



User Guide for Supervisor's Review & Approve a Project Update

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

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



Contents:

1. [Getting Started](#)
2. [Reviewing and approving the document](#)
3. [Route back to PM](#)

Getting Started

This guide outlines for DCM Supervising PMs how to update data on the Project Update document in spitfire. The Project Update document is edited by the PM and then routed to you for review and approval.

If you have not yet logged-in to Spitfire, send an email to 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.

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

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, __					

- Then click on the folder icon (📁) to open and review the project update document. Review the fields listed below as entered by the PM. If wish to make changes yourself, edit the field and save the document.

Project Update 0001 ☰ 📄 ⬆

Doc# 0001
 PROJECT 9530100 Noel-Nordfelt Animal Science Goat Dairy and Creamery
 DOCUMENT STATUS Draft ⓘ
 CREATED 12/17/2018 PM Due SUPV APPVL

Weekly Update ⬆

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)

Attachments **Route Detail**

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

Powered by **SPITFIRE**

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# 0001
 PROJECT 9530100 Noel-Nordfelt Animal Science Goat Dairy and Creamery
 DOCUMENT STATUS Draft ⓘ
 CREATED 10/8/2018 **PM Due 12/04/2018 17:00** **SUPV APPVL 12/06/2018 17:00**

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 – only edit data that has changed since the last approval.

Review the information on the document for accuracy – Start of P-Phase, Start of W-Phase, Start of Bidding, Bid Opening , NTP and Completion(Occupancy).

Weekly Update
⤴

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: Review these fields for accuracy: 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.

	S - Study
	P - Project Approval
	P - Schematic Design
	P - Preliminary Design
	W - Design Development
	W - Construction Documents
PROJECT STATUS <input style="width: 100%;" type="text" value="Active (funded)"/>	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’

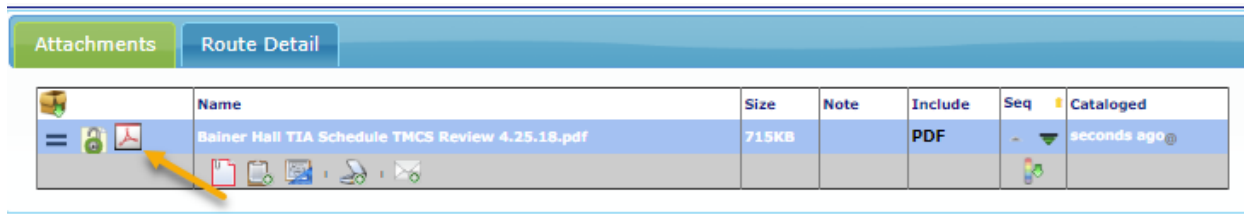
Total Project Cost: Enter the Total Project Cost – the current projected total project costs at this time.

Budget, Schedule, Current Step, Next Step (BSCN) – the next four fields are brief (140 character) statements to capture ‘in a nutshell’ these four key values.

PM Notes (Not for External Distribution) – The PM or you can record any notes (not public) that are pertinent.

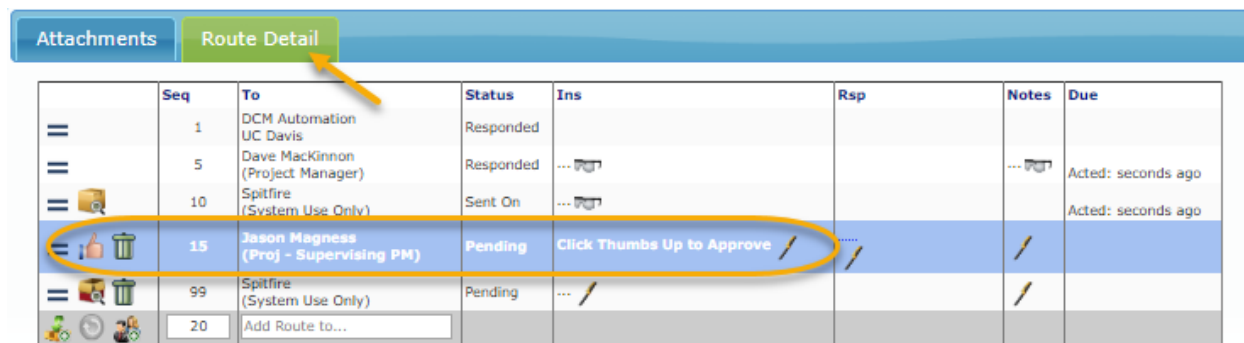
Attachments Tab

Review any attachments – Click on the icon to open/download and view the document.



Routing Detail Tab

If your review is complete and you approve, the document can be routed forward. Open the Route Detail tab by clicking on it.

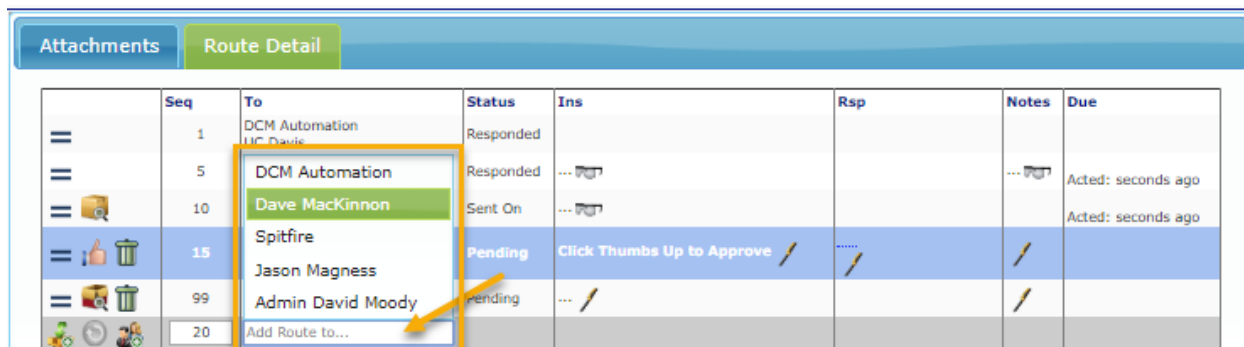


To approve the document and to close it, make sure you are in sequence 15, and click the thumbs-up icon. Clicking thumbs-up will save the document, change the document status to 'Approved' and close the document – removing it from your Inbox.

What if I want the PM to make changes to this document?

You can route this document back to the PM with a note about any issues – here's how.

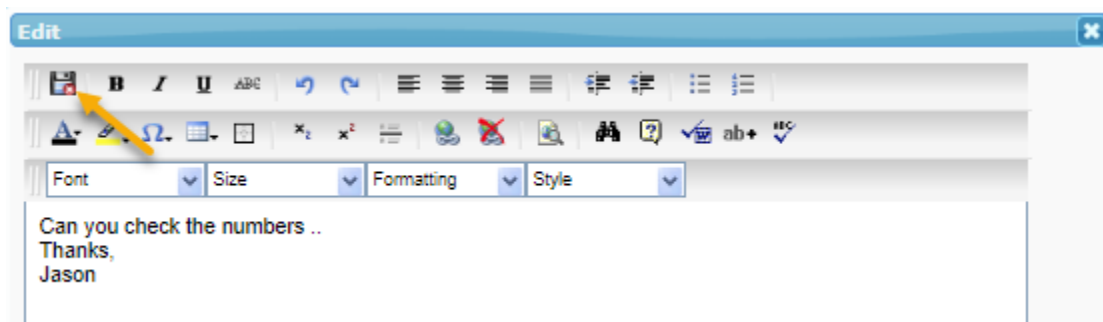
At the bottom of the route is a box with the words 'Add Route to..' this allows you to add the PM after you on the route.



A list of contacts currently on the route will pop-up, click your PM. This will have added the PM at sequence 20 on the route (the next sequence after you).

Attachments		Route Detail					
	Seq	To	Status	Ins	Rsp	Notes	Due
☰	1	DCM Automation UC Davis	Responded				
☰	5	Dave MacKinnon (Project Manager)	Responded	Acted: minutes ago
☰	10	Spitfire (System Use Only)	Sent On	...			Acted: minutes ago
☰	15	Jason Magness (Proj - Supervising PM)	Pending	Click Thumbs Up to Approve			
☰	20	Dave MacKinnon (Project Manager)	Pending				
☰	99	Spitfire (System Use Only)	Pending	...			
☰	20	Add Route to...					

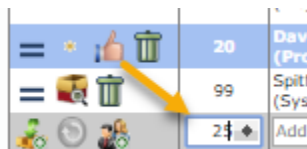
Click on the pen icon in the new row in the Ins column (Instructions). An edit box will open (with formatting controls). Type anything you wish your PM to read. Then click the save icon, the diskette with red on it in the upper-left corner.



These instructions can be read by the PM from his Inbox. To confirm what is written in an Instruction, mouse-over the ellipsis and you will get a brief view of the message.

15	Jason Magness (Proj - Supervising PM)	Pending	Click Thumbs Up to Approve	
20	Dave MacKinnon (Project Manager)	Pending		
99	Spitfire (System Use Only)	Pending		
20	Add Route to...			

Now add yourself to sequence 25 so that the PM can route the document back to you once changes have been made. Highlight the Seq box and type 25, then tab to the Add Route box.



Click on your name to add yourself to sequence 25.

Attachments		Route Detail					
	Seq	To	Status	Ins	Rsp	Notes	Due
☰	1	DCM Automation UC Davis	Responded				
☰	5	Dave MacKinnon (Project Manager)	Responded	...			Acted: minutes ago
☰	10	DCM Automation	Sent On	...			Acted: minutes ago
☰	15	Dave MacKinnon Spitfire	Pending	Click Thumbs Up to Approve	✓	✓	
☰	20	Jason Magness	Pending	✓			
☰	99	Admin David Moody	Pending	...			
☰	25	Add Route to...					

Click the document save icon in the lower-left corner.

☰	15	Jason Magness (Proj - Supervising PM)	Pending	Click T
☰	20	Dave MacKinnon (Project Manager)	Pending	...
☰	25	Jason Magness (Proj - Supervising PM)	Pending	✓
☰	99	Spitfire (System Use Only)	Pending	...
☰	20	Add Route to...		

THIS STAGE

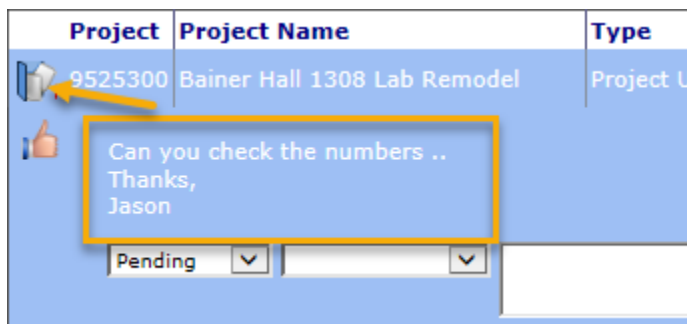
Click the thumbs-up to route the document back to your PM.

☰	5	Dave MacKinnon (Project Manager)	Responded	...
☰	10	Spitfire (System Use Only)	Sent On	...
☰	15	Jason Magness (Proj - Supervising PM)	Pending	Click
☰	20	Dave MacKinnon (Project Manager)	Pending	...
☰	25	Jason Magness (Proj - Supervising PM)	Pending	✓
☰	99	Spitfire (System Use Only)	Pending	...
☰	20	Add Route to...		

From the Inbox, the PM can now click to the right of the document title to read your message.

Project	Project Name	Type	DocNo	Description	To UCD	To Me	Priority	Status
9525300	Bainer Hall 1308 Lab Remodel	Project Update	0001	Project Update 0001		seconds ago	🟢	Pending Review
9523900	Fish Conservation and Culture Laboratory	Inspection Request	0002	Holding tank and fitting inspection under the new modular of...	12/19/2018	12/19/2018	🟡	Re-inspection Req'd

A blue window will open to display the message.



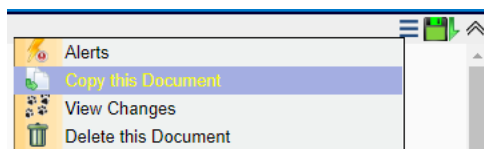
After reading the message, the PM can click the folder icon to open the document. Once the PM has revised the document, they will route it back to you.

After you review the edits made by the PM, you should click thumbs-up at Seq 25 to approve and close the document.

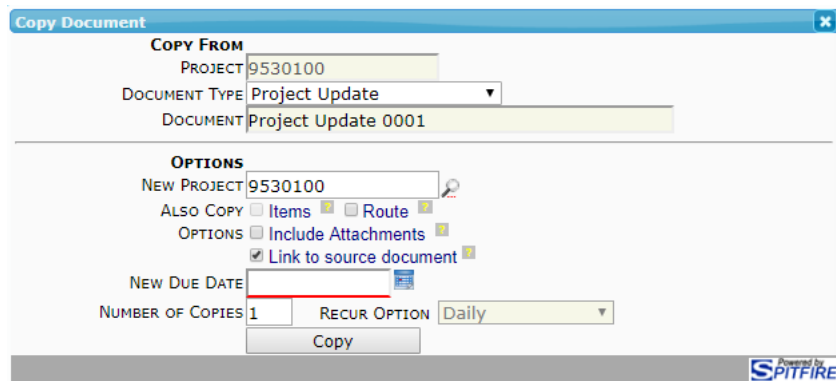
If you have any questions check with ISG or send an email to cpmahelp@ucdavis.edu to create a ticket.

Note to Directors:

If you wish to make a change to an approved document – copy it to make your change on a new version of the document. To copy the document (most recently approved document), open the document and click on the triple-bar menu in the upper-right area of the document.



A dialog box will open, click Link to source document – this will put a link between your new document and the one that it was copied from – no other boxes need to be checked. Click the copy button to create your new document.



Your new document will open, ready to edit. Once you are done with the edit(s), click on the status dropdown, select Approved and click the Save icon (upper-right diskette icon).

You have completed the copy and edit of the Project Update document.

