Technical White Paper

Via Excel (VXL) Item Templates

This technical white paper is designed for Spitfire Project Management System users. In this paper, you will learn how to create Via Excel Item Templates in Microsoft Excel. These templates are needed in order to add or edit document Items from a Microsoft Excel file.

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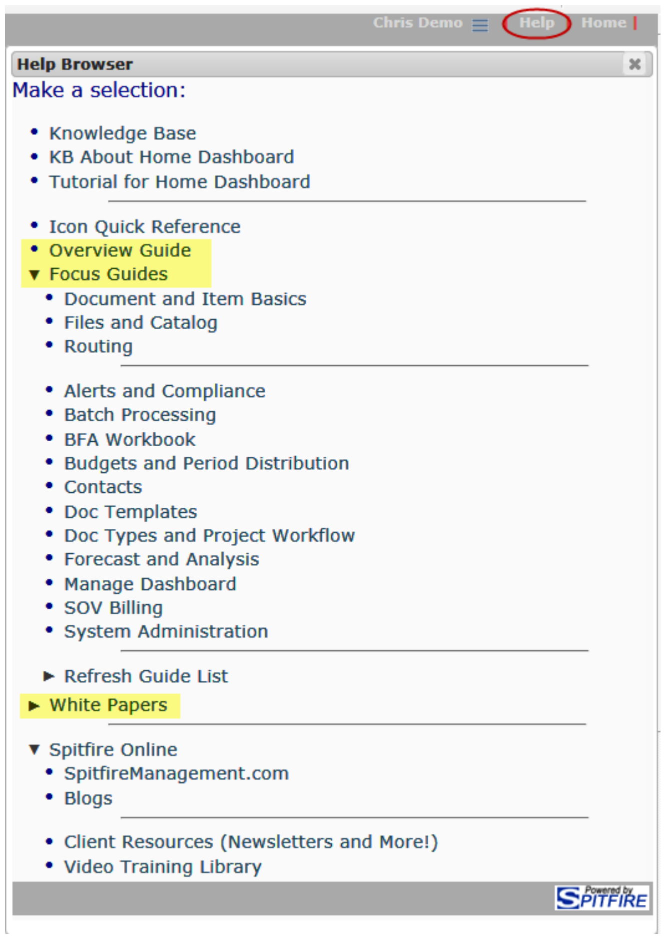
Introduction

This technical white paper describes the creation of templates—referred to as Via Excel templates, VXL templates or Spitfire Item templates—in Microsoft Excel. Via Excel templates are needed in order to add or edit document Items from a Microsoft Excel workbook. You are encouraged to review this entire white paper prior to beginning a practical exercise.

This technical white paper assumes you have a basic understanding of sfPMS in general and document Items in specific. If not, please read the *Overview Guide* and the *Focus on Document and Item Basics* guide first.

All documentation referred to within this technical white paper can be found on the Spitfire Help menu.



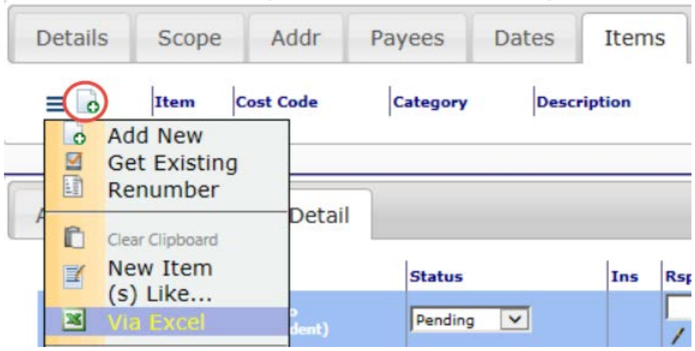
Note: This technical white paper also assumes you can open and use Microsoft Excel. Anyone without a basic understanding of Microsoft Excel should take the time to learn that application before attempting to create a Spitfire Item Template.

Note: New information added to the TWP since V4.5 appears in **green text**. Also, icons are shown in size 16 only; larger icons are similar but not identical.

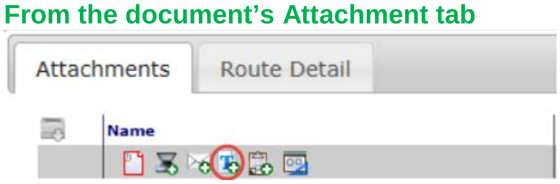
Concepts

Most Spitfire documents include Items. You can choose to add Items to documents manually through the Add New icon ( ) on the Items tab. However, you might prefer to add or edit information from a Microsoft Excel spreadsheet instead. There are two ways that files created from a Via Excel template can be used:

- **From the Via Excel option on the Items drop-down menu**



- **From the document's Attachment tab**

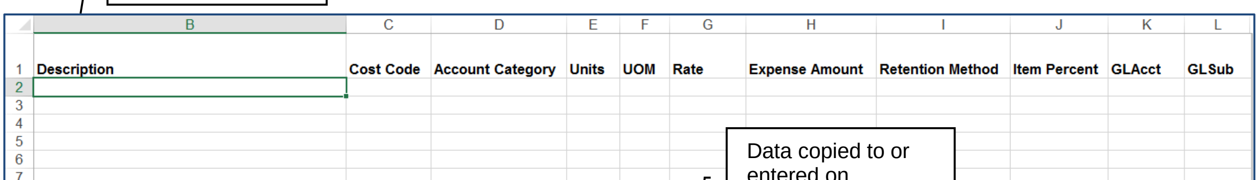


TIP

To learn how to use the template from the Attachments tab, see the *Focus on Documents and Items* guide.

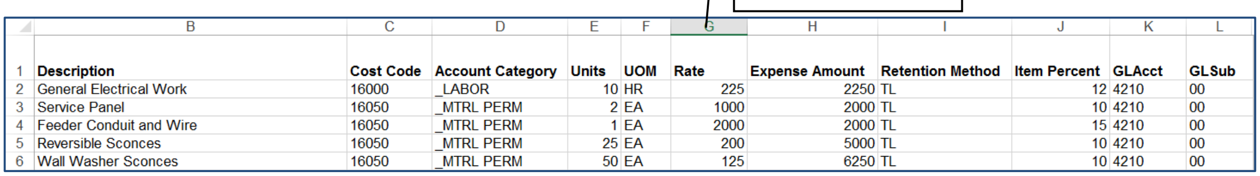
You can also use templates when exporting item information from the Spitfire Project Management System (sfPMS) to a Microsoft Excel spreadsheet for output purposes.

Via Excel template



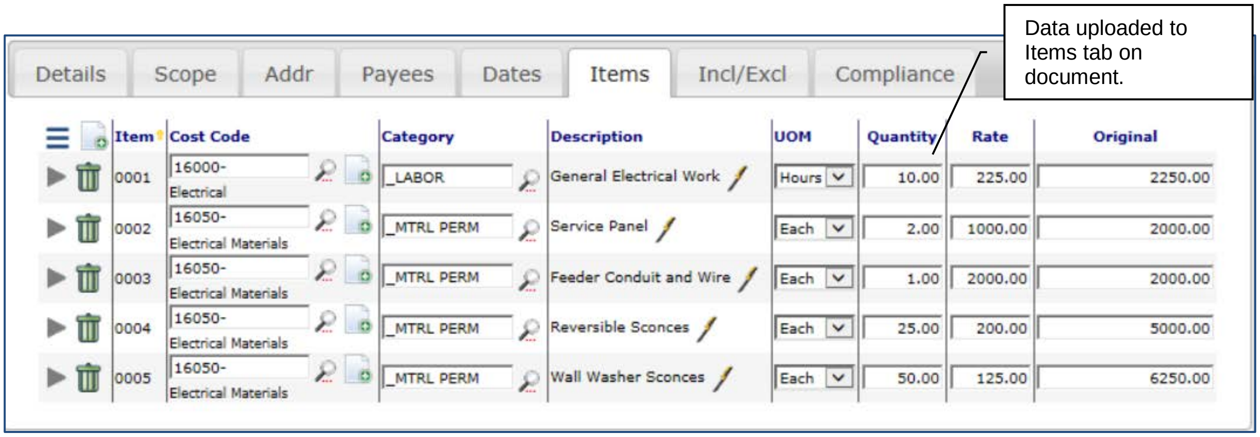
	B	C	D	E	F	G	H	I	J	K	L
1	Description	Cost Code	Account Category	Units	UOM	Rate	Expense Amount	Retention Method	Item Percent	GLAcct	GLSub
2											
3											
4											
5											
6											
7											

Data copied to or entered on Microsoft Excel file



	B	C	D	E	F	G	H	I	J	K	L
1	Description	Cost Code	Account Category	Units	UOM	Rate	Expense Amount	Retention Method	Item Percent	GLAcct	GLSub
2	General Electrical Work	16000	_LABOR	10	HR	225	2250	TL	12	4210	00
3	Service Panel	16050	_MTRL PERM	2	EA	1000	2000	TL	10	4210	00
4	Feeder Conduit and Wire	16050	_MTRL PERM	1	EA	2000	2000	TL	15	4210	00
5	Reversible Sconces	16050	_MTRL PERM	25	EA	200	5000	TL	10	4210	00
6	Wall Washer Sconces	16050	_MTRL PERM	50	EA	125	6250	TL	10	4210	00

Data uploaded to Items tab on document.



Planning

Use of Templates

The number and exact configuration of Via Excel templates for each of your desired Doc types depend on how you (or your users) will use these templates.

- If you want to add data from a Microsoft Excel file to a Spitfire document (as shown in the picture on the previous page), and/or to enter Items for a Spitfire document by typing them directly in a Microsoft Excel file, you will need to create a basic Via Excel template for that Doc type. Via Excel templates contain a **ToSpitfire** sheet. No special columns are required in the template, unless you want greater functionality as explained below**. You will need to create this template whether you are going to use the template from the Items tab or the Attachments tab.**
  Note: instructions on page 9 explain how to create a Via Excel Template.
- **If you want your template to include columns with formulas, what you will do depends on how you will use the template.**
  - If you will use it from the Via Excel option, you will need to either add one or more **To_Formula*n*** columns to your template or name an existing column **To_Formula*n*** (as described on page 24).
  - If you will use it as an Attachment template, you will need to add the formula to all possible rows in your template.
- If you want the template to indicate which static Item rows should be added (and which rows should not be added) to a document, you will need to include a **To_RowFlag** column in your template (as described on page 21).
  Note: you cannot have a To_RowFlag column in a template that will be used to *edit* Items.
- **[For templates used from the Item's Via Excel option only]** If you want to use Microsoft Excel to delete existing Spitfire document Items, you will need to include a **To_DeleteFlag** column in the Spitfire Item Template (as described on page 28).

  Note: The **To_RowFlag** column (used when adding Items) and the **To_DeleteFlag** column (used when editing Items) cannot be included in the same template. You will need to create two separate Spitfire Item Templates if you want to use both of these columns.

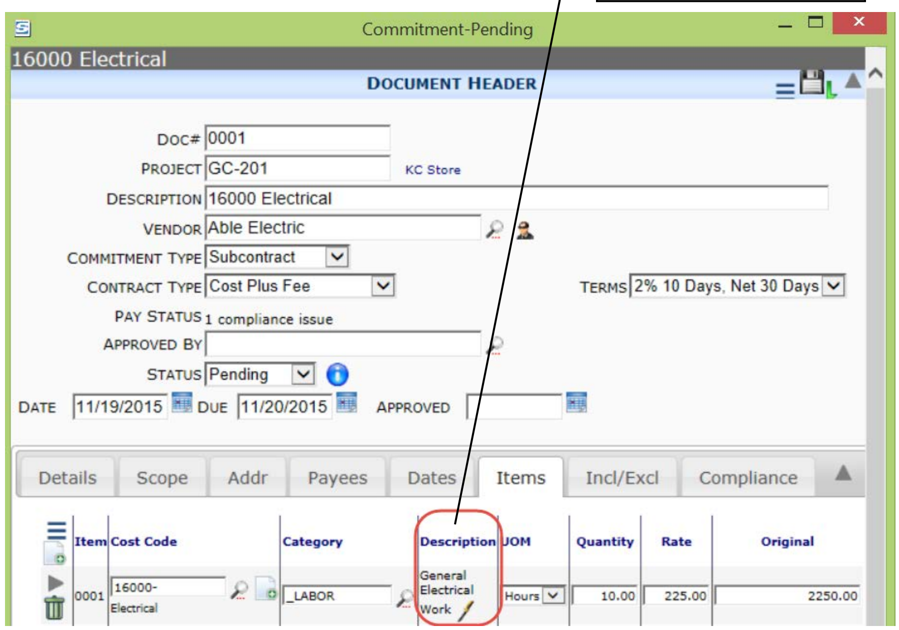
In general, you can create any number of Via Excel templates for each desired Doc type as long as you give each template a distinct filename. Also, it is easier to create one basic template file for each Doc type and then modify that file (and **Save As**) if you need to create other similar templates for the same Doc type.

- You should consider carefully how each template will be used before creating that template.
- If you will want to copy data from an existing Microsoft Excel file, make a note of the order of the columns in your existing file.

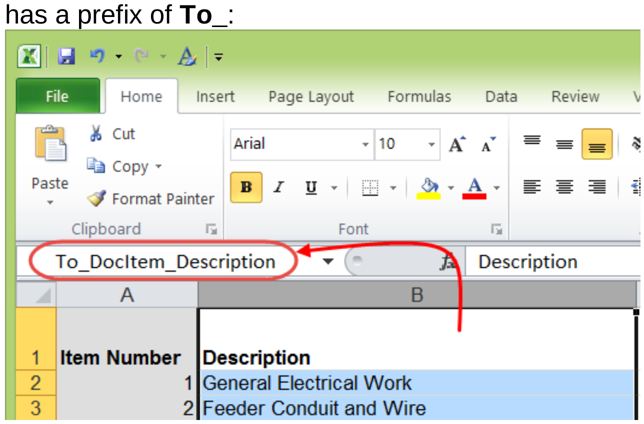
Field Names

Before you create a Via Excel template for a Doc type, you need to determine which columns you will want (and in what order) in the template. **Note**: If you will be copying data from an existing Microsoft Excel spreadsheet, you will want to order your template columns to correspond with the column order on your spreadsheet.

Each field in a Doc type has a corresponding column in the default worksheet used to create your Via Excel Item Template. For example, the Description field in a Spitfire Item has a fieldname of **DocItem_Description**.



This corresponds to the column named **DocItem_Description** on the worksheet. Because the column is found on the ToSpitfire worksheet, it has a prefix of **To_**:



Generally, the name of the column is the name of the field in the document with a **To**_ prefix.

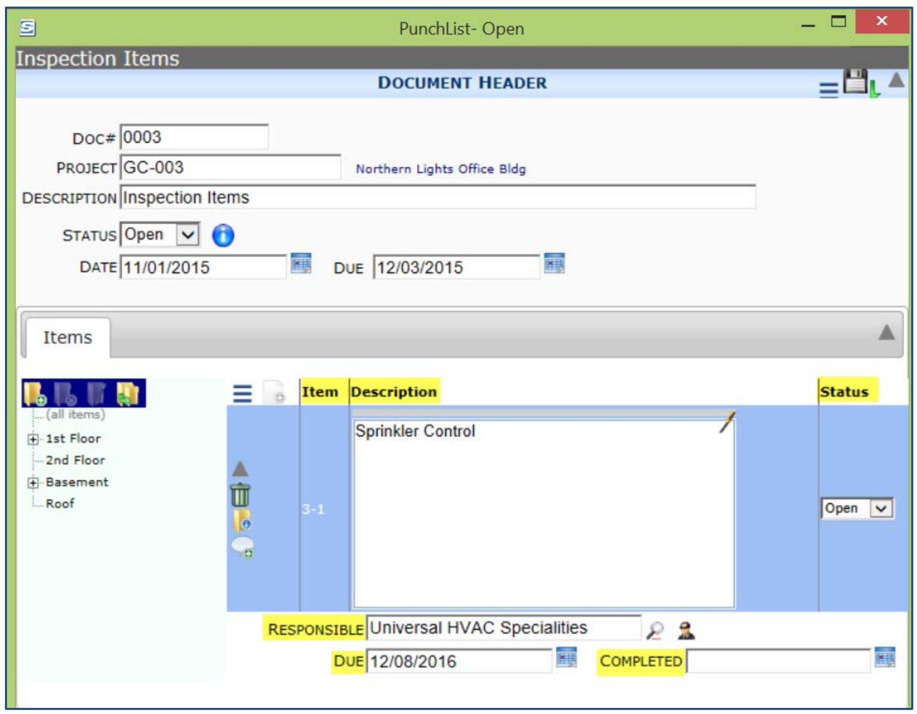
As preparation, you should write down the names of all the fields that you want in your Via Excel template and the order in which you want them to appear.

You can find the names of the fields on common Doc types starting on page 45. These fieldnames are also those used in bookmarks (on bookmark templates) and what appear in the UI Configuration tool, if you are more familiar with such means of determining fieldnames.

As mentioned, those fieldnames form the basis of the column names; just add the **To**_ prefix in front of them.

Tutorial

Let's say that you want to create a Via Excel template for PunchList documents. Based on the fields on your document's Item tab and your research in this white paper, you determine the names of the columns that you need in your template and also decide that you want them in the following order:



On Document	***Spitfire Fieldname***	***Column Name in Template***
Item	DocItem_DocItemNumber	**To_DocItem_DocItemNumber**
Description	DocItem_Description	**To_DocItem_Description**
Status	DocItem_ItemStatus	**To_DocItem_ItemStatus**
Responsible	DocItem_ResponsibleParty_dv	**To_DocItem_ResponsibleParty_dv**
Due	DocItem_Due	**To_DocItem_Due**
Completed	DocItem_Completed	**To_DocItem_Completed**

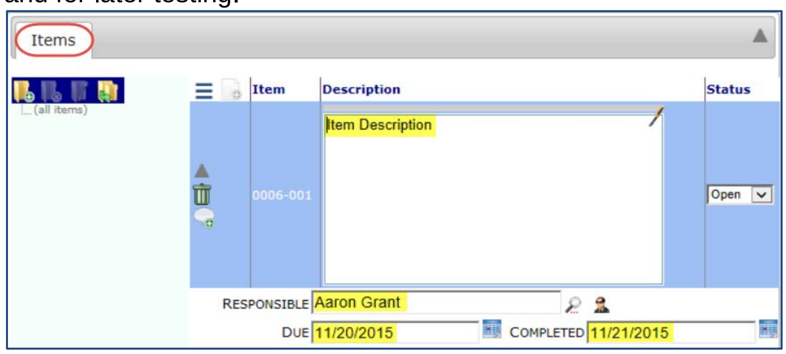
Basic Via Excel Item Template

Creating the Template

After planning, you are ready to create the Via Excel template for your Doc type (PunchList in our example).

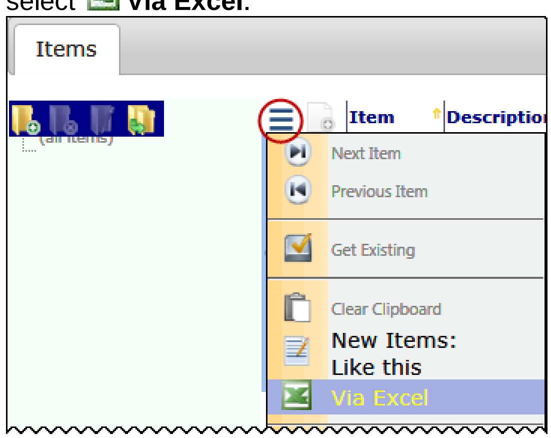
Tutorial

1. Create a new document of the desired Doc type. This document is needed only to create the template. You can close, ignore, use or delete the document afterward.
2. (*optional*) At the Items tab, click to add a new Item. While the data doesn't matter—and no data is actually required—you should fill in all fields that you want to include in your template in order to make identifying the columns on the template easier, and for later testing.



IMPORTANT: you should not add more than one Item to your document.

3. Click to save your document.
4. At the Items tab, click to open the Item Options menu then select **Via Excel**.

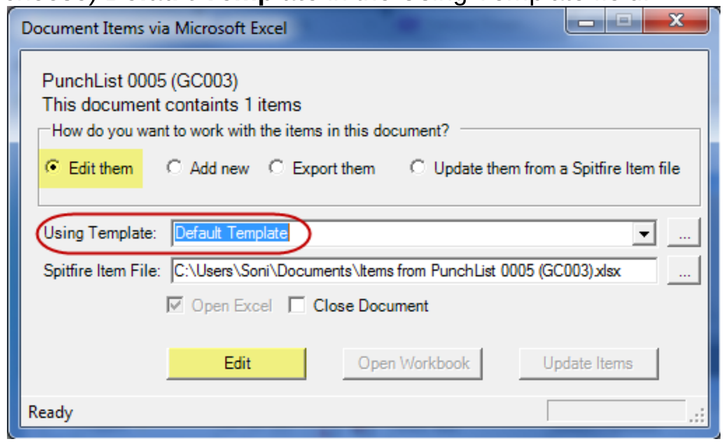


The **Document Items via Microsoft Excel** dialog box will appear.

TIP

Even if you intend to use the template to create an Attachment file, you need to first create the template using the Via Excel option as explained here.

5. Make sure the **Edit them** radio button is selected and keep (or choose) **Default Template** in the Using Template field:

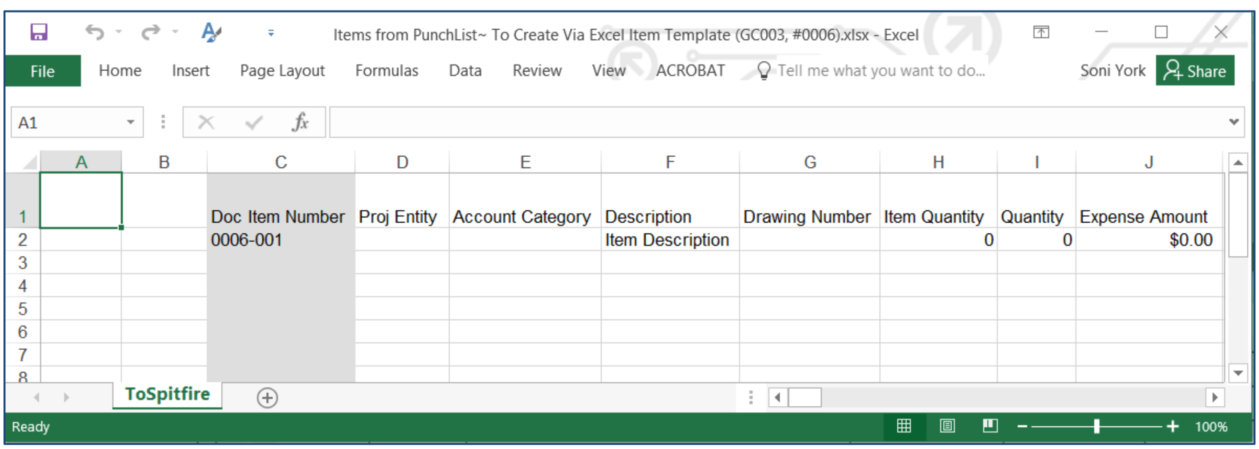


Note: unless you have a good reason to change it, you should leave the **Spitfire Item File** name as it appears. This temporary file will be used by Spitfire.

6. Click . The default Via Excel template will open.
7. Modify the template to suit the Doc type as described in the next section.

Modifying the Default Template

The default Via Excel template contains many possible columns of information because it is the starting point for all Doc types:



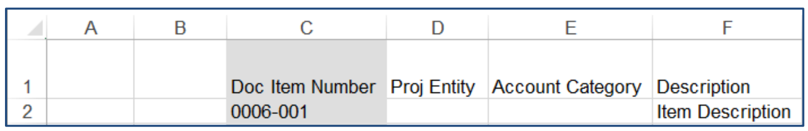
If you entered an Item on your document, you'll notice that data in some of the columns, in row 2.

In order to end up with a template that more closely matches your Doc type, you'll need to modify this default template. You will need to do the following:

- Change the order of the columns
- Re-label and reformat some columns
- Hide unused (labeled) columns
- Delete empty columns
- Delete the row that contains data
- Set the current cell for future users
- "Save As" the spreadsheet thus creating a separate Via Excel template meant just for your desired Doc type. You should save the template as an **.xlsx** file.
  Note: while the instructions to save are given after other instructions, you can choose to save at any point. Just be sure to **Save As** the first time and then **Save** when you have finished modifying the worksheet.

Changing the Order of Columns

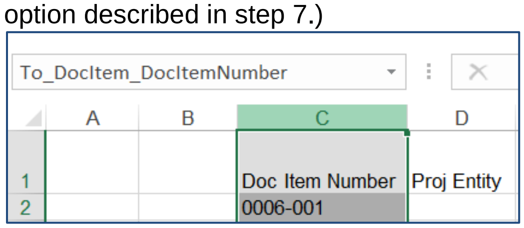
The columns that appear when you first open the default template are probably not in the order you want them, for example:



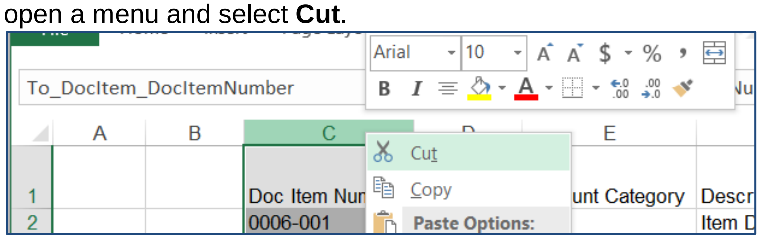
You will need to put the columns in your desired order, as described in the following tutorial.

Tutorial

1. Determine which column (name) should be positioned in the first column (location) in the template, for example, **To_DocItem_DocItemNumber.**
2. Find the column you want and click on the header to select it. (If the column is not easily visible and obvious, use the Go To option described in step 7.)



3. Click on the header of the column (the letter C) then right-click to open a menu and select **Cut**.

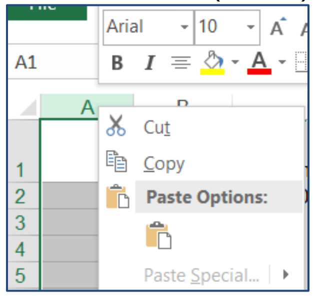


4. Scroll over to the first column of the spreadsheet. It should be blank.

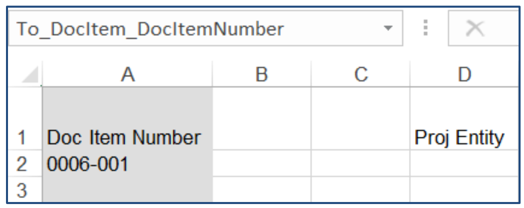
TIP
While these instructions explain how to cut and insert columns, you could also just delete columns A and B (since they are blank) if you don't need them and just want to move Doc Item Number to column A.

TIP
You can also use the keyboard shortcuts Ctrl + X and Ctrl + V to cut and paste columns.

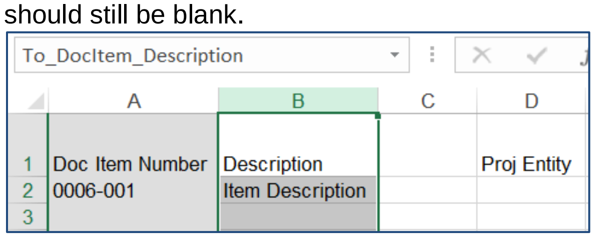
5. Right-click on the column header (A) to open a drop-down menu and select **Paste** (or ).



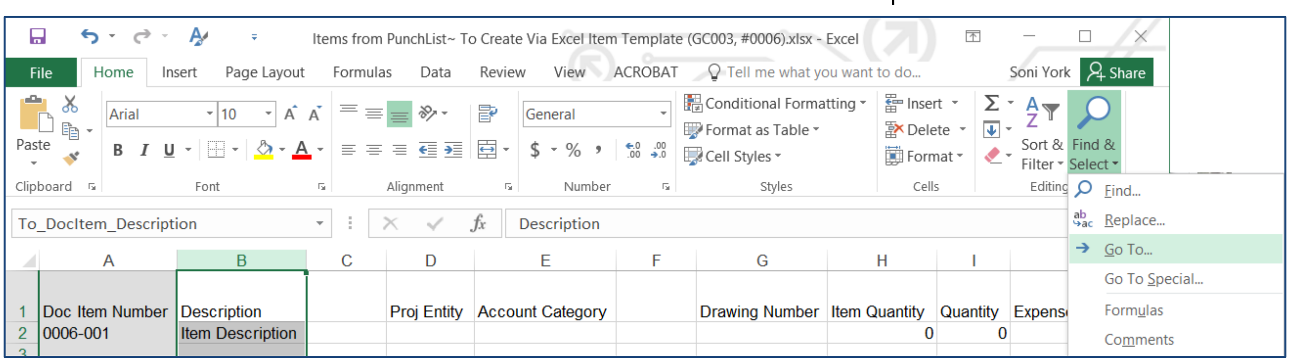
The column header and any data will appear in Column A. Columns B and C should be blank now.



6. Repeat steps 2-5 for your next column **To_DocItem_Description** (which is currently in column F)**.** Paste **To_DocItem_Description** in Column B. Column C should still be blank.



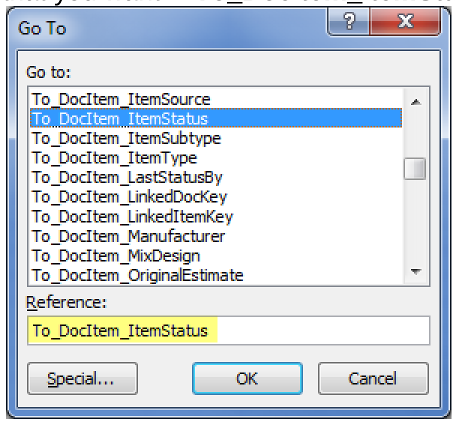
7. The next column you want, for Status, is not easily seen. Select **Go To…** from the **Find & Select** option on the Home ribbon:



TIP

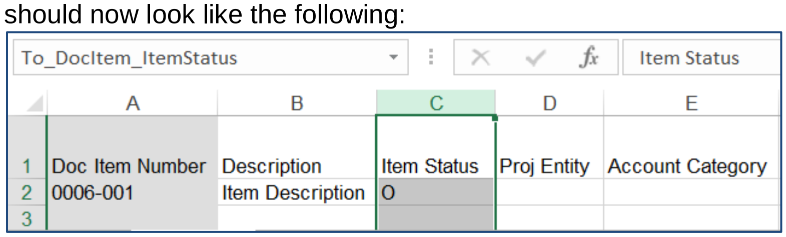
Make sure that you select the column you want with the To_ prefix. You will need to scroll past the From_ prefix choices.

8. In the box that appears, scroll down and select the next column that you want— **To_DocItem_ItemStatus** in our example.



9. Click . The column will be highlighted and selected.

10. Cut and paste this column into Column C. Your spreadsheet should now look like the following:

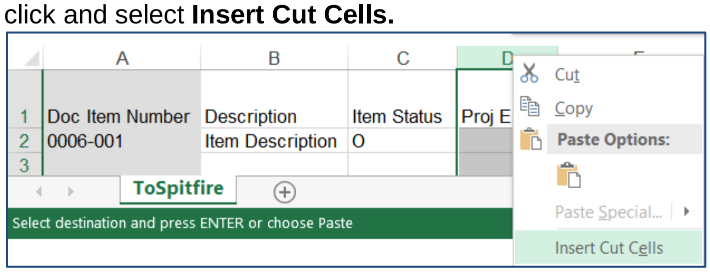


TIP

Whenever you want to place a column where a labeled column already exists, use the Insert Cut Cells option and NOT the Paste option. Insert Cut Cells will push the existing columns to the right.

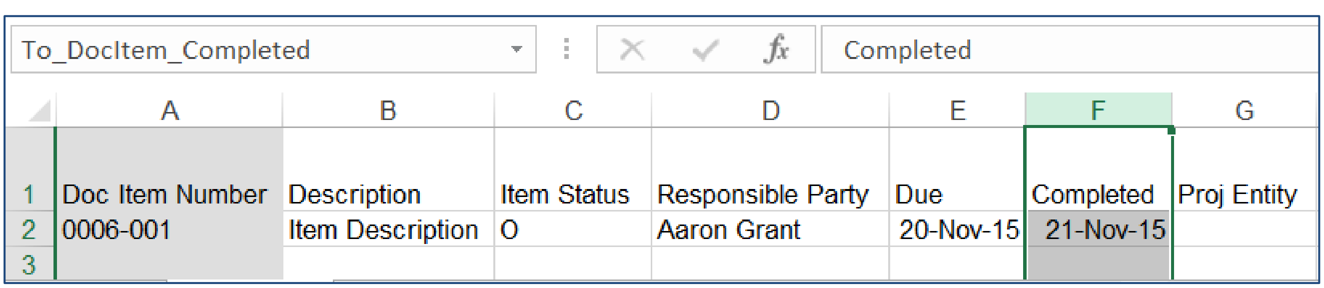
11. Using the Go To option, find your next column—**To_DocItem_ResponsibleParty_dv—**and cut it.

12. Place the cursor on the column where you want to position the Responsible Party column (in this case, column D), then right-click and select **Insert Cut Cells.**



13. Using the Go To feature if necessary, find your next column—**To_DocItem_Due—**cut it, then insert cut cells in Column E.

14. Repeat the process for **To_DocItem_Completed,** inserting the cut cells into Column F. Your spreadsheet should look like the following:

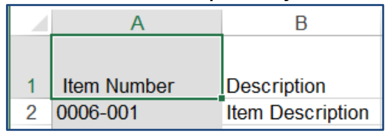


Relabeling and Reformatting Columns

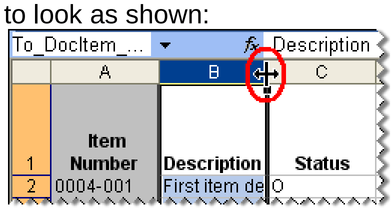
Tutorial

You will probably want to change some of the headings on your columns.

1. Double-click in cell A1, which currently says **Doc Item Number**.
2. Change the heading text, if you want. For example, delete the text **Doc** to end up with just **Item Number**.



3. (*optional*) Depending on how long your Item Numbers are, you can choose to resize the width of the column, as described in the next step.
4. **Description** is a good heading so you might not need to change the text. However, the column is probably too narrow. Position your cursor at the edge of Column B and click so that it changes to look as shown:



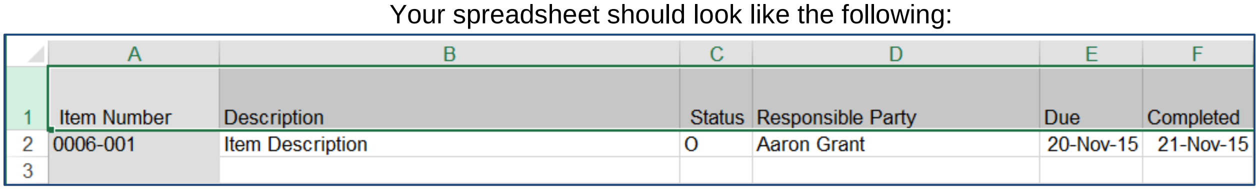
Either double-click to make the column just wide enough for the text that it contains or hold down the mouse key and drag the edge of the column to the desired width.

5. Since the **Item Status** column will hold only a short code, you can delete the text **Item** and make that column narrower.

TIP

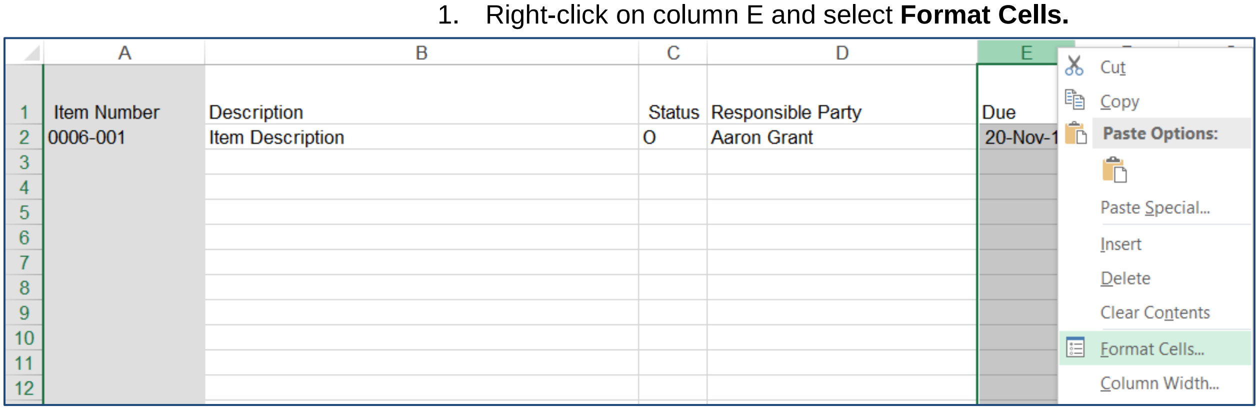
Data that is stored as a code in sfPMS must be entered as a code in the Spitfire Item File. For example, entering "open" as the Status—instead of O—will not yield results.

You can leave the headings **Responsible Party**, **Due** and **Completed** as is; however, you may want to widen the Responsible Party column. Your spreadsheet should look like the following:

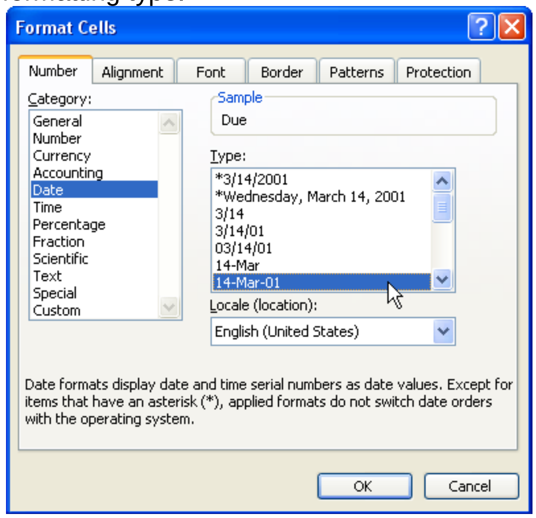


You can also change the format of the cells in a column.

1. Right-click on column E and select **Format Cells.**



2. On the Format Cells dialog box (Number tab), select **Date** then a formatting type.



3. Click . The data in your **Due** column will be reformatted.

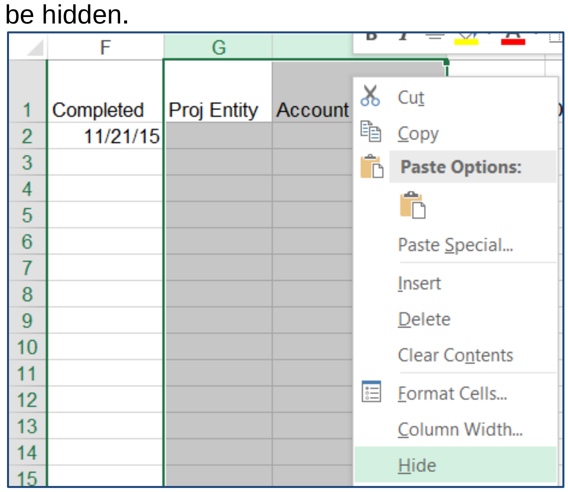
4. Do the same thing for the **Completed** column.
   Note: you can also format numeric fields in the same manner.

Hiding and Deleting Columns

Once you have changed the columns for your template, you should remove from view the other columns on the worksheet. Those other columns will not be visible in the Via Excel Item Template for this particular Doc type. Columns with headers need to be hidden; empty columns need to be deleted.

Tutorial

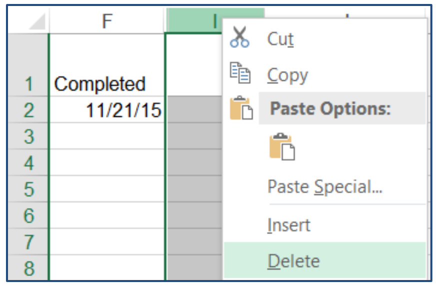
1. Click and drag to select columns G and H (which are columns with headers) then right-click and select **Hide**. The columns will be hidden.



TIP

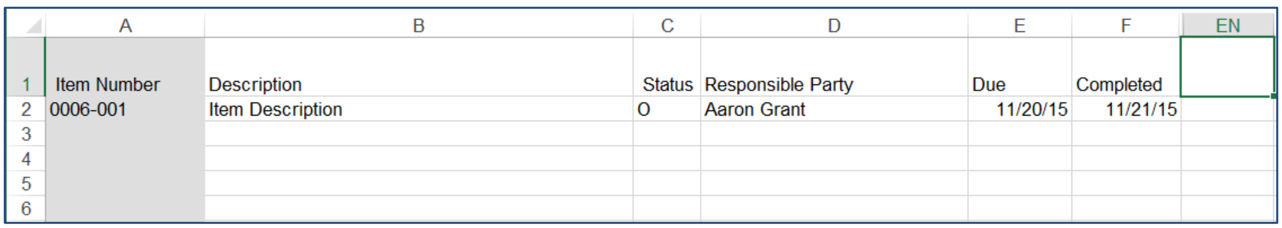
You must hide columns with headers if you don't want them to appear in your template. If you delete them, they will "come back" when the template is next opened. Hidden columns stay hidden.

2. The next column, Column I, is totally empty so can be deleted. Right-click on the column and select **Delete** from the drop-down menu.



3. Continue the process, moving from column to column to the right, hiding columns with headings and deleting columns that are empty. You can stop when all columns with headings have been hidden.

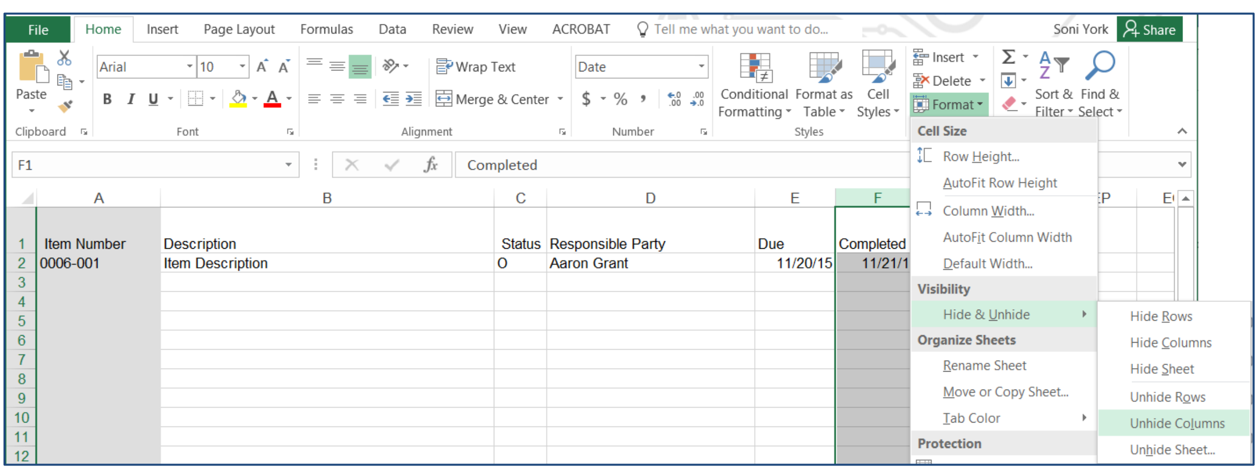
   When you are finished, your spreadsheet should look like the following:



Unhiding Columns

To unhide columns in Microsoft Excel 2007 and 2010,

1. Start at the Home ribbon. Highlight the area/columns that surround the hidden column(s) you want.
2. Select the **Format** option.
3. Select **Hide & Unhide** from the menu.
4. Select **Unhide Columns.**



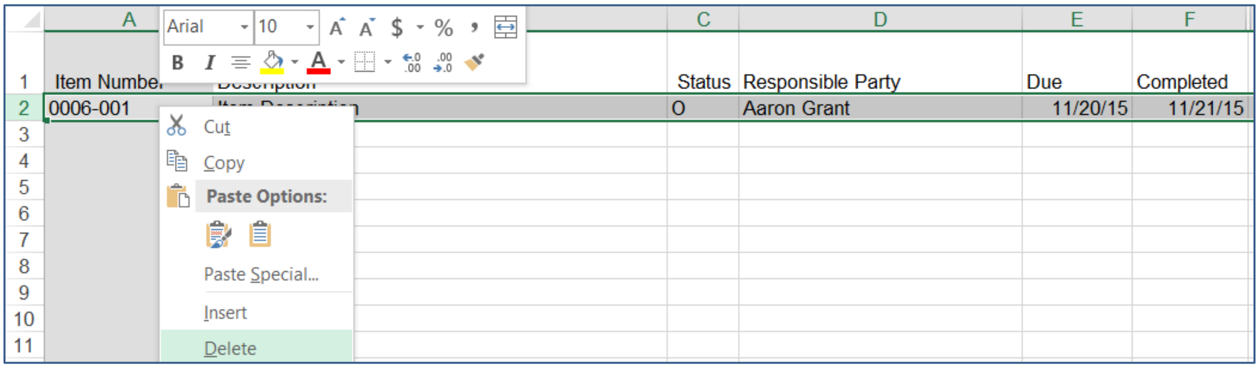
All hidden columns in that area will reappear.

Deleting Rows

Tutorial

Since you are creating a template, you now need to remove any data that is in your spreadsheet (unless you want that data or text to always appear in the files created from the template).

1. Highlight Row 2.
2. Right-click then select **Delete** from the pop-up menu:

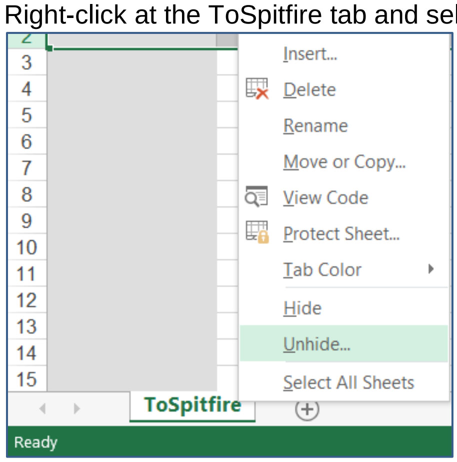


Unhiding and Hiding the RawAddr Sheet

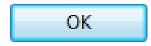
Some Doc types automatically supply address data to the template. Since your template must not have any data on it, you may need to check the RawAddr sheet and delete any rows of data found there. The RawAddr sheet is normally hidden.

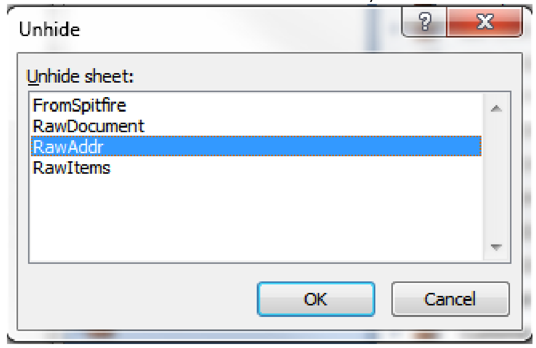
Tutorial

1. Right-click at the ToSpitfire tab and select **Unhide**:



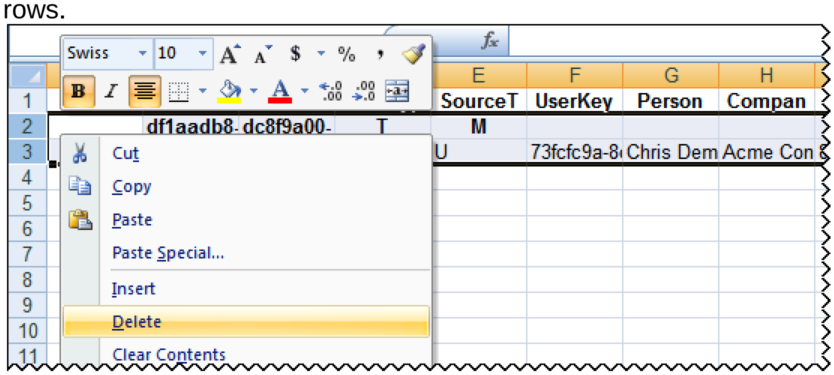
A box listing all hidden worksheets will appear.

2. Select the RawAddr worksheet, then click 

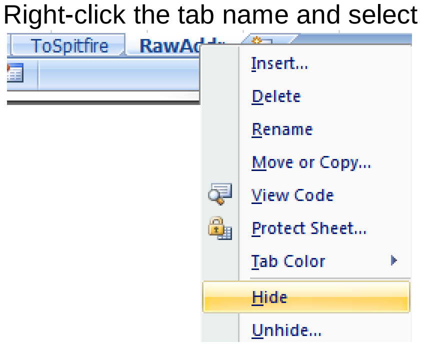


The hidden worksheet will become visible.

3. See if there any data rows on this worksheet. If so, delete those rows.



4. Right-click the tab name and select **Hide**.



Making Cosmetic Changes

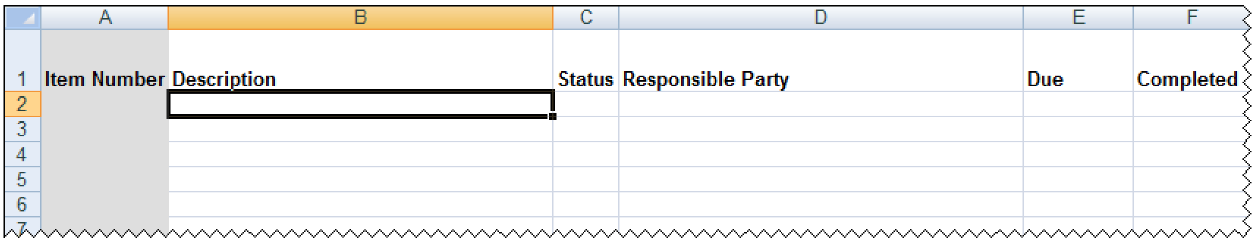
Before you consider your template to be finished, you can add cosmetic changes to it. You can, for example, bold the headings or color any of the columns or change the font size of the whole template.

Setting the Current Cell

The cell that is active when you save the template will be the current cell when the template is opened. It is a good idea to set the current cell before your final save.

Tutorial

1. Click on cell B2. This is likely to be the first cell to be used when entering data.

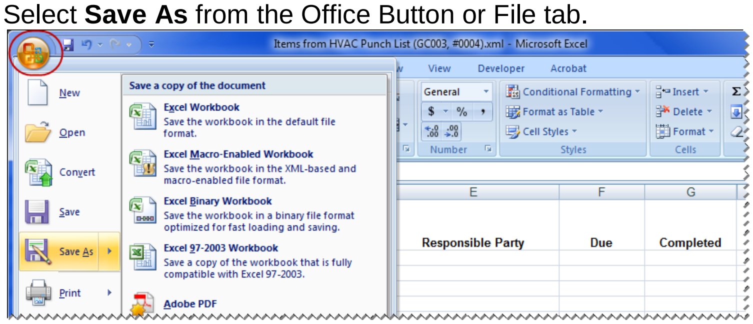


Saving the Template

At any point during the modification of the template, you can choose to save your Spitfire Item Template. When you are done with your modifications, you **must** save it.

Tutorial

1. Select **Save As** from the Office Button or File tab.



2. Give your Spitfire Item Template a proper name (for example, Punchlist Items.**xlsx**) and place it in an appropriate folder on your computer.

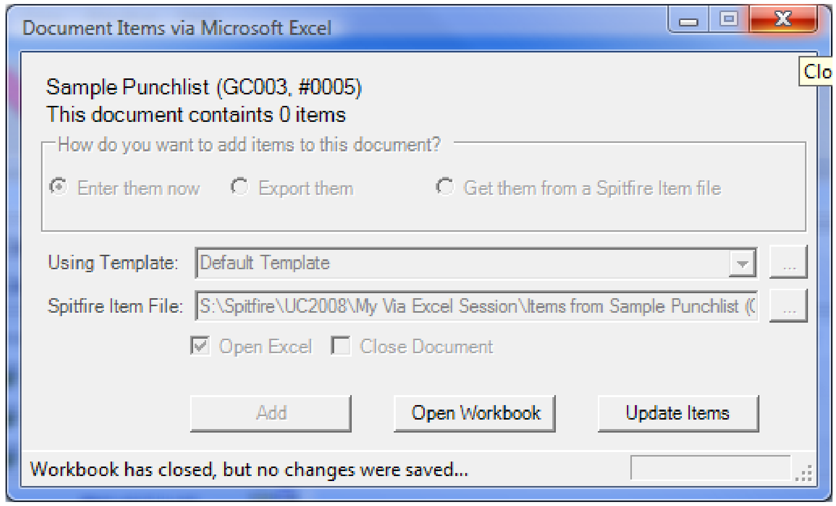
   Note: if you save the file again, you can use the **Save** option.

Important! You should not try to use or add data to the template at this point. You will need to close Microsoft Excel and the Via Excel dialog box before this template can be uploaded and used.

Closing the Template and Dialog Box

Tutorial

1. After saving the Spitfire Item Template, click  to close Microsoft Excel.
2. Back in sfPMS, click  to close the Document Items via Microsoft Excel dialog box:



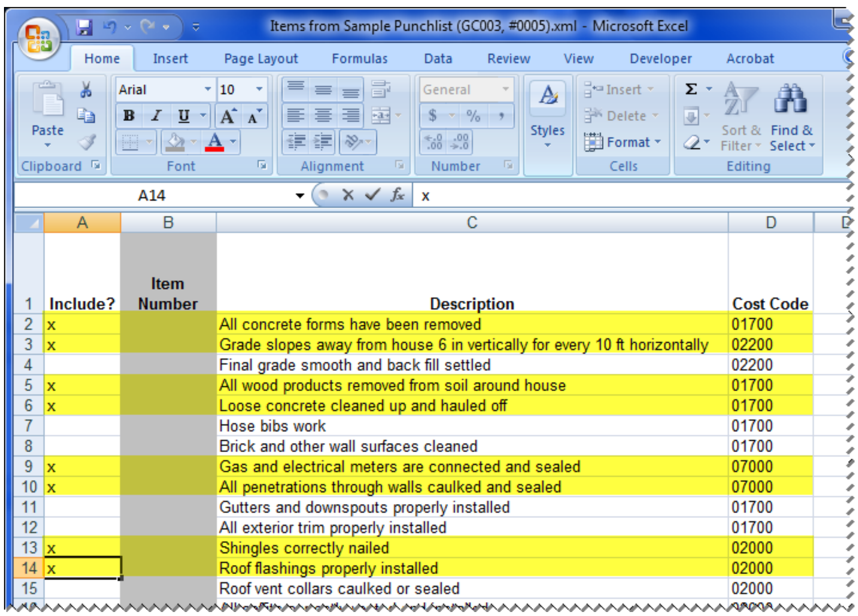
The Spitfire Item template is now ready to be tested, as described on page 33 or to be uploaded, as described on page 38.

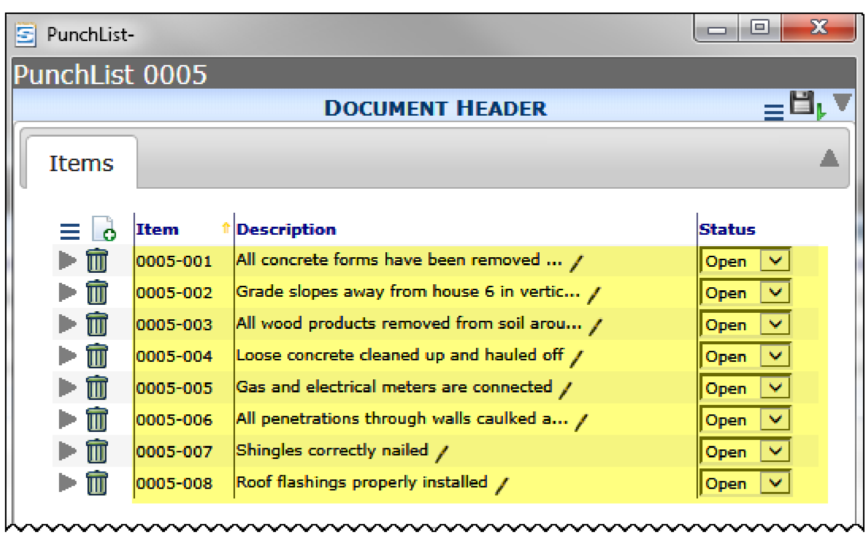
Advanced Columns for Spitfire Item Templates

To_RowFlag Column

If you want to provide your users with a list of Items from which they can select the ones they want for a particular document, you can modify your Via Excel template for that Doc type to include the **To_RowFlag** column. You would then either save your template file with that extra column or save the modified template as a separate file.

Afterward, when users open this template, they will mark in the **To_RowFlag** column (which can have any title such as "Include") the rows that they want to include in the Spitfire document. sfPMS checks this column and if a cell is empty, the row is ignored. Otherwise, it is added to the Spitfire document. For example, a Punchlist template might include a long list of possible inventory Items. Users select the rows they want by typing **x** in the **To_RowFlag** column, as shown:



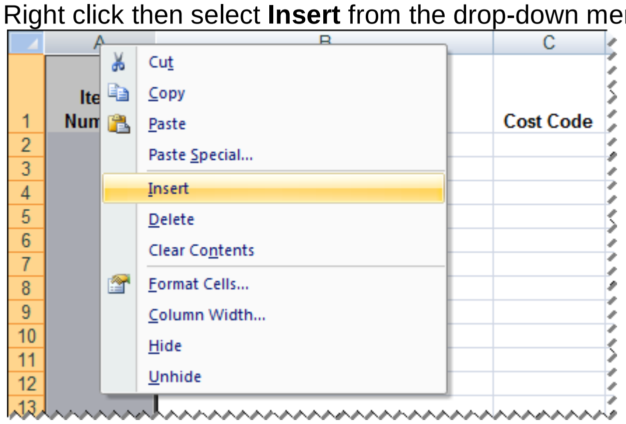


Notes

- If the template includes the **To_RowFlag** column, rows that users enter manually also need to be marked in order to be added to the Spitfire document.
- A template with a **To_RowFlag** column is used only when adding Items to a Spitfire document. You should not have a **To_RowFlag** column on any template used to edit Items.
- You would open (or begin with) your basic template. Once you get comfortable creating Via Excel Templates, you will find that you can create advanced templates without creating basic templates first.

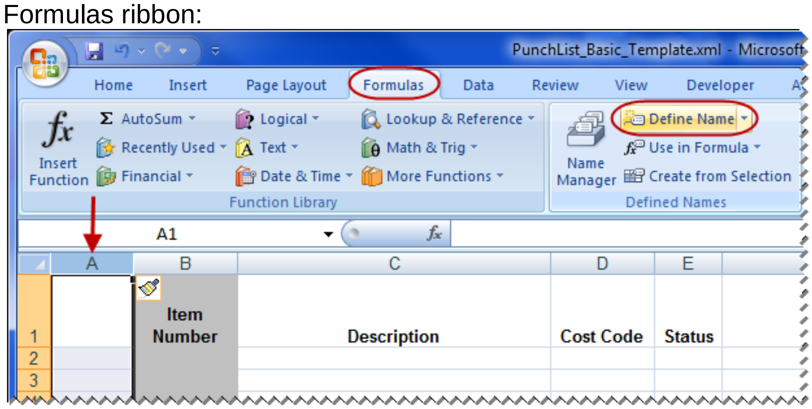
Tutorial

1. Open your template (for example, the Punchlist template created before) as you would any Microsoft Excel file. You need not have sfPMS open.
2. In your template, click on the header of Column A to highlight the column.
3. Right click then select **Insert** from the drop-down menu:

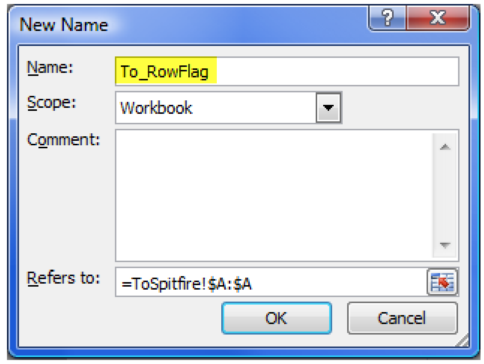


The new Column A will appear highlighted.

4. With the new column highlighted, select **Define Name** from the Formulas ribbon:

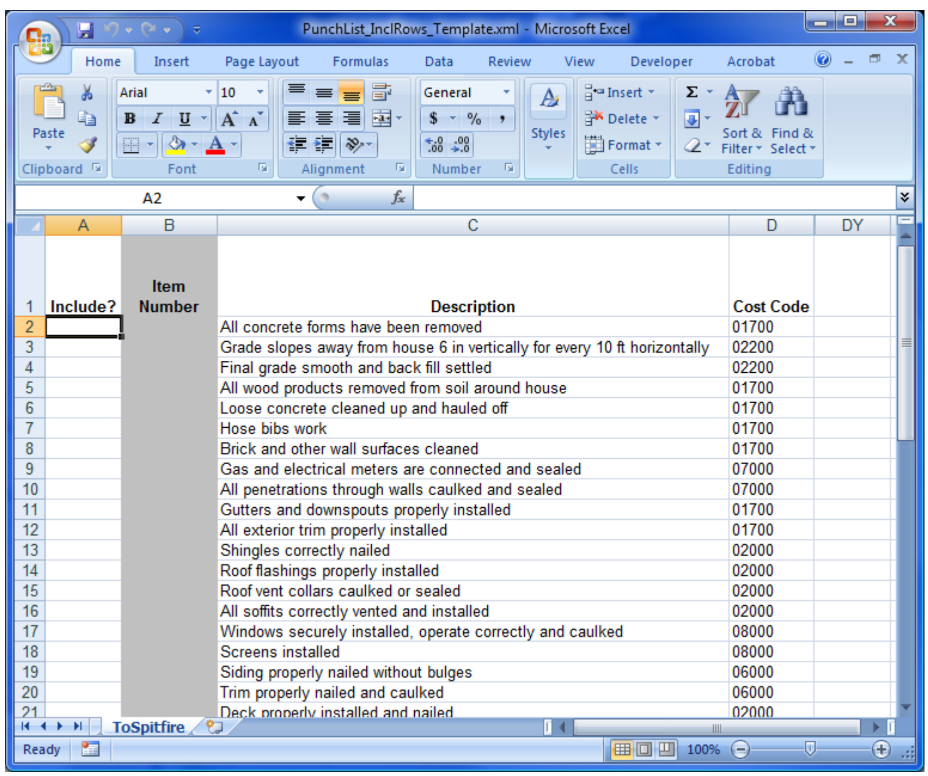


5. In the New Name dialog box that appears, type **To_RowFlag** and click OK:



6. Click in cell A-1 and type a header for your column, for example, **Include Row?**
7. *(optional)* If you don't want all the columns from the basic template in this template, hide the unwanted columns.
8. In the data rows, type what you want to appear in this template. Users will be able to include these rows (as well as rows they add) by entering something (for example, an X) in the To_RowFlag column.
9. Choose to either **Save** or **Save As**, depending on whether you want both the basic and advanced Via Excel templates or if you want just this one template. Save the template as an .xlsx file.

Your modified template for Punch List documents might look like the following:



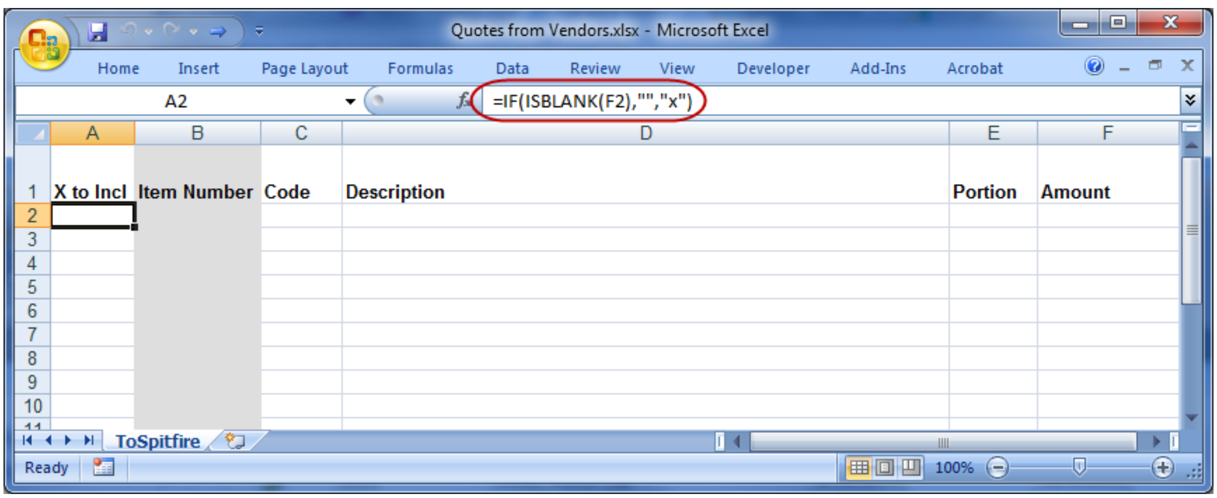
To_Formula*n* Column

Note: To_Formula*n* columns can appear only in templates that will be used from the Via Excel option. If you intend for your template to be used as an Attachment template, the following sections and instructions do not apply to your template. Instead, you can add formulas to any cells you want, for as many rows as you think necessary, in your template.

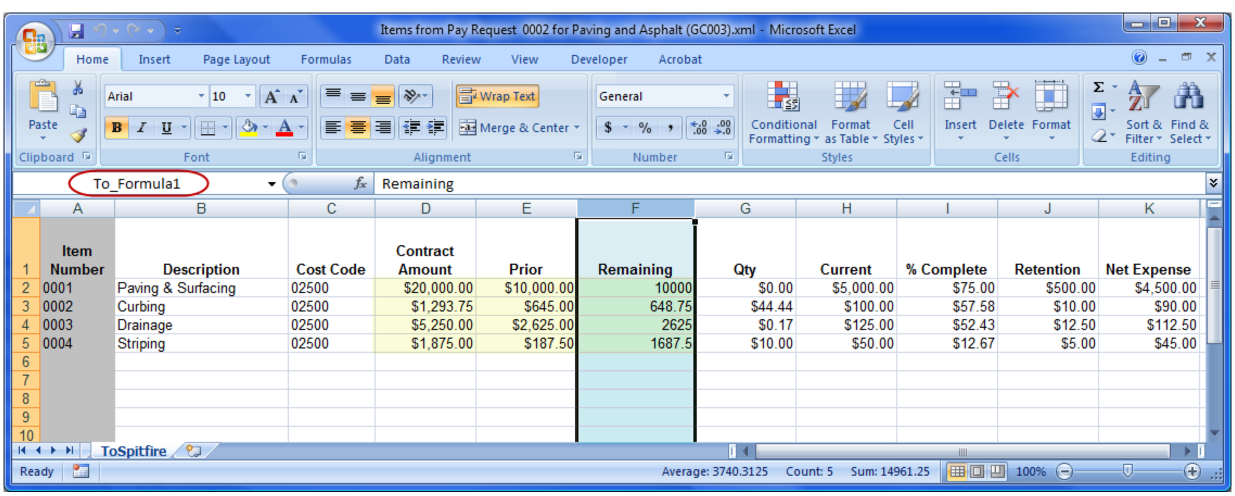
If you want to include Microsoft Excel formulas that use data from your Items for calculations, you can modify your basic Via Excel template for that Doc type to include **To_Formula*n*** columns. The first such column would be named **To_Formula1**, the next **To_Formula2**, the next **To_Formula3**, etc. You would then either save your template with the extra column(s) or save the modified template as a separate Spitfire Item Template.

Afterward, when users use this advanced template, each formula will be copied for each Item row and the calculated results will appear in the formula columns.

For example, in the following template, column A holds a formula that places an X in the column if there is data in column F:



As another example, in the following template, the **Remaining** column has been added to hold the formula **=D*n*-E*n***:



A Spitfire Item Template with a **To_Formula*n*** column can be used both when adding Items to, and when editing Items on, a Spitfire document. If you name an existing data column **To_Formula*n***, the results of your formula will be copied back to the correct field on the Spitfire document. However, if you add a new, blank column to your worksheet and make it a **To_Formula*n*** column, the data in that column will be ignored when data is imported to Spitfire.

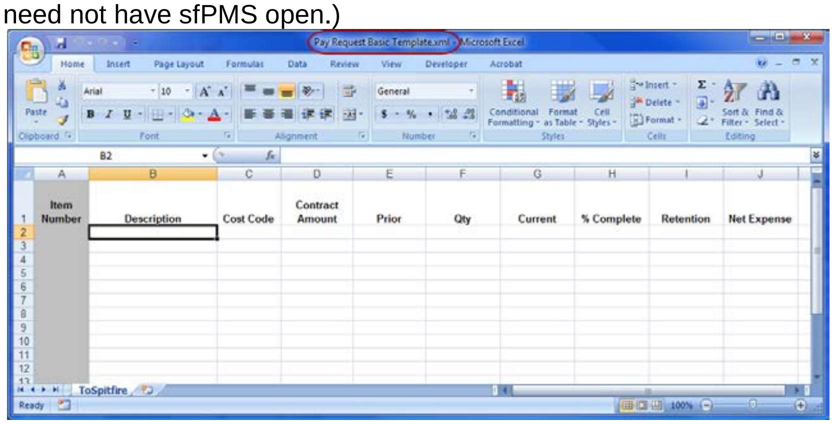
New Formula Column

Let's say you want to add that Remaining column shown on the previous page to a Pay Request template. You would need to open (or begin with) your template for Pay Requests (which you might have created following the steps in the previous chapter.)

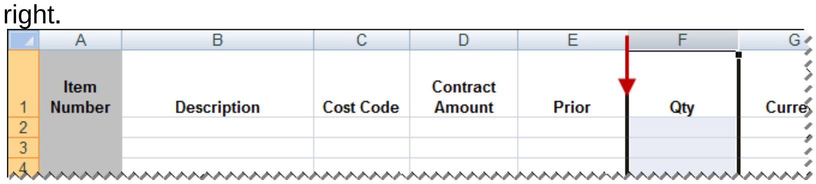
Note: once you get comfortable creating Via Excel templates, you will find that you can create advanced templates without creating basic templates first.

Tutorial

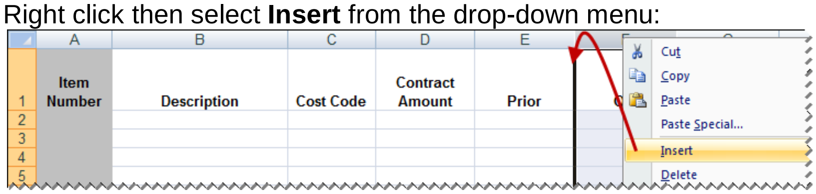
1. Open your template as you would any Microsoft Excel file. (You need not have sfPMS open.)



2. In your template, decide where you want your formula column to appear then click on the column header of the column to the right.

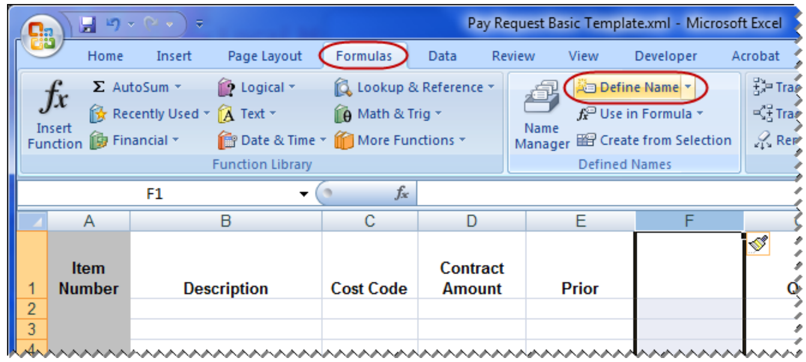


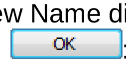
3. Right click then select **Insert** from the drop-down menu:

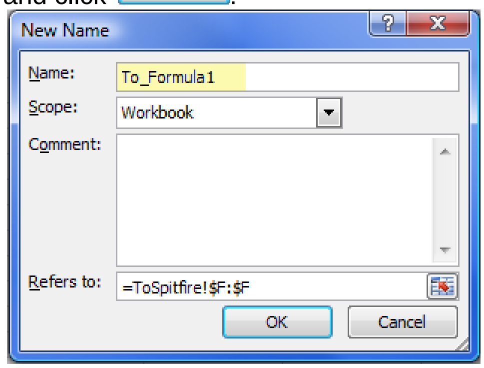


The new column will appear highlighted. This column will hold your formula.

4. With the new column highlighted, select **Define Name** from the Formulas ribbon:



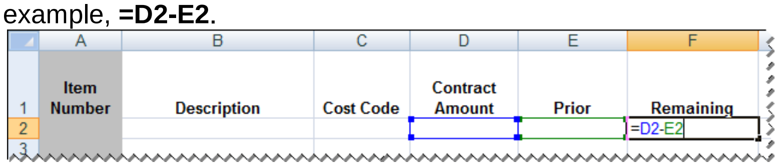
5. In the New Name dialog box that appears, type **To_Formula1** and click :



6. In Row 1 of this column, type a header, for example **Remaining**.

7. (*optional*) Widen the column, if necessary.

8. In Row 2 of this column, type your Microsoft Excel formula, for example, **=D2-E2**.



You can take advantage of the full functionality of Microsoft Excel formulas.

9. Click on the column letter to select the whole column, then right-click and select **Format Cells** from the pop-up window.

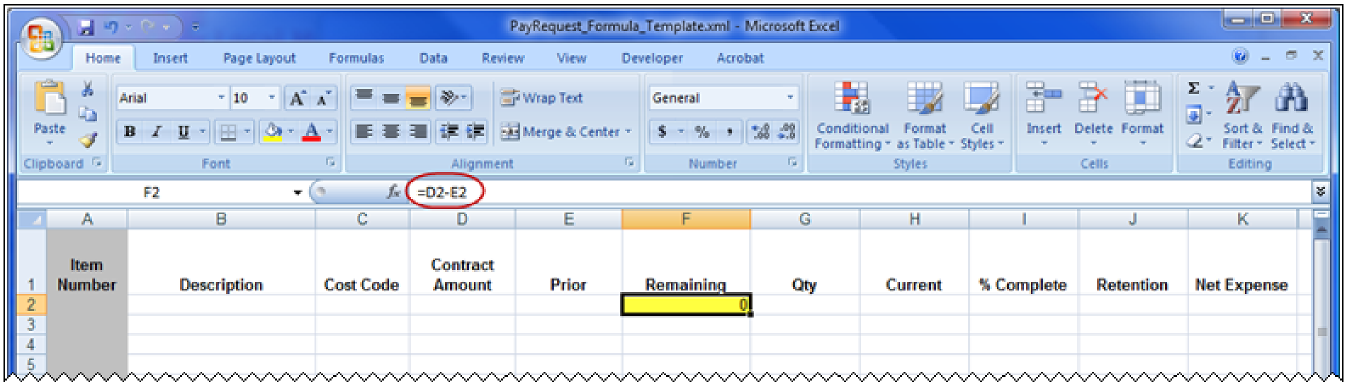
10. Format the column as desired.

11. (*optional*) Repeat steps 1-8 if you want to add other formula columns. The second formula column must be named **To_Formula2**, the third **To_Formula3**, etc.

12. Remember to delete rows of data, if any appear in the template.

13. Choose to either **Save** or **Save As** depending on whether you want both the basic and advanced Spitfire Item templates or if you want just this one template file. Remember to save as an **.xlsx** file.

A modified template for Pay Request documents might look like the following:

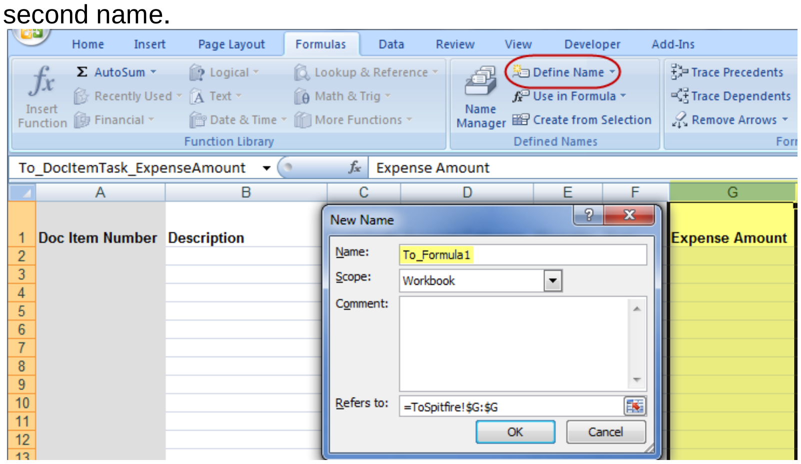


Existing Column as Formula Column

If you want the results of your formula to appear in a particular field on your Spitfire document, you can define an existing column in your template as a formula column. For example, for a Commitment document, you might want to enter Quantity and Rate in Microsoft Excel, have Excel calculate the resulting amount (Quantity x Rate), and then have that result appear in the Original Amount field (To_DocItemTask_ExpenseAmount) on the Commitment.

The instructions to use an existing template column as a formula column are similar to those listed in the previous section with this exception:

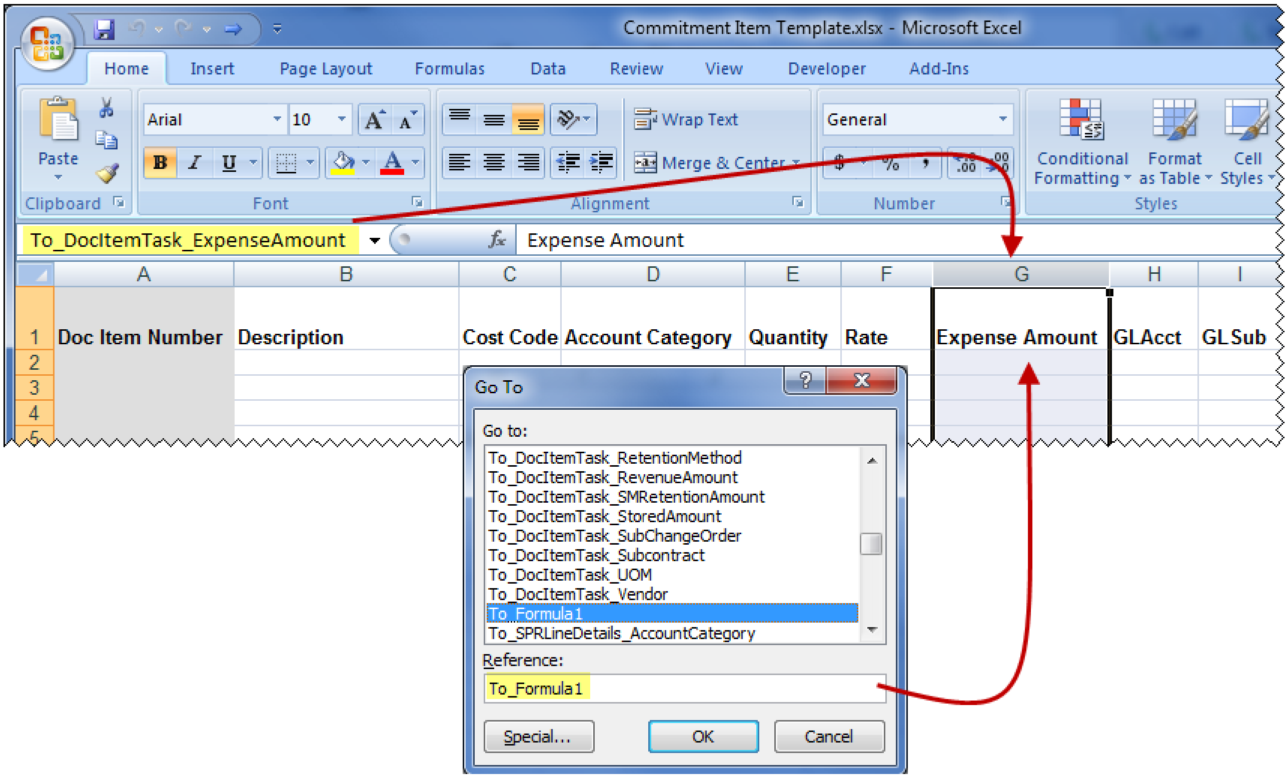
- Instead of inserting a blank column, find the column that should have a formula and define its name as **To_Formula*n***. Since this column will already have a name, you will be giving the column a second name.



Note: the **To_Formula*n*** name will not appear on the name box if the column already has a template name. However, if you use the Go To… feature to find the To_Formula*n* column, the correct column will be highlighted. For example,

TIP

A column can be defined as both a Formula column and a To_RowFlag column (explained on the next page) at the same time.



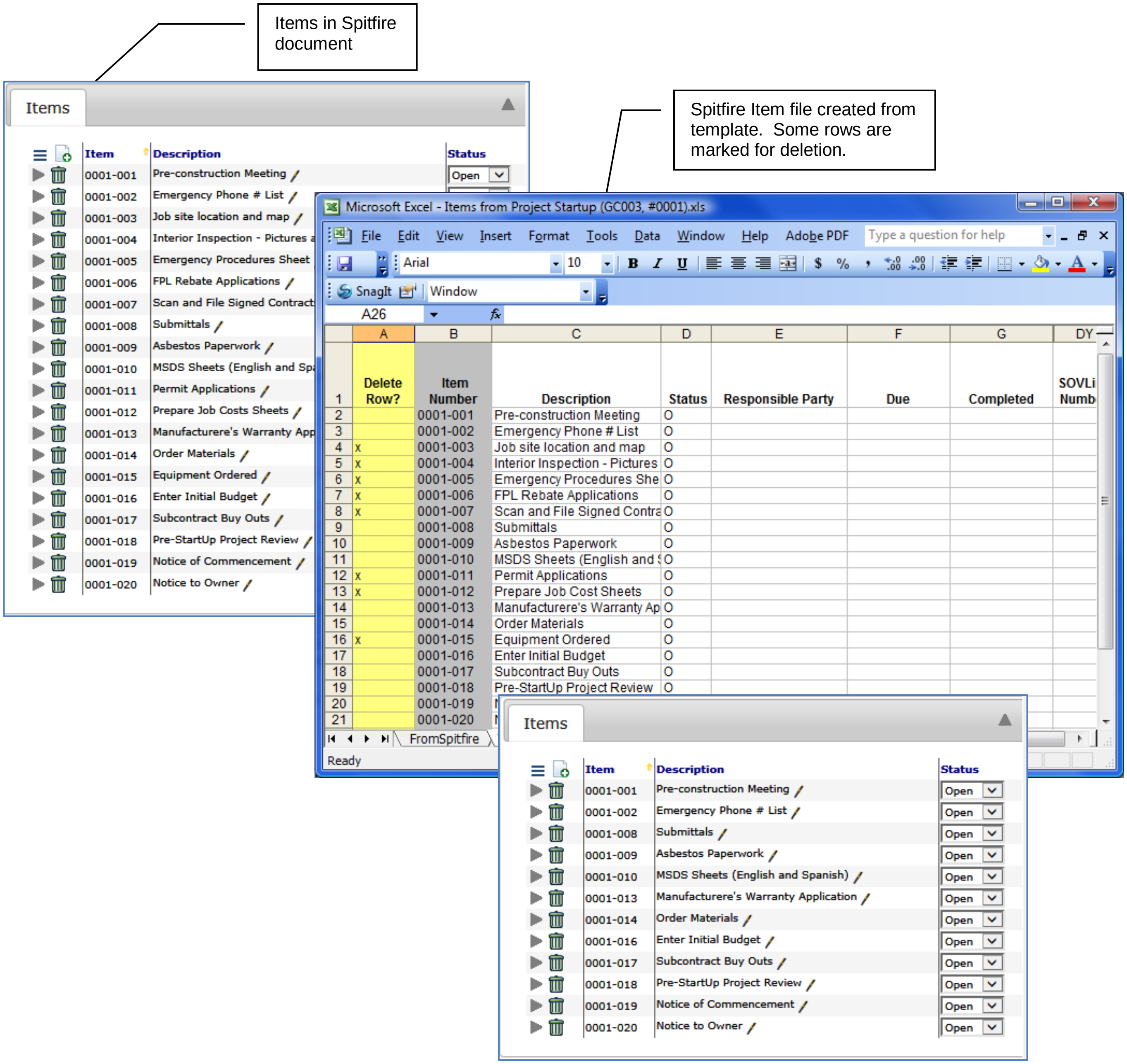
To_DeleteFlag Column

Note: the To_DeleteFlag column can be added to only those templates that will be used through the Via Excel option. Templates that will be used as Attachment templates cannot contain the To_DeleteFlag column.

If you want to provide your users with the ability to mark Items for deletion within Microsoft Excel, you can modify your basic Via Excel template for that Doc type to include the **To_DeleteFlag** column. You would then either save your template file with that extra column or save the modified template as a separate file.

Afterward, when users use the modified template, they will mark in this advanced column the rows that they want to delete in the Spitfire document. sfPMS checks this column; if a cell is marked, the row is deleted. Otherwise, it is copied back to Spitfire. For example:

\



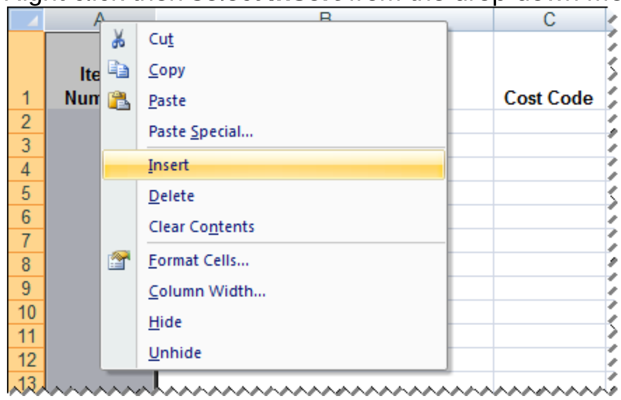
A Via Excel template with a **To_DeleteFlag** column is used only when editing Items on a Spitfire document. For this reason, ***you cannot have both a To_RowFlag column and a To_DeleteFlag column in the same Spitfire Item Template.***

You would open (or begin with) your basic template.

Tutorial

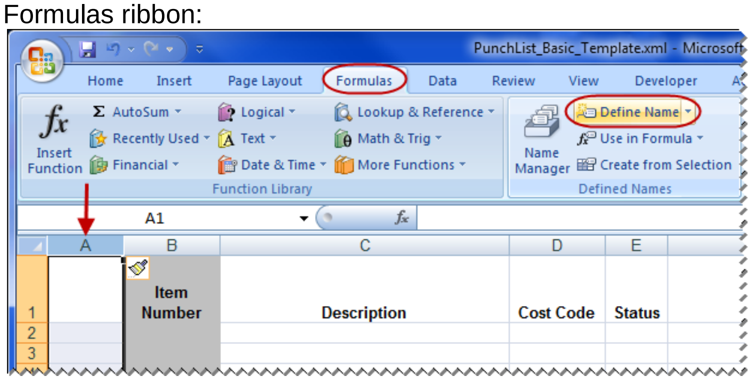
1. Open your template (for example, the Punchlist template created before) as you would any Microsoft Excel file. (You need not have sfPMS open.)
2. In your template, click on the header of Column A to highlight the column.

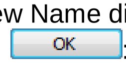
3. Right click then select **Insert** from the drop-down menu.

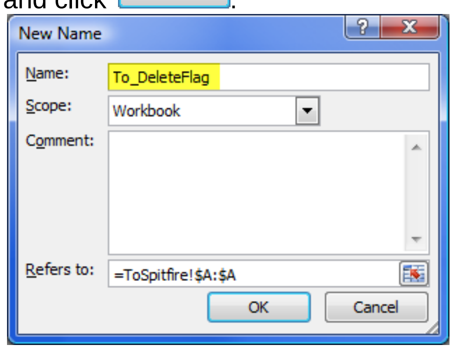


   The new Column A will appear highlighted.

4. With the new column highlighted, select **Define Name** from the Formulas ribbon:



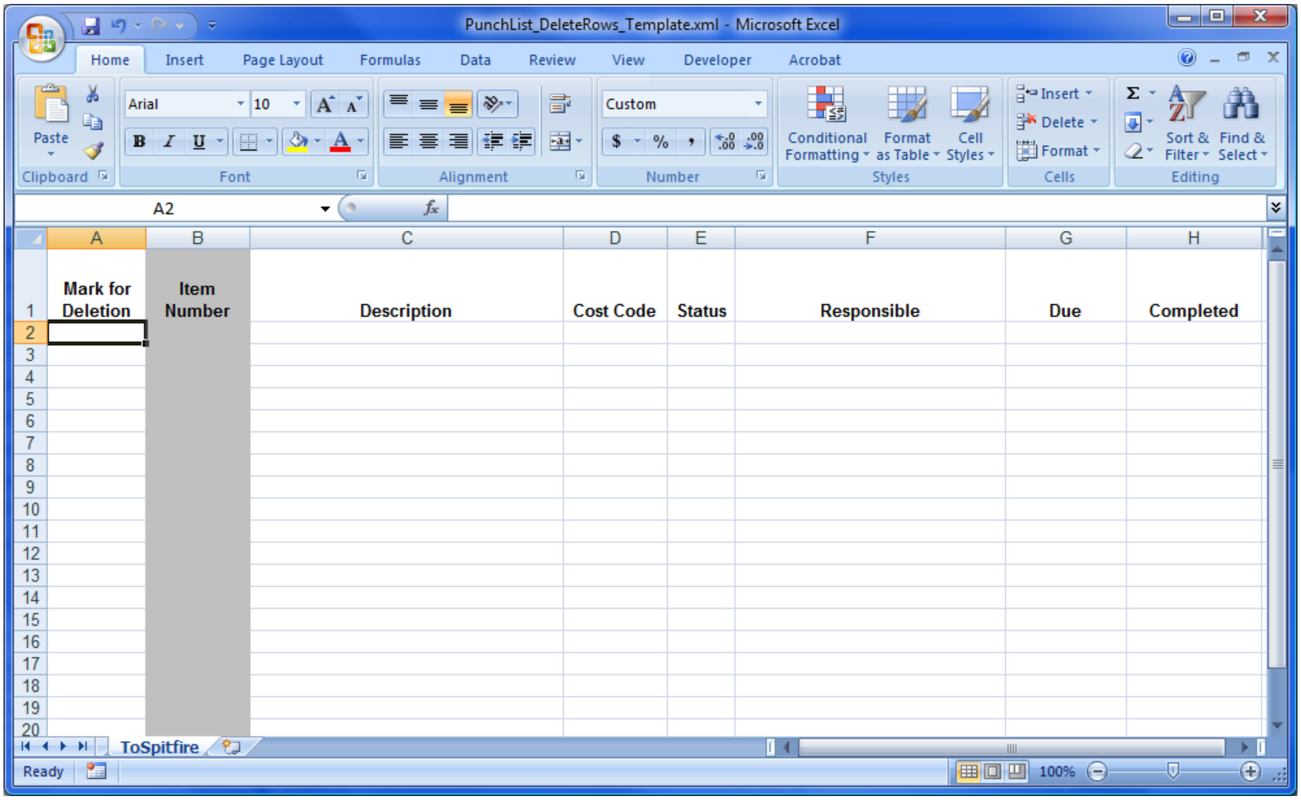
5. In the New Name dialog box that appears, type **To_DeleteFlag** and click :



6. Click in cell A1 and type a header for your column, for example, **Mark for Deletion.**

7. Choose to either **Save** or **Save As** depending on whether you want both the basic and advanced Via Excel Templates or if you want just this one template file. Remember to save as an .xlsx file.

Your modified template for Punch List documents might look like the following:

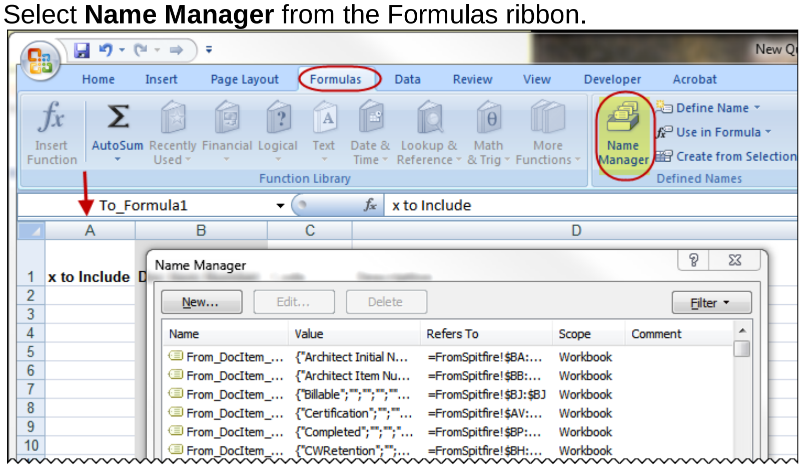


Removing Defined Names

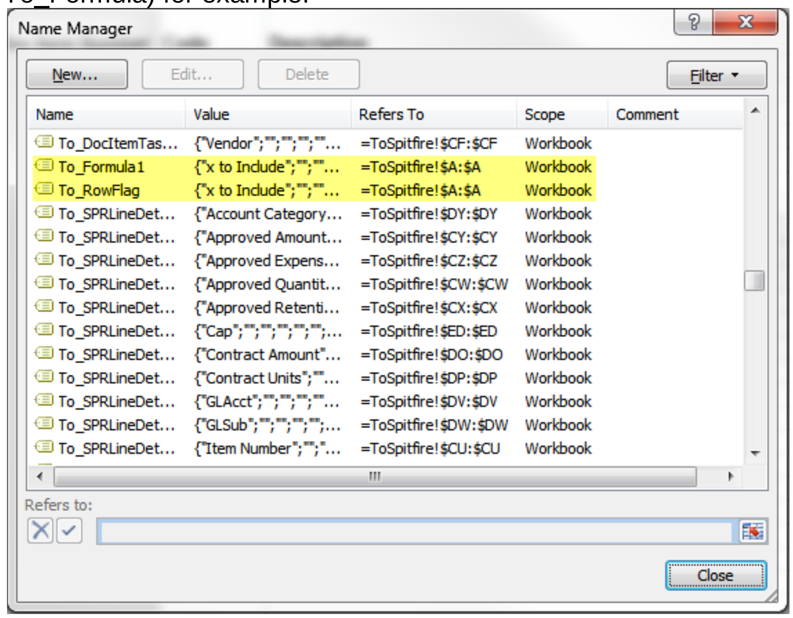
There may be times when you want to modify a template and remove the **To_DeleteFlag**, **To_RowFlag**, and/or **To_Formula** defined name.

To remove a defined name:

1. In your template, click on the header of the column to highlight it.
2. Select **Name Manager** from the Formulas ribbon.



3. Scroll through the Name Manager window to find the defined name you want to remove (To_DeleteFlag, ToRowFlag and/or To_Formula) for example:



4. Select the defined name row(s) then click .

5. Close the Name Manager window.

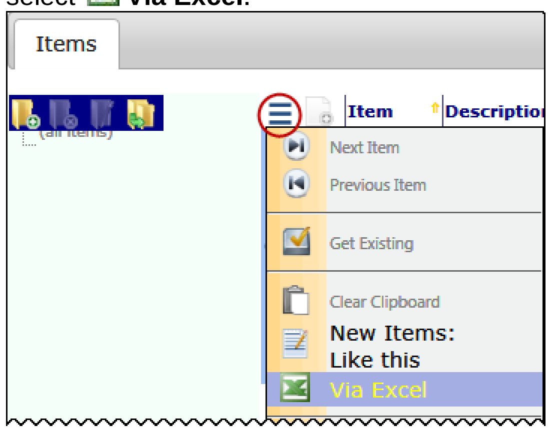
Testing the Spitfire Item Template

Before uploading a Via Excel template into sfPMS, you might want to do a quick test to ensure that it looks and works as necessary.

Running a Quick Test

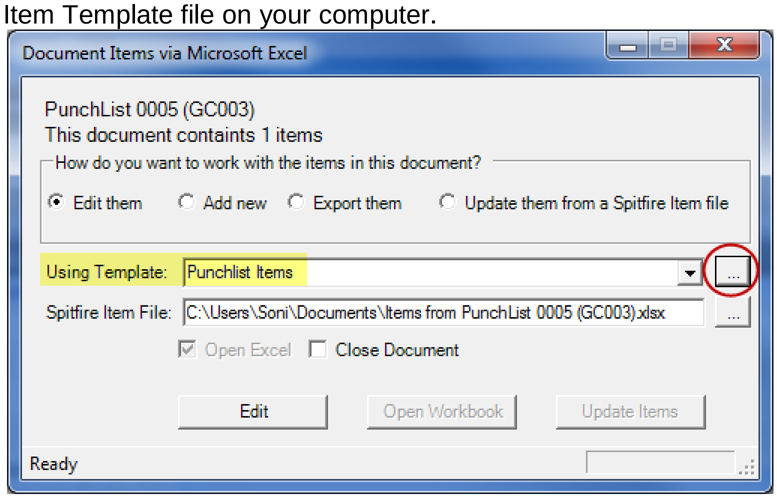
Tutorial

1. Open or create a document of the appropriate Doc type.
   Note: if you are testing a template for editing, make sure there are Items on your document.
2. Click to save your document.
3. At the Items tab, click to open the Item Options menu then select **Via Excel**.

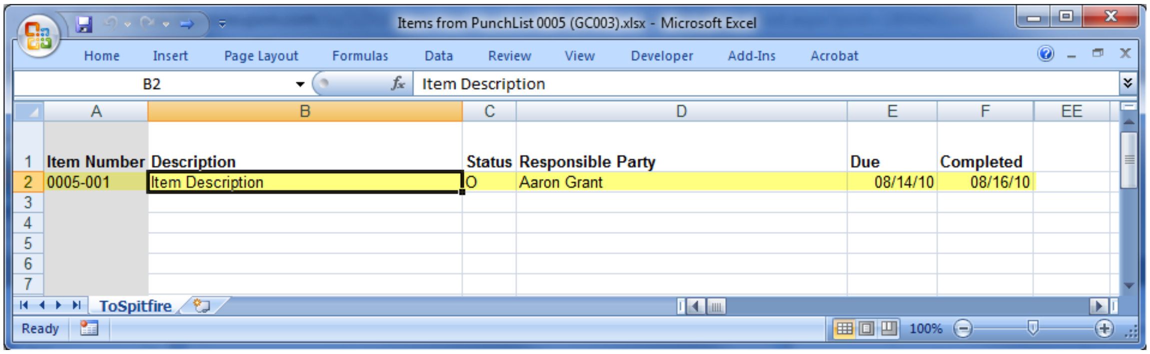


The **Document Items via Microsoft Excel** dialog box will appear.

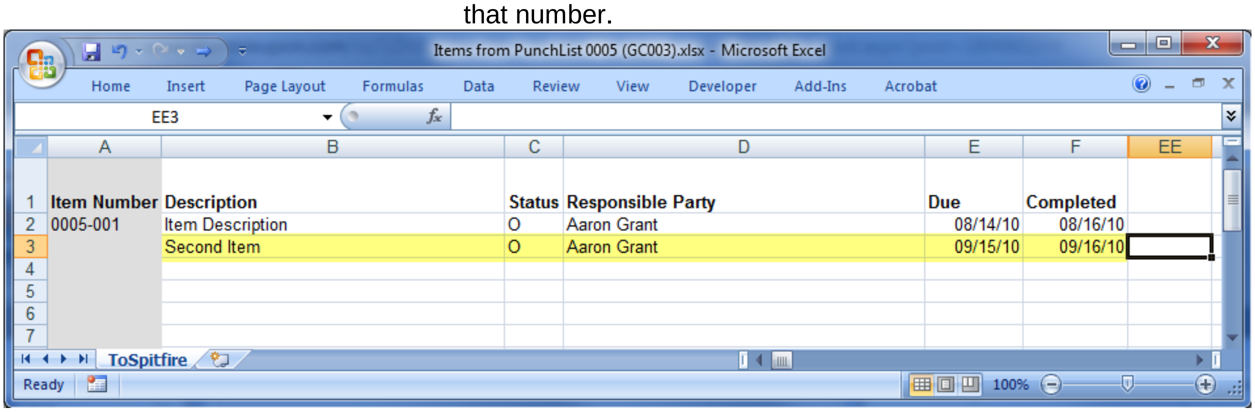
4. Click at the Using Template field to browse for your Spitfire Item Template file on your computer.



5. Depending on the type of template being tested and if there are Items on the document, click Edit or Add to generate a Spitfire Item File from the Spitfire Item Template.
   Note: see the Warning Messages section on page 34 if all does not work properly.



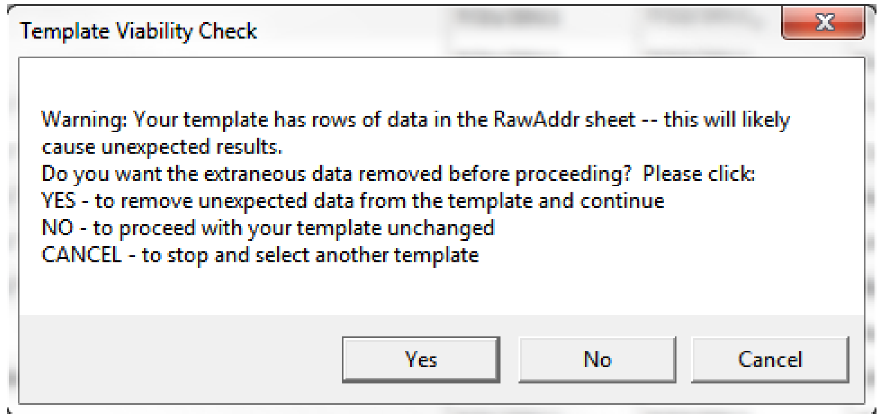
6. Ensure that any document Item data appears in the correct columns.
7. Type new data for all the available columns.
   Note: leave the Item Number column blank; Spitfire will provide that number.



8. Click [save] to save then [X] to close Microsoft Excel. Your data will be uploaded to sfPMS.
   Note: if data is not automatically uploaded to sfPMS, click the Update Items button that appears on the **Document Items via Microsoft Excel** dialog box.
9. When your document reopens, expand Items to ensure that all information appears where it should.
10. If you encounter problems, you will need to find your template (on your computer) and make the appropriate changes to it. (See also the next section.) If there are no problems, your template is ready to be uploaded as described in the following chapter.

Warning Messages

When you click the Edit button (or the Add button) in the Via Excel dialog box, you may encounter a warning message about extraneous data, such as the following:



Extraneous data appears on one of the hidden sheets in the template, for example, the RawAddr sheet mentioned in the message above. Most templates do not have extraneous data.

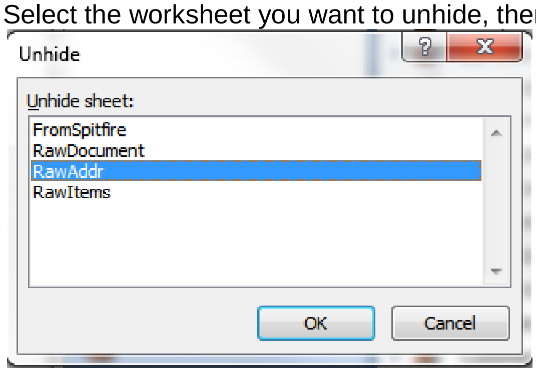
- Click Cancel and close the Via Excel dialog box. In order to prevent each user from having to deal with this message, you should
  - Modify the template (outside of Spitfire) by removing the extraneous data (see page 17).
  - Save the revised template.

Hidden Sheets

There are a few hidden worksheets in the template. You can unhide and then re-hide any of these worksheets if needed.

To unhide template worksheets:

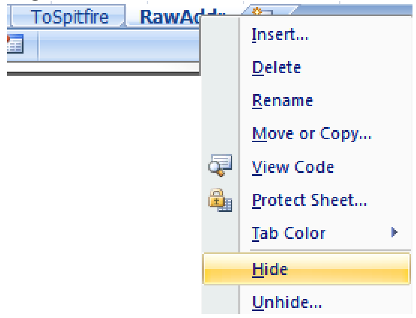
1. Right-click at the ToSpitfire tab and select **Unhide**:
   A box listing all hidden worksheets will appear.
2. Select the worksheet you want to unhide, then click OK



The hidden worksheet will become visible.

To re-hide template worksheets:

1. Right-click at the tab name and select **Hide**.



2. If you made any changes to the template, remember to save.

Unexpected Columns

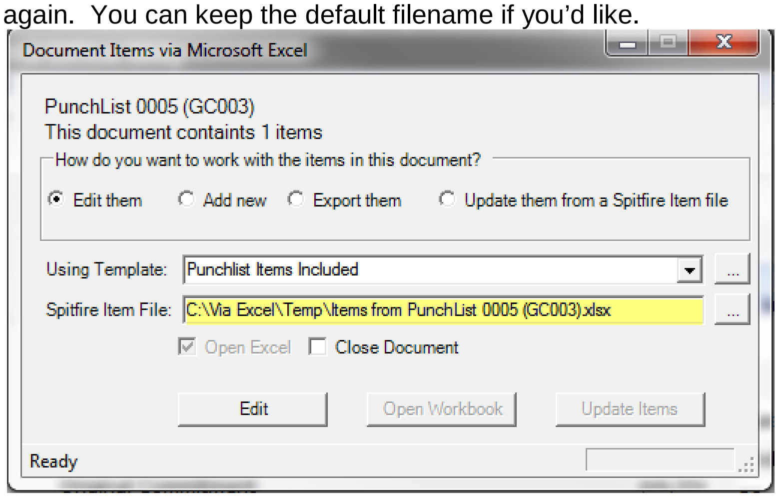
If your Spitfire Item File opens without a problem, but you notice a column that shouldn't be there, you will need to modify your template. But you may also need to open the Spitfire Item File. If you do not know where Spitfire places the Spitfire Item File, start your test of Via Excel again as follows. Otherwise, skip to step 5:

1. At the Items tab, click ≡ to open the Item Options menu then select **Via Excel**.

   The **Document Items via Microsoft Excel** dialog box will appear.

2. Click ... at the Using Template field to browse for your Via Excel template file on your computer.

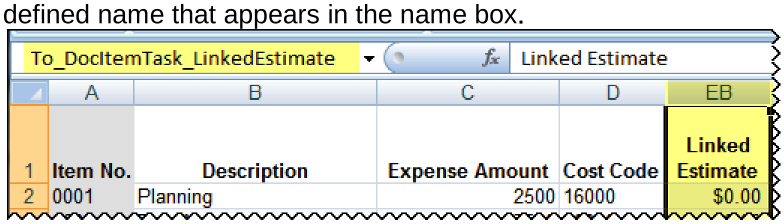
3. At the **Spitfire Item File** field, change the location of the file that will be created to someplace where you will easily find the file again. You can keep the default filename if you'd like.



4. Click Edit to generate a Spitfire Item File from the template.

5. Save and close Microsoft Excel

6. Close ( ) the **Document Items via Microsoft Excel** dialog box.
7. Outside of Spitfire, open your Via Excel template.
8. Look for the extra columns, in case you forgot to hide them. **Note**: columns with headers that are deleted instead of hidden will appear in Spitfire Item files.
9. If you do not see the columns in the template, open the recently created Spitfire Item File. Keep the template file open also.
10. In the Spitfire Item File, select the extra column and jot down the defined name that appears in the name box.

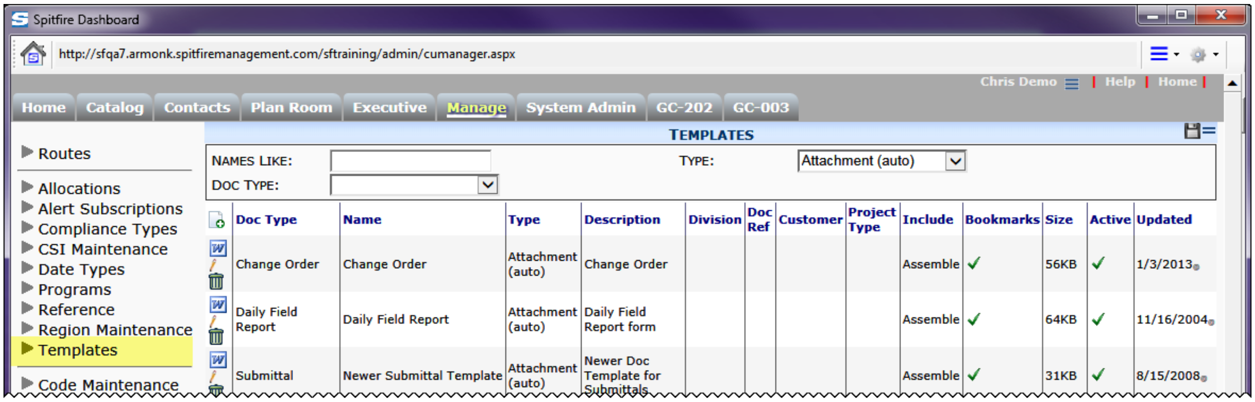


11. Copy the column then go to the template and paste the column in one of the blank columns.
12. With the pasted column highlighted, select **Define Name** from the Formulas ribbon:
13. In the **New Name** dialog box that appears, type the defined name that you jotted down and click OK.
14. Now that the column has the proper defined name, hide it.
15. Save your Via Excel template.
16. Close everything.
17. Retest with the revised template.

Uploading the Via Excel Template

Once your template has been saved, closed and tested (and possibly revised), it is ready to be uploaded into sfPMS so that it can be used by you and other users.

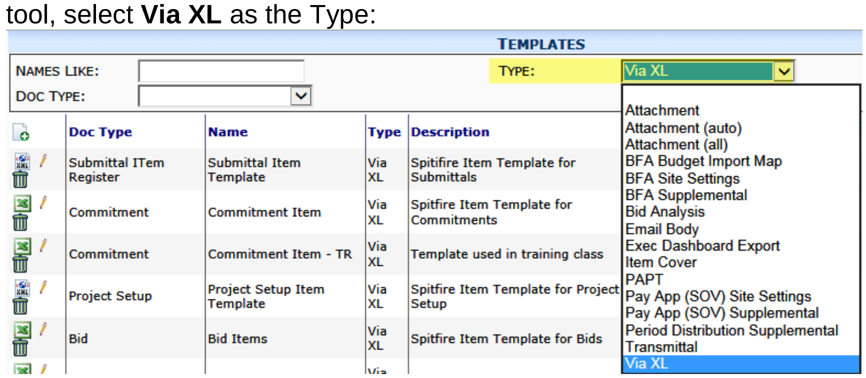
Templates are uploaded into sfPMS through the Templates tool found on both the Manage and System Admin Dashboards.



Note: The Templates tool is also used to upload other types of templates in Microsoft Word and Excel. See KBA-01507 for more information about Templates types.

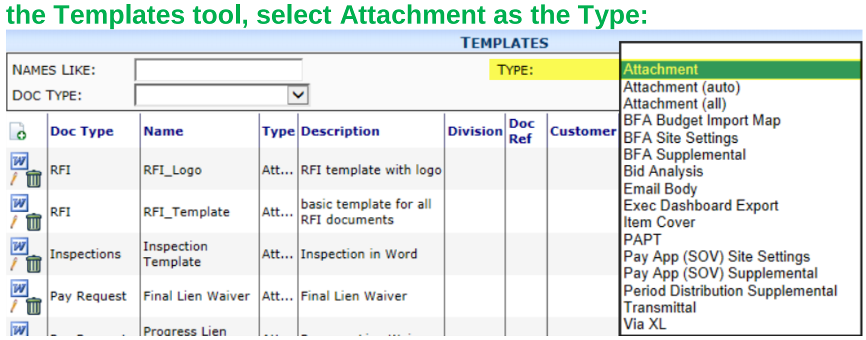
Tutorial

1. [If using the template with the Via Excel option] In the Templates tool, select **Via XL** as the Type:



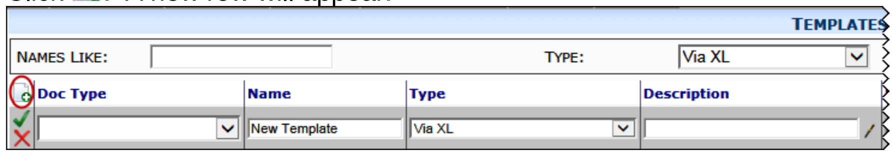
If you have any Via XL templates already in the template library, they will be listed.

[If using the template to create a file on the Attachments tab] **In the Templates tool, select Attachment as the Type:**

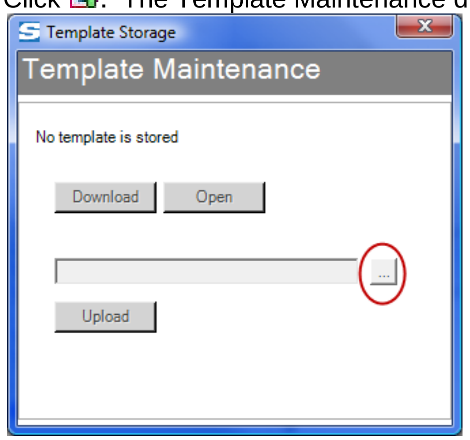


If you have any Attachment templates in the template library, they will be listed.

2. Click . A new row will appear.



3. In the **Doc Type** drop-down, select the Doc type for the Via Excel template, for example, **PunchList**.
4. In the **Name** field, enter a short name for this template, such as the name of the file. This is the name that will appear in the Using Template field on the Via Excel dialog box or the Create from Attachment dialog box.
5. Leave the **Type** field as **Via XL** **or Attachment, depending on how you will use the template**.
6. In the Description, type a longer description of the template, for example, **Basic Template for Punchlist Items**.
7. (*optional*) If you want this template associated with a particular **Division**, **Doc Reference, Customer** or **Project Type**, look up or select the corresponding information.
8. Click to accept the row, then to save.
9. Find your newly added row. It will be marked by .
10. Click . The Template Maintenance dialog box will appear.

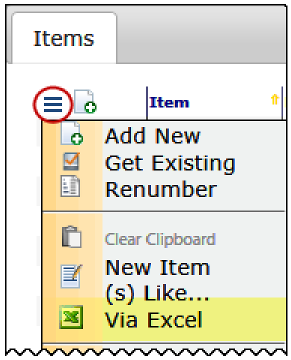


11. Click then browse for the desired Via Excel Template on your computer and click Open.
12. Back at the Template Maintenance dialog box, click Upload.
13. Click to close the dialog box.
14. Click at the Templates tool. The icon will be replaced by the icon.

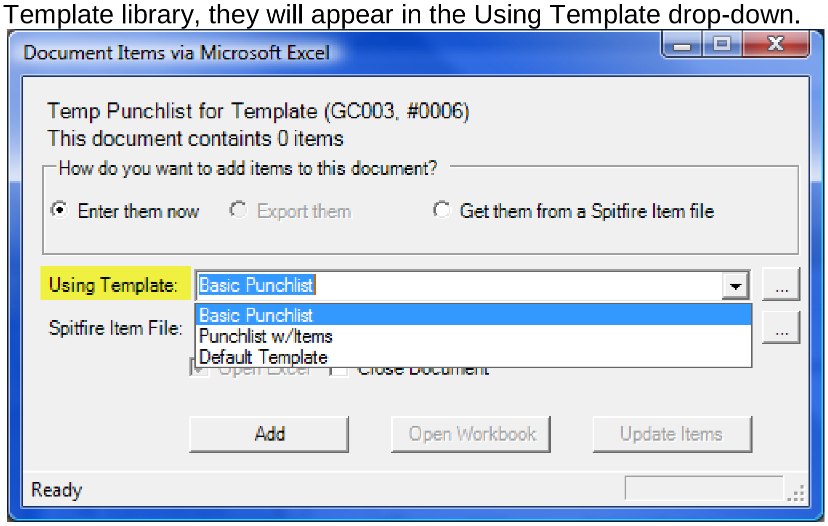
Using the Via Excel Template

Via Excel templates can be used to create attached files, which in turn import Items on to the Items tab. For information on how to use the templates in this manner, see the section **Items from Attached "Via Excel" Files** in the *Focus on Documents and Items* guide.

Via Excel templates can also be used to add, edit or export Items through the Via Excel option. The use of the Via Excel option is summarized in the following pages. For more information see the **Via Excel** section in the *Focus on Document and Item Basics* guide.

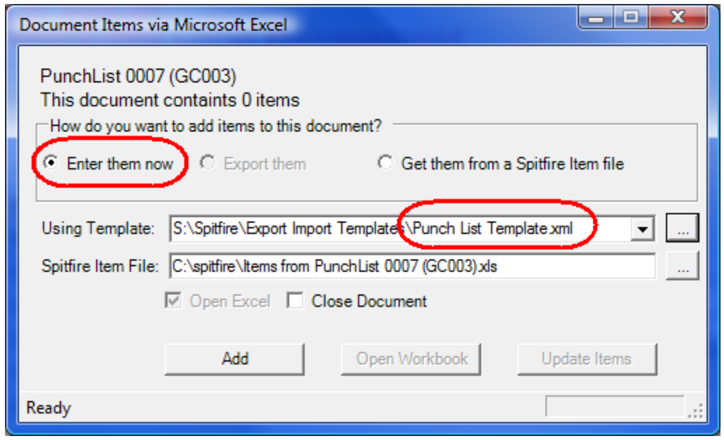


When you select the Via Excel option, the **Document Items via Microsoft Excel** dialog box will appear (and your document will close). If you have Spitfire Item Templates for your Doc type in the Spitfire Template library, they will appear in the Using Template drop-down.



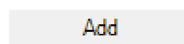
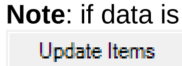
What options you choose on the dialog box will depend on what you want to do.

Add Items to Document with No Items

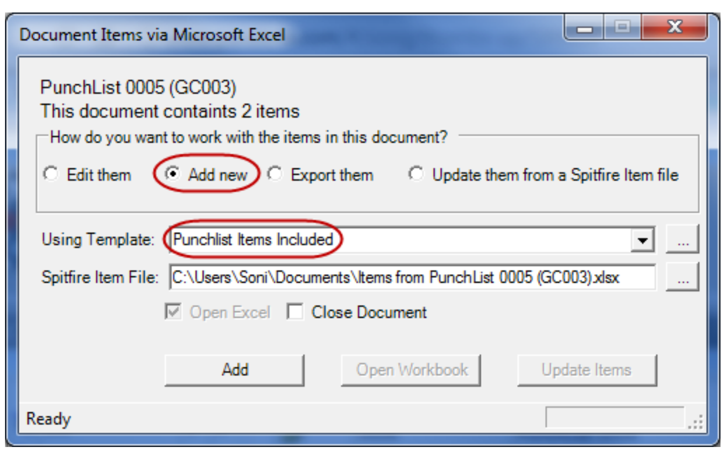


TIP

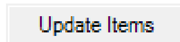
If you get a message about extraneous data, see page 34.

- Select the **Enter them now radio** button.
- Use the  button.
- Enter your information in the Microsoft Excel file that opens. It will be created from the template. When you save and close that Spitfire Item file, the information will be added to your Spitfire document.
  Note: if data is not automatically uploaded to sfPMS, click the  button.
- When you copy data from another Microsoft Excel spreadsheet to your Spitfire Item file, make sure there are no blank rows between data rows. Delete blank rows if necessary.
- If you need to enter data for a checkbox, enter TRUE or FALSE.

Append Items to Document with Items

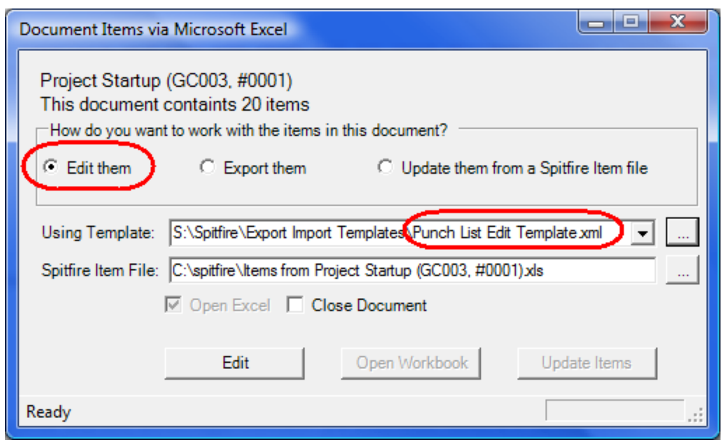


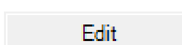
- Select the **Add new** radio button.
- Use the 

button.
- Even though there are Items on your document, when Microsoft Excel opens, the file created from the Via Excel template will be blank (i.e., no data).
- Enter your new Items. When you save and close the Spitfire Item file, the new Items will be added to the end of your Spitfire Items.
Note: if data is not automatically uploaded to sfPMS, click the 

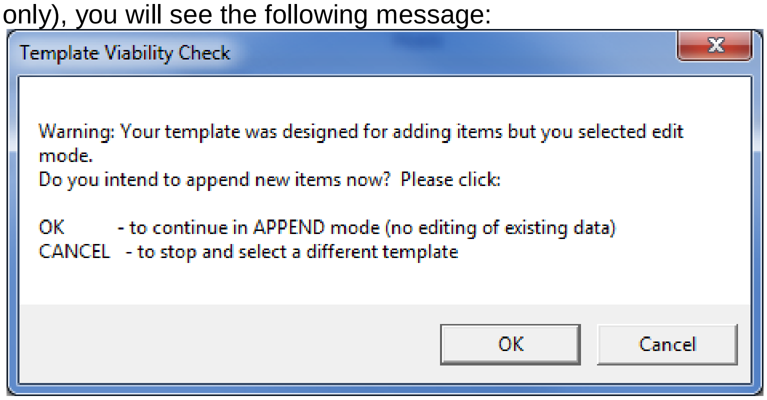
button.
- When you copy data from another Microsoft Excel spreadsheet to your Spitfire Item file, make sure there are no blank rows between data rows. Delete blank rows if necessary.
- If you need to enter data for a checkbox, enter TRUE or FALSE.

Edit Items



- Select the **Edit them** radio button.
- Use the 

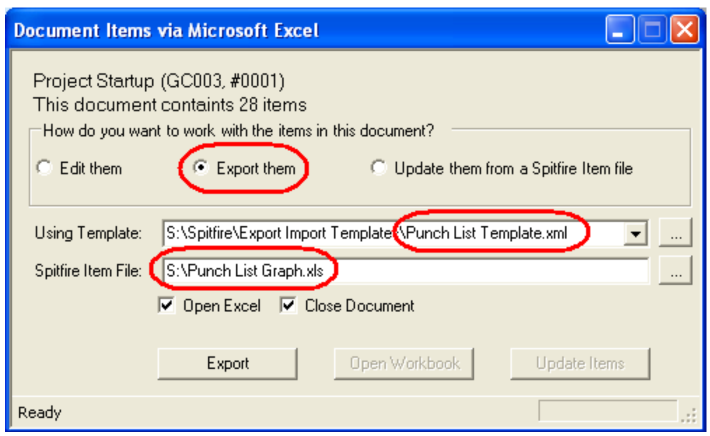
button.
Note: if the template you selected contains a **To_RowFlag** column (which is meant for adding Items to an empty document only), you will see the following message:



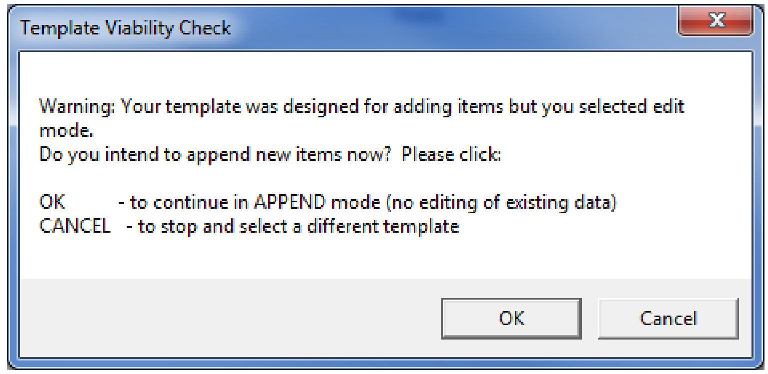
- Click OK if you want to append newly selected rows from the template to your existing Items. The template will open.
- Click Cancel if your intention was to edit (not add or append) Items, then select a different template that is appropriate for editing and click Edit again.

- Make your changes in the Microsoft Excel file that opens. It will be created from the template. When you save and close that Spitfire Item file, the edited information will be added back to your Spitfire document.
  Note: if data is not automatically uploaded to sfPMS, click the Update Items button.
- Remember that you cannot delete Items unless there is a **To_DeleteRow** column for this purpose.
- Calculated fields in Spitfire cannot be editing in Microsoft Excel.

Export Items



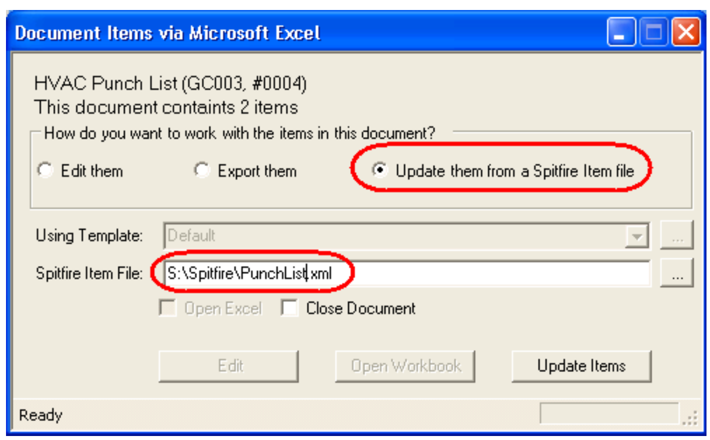
- Select the **Export them** radio button.
- Indicate a path and filename for your Spitfire Item File.
- Use the Export button.
  Note: if the template you selected contains a **To_RowFlag** column (which is meant for adding Items to an empty document only), you will see the following message instead:



- Click Cancel to select a template that is appropriate for exporting, then click Export again.

- Export Items for output purposes (so that you can display your data in graphs or Pivot Tables, for example). Exported Items are saved in the Spitfire Item file that is created through the template.
- Changes made on that Spitfire Item file are *not* automatically made in Spitfire unless you later import the changes as described below.

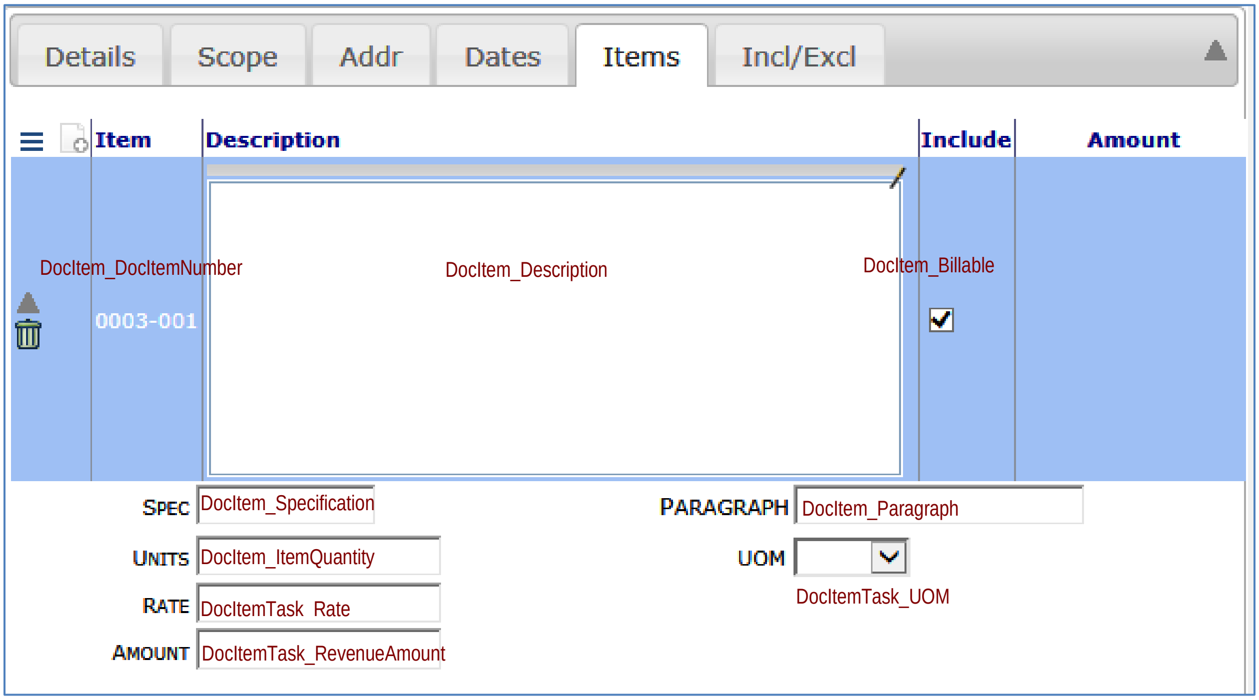
Import Items



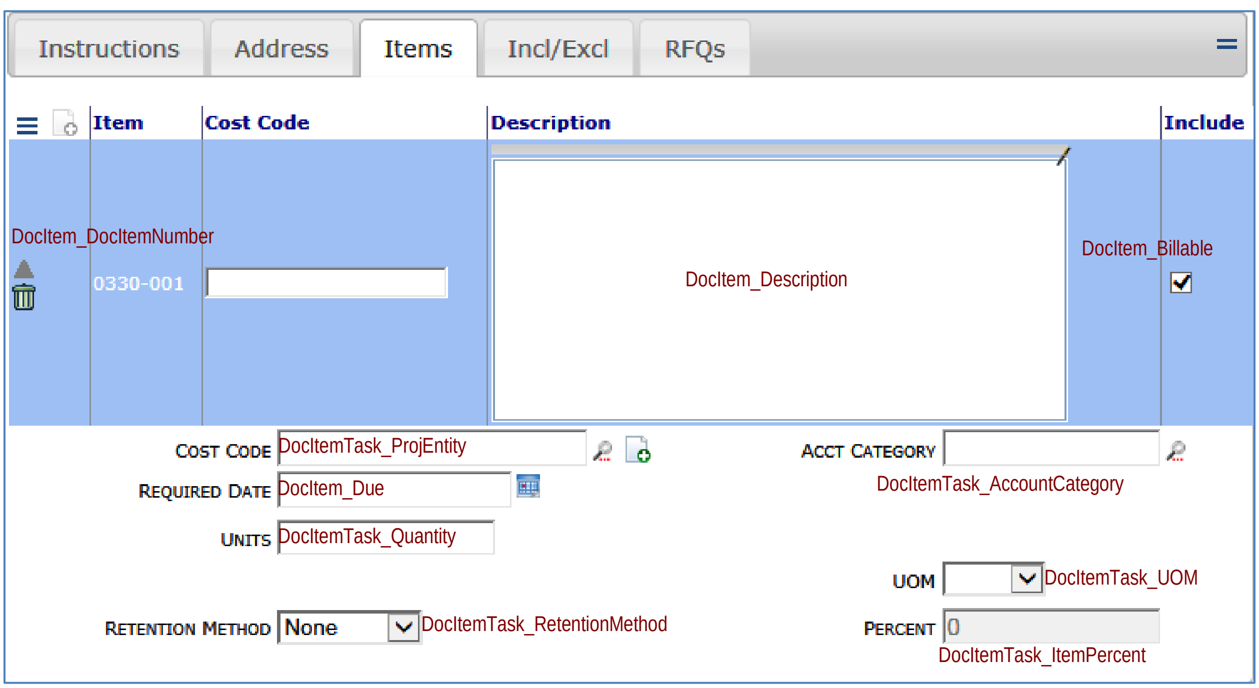
- Select the **Update them from a Spitfire Item** file radio button.
- Once you have a Spitfire Item file, you can update Items from that file into your Spitfire document.
- Browse for your Spitfire Item file.
- Use the Update Items button.

Field Names in Appropriate Doc Types

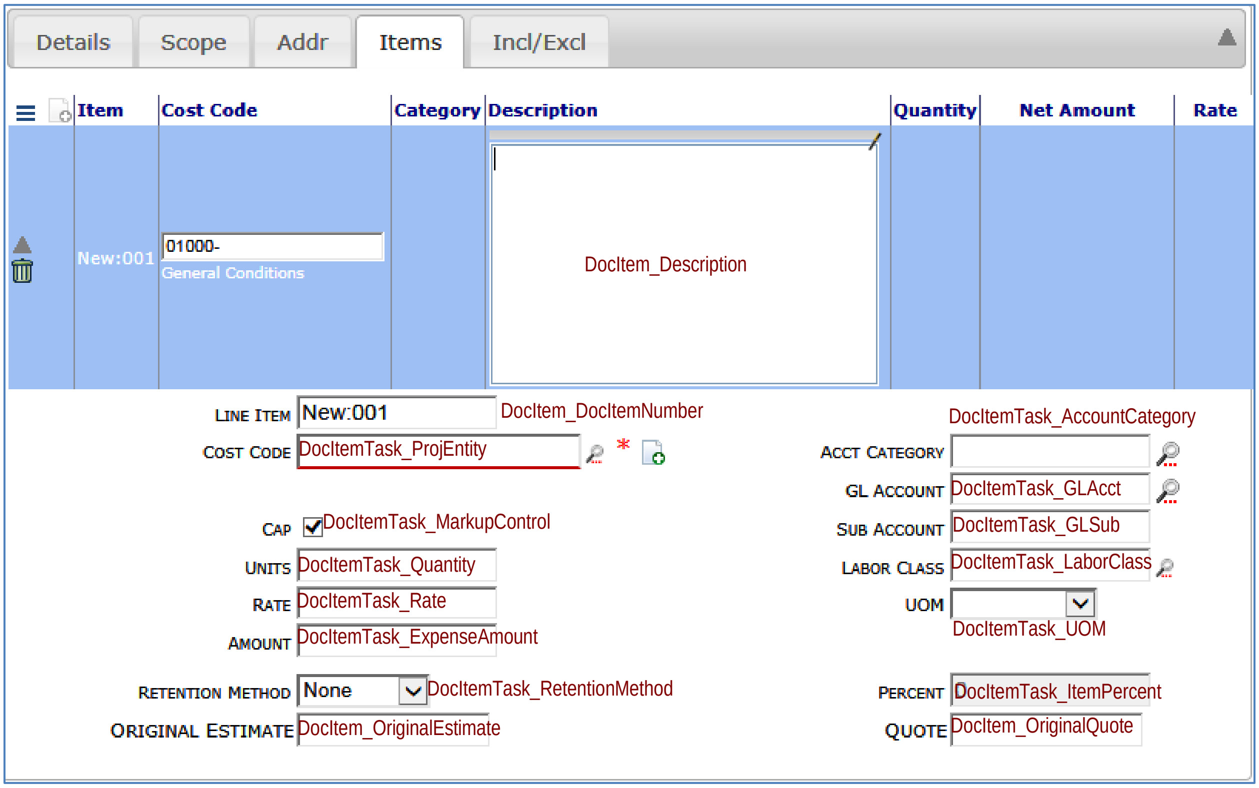
Bid



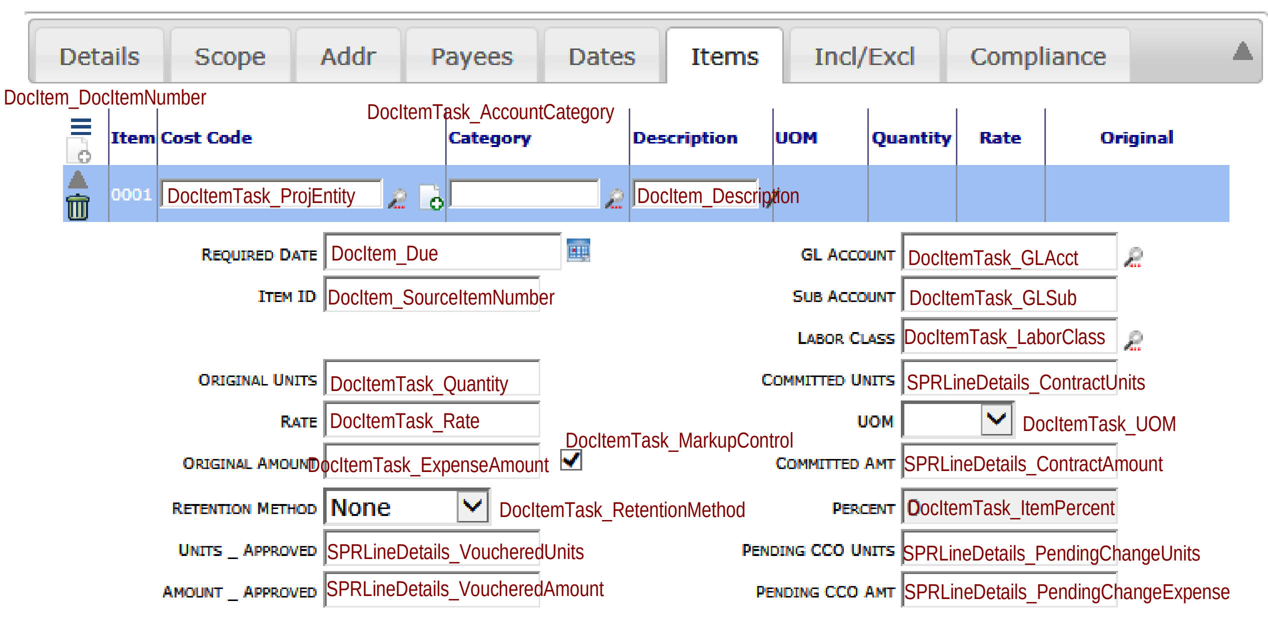
Bid Package



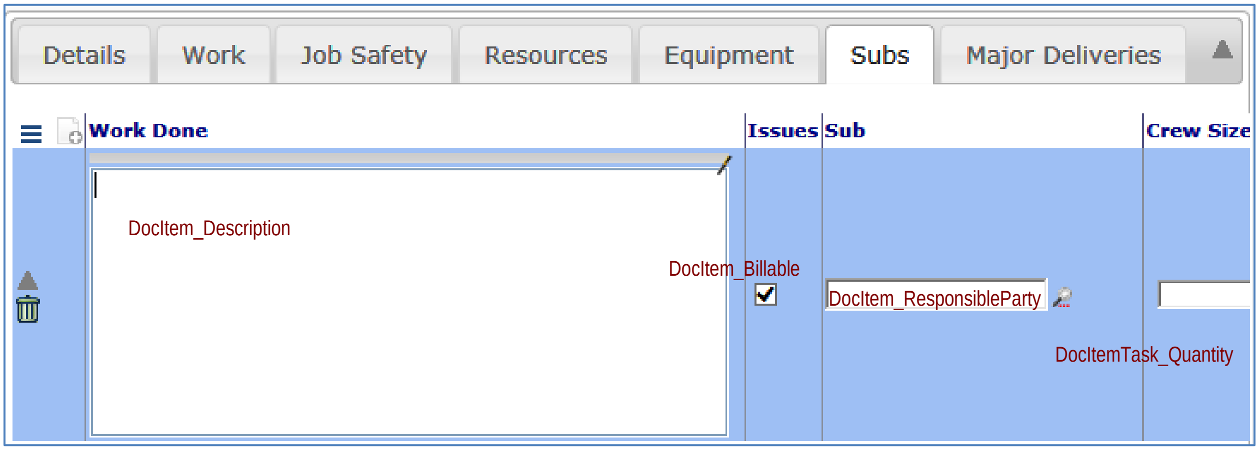
CCO



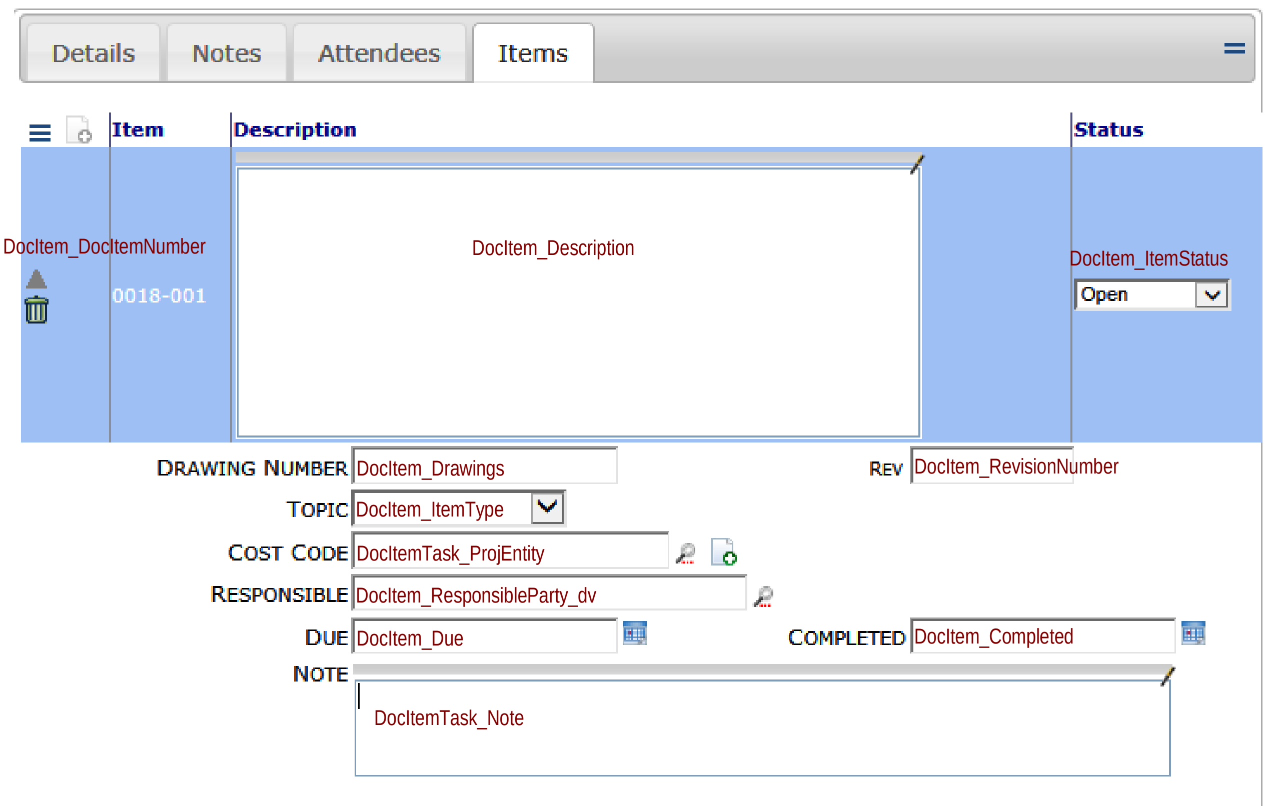
Commitment



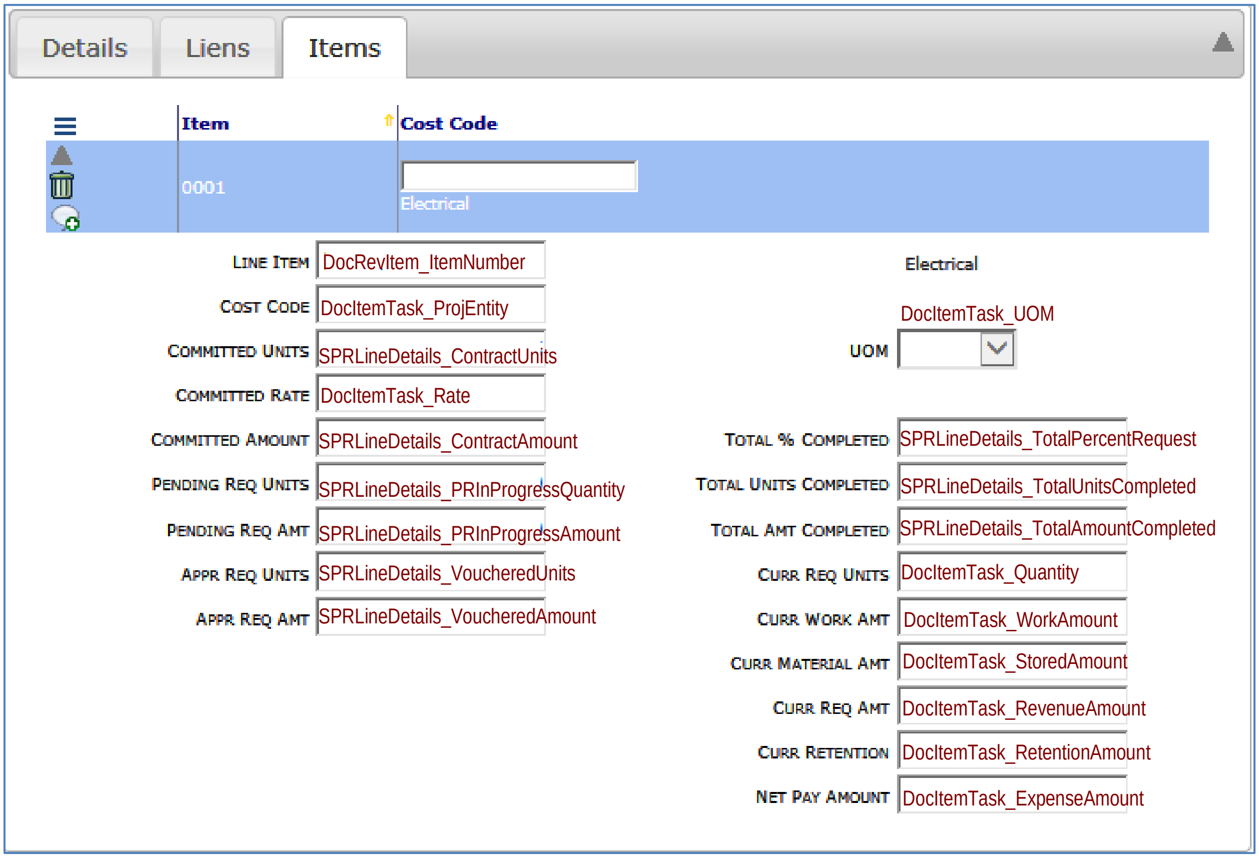
Daily Field Report

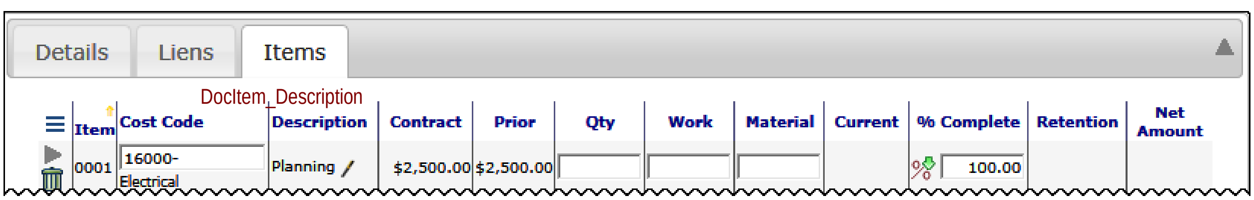


Meeting Minutes

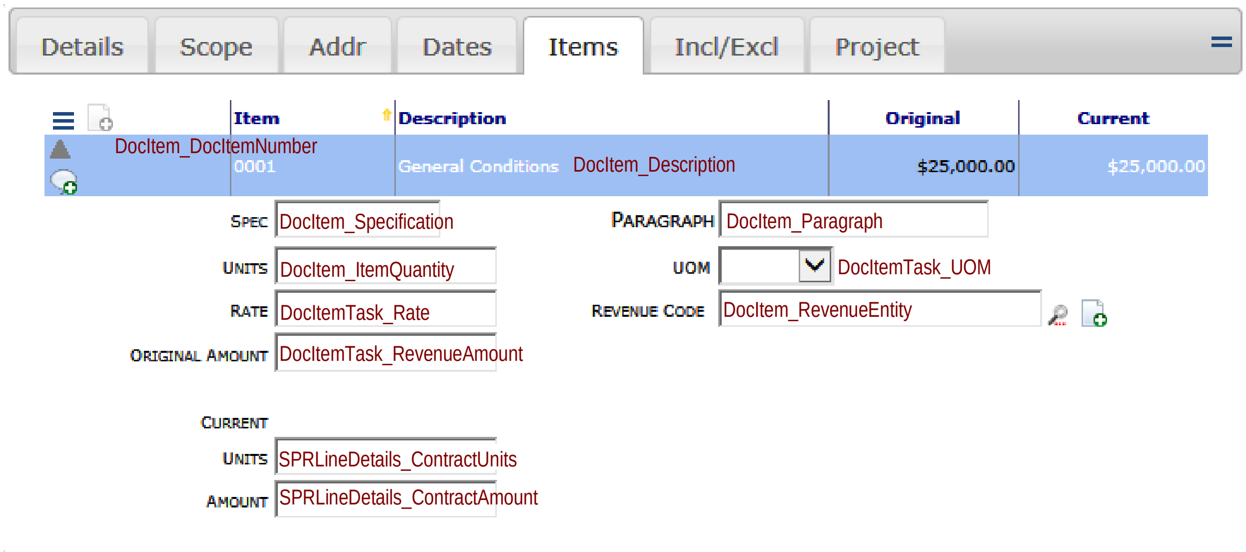


Pay Request

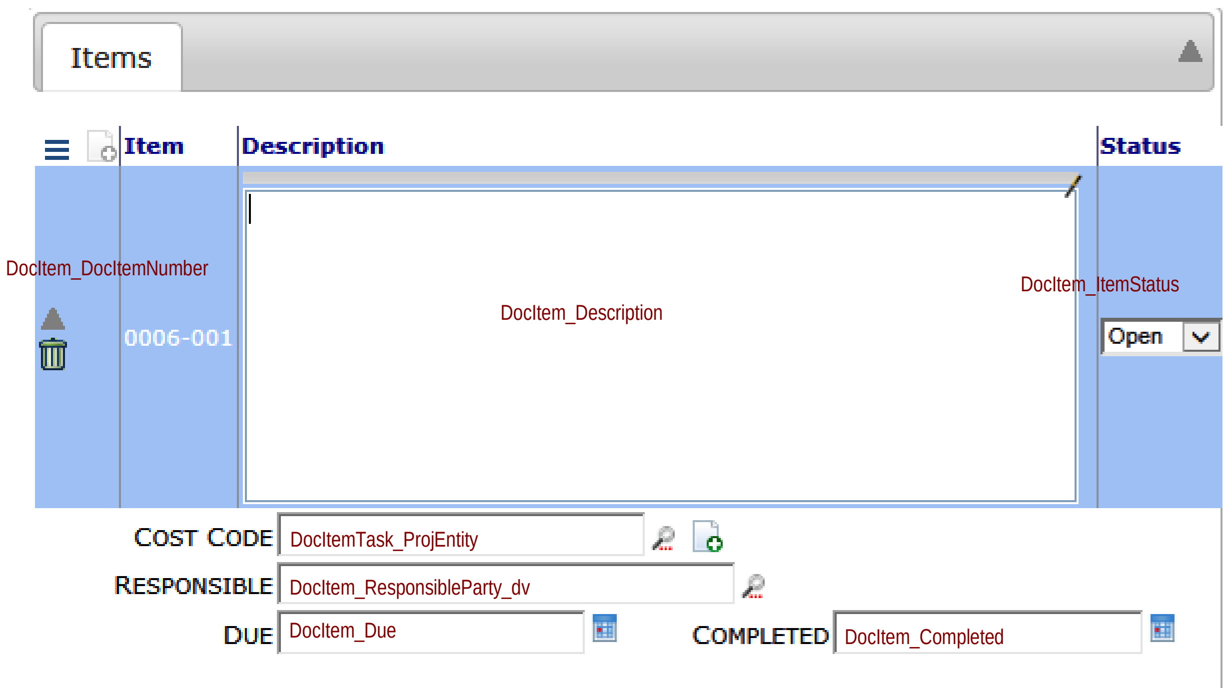

Details
Liens
Items
Item
Cost Code
0001
Electrical
LINE ITEM
DocRevItem_ItemNumber
COST CODE
DocItemTask_ProjEntity
COMMITTED UNITS
SPRLineDetails_ContractUnits
COMMITTED RATE
DocItemTask_Rate
COMMITTED AMOUNT
SPRLineDetails_ContractAmount
PENDING REQ UNITS
SPRLineDetails_PRInProgressQuantity
PENDING REQ AMT
SPRLineDetails_PRInProgressAmount
APPR REQ UNITS
SPRLineDetails_VoucheredUnits
APPR REQ AMT
SPRLineDetails_VoucheredAmount
Electrical
DocItemTask_UOM
UOM
TOTAL % COMPLETED
SPRLineDetails_TotalPercentRequest
TOTAL UNITS COMPLETED
SPRLineDetails_TotalUnitsCompleted
TOTAL AMT COMPLETED
SPRLineDetails_TotalAmountCompleted
CURR REQ UNITS
DocItemTask_Quantity
CURR WORK AMT
DocItemTask_WorkAmount
CURR MATERIAL AMT
DocItemTask_StoredAmount
CURR REQ AMT
DocItemTask_RevenueAmount
CURR RETENTION
DocItemTask_RetentionAmount
NET PAY AMOUNT
DocItemTask_ExpenseAmount


Details
Liens
Items
DocItem_Description
Item
Cost Code
Description
Contract
Prior
Qty
Work
Material
Current
% Complete
Retention
Net Amount
0001
16000-
Electrical
Planning
$2,500.00
$2,500.00
100.00

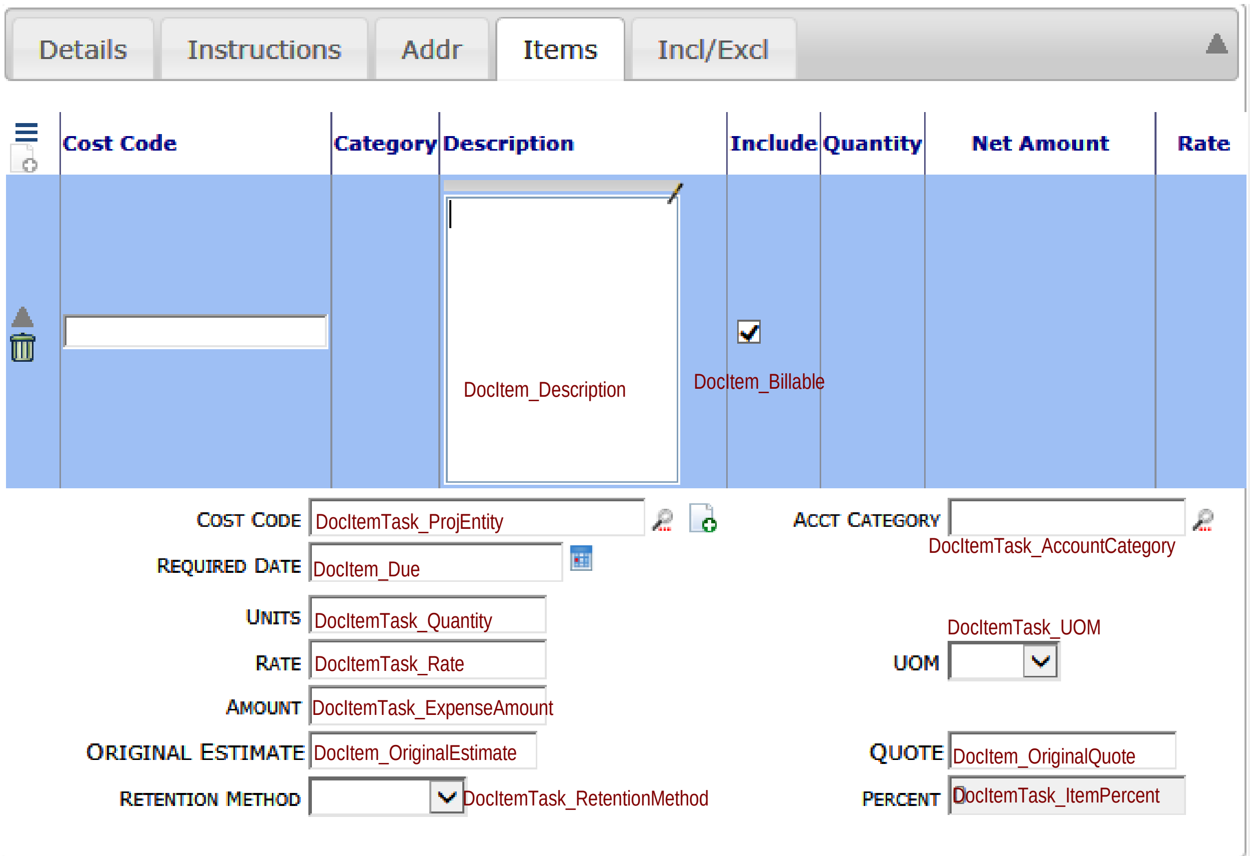
Project Setup



Punch List



RFQ


Details
Instructions
Addr
Items
Incl/Excl
Cost Code
Category
Description
Include
Quantity
Net Amount
Rate
DocItem_Description
DocItem_Billable
Cost Code
DocItemTask_ProjEntity
Acct Category
DocItemTask_AccountCategory
Required Date
DocItem_Due
Units
DocItemTask_Quantity
DocItemTask_UOM
Rate
DocItemTask_Rate
UOM
Amount
DocItemTask_ExpenseAmount
Original Estimate
DocItem_OriginalEstimate
Quote
DocItem_OriginalQuote
Retention Method
DocItemTask_RetentionMethod
Percent
DocItemTask_ItemPercent

Submittal, Submittal Package and Submittal Item Register