



# User Guide for Project Managers

## Update & Route a Project Update

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

If you need help or have any questions,  
please send an email to:  
[cpmahelp@ucdavis.edu](mailto:cpmahelp@ucdavis.edu)



## Contents:

1. [Update Project Update](#)
2. [Add Attachments](#)
3. [Routing Instructions](#)

## Getting Started

This guide outlines for DCM Project Managers how to update data on the Project Update document in spitfire.

If you have not yet logged-in to Spitfire, send an email to [cpmahelp@ucdavis.edu](mailto:cpmahelp@ucdavis.edu) requesting assistance.


## The Project Update document will appear in your Spitfire Inbox

1. To update and route a Project Update document directly from your inbox, login to Spitfire. The first screen that you see after logging in is your Home Dashboard. Near the top of the Home Dashboard, underneath the Home tab is the Inbox. Look through the inbox for your Project Update documents. Find a Project Update document in the Inbox.

INBOX									
Project	Project Name	Type	DocNo	Description	To UCD	To Me	Priority	Status	
9573650	ATIRC Main Lab Renovation	Project Update	0002	Project Update 0002	12/6/2018	12/6/2018		Draft	

PROJECT LIST							
Select	Project Name	Location	Description	Start	Completion	Status	Schedule
	Orchard Park Construction Site Fence 2504420	City TBD, __					
	JOC Management 2504940	City TBD, __					
	Minor Cap Projects Processing and Code Compliance Support 2505130	City TBD, __					
	Sproul Hall Elevator Upgrades 2505140	City TBD, __					

2. Then click on the folder icon (  ) to open the project update document.

Project Update 0001 ☰ 📄 ↗

Doc#

PROJECT  Noel-Nordfelt Animal Science Goat Dairy and Creamery

DOCUMENT STATUS  ⓘ

CREATED  PM DUE  SUPV APPVL

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**Weekly Update** ↗

	Description	Projected	Completed / Actual
<input type="checkbox"/>	Start of P-Phase	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Start of W-Phase	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Start of Bidding	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Bid Opening	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	NTP	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Completion (Occupancy)	<input type="text"/>	<input type="text"/>

PROJECT STATUS

ON BUDGET

ON TIME

TOTAL PROJECT COST \$

BUDGET - B

SCHEDULE - S

CURRENT STEP - C


NEXT STEP - N

PM NOTES (NOT FOR EXTERNAL DISTRIBUTION)

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**Attachments** **Route Detail**

Name	Size	Note	Include	Seq	Cataloged
Click here (or save) to enable					

Powered by 

### Header

On the header, the only editable fields are the scheduled update date / times for the PM and the Supervising PM.

Project Update 0001 \* ☰ 📄 ↗

Doc#

PROJECT  Noel-Nordfelt Animal Science Goat Dairy and Creamery

DOCUMENT STATUS  ⓘ

CREATED  PM DUE  SUPV APPVL

### Weekly Update Tab

Once the Project Update document has been completed at least once for a project, all of the values for the current week will be a copy of the values from the previously approved Project Update document – the only fields to be edited, would be fields where the data that has changed since the last approval.

Fill-in the initial dates if empty (when information is available) or update the Start of P-Phase, Start of W-Phase, Start of Bidding, Bid Opening , NTP and Completion(Occupancy) if there have been any changes.

Description	Projected	Completed / Actual
Start of P-Phase	<input type="text"/>	<input type="text"/>
Start of W-Phase	<input type="text"/>	<input type="text"/>
Start of Bidding	<input type="text"/>	<input type="text"/>
Bid Opening	<input type="text"/>	<input type="text"/>
NTP	<input type="text"/>	<input type="text"/>
Completion (Occupancy)	<input type="text"/>	<input type="text"/>

PROJECT STATUS (Pick One, Save, Pick 2nd) (Pick 1st Col, Save, Then T)  
 ON BUDGET  
 ON TIME  
 TOTAL PROJECT COST \$  
 BUDGET - B  
 SCHEDULE - S  
 CURRENT STEP - C  
 NEXT STEP - N  
 PM NOTES (NOT FOR EXTERNAL DISTRIBUTION)

**Project Status:** This is a two part value. Select the first column, save the document, then select the value in the second column. Values in the first column are: Future(not-funded), Active(Funded), Closeout / Warranty, Post Construction Claims. Values in the second column are dependent on the value of the first column, for example, when the first column is Active (funded), the choices in the second column are shown below.

PROJECT STATUS Active (funded) ▼

- S - Study
- P - Project Approval
- P - Schematic Design
- P - Preliminary Design
- W - Design Development
- W - Construction Documents
- C - Bid / Award
- C - Construction
- On Hold

**On Budget :** Choose Yes if the project is On Budget for that week if not set it as ‘No’

**On Time:** Choose ‘Yes’ if the project is On Time for that week if not set it as ‘No’

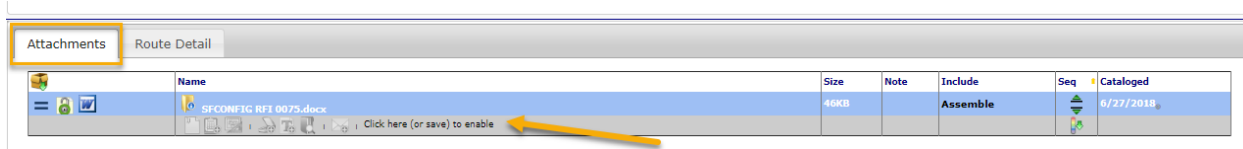
**Total Project Cost:** Enter the Total Project Cost – the current projected total project costs at this time.

**Budget, Schedule, Current Step, Next Step (BSCN)** – Enter brief statements in these four fields. The intention is to provide an executive level update, 1–2 sentences each (140 characters each max). This information will be public, shared with clients and posted to the website.

**PM Notes (Not for External Distribution)** – For internal use only, enter information you want for yourself or to share with your supervisor.


**Attachments Tab**

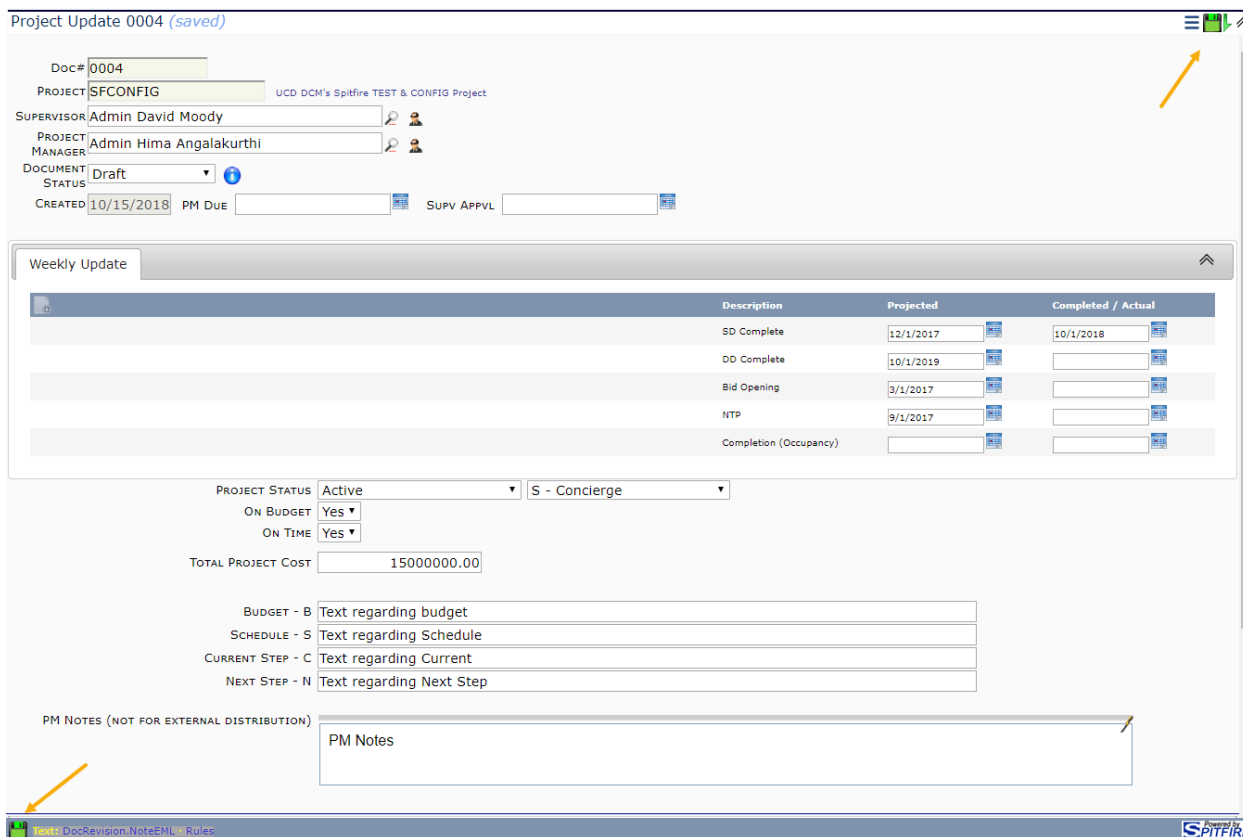
To add attachments - select the attachments tab and drag and drop. *Please note: If the attachment icons are not enabled, you will need to save the document again or click on 'Click here (or save) to enable' on the attachments tab:*




Once icons are enabled, just drag and drop your file to add:



Once you have added your attachment, click the  icon at the top or bottom of the page.



## Routing Detail Tab

To move the document along, make sure you are in sequence 2, and click the  icon. Clicking thumbs-up will save the document, change the document status to 'Pending Review' and route the document to the Supervising PM for review and approval (puts it in their Inbox).

Attachments		Route Detail		Status	Ins	Resp	Notes	Due
	1	Admin Michelle Davis (Project Staff)		Responded				Due: Oct 15 14:31 Acted: seconds ago
	5	Admin Hima Angalakurthi Design and Construction Management (Project Manager)		Pending				
	10	Spitfire (System Use Only)		Pending				
	10	Add Route to...						

THIS STAGE       CONFIDENTIAL      PRIORITY: LOW

### How often do I edit / update this document?

For each project, there will be a new Project Update document each week that will be in your inbox on Friday. Make your edits to each Project Update document by the end of the day on the following Tuesday.

Consult your supervisor if you have questions.