Technical White Paper

Quick Doc Type Reference

This technical white paper is designed for Spitfire Project Management System users. Spitfire Project Management System (sfPMS) comes with many different Doc types. The distributed Doc types are summarized in this guide.

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Introduction

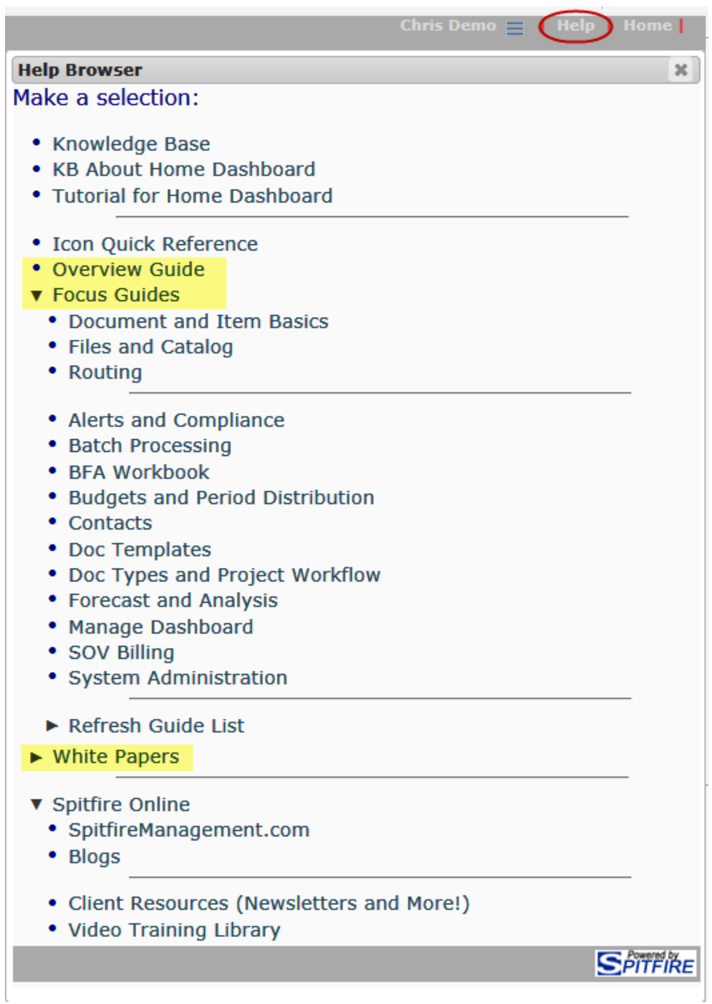
Spitfire Project Management System (sfPMS) comes with many different Doc types, some of which you may choose to rename or not use. The distributed Doc types are summarized in this guide.

More in-depth information about each Doc type is available in the *Focus on Doc Types and Project Workflow* guide; just click on the Doc type name in this guide.

In addition, general information about documents is available in the *Focus on Document and Item Basics* guide.

More information about the Doc Types tool (used to activate/de-active and rename Doc types) is available in the *Focus on System Administration* guide.

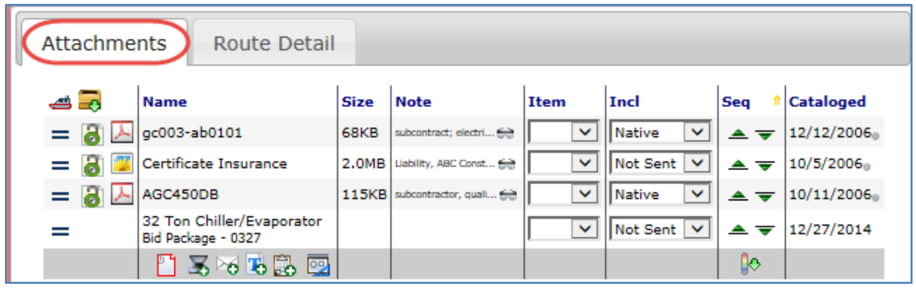
This documentation can be found on the Spitfire Help menu.



Note: The information in this Quick Guide is the same as that for V4.5.

Attachments

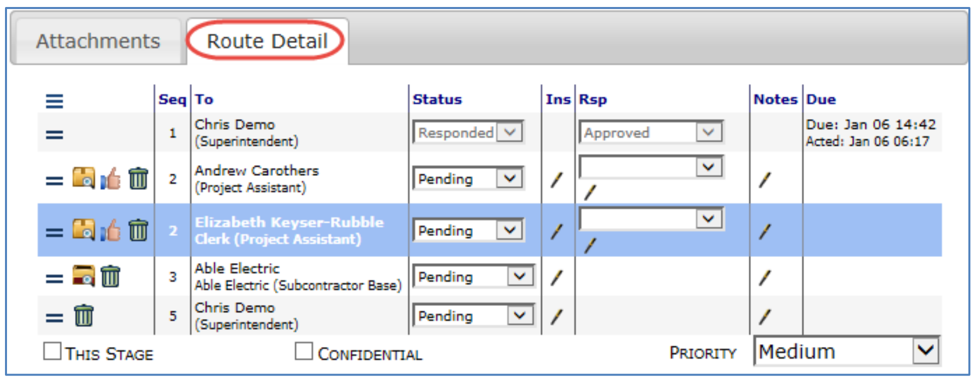
All Spitfire documents (i.e., of whatever Doc type) allow you to attach files and other Spitfire documents at the Attachments tab, provided you have the proper permission:



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

Route Details

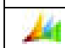
All Spitfire documents (i.e, of whatever Doc type) allow you to route the document to other people, both Spitfire users and non-Spitfire users.



For more information, see the *Focus on Routes* guide.

Doc Type Symbols

The following symbols are used as shortcuts in the descriptions of the various Doc types.

	Can be part of the Bid – Project Setup process
	Can be part of the Invitation to Bid - Bid Package – Plan Room process
	Is a Doc type that can be related or connected to a Commitment
	Can be part of the Submittal process
	Can be part of the Change Order process
	Can be part of Batch processing
	Is associated with a Spitfire Microsoft Excel workbook
	Is created from Microsoft Dynamics SL (*available for integrated sites only*)
	Is created by sfPMS
	Is associated with a Contact
	Can be created or exists outside a project
Addr	Includes an Addr (Address) tab by default
Atte	Includes an Attendees (Contacts, Liens, Resources) tab by default
Inst	Includes an Attributes (Info, Instructions, Follow-Up) tab by default
Com	Includes a Compliance tab by default
Date	Includes a Dates tab by default
Deta	Includes a Details (Amounts, Notify, Summary) tab by default
Incl	Includes an Incl/Excl tab
Item	Includes an Items (CI, Cost Codes) tab by default
Mess	Includes a Message (Email) tab by default
Note	Includes a Notes (Scope, Comments, Work) tab by default
Proj	Includes the Project tab by default
RFQs	Includes the RFQs tab by default

Summary of Doc Types

AP Voucher

AP Voucher documents are created through the Microsoft Dynamics SL Voucher and Adjustment Entry screen for approved Pay Requests and project related expenses.

Deta Item

AR Invoice

AR Invoice documents are created through the Microsoft Dynamics SL Invoice and Memo screen for routing and attachment purposes.

Bid

Bid documents keep track of all your bids for prospective projects.

Addr Date Deta Item Note

Bid Package

When the same RFQ is sent to more than one vendor, a Bid Package document is used to contain information about the quote request and all responses from the subcontractors/vendors receiving the RFQ.

Addr Deta Incl Item Note RFQs

Bid Package Addendum

A Bid Package Addendum document is used to add information to an existing Bid Package that was sent out to vendors.

Note

Budget

Budget documents detail the original and current anticipated spending for your project through corresponding BFA workbooks.

Note

Cash Trans

Cash Trans documents are created through the Microsoft Dynamics SL Cash Account Transactions screen for routing and attachment purposes.

Catalog File Router

The Catalog File Router document is a special document created by sfPMS for the sole purpose of routing a file to another person, thus allowing all Catalog files to be routed.

Note

CBE

CBE documents are created through the Microsoft Dynamics SL Construction Billing Entry screen for routing and attachment purposes.

CCO

The CCO (Commitment Change Order) document is used to make changes or additions to Items on a Committed Commitment.

Addr Deta Incl Item Note

Change Item Register

The Change Item Register is the master list of all Change Items (Items that appear on Proposed COs and Change Orders) for a project.

Change Order

Change Orders are used to track changes to the project’s revenue and expenses.

Addr Deta Item Note

Charge Entry

Charge Entry documents, available for non-integrated sites only, keep track of all your actual expenses (time and material) that are not covered by Pay Requests.

Deta Item Note

Commitment

The Commitment document contains information on the contracts you have with vendors and subcontractors (subcontracts) and, optionally, suppliers (purchase orders).

Addr Com Date Deta Incl Item Note

Compliance Notification

Compliance Notification documents are automatically created and routed to appropriate people when Commitment or Vendor requirements are out of compliance.

Note

Correspondence

Correspondence documents track various forms of correspondence with others (for example, letters, phone calls, emails, etc.).

Addr Deta Mess Note

Customer

Customer documents are created by sfPMS to hold additional information and pertinent attachments for Customer Contacts.

Addr Note

Daily Field Report

Daily Field Report documents are used for regular communication about the project.

Atte Deta Incl Inst Item Mess Note

Drawings

A Drawings document tracks and identifies drawing files. Drawing files that are attached to one Drawings document serve as a drawing log for the project.

Note

DSL-SPR

DSL-SPR documents are created through the Microsoft Dynamics SL Subcontract Payment Request Entry screen for routing and attachment purposes when payment requests are entered in Dynamics SL instead of in sfPMS. This Doc type is mutually exclusive with the standard Pay Request Doc type, which provides many more features.

Employee

Employee documents are created by sfPMS to hold additional information and pertinent attachments for Employee Contacts.

Estimate

Estimate documents largely serve as “wrappers” for routing attached estimate workbooks in Microsoft Excel.

Note

Expense Entry

Available for integrated sites only, Expense Entry documents list and track the ongoing expense requests made by employees throughout a project.

Deta Item

Field Work Order

Field Work Order documents are used for regular project-related directives and work orders.

Addr Note

File Batch

File Batch documents are created either by Spitfire’s Batch Upload Tool or from the Site Options menu and usually routed through automated routes to the person responsible for processing the batch files attached to the document.

Deta Note

Forecast

Forecast documents detail financial forecasts throughout your project. Each Forecast document opens the BFA workbook in Forecast mode.

Deta Note

GL Journal Trx

GL Journal Trx documents are created through the Microsoft Dynamics SL Journal Transactions screen for routing and attachment purposes.

Inspection

The Inspection document tracks information concerning inspections and tests and often serves as a “wrapper” for routing attached inspection reports.

Note

Inv & Adj

Inv & Adj documents are created through the Microsoft Dynamics SL Invoice & Adjustment Maintenance screen for routing and attachment purposes.

Invitation to Bid

Invitation to Bid documents are used to send general information about a project to a large number of potential vendors.

Addr Mess Note

Issue

An Issue document records problems or situations that occur during the course of a project.

Date Deta Item Note

Item Request

Item Request documents are created through the Microsoft Dynamics SL Item Request screen for routing and attachment purposes.

Lien Waiver

Lien Waiver documents largely serve as “wrappers” for routing outbound lien waiver files.

Note

Meeting Minutes

Meeting Minutes documents track project meetings.

Atte Deta Item Note

Milestone

Milestone documents record important achievements reached during the course of a project.

Note

Pay Application

Pay Application documents are used to create and track the SOV (Schedule of Values) based AR billings for your project, through the SOV workbook.

Addr Date Deta Note

Pay Request

Pay Requests list and track the ongoing payment requests from vendors for particular Commitments.

Atte Deta Item

Pct Billing

Pct Billing documents are created through the Microsoft Dynamics SL Percent Complete Entry screen for routing and attachment purposes.

Period Distribution

Period Distribution documents contain the Period Distribution workbook, which draws information from your current budget so that you can spread budget costs over financial periods representing the life of the project.

Deta Note

Permits

A Permits document tracks the permits associated with your project.

Deta Item Note

PO

PO documents are created through the Microsoft Dynamics SL Purchase Order Maintenance screen for attachment purposes and for routing the PDF of the purchase order to external vendors.

Production Units

Production Units documents are aggregated to update BFA financial information for Actual and Current units of production at the Cost Code level.

Item Note

Project Dashboard Photo

Project Dashboard Photo is a special Doc type used internally by sfPMS to hold the photos that appear on a Project Dashboard's Photo part. You cannot access this special-use Doc type.

Project Setup

The Project Setup document, containing project contract information, is the premier document for your project. Once the Project Setup is created and saved, you can access that project's dashboard and create other documents.

Proj Addr Date Deta Incl Item Note

Project Setup Info

The Project Setup Info document contains more information about a project than could be entered on the Project Setup alone.

Deta Note

Proposed CO

A Proposed CO (Change Order) document contains one or more proposed changes to the Project Contract.

Addr Deta Item Note

PunchList

A PunchList document is a type of "to-do" or checklist document.

Item

Receipt

Receipt documents track receipt or delivery of materials (or services) expected by Commitments.

Deta Item

Requisition

Requisition documents are created through the Microsoft Dynamics SL Requisition screen for routing and attachment purposes.

RFI

RFI (Request for Information) documents track your requests for information throughout the project.

Addr Deta Note

RFQ

An RFQ (Request for Quote) document tracks your quote request to a subcontractor/vendor and his response (quote/bid).

Addr Deta Incl Item Note

Safety Notice

Safety Notice documents track safety incidents and notices received during the course of the project.

Note

Scanned Timecards

Scanned Timecards documents are created by Spitfire's Batch Upload Tool and usually routed through automated routes to the person responsible for processing the timecards attached to the document.

Note

Schedule

The Schedule document primarily functions as a "wrapper" for routing attached schedule files in Microsoft Word, Excel, or Project or created by another scheduling software application.

Service Call Entry

Service Call Entry documents are created through the Microsoft Dynamics SL Service Call Entry screen for routing and attachment purposes.

Service Contract

Available only for equipment projects, Service Contract documents largely serve as “wrappers” for attached service contract files.

Deta Note

Service Ticket

Available only for equipment projects, Service Tickets track service-related incidents.

Item Note

Site Photo

The Site Photo document contains photos taken during the course of your project.

Submittal

Submittal documents list and send details of a project, especially materials and documentation, to subcontractors or vendors.

Item

Submittal Item Register

A Submittal Item Register tracks all submittal items on a project.

Deta Note

Submittal Package

Submittal Package documents list and send details of a project, especially materials and documentation, to clients or architects.

Addr Item

Task

Task documents communicate tasks among project team members.

Note

Team Message

Team Message documents communicate project-related messages among team members.

Note

Timecard

Timecard documents are created through the Microsoft Dynamics SL Timecard Entry screen for routing and attachment purposes.

Timesheet

Timesheet documents are created through the Microsoft Dynamics SL Project Timesheet with Rate/Amount Entry screen for routing and attachment purposes.

Transmittal

Transmittal documents track delivery of project materials that are not elsewhere tracked.

Addr Inst Item Note

Vendor

Vendor documents are created by sfPMS to hold compliance tracking, pertinent attachments, and additional information for Vendor Contacts.

Atte Com Deta Note

Warranty

Warranty documents track all types of warranties that are not elsewhere spelled out for a project.

Note
