



User Guide for Project Managers

Update Project Info Document

Design and Construction Management uses the Spitfire Project Management System (sfPMS). This guide provides the steps you will need to update the Project Info document.

If you need help or have any questions,
please send an email to:

cpmahelp@ucdavis.edu



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Getting Started

This guide outlines how DCM Project Managers can update data on the Project Information document in spitfire. The Project Manager is responsible for updating this document as major milestones occur. The system will not automatically prompt you to update this document, and it will never appear in your inbox.

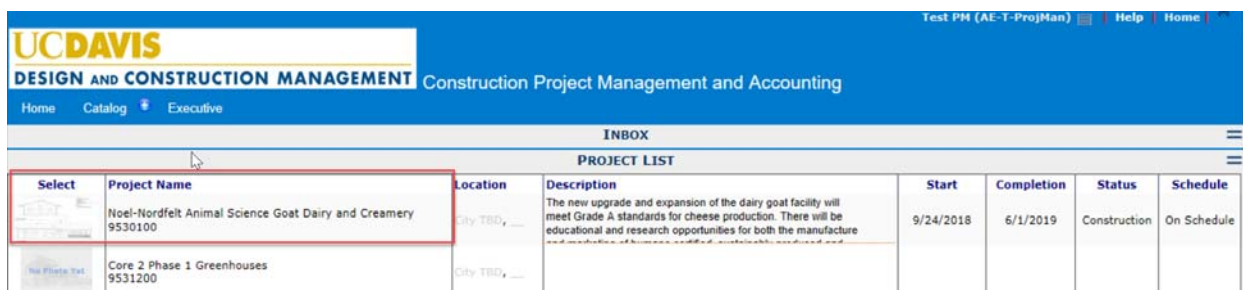
Work with your supervisor to maintain current data.

If you have not yet logged-in to Spitfire, send an email to cpmahelp@ucdavis.edu requesting assistance.

The Project Info document is located on your project dashboard

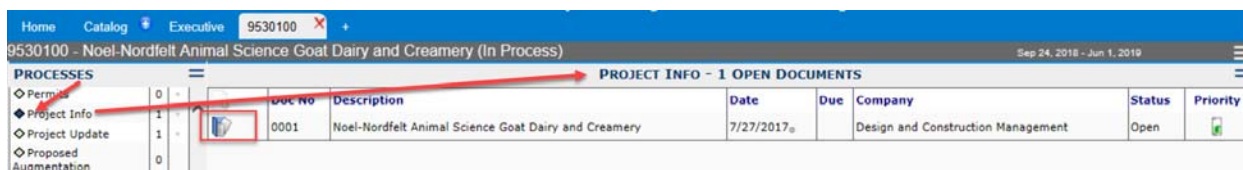
There is a Project Information document on each project with project specific information about the project. This information is provided by the project manager. Follow the steps below to open the Project Information document on your project.

1. From Home Dashboard find the Project List section and click the project link to navigate to your project



Select	Project Name	Location	Description	Start	Completion	Status	Schedule
<input type="checkbox"/>	Noel-Nordfelt Animal Science Goat Dairy and Creamery 9530100	City TBD, ...	The new upgrade and expansion of the dairy goat facility will meet Grade A standards for cheese production. There will be educational and research opportunities for both the manufacture	9/24/2018	6/1/2019	Construction	On Schedule
<input type="checkbox"/>	Core 2 Phase 1 Greenhouses 9531200	City TBD, ...					

2. From project dashboard click on the Project Information in the processes menu on the left (If it is not visible click on the [+ More...](#) in the processes)



Doc No	Description	Date	Due	Company	Status	Priority
0001	Noel-Nordfelt Animal Science Goat Dairy and Creamery	7/27/2017		Design and Construction Management	Open	High

- This will open the document list on the right side. Click on the folder icon (📁) to open the project information document. Unlike other document types, there will only ever be document # 0001. The Project Information document will open in a window as shown below.

Noel-Nordfelt Animal Science Goat Dairy and Creamery ☰ 🟢 🏠

Doc# 0001 TRIRIGA WO #

PROJECT 9530100 Noel-Nordfelt Animal Science Goat Dairy and Creamery

ARCHITECT DCM Design Group 👤

ENGINEER 👤

CONTRACTOR D G Granade Inc 👤

STATUS Open 📘

CREATED DATE 7/27/2017

Details ⬆

REV DESCRIPTION rev:This can Rev description

REV NUMBER 1: Current Revision 📘

CONCIERGE OPC - Low HIGH

PROJECT TYPE New Lab / Research

TOTAL APPRVD AUGMENTATIONS 0

TPC @ START OF P-PHASE Total Project Cost

TPC @ START OF DD 0

TPC @ START OF W-PHASE

TPC @ ADVERTISEMENT

TPC @ AWARD

TPC @ CLOSEOUT

POST PROJECT DATA TO WEBSITE Yes ▼

AUTO CREATE PROJECT UPDATE DOC Yes ▼

INCLUDE CLIENT (A) IN EPAC REPORT Yes ▼

CLIENT (B) 👤

INCLUDE CLIENT (B) IN EPAC REPORT ▼

CLIENT (C) 👤

INCLUDE CLIENT (C) IN EPAC REPORT ▼

ASF

GSF

LEED NA ▼

POST STUDY PHASE TO WEBSITE

Attachments Route Detail

Name	Size	Note	Include	Seq	Cataloged
Noel-Nordfelt Animal Science Goat Dairy and Creamery Project Setup		Auto Linked	Not Sent		7/27/2017

Powered by

Header

Fill the Architect, Engineer and Contractor from look up fields

Noel-Nordfelt Animal Science Goat Dairy and Creamery ☰ 🟢 ⬆️

Doc# 0001 TRIRIGA WO #

PROJECT 9530100 Noel-Nordfelt Animal Science Goat Dairy and Creamery

ARCHITECT DCM Design Group 🔍 👤

ENGINEER 🔍 👤

CONTRACTOR D G Granade Inc 🔍 👤

STATUS Open 📘

CREATED DATE 7/27/2017

Details Tab (field descriptions below)

Details ⬆️

REV DESCRIPTION

REV NUMBER 1: Current Revision 📘

CONCIERGE OPC - LOW 0: This can Rev desc HIGH

PROJECT TYPE 1: Current Revision Lab / Research

TOTAL APPRVD AUGMENTATIONS Create New Revision

TPC @ START OF P-PHASE

TPC @ START OF DD

TPC @ START OF W-PHASE

TPC @ ADVERTISEMENT

TPC @ AWARD

TPC @ CLOSEOUT

POST PROJECT DATA TO WEBSITE Yes ▼

AUTO CREATE PROJECT UPDATE DOC Yes ▼

INCLUDE CLIENT (A) IN EPAC REPORT Yes ▼

CLIENT (B)

INCLUDE CLIENT (B) IN EPAC REPORT ▼

CLIENT (C)

INCLUDE CLIENT (C) IN EPAC REPORT ▼

ASF

GSF

LEED NA ▼

POST STUDY PHASE TO WEBSITE

Attachments Route Detail

Name	Size	Note	Include	Seq	Cataloged
Noel-Nordfelt Animal Science Goat Dairy and Creamery Project Setup		Auto Linked	Not Sent		7/27/2017

Revision Description: This field can remain labelled 'Project Info'.

Rev Number: Initially this field will remain as Current revision. Later, when information is updated, drop this field down and select Create New Revision and click the save button prior to updating data.

Concierge OPC – Low & High: Concierge to fill in Opinion of Probable cost - Low and high in Dollars.

Project Type: Select appropriate type from New, Renovation, Both (New and Reno) and Infrastructure and subtype of the project.

Total Approved Augmentations: Fill-in the combined total dollar value of all approved augmentations.

TPC @ Final DPP : Fill in Total Project Cost dollar value at Final DPP phase

TPC @ End Of SD/PD (Project Budget Approval) : Fill in Total Project Cost dollar Value at the End of SD/PD

TPC @ End Of DD: Fill in Total Project Cost dollar Value at the end of Design Development

TPC @ Advertisement : Fill in Total Project Cost dollar Value at Advertisement

TPC @ Award : Fill in Total Project Cost dollar Value at Award.

TPC @ CloseOut: Fill in Total Project Cost dollar Value at Close Out

Auto Create Project Update Doc (*edited by Directors and Ads only*): Drop-down choices Yes/No to have the PM update the project weekly.

Include Client (A) in EPAC Report (*edited by Directors and Ads only*): Drop-down choices Yes/No to include this project in Client A's EPAC Report

Client (B) (*edited by Directors and Ads only*): For projects with more than one client – add another client to the project

Include Client (B) in EPAC Report (*edited by Directors and Ads only*): Drop-down choices Yes/No to include this project in Client B's EPAC Report

Client (C) (*edited by Directors and Ads only*): For projects with more than two clients – add another client to the project

Include Client (C) in EPAC Report (*edited by Directors and Ads only*): Drop-down choices Yes/No to include this project in Client C's EPAC Report

ASF : Fill in Assignable Square Footage information

GSF : Fill in Gross Square Footage information

Post Study Phase to Website (*edited by Directors and Ads only*): Check to post project study phase to website




Attachments Tab

Project Setup is always linked as a default. Attachments tab available for any related attachments.

Name	Size	Date	Include	Seq
Real Plan/Full National Business Deal Entry and Creation	Auto Upload	1/22/2019	Web Send	1/22/2019

Routing Detail Tab

Routing isn't currently used for the Project Information document. Typically, sequence 1 is occupied by whoever created the project.

Attachments		Route Detail					
	Seq	To	Status	Ins	Rsp	Notes	Due
	1	Jennifer Calori Plant Accountant (Accounting)	Pending				Due: Nov 09 13:02 Viewed: Nov 09 13:02
	5	Add Route to...					

How often do I edit / update this document?

The Project Information document should be updated whenever the data stored on this document changes. This document is not routed to you for an update, it is up to you to open it and edit it.

Consult your supervisor if you have questions.