basic understanding of sfPMS in general. Documentation referred to within this technical white paper can be found on the Spitfire Help menu.

Note: aside from a few updated pictures, the documentation in this guide is the same as the documentation in the V4.3 technical white paper.

Concepts

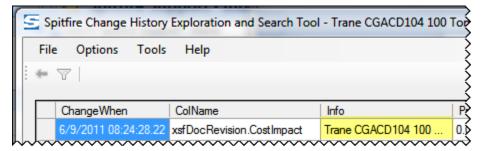Audit trails are very useful in project management systems. Audit trails are records that show who accessed the system and what changes were made by that person during a given period of time. sfPMS has always provided an audit trail for document changes, but sfPMS V4.0 introduced the sfChest tool as an easier and more powerful way to access data. In V4.1, the scope of changes shown in sfChest was expanded to include changes made to Contacts and rules.

Some of the information displayed in sfChest are GUIDs. GUIDS are Globally Unique Identifiers—unique numbers used to identify components, entries or users in the system. When possible, GUIDs are translated into what they identify. For example, instead of displaying the GUID **ed022618-0fac-4195-8a18-2969a99875d1** as the document in the Info column, sfChest displays the document's title:
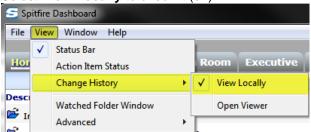
Especially for documents, information from many data tables will likely be displayed. The various data tables can be thought of as parts of a document. (See the Appendix on page 19 for information on how tables correlate to aliases).

Installing sfChest

sfChest needs to be installed on your workstation before you try to open it.

To install sfChest on your workstation:

1. Select **Change History** from Spitfire's View menu.

2. Select **View Locally** to check it (on).

You will be asked to specify a folder for the sfChest files, although a default location will be offered.

3. (*optional*) Change the default folder.

4. Click **OK**.

Accessing sfChest

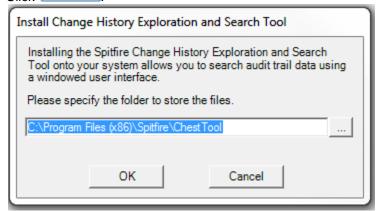sfChest can be opened from wherever you see the icon. The icon also opens sfChest. The information displayed in the main sfChest window depends on where you opened sfChest. If there have been no changes, sfChest will indicate **Nothing found**

From Contacts
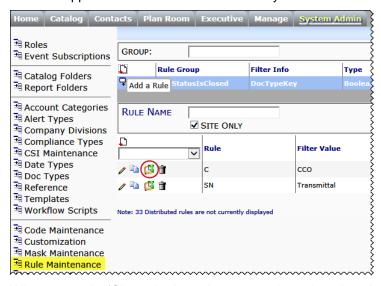
You can open sfChest from the Contacts Dashboard, either from the list of Contacts or the list of Companies.

- If opened through , sfChest displays changes made **by** the Contact.

- If opened through , sfChest displays changes made **to** the Contact record.

From Rules Maintenance
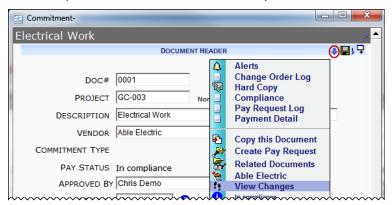
You can open sfChest from the Rules Maintenance tool's grid view. The icon appears on rows that were added by a user.

When opened, sfChest displays changes made to the rule value (row).
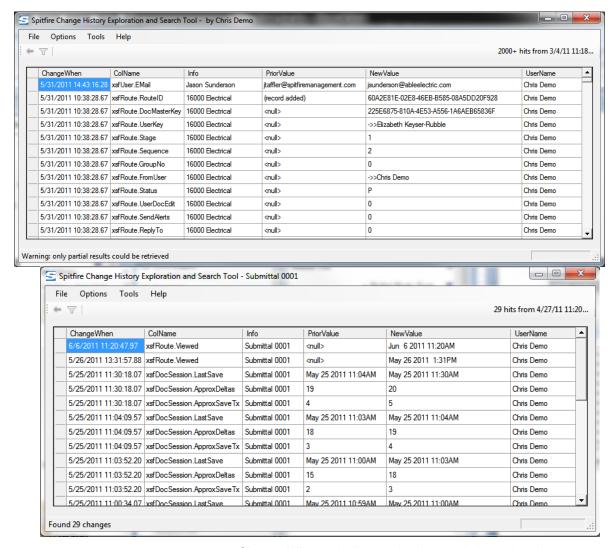
From a Document

You can open sfChest from a document's Options menu.

When opened, sfChest displays changes made to the document.

The sfChest Window
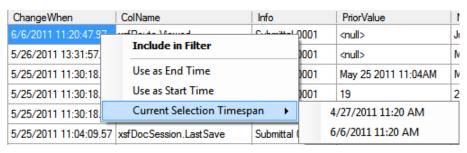
- **ChangeWhen** – indicates the date and time when the change was made.

- **ColName** – indicates the *table.field* in which the value is stored in sfPMS.

- **Info** – indicates related information (such as Contact record, rule name or Doc No) about where the change took place.

- **PriorValue** – indicates the prior value for the field. If there was no prior value, **<null>** appears instead. Values preceded by **->>** indicate that a GUID has been replaced by the information it identifies.

- **New Value** – indicates the value after the change. Values preceded by **->>** indicate that a GUID has been replaced by the information it identifies.

- **UserName** – indicates who made the change.
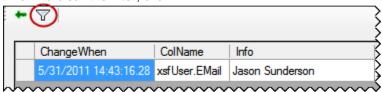
Right Click Options

When you right-click your mouse while in a particular column and row on the sfChest window, drop-down options appear.

ChangeWhen
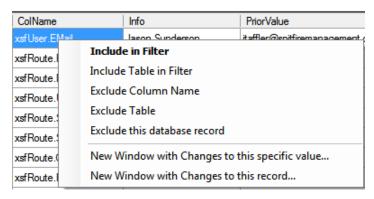
- **Include in Filter** – filters your results on the selected date and time. To clear the filter, click the funnel icon.

  Note: to return to a previous filter, click the green arrow.

- **Use as End Time** – displays results up to the selected date and time.

- **Use as Start Time** – displays results starting from the selected date and time.

- **Current Selection Timespan** – indicates the start and end times bookending the displayed results.

ColName
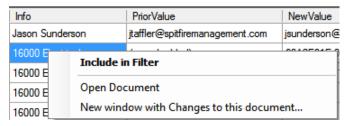
- **Include in Filter** – filters your results on the selected table.field.

- **Include Table in Filter** – filters your results on the selected table.

- **Exclude Column Name** – removes the selected *table.field* from the displayed results.

- **Exclude Table** – removes all rows with the selected table from the displayed results.

- **Exclude this database record** – removes all results associated with the Contact/document/rule from the sfChest display.

- **New Window with Changes to this specific value…** – opens another sfChest window with only the results associated with the *table.name* for the specific piece of the data (e.g., a specific route, document item or Contact attribute.) For example, you can use this option to see the different statutes on a routing record over time.

- **New Window with Changes to this record…** – opens another sfChest window with only the results associated with the specific piece of the data (e.g., a specific route, document item or Contact attribute.)
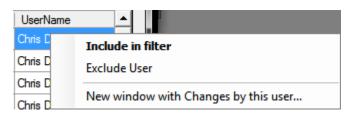
Info

Info	PriorValue	NewValue
Jason Sunderson	jtaffler@spitfiremanagement.com	jsunderson@
16000 E		
16000 E	**Include in Filter**	
16000 E	Open Document	
16000 E	New window with Changes to this document...	

- **Include in Filter** – filters your results on the selected Contact/document/rule.

- **Open Document** – opens the selected document (if applicable).

- **New window with Changes to *this document…*** – opens another sfChest window with changes to the selected Contact/document/rule.

PriorValue, NewValue

There are no right-click options on these columns.

UserName

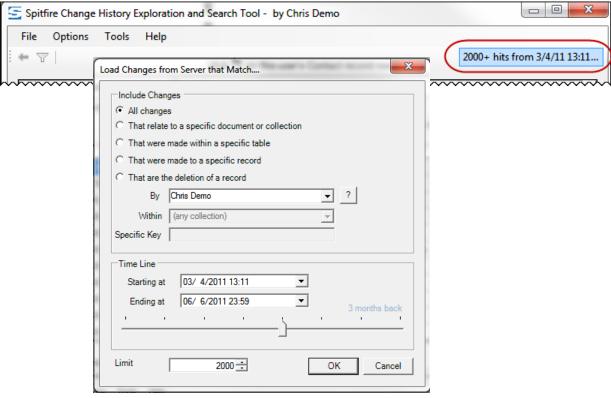| UserName	▲	
Chris D	**Include in filter**	
Chris D	Exclude User	
Chris D		
Chris D	New window with Changes by this user...	

- **Include in Filter** – filters your results on the selected user.

- **Exclude User** – removes the selected user from the displayed results.

- **New Window with Changes by this user** – opens another sfChest window with changes made by the selected user.
  Note: the results on this new window are the same as when you click ⁑ on this user's Contact record row.

Selection Criteria Options

You can change the selection criteria being used in the sfChest window.
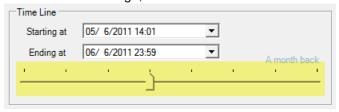
- Click the information above the results to change criteria.
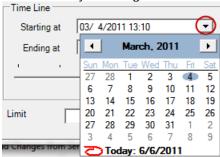
Time Line

The pop-up window that appears is used mostly to change the start and end points for the results. You can do this in two ways:

- Use the slider to change how far back the results should start. Your choices on the slider are

  o 24 hours back

  o 48 hours back

  o A week back

  o A month back

  o 3 months back

  o A year back

  o 2 years back

  o Custom Range, which means use the date fields.

- Click the drop-down arrow at the Starting at and/or Ending at fields to select dates from a calendar. The time will remain the same unless you change it.

**Note**: when you change the start and/or end dates, the slider will automatically move to the last (custom) position.

Limit

You can indicate the maximum number of resulting rows to display in the main sfChest window.
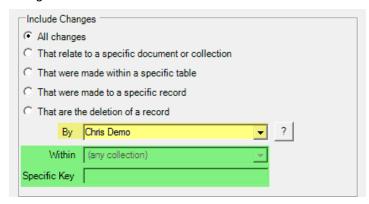
- Type a number or use the spinners to change the **Limit**.

Include Changes

You can indicate that the results on the sfChest window should include

- o All changes,
- o Changes that relate to a specific document or collection (indicated as a GUID on the **Specific Key** field or selected from the **Within** drop-down),
- o Changes that were made within a specific table (indicated as a GUID on the **Specific Key** field or selected from the **Within** drop-down),
- o Changes that were made to a specific record (indicated as a GUID on the **Specific Key** field),
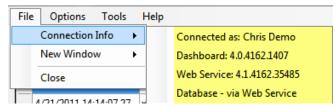- o Deletions of a specific record (indicated as a GUID on the **Specific Key** field),

You can also indicate if you want to change the user responsible for the changes.
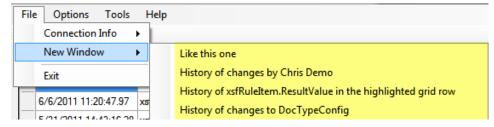
sfChest Menus

File

Connection Info

This option displays information about the current connection.

New Window

This option opens another sfChest window based on your selection:
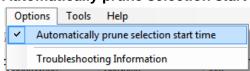
- **Like this one** – a duplicate of the sfChest window already open.

- **History of changes by *user*** – only changes made by the indicated user.

- **History of *ColName* in the highlighted grid row** – only changes made to the specified *table.field*.

- **History of changes made to *Contact/document/rule*** – only changes made to the specified Contact/document/rule.

Close/Exit

This option closes the sfChest window.

Options
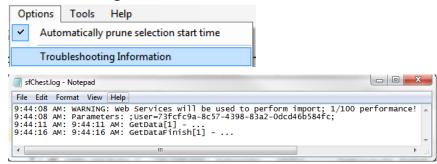
Automatically prune selection start time

This option sets the start date/time to match the earliest actual result within the default 3 month range. Pruning the start date/time (for example, changing from 3 months ago to 2 weeks ago) makes subsequent searches faster.
Note: this option is ON by default.
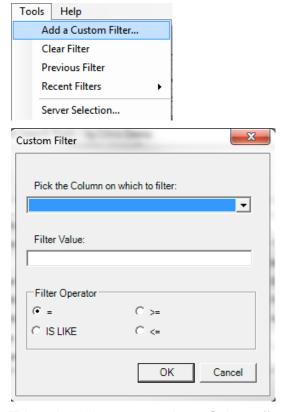
Troubleshooting Information

This option opens Notepad with information that can help troubleshoot or debug a problem.
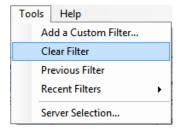
Tools

Add a Custom Filter…
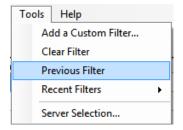
This option allows you to select a **Column** (from a drop-down list), enter a **Value** and select an **Operator** to create a custom filter for the sfChest window.

Clear Filter
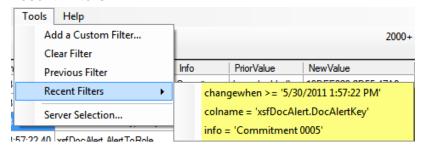
This option clears all filters. It is equivalent to using the ⛛ icon.

Previous Filter
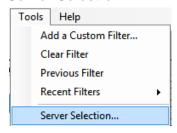
This option uses the previous filter, if applicable, to display results. It is equivalent to using the ⬅ icon.

Recent Filters

This option displays the last 12 Filters used on this sfChest window.
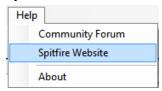
Server Selection

This option opens the <u>criteria selection pop-up window</u>, described on page 12.

Help
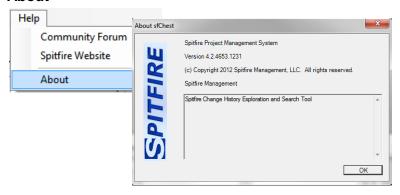
Spitfire Website

This option takes you to the Spitfire website.

About

This option displays information about your version of sfChest.

FAQ

Q: How can there ever be times when the "prior" value of a given change doesn't exactly match the "new" value of the preceding change.

A: Spitfire's web application audits all changes made through the user interface, but if a change is made through a custom save extension or backend SQL access, there may be a gap in the audit trail.

Q: How long is audit data kept?

A: Currently, forever. Or until manually pruned through SQL commands.

Q: How many entries are there?

A: Likely millions.

Q: How much space is used?

A: That depends on the size of the prior and new values. Approximately 250,000 records can be stored per GB.

Q: How can I determine my daily audit trail volume?

A: Run the Work Accomplished Summary report for a given day (or week, etc.) and check the Audited Data Changes value on the report.

Appendix

Table in sfChest	Alias	Refers to
xsfComment	CommentList_	Remarks
xsfFileAttach	DocAttachedFile_	Information related to files and documents attached to a document.
xsfCompliance	DocCompliance_	Information on a document's Compliance tab
xsfDocDates	DocDates_	Information on a document's Dates tab
xsfDocHeader	DocHeader_	Information on a document's Document Header
xsfAttribute	DocInstruction_	Information on a document's Attribute/Instruction tab

xsfDocItem	DocItem_	Basic information on a document's Items tab
xsfDocItemTask	DocItemTask_	More financially-oriented information on a document's Items tab
xsfDocMeetingAttendee	DocMeetingAttendee_	Information on a document's Attendee/Liens tab
xsfDocRevision	DocRevision_	Information (sometimes computed dynamically) on a document's Details tab
xsfDocRevItem	DocRevItem_	The Item number

xsfDocRoute	DocRoute_ ToRoute_	Information on a document's route, including routed transmittals
xsfInclusion	Exclusion_ Inclusion_ LegalAtt_ OtherClause_	Information on a documents Incl/Excl tab
xsfDocAddr	FromAddr_ ToAddr_	Information on a document's Addr tab