Focus Guide

Bookmark Templates

This Focus Guide is designed for Spitfire Project Management System users. In this guide, you will learn how to create Microsoft Word templates that use bookmarks to merge data from Spitfire documents into Microsoft Word output.

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Version 4.6

Revision Number: 4.6.01.28.2016

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About Our Documentation

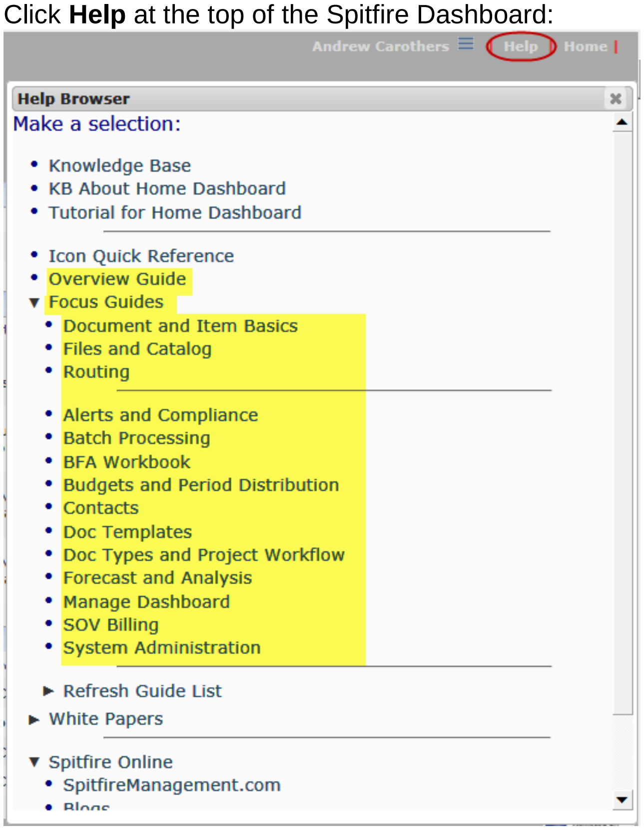
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller units of documentation—guides, knowledge base articles, and technical white papers.

Guides

Our guides, which include an *Overview Guide* and various other guides, focus on specific areas or tasks in sfPMS. Often, one Focus Guide will refer you to a second Focus Guide when an overlapping section is described in more detail in the second guide. By reading the guides, you will get a good understanding of the system in general and you will learn procedures for how to do many of the things that sfPMS allows you to do. We suggest you read the *Overview Guide* first, followed by other Focus Guides as needed.

To access the guides:

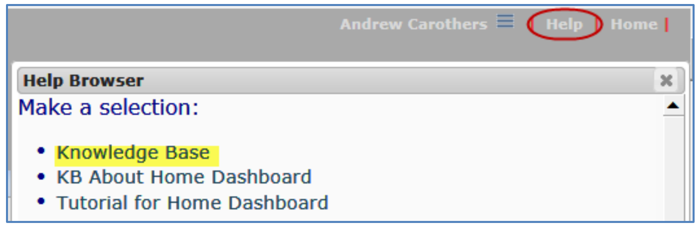
1. Log in to sfPMS.
2. Click **Help** at the top of the Spitfire Dashboard:



3. Select either **Overview Guide** or one of the choices under **Focus Guides.**
4. The guide will appear as a PDF file.

The Knowledge Base

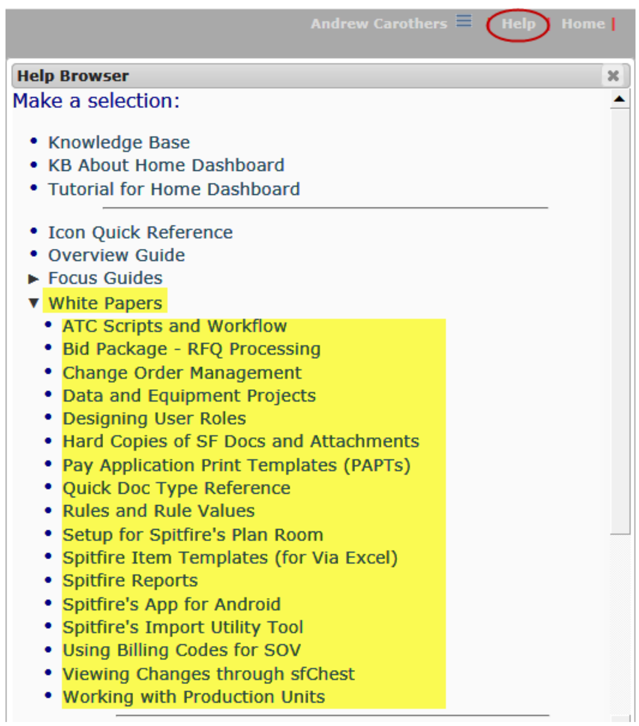
The Knowledgebase contains articles, in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



Articles in the Knowledgebase are numbered, for example, KBA-01044.

White Papers

White papers (also known as technical white papers or TWP) are documents that delve into some of the more technical aspects of sfPMS. White papers are accessed through the same Help menu:



Introduction

Because your Contacts are probably not all Spitfire users who can log into the Spitfire Project Management System (sfPMS) and read a Spitfire document that has been routed to them, we've developed Bookmark Templates (previously called Doc Templates). Bookmark Templates are used to send Spitfire information to people through email or printed out in hard copy.

Bookmark Templates in Microsoft Word can merge information from your Spitfire document into a Microsoft Word file. The Microsoft Word files created from these templates can include any information from Spitfire documents. The Microsoft Word files are emailed when Spitfire documents are routed and are included in the Spitfire File Catalog.

This guide focuses on the creation, modification, and use of Bookmark Templates.

This guide assumes some familiarity with sfPMS, Spitfire documents, and routing within Spitfire as described in the *Overview Guide*, *Focus on Document and Item Basics* and *Focus on Routes and Automatic Workflow*, all found off the Help Menu in sfPMS.

A Note About Microsoft Excel

Although sfPMS allows for templates in Microsoft Excel, these templates do not use bookmarks to merge data from Spitfire documents and should be considered outside the scope of this focus guide.

Template Tool and Types

For information about the Template tool (used to upload templates into sfPMS or used when you want to modify a template in your template library) and for information about all templates types (including templates in Microsoft Excel), see the Templates chapter in the *Focus on the Manage Dashboard* guide.

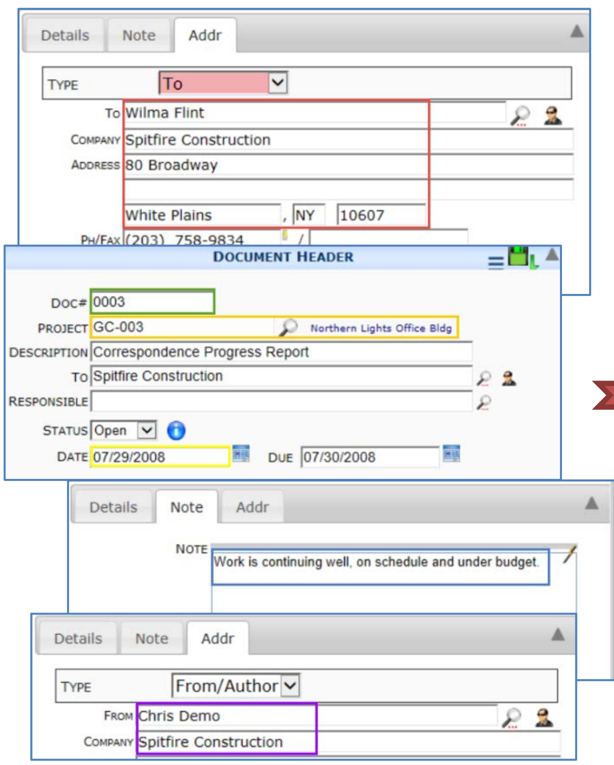
Note: Chapters, sections and information that are new or changed from the V4.5 documentation appear with **green text** and sometimes an *. Also, icons are shown in size 16 only; larger icons are similar but not identical.

Concepts

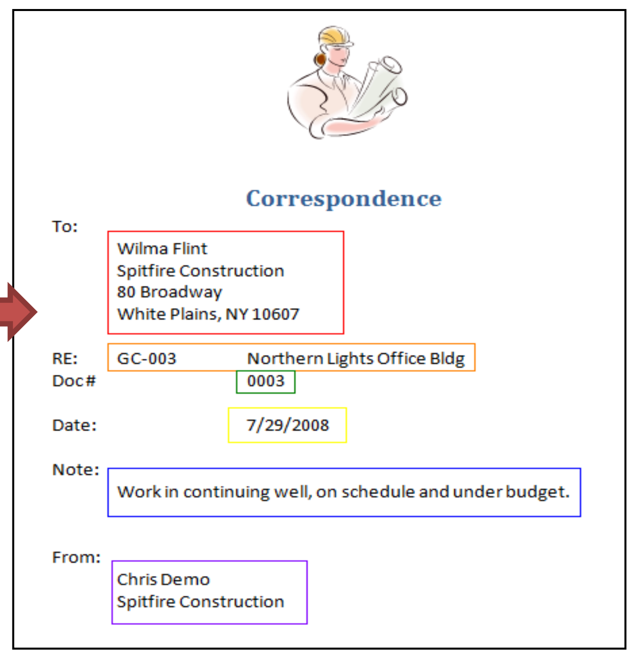
All documents in sfPMS belong to specific Doc types. Bookmark Templates correspond to Doc types but not necessarily in a one-to-one relationship. Each Doc type can have one or more templates, and one template can be used for several Doc types (for example, a cover sheet used as a Transmittal Template). Bookmark Templates are created in Microsoft Word.

Merged Data

Bookmark Templates in Microsoft Word can include both regular Microsoft Word features (such as text, tables, graphics) formatted in any way that you want and merged data that come from specific fields in your Spitfire documents. When creating a Bookmark Template in Microsoft Word, you can indicate the Spitfire data that you want and where you want it in your resulting printout. In the simple example below, data from various parts of a Correspondence document are used to “fill-in-the-blanks” on its associated template. When saved, Bookmark Templates printouts are stored with their corresponding Spitfire documents.



Information on Correspondence Document



BookmarkTemplate printout in Microsoft Word with merged data

You’ll need to understand how the Bookmark Template identifies which data to merge and where to place that merged data before you begin planning your templates in Microsoft Word.

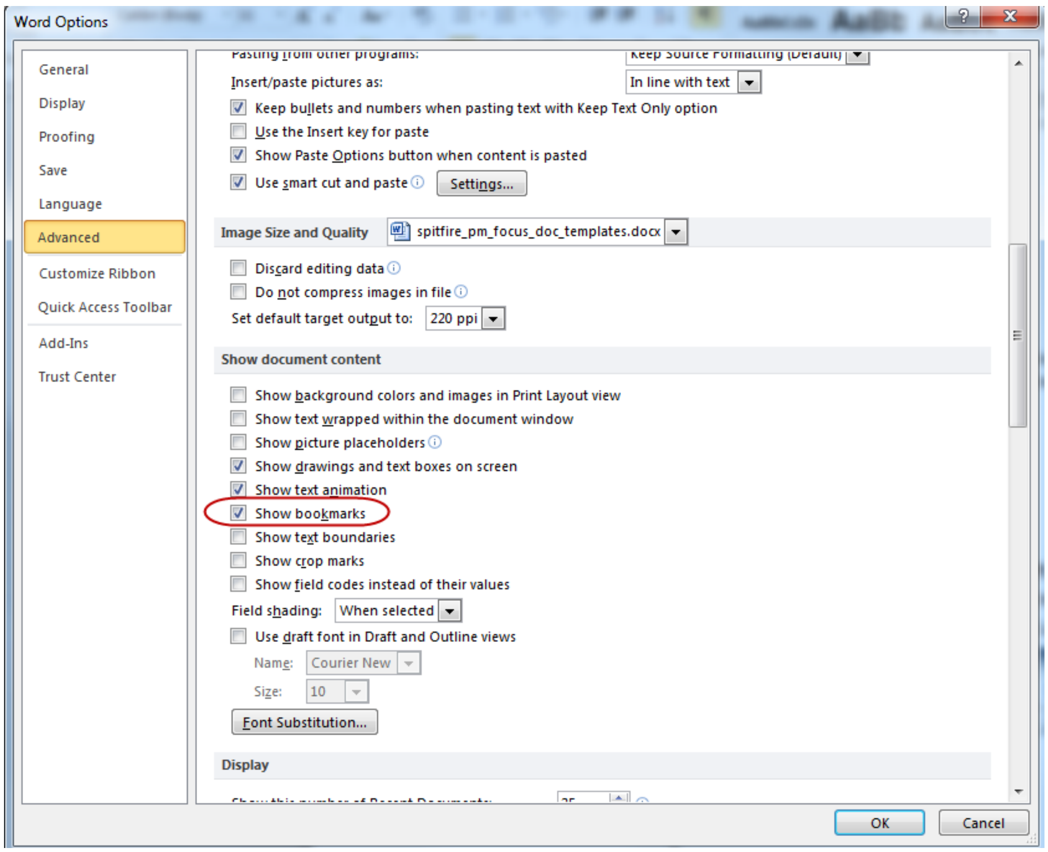
Bookmarks in Word

Spitfire uses a basic Microsoft Word feature: Bookmarks. A bookmark is simply a place holder in a Word file. Each bookmark must have a unique name.

Word Options

To see bookmarks:

1. In Microsoft Word, go to the File menu and select Options.
2. On the Advanced tab, select the **Show bookmarks** option.

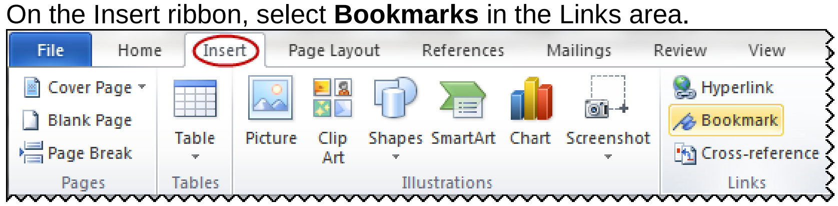


3. Click 

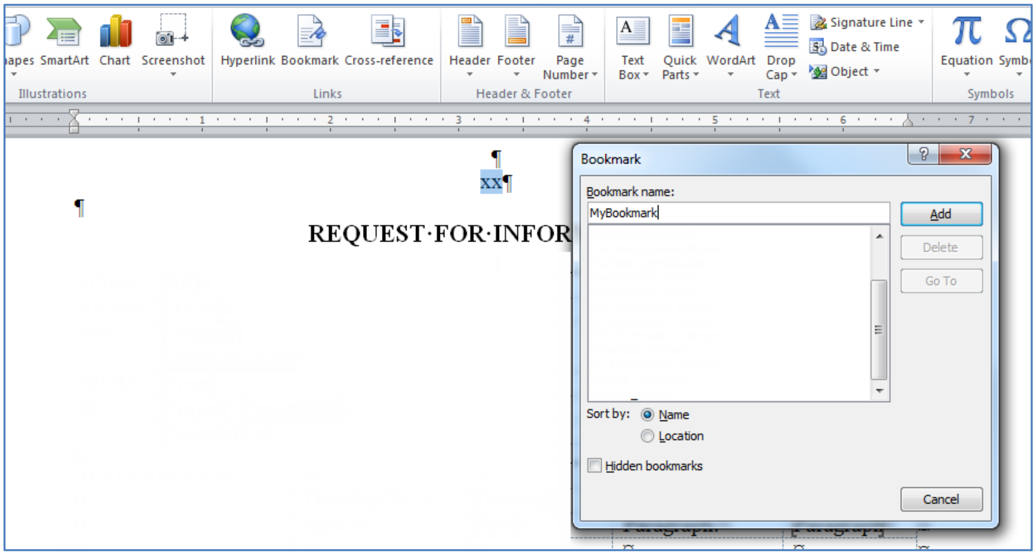
.

To insert a bookmark into any Word document:

1. In your Word document, type **xx** and highlight the xx
2. On the Insert ribbon, select **Bookmarks** in the Links area.



3. Type the name for your bookmark.



4. Click .

That's it. You've created a bookmark—a placeholder that Microsoft Word can identify. Notice that the bookmark is enclosed in square brackets [ ] to identify it is a bookmark.(If you don't see the square brackets on yours, go back to Word options and check that you selected Show Bookmarks.)

sfPMS uses this simple functionality and builds on it. sfPMS uses the bookmark name to identify which piece of data you want to merge to this Word bookmark (your placeholder). Therefore, if you name your bookmark **DocHeader_Title**, Spitfire inserts the Title of your document into this place. If you name your bookmark **DocHeader_Date**, sfPMS inserts the document's date into the placeholder.

To help you identify the bookmark names for Spitfire data, we've added an Appendix to this guide. Check Appendix A to find the bookmark name for each field on the Spitfire document.

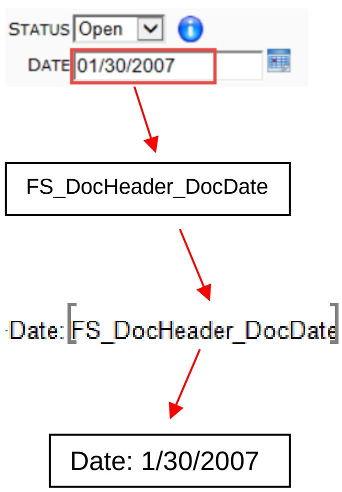
Using this simple concept of bookmark name to merge Spitfire data will allow you to create many of your document templates. Of course, there are some additional tips and tricks you'll need to use for some data—like adding **RR_** (Repeat Row) at the beginning of the bookmark name when you are trying to print a list of all the items on the document's Item tab. But we'll get to those special cases later in this guide.

Basic Templates with Merged Data

Understanding Placeholder Bookmarks

As explained earlier, a template in Microsoft Word must contain bookmarks if you want Spitfire data to be included in your printout file.

Spitfire uses these bookmarks as placeholders for the data that will be merged. The bookmark name you give to each bookmark determines which Spitfire data element will be merged.



For example, in your template, you may originally write the date line as such:

Date: document date

After you find the prefix + alias + fieldname for the information you want, you use that as the bookmark name. (Prefixes, aliases and fieldnames are explained in the section below and also in the next chapter.) To make merged data easier to track, we recommend that you change the placeholder text to match the prefix + alias + fieldname (when possible) and then copy that name as the bookmark. If Microsoft Word is configured to "show bookmarks," gray brackets identify the placeholder text as being bookmarked, as shown on the left:

In the example to the left, the name of the bookmark was modified with a prefix of FS. The FS is for choosing a Date Format. See Simple Prefixes on page 12 for more information.

Name Conventions

Basic bookmark names consist of two sections separated by underscores: table_fieldname . Since all Spitfire tables use xsf for the first three letters of the table, the bookmark assumes xsf—you should omit the xsf and use the simple name or alias. Therefore xsfDocHeader becomes **DocHeader** and xsfDocItem becomes **DocItem**.

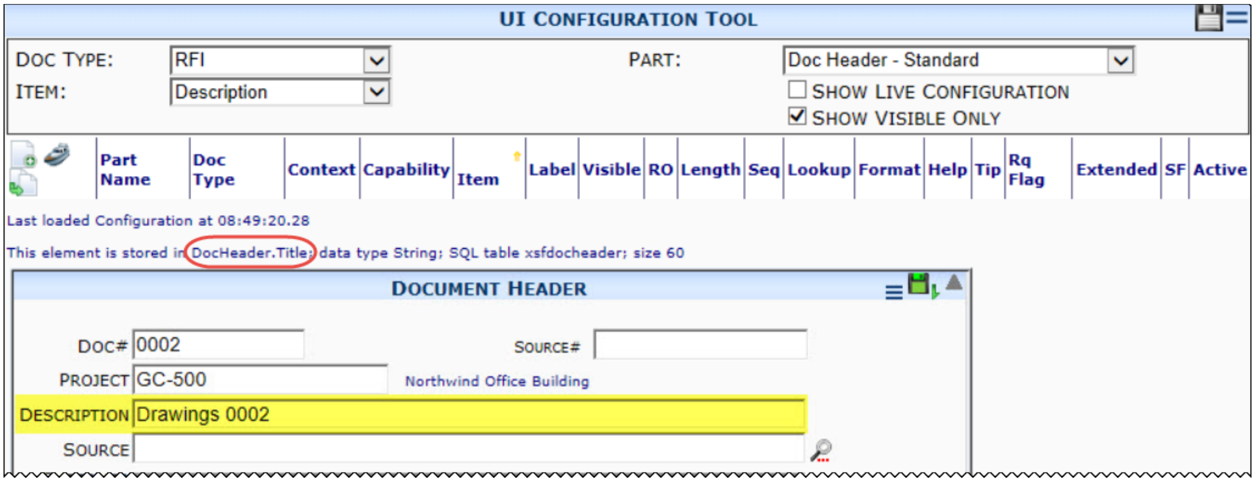
To find the bookmark name for the field you want to merge, here are three suggestions, listed in order of preference:

Appendices in this Focus Guide:

- Appendix A in this guide contains a list of most of the fields used on Spitfire Doc Types.
- Other Appendices contain bookmark names for data computed on the fly when a document is opened or data available to the document from the Project ID.

System Admin | UI Configuration

- When you edit a field in the UI Configuration tool, the table and field are shown above the sample image.



Data Dictionary

- The Data Dictionary—available on the **Help | White Papers** menu—lists each table and the cells in each table.

xsfDocHeader	**Document Header** The header of a routed document	
DocMasterKey	Guid Default(newid())	Primary Key:1
DocTypeKey	Guid	In Index IX_DocList:2 References xsfDocType.DocTypeKey
DocReference	Guid NULL	In Index IX_DocOCD:0 References xsfDocReference.DocReferenceKey
DocDate	Datetime(23,3) Default(getdate())	Updatable; see also xsfDocRevision.Created In Index IX_DocOCD:1
DocNo	Char(16) NULL	References base document, based upon DocType
Title	Varchar(60) NULL	Short description In Index IX_DocOCD:0
Source	Varchar(8) NULL	via xsfDocTypeSubcodes - user-defined (Source)

In the extract above, the table is **xsfDocHeader** (which we shorten to its alias **DocHeader**) and the fields are **DocMasterKey**, **DocTypeKey**, **DocReference**, **DocDate**, **DocNo**, **Title**, **Source**, etc.

In addition to the table_field basic bookmark, we can use a Prefix to pass additional information, such as Date Format or Repeat Row for Item bookmarks.

Simple Prefixes

TIP

Advanced operations require advanced prefixes. See page 28.

Adding simple prefixes to bookmark names allows you to do the following:

- Extract some data not stored directly in the document. For example, the description that corresponds to the ID Code.
- Format number and date fields as you want them.
- Extract data from a Contact record.

TIP
Bookmark names can also include prefix extensions—see page 22.

TIP
We offer a List of DV_prefix bookmarks template that you can use to see how your data will appear when you use (or not use) the DV_ prefix on applicable bookmarks. See KBA-01612.

TIP
For more information about the Mask Maintenance tool, see the *Focus on System Administration* guide.

TIP
Fd_ is the most commonly used. FS_ and FG_ are very similar but FS_ is sensitive to Microsoft Window's Control Panel Date Display preferences and does not include the time if it is midnight. FG_ is not influenced by the Control Panel and does include midnight as the time.

- Repeat rows or columns. Some elements of a document, such as Items, are multiples. In such a case, you will probably want to include each of these line items in your template.

Description Value

Use the **DV_** prefix to indicate that you want the text associated with certain fields, instead of the code associated with the field. For example,

DocHeader_Project = GC003

DV_DocHeader_Project = Northern Lights Office Bldg

DocItem_ItemStatus = O

DV_DocItem_ItemStatus = Open

Only some bookmark names allow this prefix and some bookmarks require this prefix. See Appendix B on page 50 for more bookmark names that use the DV_ prefix.

Mask

Use the **DM_** prefix to insert your "mask" for Project or Cost Code IDs. Masks determine how IDs are formatted. They are set up through the Mask Maintenance tool on the System Admin Dashboard. For example, if the mask for your Project ID is *ID-nnn* then:

DocHeader_Project = GC003

DM_DocHeader_Project = GC-003

See Appendix C on page 60 for more information about the DM_ prefix.

Plain Text

Use the **FPT_** prefix if your bookmark source is an unlimited text field with HTML, but you would like only plain text in the bookmark target:

DocRevision_Notes = *Nicely **formatted** text*

FPT_DocRevision_Notes = Nicely formatted text

You can combine the FPT prefix with the RR and DV prefixes:

RR**FPT_** combined with the Repeat Row prefix

DV**FPT_** combined with the Descriptive Value prefix

Date

Use the **FS_**, **FG_**, **FD_**, **Fd_ FM_**, **FR_**, **FT_**, **FU_** or **FY_** prefix to format date fields. For example,

DocHeader_DocDate = Monday, June 11, 2007 1:00:00 PM

Fd_DocHeader_DocDate = 6/11/2007

FS_DocHeader_DocDate = 6/11/2007 1:00 PM

FG_DocHeader_DocDate = 6/11/2007 1:00:00 PM

FD_DocHeader_DocDate = Monday, June 11, 2007

FM_DocHeader_DocDate = June 11

FR_DocHeader_DocDate = Fri, 11 Jun 2007 13:00:00 GMT

FT_DocHeader_DocDate = 1:00:00 PM

FU_DocHeader_DocDate = Monday, June 11, 2007 1:00:00 PM

FY_DocHeader_DocDate = June, 2007

In addition, you can create freeform date prefixes that begin with F and are followed by a combination of the elements shown below.

(Examples use the date Thursday, September 6, 2007, at 4:05 p.m.)

Element	***Description***	***Result***
d	Displays the day without leading zero	6
dd	Displays the day with leading zero	06
ddd	Displays the abbreviated name of the day	Thu
dddd	Displays the full name of the day	Thursday
M	Displays the month without leading zero	9
MM	Displays the month with leading zero	09
MMM	Displays the abbreviated name of the month	Sep
MMMM	Displays the full name of the month	September
yy	Displays the year without the century, with leading zero	07
yyyy	Displays the year with the century	2007
h	Displays the hour in a 12-hour clock, no leading zero	4
hh	Displays the hour in a 12-hour clock with leading zero	04
H	Displays the hour in a 24-hour clock, no leading zero	16
HH	Displays the hour win a 24-hour clock with leading zero	16
m	Displays the minute without leading zero	5
mm	Displays the minute with leading zero	05
t	Displays either A for AM or P for PM	P
tt	Displays the AM/PM designator	PM
b	Displays a blank space (used to separate elements)	
x	Displays the default date separator (/ for US)	/
c	Displays a comma	,
X	Displays the default time separator (: for US)	:

For example:

FMMMMbddcbyyyy_DocHeader_DocDate = September 06, 2007

FMxdxyy_DocHeader_DocDate = 9/6/07

FyyyybMMMbdd_DocHeader_DocDate = 2007 Sep 06

FddxMMxyyyybhhXmmbtt_DocHeader_DocDate = 09/06/2007 04:05 PM

Note: the DV prefix can be combined with a date prefix (with no underscore between them) if needed. For example:

DVFMxdxyy_DocHeader_ProjectFinishDate

Number

There are several Number prefixes. In each, *x* stands for the number of decimal places. If you omit the *x* variable, 2 decimal places are assumed. For whole integers, use 0 as the *x* variable

Use the **FC*x*_** prefix to format numbers as currency, for example:

DocItem_OriginalQuote = 1000.000

FC_DocItem_OriginalQuote = $1,000.00

Use the **FN*x*_** prefix to format numbers with commas:

FN0_DocItem_OriginalQuote = 1,000

Use the **FF*x*_** prefix to format numbers without commas:

FF1_DocItem_OriginalQuote = 1000.0

Use the **FDTX_** prefix for written out amounts:

FDTX_DocItem_OriginalQuote = One thousand and zero/100

Use the **FNTX_** prefix for written out numbers without adding the dollar check format:

FNTX_DocItem_OriginalQuote = One thousand

Use the **FP*x*_** prefix to format numbers as percentages.

DocRevision_TaxRate = .08125

FP1_DocItem_OriginalQuote = 8.1%

Note: the DV prefix can be combined with a number prefix (with no underscore between them) if needed. For example:

DVFN0_DocHeader_SubcontractExpenseAmount

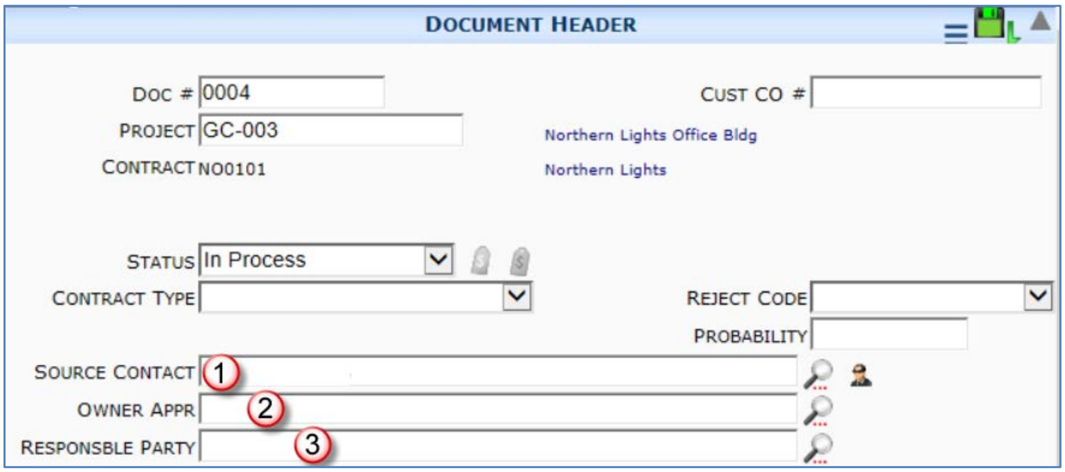
Bookmarks for Contact Information

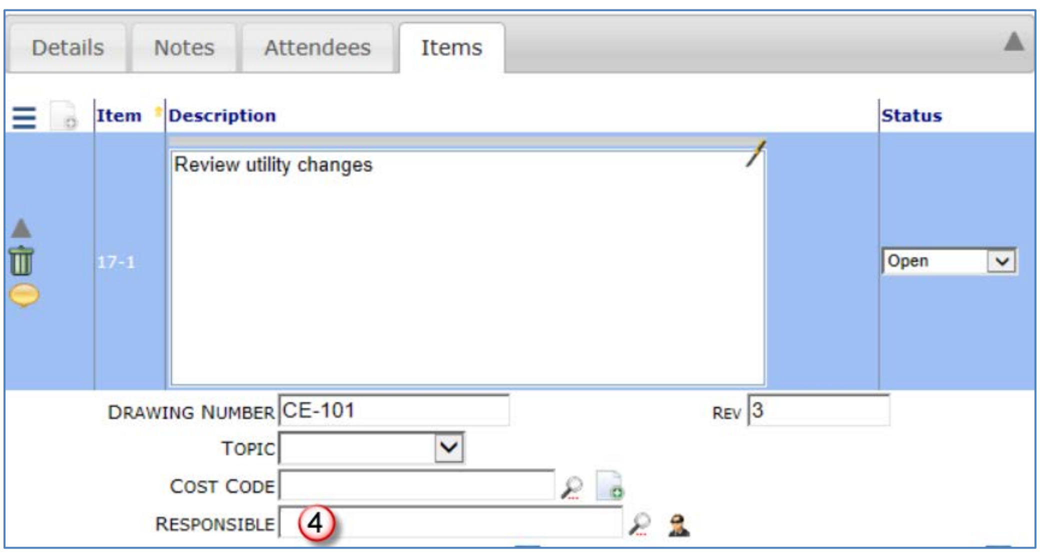
First, determine how the link to the contact is made:

1. Document Level
2. Project level

Document Level

A contact on the document level means that the contact name is merged from a field on the document.





The screen shot above displays the three contact fields on the Document Header and the one contact field on the Items tab:

1. **DocHeader_SourceContact:** the first Contact Lookup field in the Document Header. Depending upon its use, this is usually the Vendor or the Customer. For example, on Project Setup Doc types, it's usually Customer; on Commitments, it's usually Vendors.

2. **DocHeader_OwnerApprover:** the second Contact Lookup field is often hidden on many documents. This is used primarily on documents that require approval by an external contact.

3. **DocHeader_ResponsibleParty:** the third Contact Lookup field is Responsible Party. Usually this field is used for the internal approver, or the internal employee responsible for this document.

4. **DocItem_ResponsibleParty**: the Responsible Party field on each item on the Item tab uses this bookmark usually with the RR_ (repeat row) prefix: RR_DocItem_ResponsibleParty.

Depending on the document, the labels on these fields may be different, but as far as bookmarks go, the field in the table determines the name used for the bookmark, so the bookmark names stay the same even when labels change.

The above bookmarks are limited to the Contact Name—which may be your primary goal—but many times the contact's address, email or phone number is also required.

To pull this additional information from the Contact's Information, use the *xxx*ADDR_*data* format.

In the table below is a list of the available types *xxx*Addr_*data* formats that pull data directly from the document:

From the Document Header	
SrcConAddr_	Source Contact for a document
ExtApprAddr_	Owner Approver for document
RPartyAddr_	Responsible party on document

From the Addr tab on the Document	
FromAddr_	"From" address on a document's Addr tab
ToAddr-	"To" address on a document's Addr tab
ShipAddr_	"Ship To" address on a document's Addr tab
ProjectAddr_	Project address from Project Dashboard

Project Level

Contacts from the Project Team List are available for bookmarks through the document's Project ID and the role assigned to the Team Member for this Project.

TEAM CONTACTS

	Name	Company	Phone	Role	Contact's Project
	Aaron Grant	Grant & Dickenson		Consultant	
	Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager	
	Jason Sunderson	Able Electric Corp	(555) 555-1212	Subcontractor Base	AB0101
	Chris Demo	Spitfire Construction	(203) 952-6552	Superintendent	
	Ken Lathe	Universal HVAC Specialities	(914) 273-7263	Subcontractor Base	98273

From the Project Team Contacts	
AccountantAddr_	Contact detail window (General and Address tabs) for Accountant*
AltCMAddr_	Contact detail window (General and Address tabs) for Alternate CM*
AltPMAddr_	Contact detail window (General and Address tabs) for Alternate PM*
ArchitectAddr_	Contact detail window (General and Address tabs) for Architect*
AssociateAddr_	Contact detail window (General and Address tabs) for Associate*
BonderAddr_	Contact detail window (General and Address tabs) for Bonder*
CMAddr_	Contact detail window (General and Address tabs) for Construction Manager*
DevMgrAddr_	Contact detail window (General and Address tabs) for Development Manager*
ExecutiveAddr_	Contact detail window (General and Address tabs) for Senior Executive*
GCAddr_	Contact detail window (General and Address tabs) for General Contractor
JuniorPM_	Contact detail window (General and Address tabs) for Junior Project Manager*
LenderAddr_	Contact detail window (General and Address tabs) for Lender*
OPSMgrAddr_	Contact detail window (General and Address tabs) for Operations Manager
OwnerAddr_	Contact detail window (General and Address tabs) for Customer/Owner*
PMAddr_	Contact detail window (General and Address tabs) for Project Manager*
SenoirPM_	Contact detail window (General and Address tabs) for Senoir Project Manager*
StaffAddr_	Contact detail window (General and Address tabs) for Project Staff*
SuperAddr_	Contact detail window (General and Address tabs) for Superintendent*
From the Project Setup document for the Project	
ProjectAddr_	Site address from Project Setup document
ProjectCompanyAddr_	Division ID on Project Setup pulls from Company Detail from System Admin Dashboard
ProjectCustomerAddr_	Customer on Project Contract
PST*x*Addr_	Other address from the Project Setup document. (For example, Project Setup's To Address woutld be PSTTAddr_) If you add a custom Addr Type for the Project Setup document, such as a Warehouse location, this bookmark can be helpful for Commitment templates.

Type of Data

Second, determine what type of data you want to merge. There are two methods for pulling the contact info from the contact records:

- Fieldname
- Prefixes

Fieldnames

Fieldnames are limited and can only be used in the *xxx*ADDR_ format. Only some data is available through this method.

PMAddr_Company pulls Project Manager's Company.

PMAddr_Person pulls Project Manager's Name.

PMAddr_email pulls Project Manager's email.

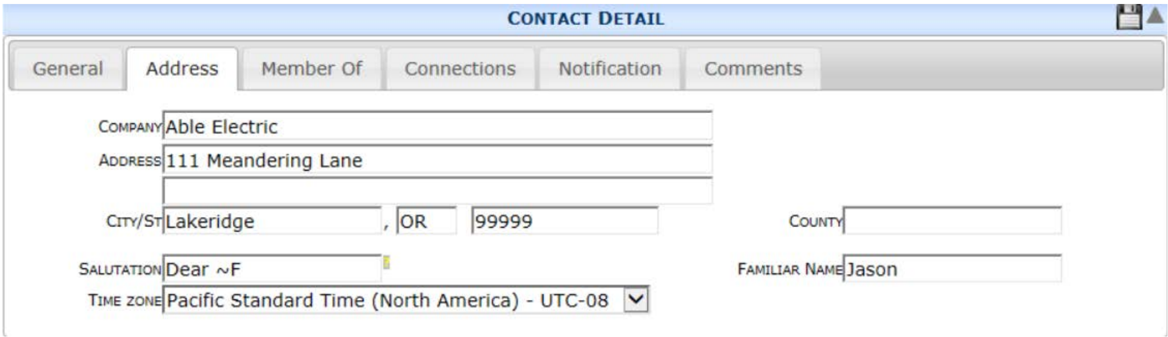
Prefixes

The DocHeader_ResponsibleParty will pull the Person, but requires a prefix to pull other info.

DocHeader_ReponsibleParty pulls Contact's Name

DCO_DocHeader_ResponsibleParty pulls Contact's Company

There are a number of prefixes that allow you to get information from a Contact record.



Use the **DCO_** prefix to get the Company name from the Contact record, for example:

DCO_DocHeader_SourceContact = Able Electric Corp.

TIP

For more information on the Salutation field on a Contact Detail, see the *Focus on Contacts* guide.

Use the **DADD_** prefix to get the full address (street address, city, state and ZIP code) formatted as an address block, for a specific Contact, for example:

DADD_DocHeader_SourceContact =

111 Meandering Lane

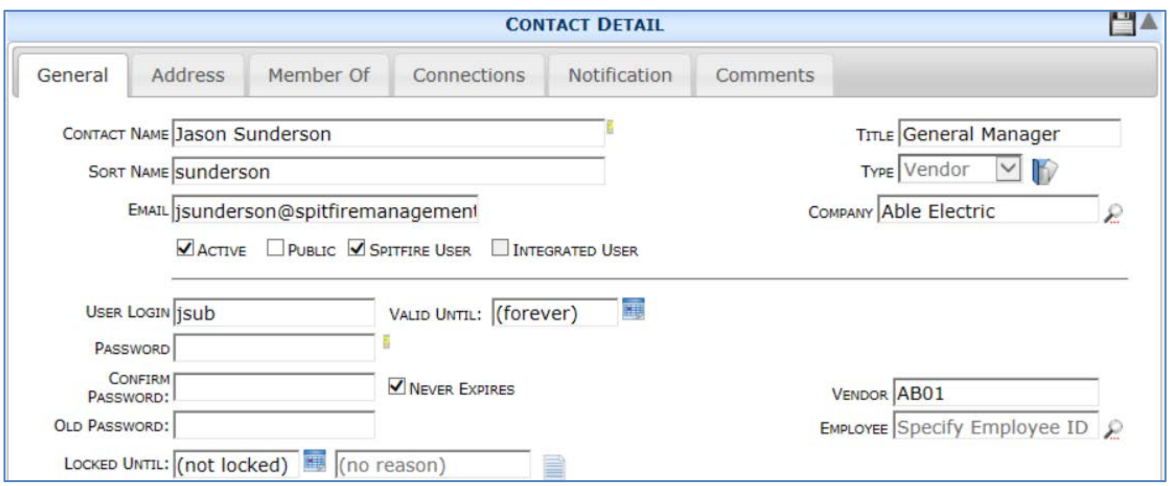
Lakeridge, OR 27891

Use the **DFAM_** or **_DNIC** prefix to get the Familiar Name of a Contact:

DFAM_ToAddr_UserKey = Jason
DNIC_DocHeader_SourceContact = Jason

Use the **DSAL_** prefix to get the Salutation:

DSAL_DocHeader_SourceContact = Dear Jason



Use the **DTI_** prefix to get the Contact Title:

DTI_DocHeader_ResponsibleParty = General Manager

Use the **DCUS_** prefix to get the Customer ID (*not shown above*):

DCUS_DocHeader_SourceContact = C001

Use the **DEMP_** prefix to get the Employee ID (*not shown above*):

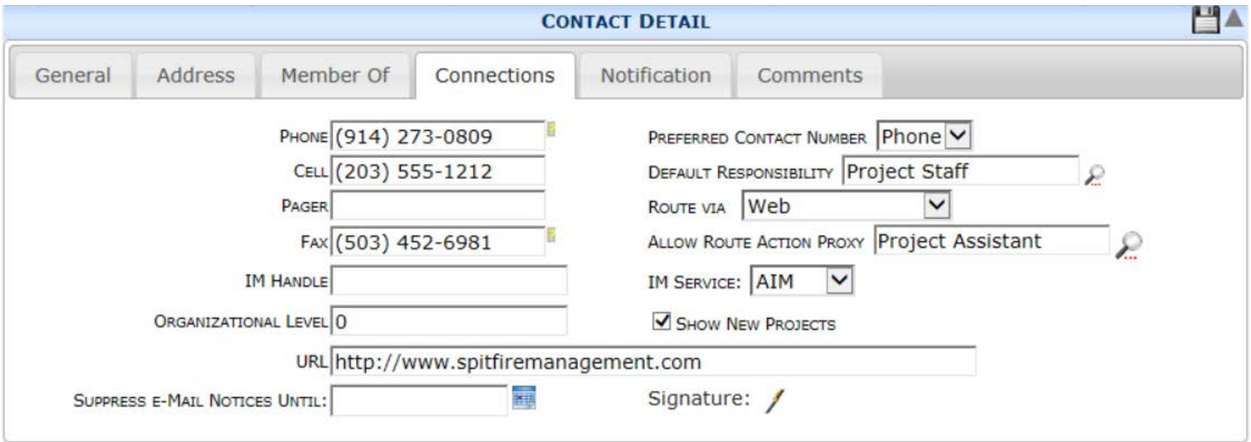
DEMP_DocMeetingAttendee_UserKey = EJ87

Use the **DVEN_** prefix to get the Vendor ID:

DVEN_DocHeader_SourceContact = AB01

Use the **DEMAIL_** prefix to get the email:

DEMAIL_ToAddr_UserKey = jsunderson@spitfiremanagement.com



Use the **DCEL_** prefix to get the Contact Cell:

DCEL_DocHeader_ResponsibleParty = (203) 555-1212

TIP
See the table on the next page for more information about prefixes and contact bookmarks.

Use the **DPHO_** prefix to get the Contact Phone:

DPHO_DocHeader_ResponsibleParty = (914) 273-0809

Use the **DFAX_** prefix to get the Contact Fax:

DFAX_ToAddr_UserKey = (503) 452-6981

Use the **DCAL_** prefix to get the Contact Preferred Number:

DCAL_ToAddr_UserKey = (555) 555-1212 (the number designated in the Preferred Contact Number field).

Use the **DSIG_** prefix to get the Signature.

Note: the signature can be an image file. See KBA-01586 for information on uploading image files to HTML fields. The Signature field appears only for Contacts who are Employees or have the **CSTM | Internal Staff** rule capability.

Prefix	Alias (see pg 58)	Bookmark	Data
(no prefix)		_Person	Contact’s Name
(no prefix)		_Company	Contact’s Company
(no prefix)		_Addr1	Contact’s Street Address Line 1
(no prefix)		_Addr2	Contact’s Street Address Line 2
(no prefix)		_City	Contact’s City
(no prefix)		_State	Contact’s State
(no prefix)		_Zip	Contact’s Zip
(no prefix)		_Phone	Contact’s Phone number
(no prefix)		_Fax	Contact’s Fax
(no prefix)		_Email	Contact’s email
(no prefix)		_RoleName	Contact’s Default Role
(no prefix)		_ContactProject	Contact’s Project ID from the Project Contact Part
(no prefix)		_AddrBlock	Contact’s Street Address1 Contact’s Street Address Line 2 (if available) Contact’s City, State, Zip
(no prefix)		_Title	Contact’s Title
DV_		_UserKey / _FromUser / _EditUser /_ResponsibleParty _SourceContact	The name of the Contact / From User / Current User / Responsible Party / Source Contact, respectively
DADD_		_UserKey / _FromUser / _EditUser /_ResponsibleParty _SourceContact	The following information for the Contact etc. Street Address1 Street Address Line 2 (if available) City, State, Zip
DCO_		_UserKey / _FromUser / _EditUser /_ResponsibleParty _SourceContact	The Company of the Contact etc.
DCAL_			The preferred phone number for the Contact etc.
DCEL_			The cell phone number for the Contact etc.
DCUS_			The Customer ID of the Contact etc.
DEMAIL_			The email of the Contact etc.
DEMP_			The Employee ID of the Contact etc.
DFAM_ or DNIC_			The Familiar Name/Nickname of the Contact etc.
DFAX_			The fax number for the Contact etc.
DKEY_			The GUID of the Contact etc.
DKEYAT_			The “primary person” at the source company of the Contact / From Person / Current User / Responsible Party / Source Contact respectively
DPHO_			The phone number for the Contact etc.
DSAL_			The salutation of the Contact etc.
DSIG_			The Signature of the Contact etc.
DTI_			The Title of the Contact etc.
DVEN_			The Vendor ID of the Contact etc.
DWEB_			The Web URL of the Contact etc.

Bookmarks for Items

IMPORTANT
You must use the RR_ prefix within a Microsoft Word table. You can have more than one table in your template.

Repeat Row

Use the **RR_** prefix to repeat items on rows; use the **RC_** prefix to repeat items across columns. For example, if you have a number of line items in your Items tab and you want to list all of their descriptions, then:

DocItem_Description	=	Description of first item
RR_DocItem_Description	=	Description of first item
		Description of second item
		Description of third item, etc.

Note: You can combine the RR and RC prefixes with other prefixes such as the DV or DM prefix, in which case there is no underscore between prefixes. For example, the following are valid:

RRDV_DocItem_ItemSubType

RRDM_DocHeader_Project

See Appendix C on page 60 for a list of bookmark names that take the RR_ and RC_ prefixes.

Row Number

You can use the **_RowNumber** fieldname with any alias to include row numbers in a table. The field is often used with the RR_ prefix, for example:

RR_DocItem_RowNumber	=	1
		2
		3 etc.

Prefix Extensions

TIP
For another way to deal with the need to repeat a bookmark name in a document, see Appendix D on page 62.

There may be times when you want to use the same bookmark name more than once in a Bookmark Template. For example, you may have two or more tables, each needing the RR_DocItem_Description bookmark or you may want to reference the Project ID in several places. Since bookmark names must be unique to a template, you can add a user-defined fourth segment to your bookmark name in such situations. These added segments can be thought of as extensions to the prefix because they are placed between the prefix you want and the alias + fieldname of the bookmark name:
prefix_prefixextension_alias_fieldname.

The prefix extension can be anything you want. It serves both to identify the bookmark name and to distinguish it from other instances of the same bookmark. For example, if you did need to use RR_DocItem_Description twice in your template you could use the following bookmark names:

RR_First_DocItem_Description

RR_Second_DocItem_Description

-or-

RR_anythingyouwant_DocItem_Description

RR_somethingdifferent_DocItem_Description

In reality, shorter prefix extensions are better, so you might want to use

RR_A_DocItem_Description

RR_B_DocItem_Description

While prefix extensions are often used with the RR_ or RC_ prefix, they can be used with other prefixes also.

Creating the Bookmark Template

After you plan and gather information of the data you plan to merge, you are ready to create your template.

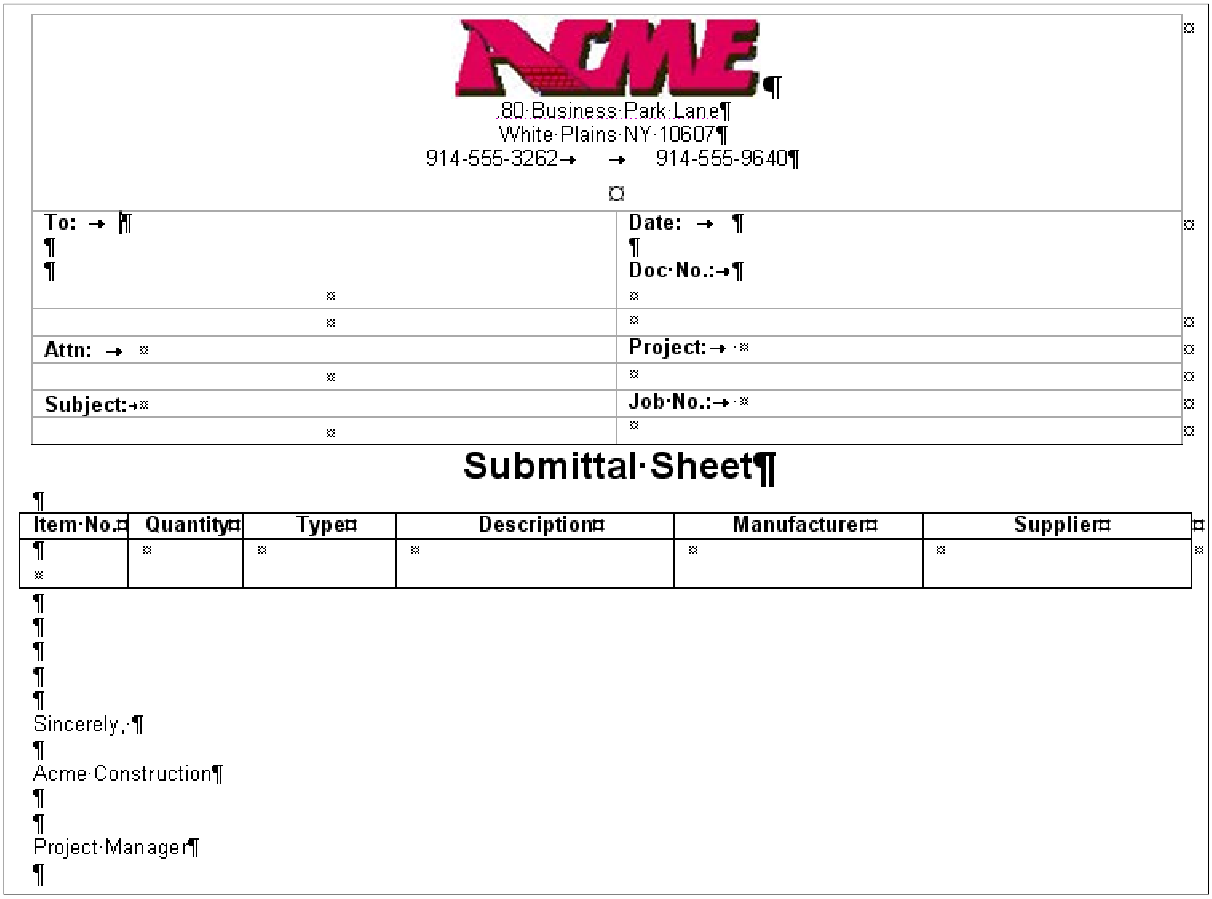
Create, Edit or Use a Microsoft Word File

First, you must have a Microsoft Word file that you will convert into the Bookmark Template. Create and format this Microsoft Word file as you would any other Microsoft Word file. You can add pictures, graphs, headings, your logo, etc. to the file. You can also start with an existing Microsoft Word file.

Convert Microsoft Word File into Bookmark Template

To create a Bookmark Template:

1. Open your Microsoft Word file. For example, let's say you want to create a template for your Submittal document. You might have a Microsoft Word file formatted as shown:



ACME¶
80·Business·Park·Lane¶
White·Plains·NY·10607¶
914-555-3262 → 914-555-9640¶

To: → ¶	Date: → ¶ Doc·No.: →¶
Attn: →	Project: →
Subject: →	Job·No.: →

Submittal·Sheet¶

Item·No.	Quantity	Type	Description	Manufacturer	Supplier

Sincerely,·¶

Acme·Construction¶

Project·Manager¶

2. Type a placeholder wherever you want data to be merged from your Spitfire document. These placeholders will be bookmarked. They can be whatever you want but should serve to indicate what data is desired. We recommend that you make the placeholders their equivalent bookmark names, where possible. In the following example some placeholders are bookmark names and others are not. They appear in blue, but color does not matter.

ACME

80 Business Park Lane
White Plains NY 10607
914-555-3262 → → 914-555-9640

To: → Company Street Address City, State, Zip	**Date:** → FS_DocHeader_DocDate **Doc No.:** → DocHeader_DocNo
Attn: → Person's Name	**Project:** → DV_DocHeader_Project
Subject: → Title	**Job No.:** → DocHeader_Project

Submittal Sheet

Item No.	Quantity	Type	Description	Manufacturer	Supplier
RR_DocItem_OriginalQuote	RR_DocItem_Quantity	RRDV_DocItem_ItemSubType	RR_DocItem_Description	RR_DocItem_Manufacture	RR_DocItem_Supplier

DocRevision_Notes

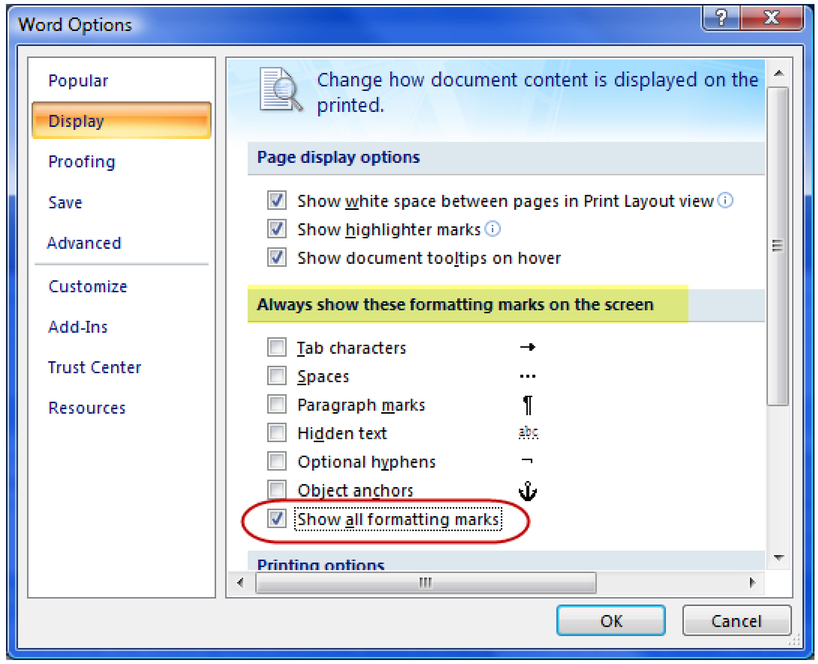
Sincerely,

Acme Construction

PM Name
Project Manager
PM Email

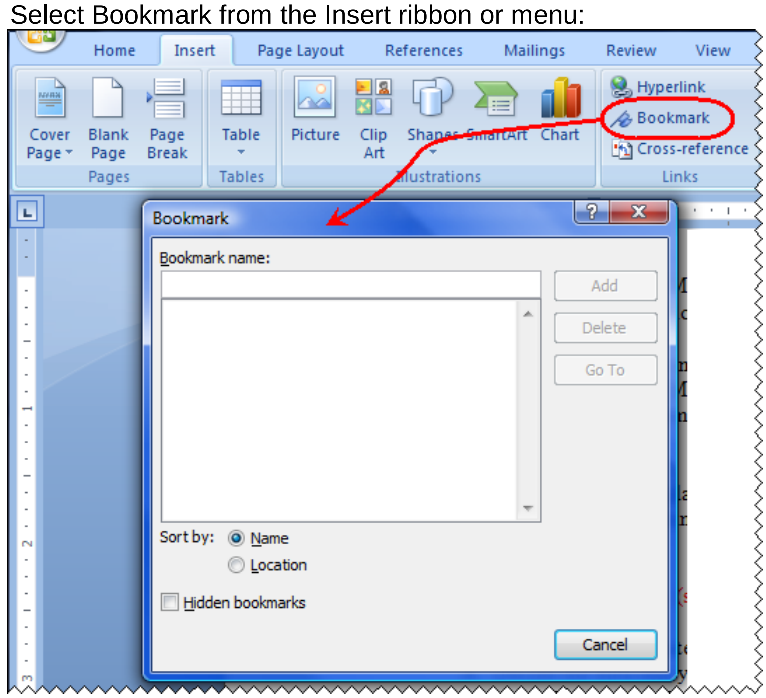
3. You will need to be able to see bookmarks. (See page 9.)

4. You should also be able to see paragraph marks. If necessary, open **Word Options | Display** and check **Show all formatting marks**.



5. Back in the body of your Microsoft Word file, highlight your first placeholder. If you used the bookmark name as your placeholder, copy this text.
Note: take care to not copy any paragraph marks.

6. Select Bookmark from the Insert ribbon or menu:



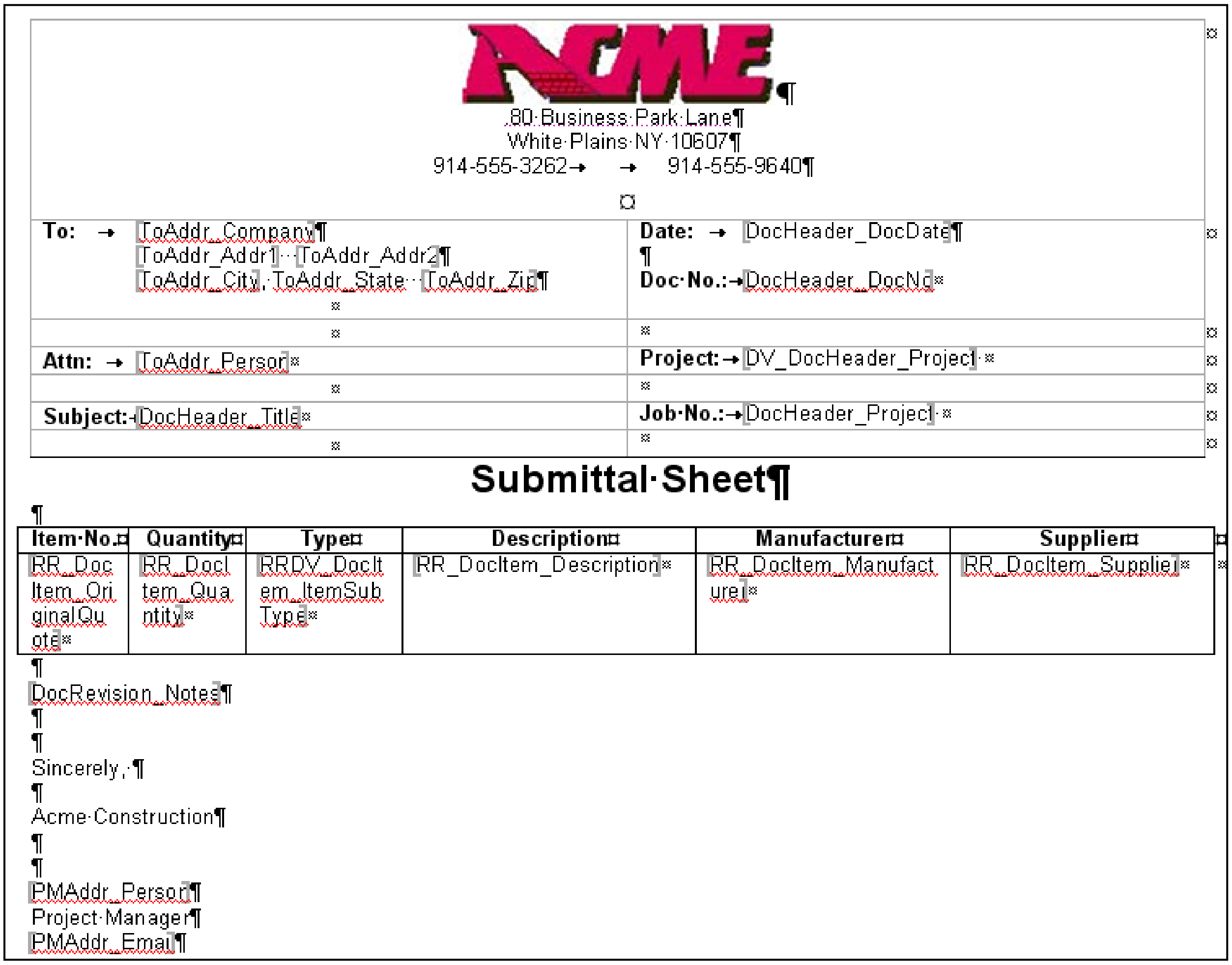
7. In the Bookmark dialog box, enter (or paste) the corresponding bookmark name (Spitfire alias + fieldname) including any appropriate prefix then click Add. Gray brackets will appear around your placeholder. This means the text is bookmarked.

TIP

Although anyone can create a Bookmark Template, only users with access to the Template tool on either the Manage or System Admin Dashboard can upload the template into sfPMS.

8. Repeat the process for each placeholder.
   Note: In Microsoft Word, each bookmark must have a unique name. See page 22 and/or page 62 if you want to use a bookmark more than once in your template.
9. (optional) Add special bookmarks, as described in the next chapter.
10. When you are finished, save your template as a **.docx** file. The template in Microsoft Word is now ready to be uploaded into Spitfire through the Templates tool, as described in the Templates chapter of the *Focus on the Manage Dashboard* guide.

The example that follows shows the template with all its bookmarks (and showing all bookmark names):



80 Business Park Lane
White Plains NY 10607
914-555-3262 → → 914-555-9640

To: → ToAddr_Company ToAddr_Addr1 ToAddr_Addr2 ToAddr_City, ToAddr_State ToAddr_Zip	**Date:** → DocHeader_DocDate **Doc No.:** → DocHeader_DocNo
Attn: → ToAddr_Person	**Project:** → DV_DocHeader_Project
Subject: → DocHeader_Title	**Job No.:** → DocHeader_Project

Submittal Sheet

Item No.	Quantity	Type	Description	Manufacturer	Supplier
RR_DocItem_OriginalQuote	RR_DocItem_Quantity	RRDV_DocItem_ItemSubType	RR_DocItem_Description	RR_DocItem_Manufacture	RR_DocItem_Supplier

DocRevision_Notes

Sincerely,

Acme Construction

PMAddr_Person
Project Manager
PMAddr_Email

Advanced Prefixes

Hard New Line (Line Break)

TIP

The _AddrBlock fieldname combines street addresses, city, state and ZIP code with appropriate hard line breaks so, for example, the bookmarks to the right could be replaced with

To Addr_Person
ToAddr_AddrBlock

and you would get the same results.

In situations where you want to either insert a hard new line (if merged data follows) or a space (if the merged data is blank), you can use a ***HNL_** prefix. The *HNL prefix, which is often used as **FHNL_**, tells the template to evaluate the alias + fieldname that follows it and insert a space or hard new line accordingly. For example, if you want addresses to appear correctly whether or not a second address line appears, you would use **FHNL_** combined with the Addr2 field to insert either a space or hard new line before the Addr2:

ToAddr_Person

ToAddr_Addr1 FHNL_ToAddr_Addr2 ToAddr_Addr2

ToAddr_City, ToAddr_State, ToAddr_Zip

=

Chris Demo

84 Business Park Drive (blank space)

Armonk, NY 10504

-or-

Chris Demo

84 Business Park Drive

Suite 111

Armonk, NY 10504

The HNL_ prefix can also be combined with most of the D* prefixes (DV and the Contact prefixes shown on page 18) any time the information you want requires one of those D* prefixes. For example, you would use **DTIHNL_** to evaluate the Title of the Project Manager (DTI plus HNL):

PMAddr_Person DTIHNL_PMAddr_UserKey DTI_Addr_UserKey

=

Chris Demo (blank space)

-or-

Chris Demo

Project Manager

Special Bookmarks

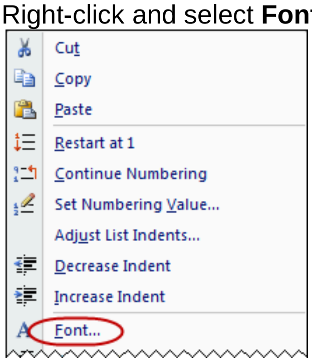
Special bookmarks use advanced prefixes to do the following:

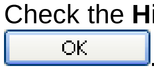
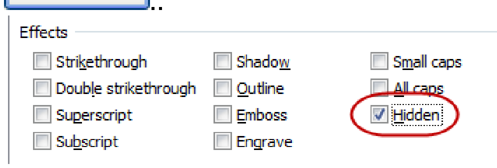
- Sort and filter line items. You may want to sort and/or filter line items by a specific column.
- Include computed values not stored in the database. Some values or amounts displayed in Spitfire documents are computed dynamically on screen. These values can be merged just like other data. However, you may want to compute values or amounts that are not already computed in the document. You can include newly computed values in your template.

Special bookmarks affect the whole Bookmark Template. For this reason, they are usually placed at the very end of the template (or some other unused area) and are hidden. Advanced prefixes are identified by an initial letter "x".

Hidden Text

To hide text in Microsoft Word:

1. Highlight the text that you want to hide.
2. Right-click and select **Font**.


3. Check the **Hidden** checkbox in the Effects section then click 
..


4. If Microsoft Word has been configured to "show hidden text," a dotted line will indicate that the text you highlighted is hidden. Hidden text will not appear when you print or preview the Doc Template.

Note: to show hidden text, open **Word Options | Display** and check **Hidden Text.**

Sort

The RR_ and RC_ prefixes process repeating data, but the order may not be what you expect or need. Use the **xSort**_ prefix to sort rows (or columns) in your tables (the tables that contain the RR_ or RC_ bookmarks). You can use the xSort_ prefix to sort data in the tables in your template or just the data in one particular table.

To sort all references to an alias in your template:

TIP
WordTemplateConfig rules (set through the Rules Maintenance tool on the System Admin Dashboard) can also be used to sort. Using the rule is generally easier to maintain. See KBA-01323 for more information.

1. In some unused area, type

   xSort_*Alias* = *fieldname DESC, fieldname*

   where *Alias* is the Spitfire alias and *fieldname* is the name of each field by which you want to sort. (Remember that each bookmark name is made up of an alias and a fieldname.) If you want to sort by more than one field, fieldnames must be separated by a comma. If you want any field to be sorted in descending order, include DESC after the fieldname. Otherwise, an ascending order is used.

   For example, if you had a table with the following bookmarks…

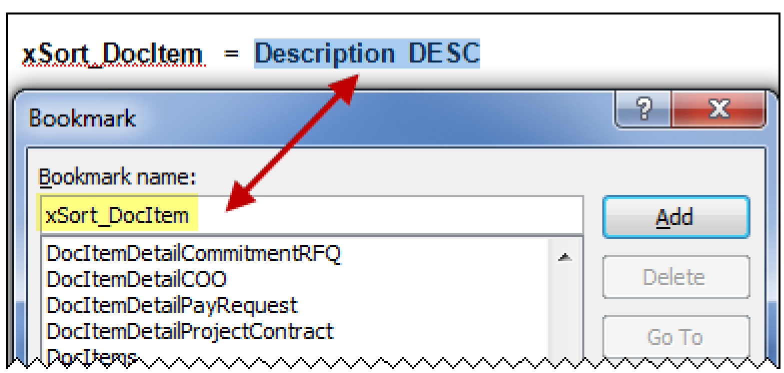
Item No.	***Description***
RR_DocItem_OriginalQuote	RR_DocItem_Description

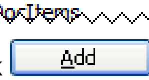
   …and you wanted to sort by description in descending order, you would type:

   xSort_DocItem = Description DESC

2. Hide the line you just typed, as described on the previous page.
3. Highlight everything that comes after the = sign (in this example, **Description DESC**).
4. Insert a bookmark. The name of this bookmark will be what you typed in front of the = sign (in this example, **xSort_DocItem**).

TIP
Space around the = sign is insignificant. If you have several bookmarks with advanced prefixes you can use the Tab key to line up the = signs for easier readability.

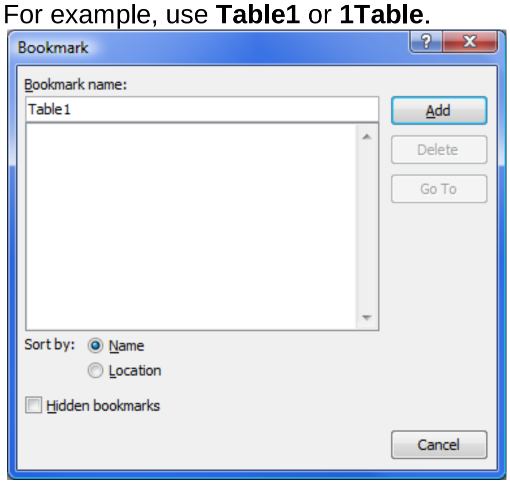


5. Click .

To sort a list in a particular table in your template:

1. Click ⊞ to highlight the whole table that you want sorted, for example:

2. Insert a bookmark. For the bookmark name, use any short name that begins or ends with the word "Table" that will identify this table for you. **Important**: do *not* use underscores in your name. For example, use **Table1** or **1Table**.



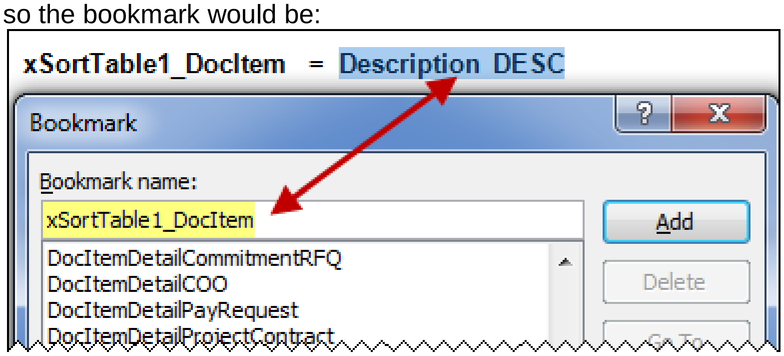
3. Click Add.

4. Use this bookmark name to create a new prefix by adding it to the xSort prefix, for example, **xSortTable1_**.

5. Follow the directions for using the xSort_ prefix but use your newly created xSort*Tablename*_ prefix in its place. For example, your hidden text might be:

   xSortTable1_DocItem = Description DESC

   so the bookmark would be:



6. Repeat this process for other tables that you want sorted in your template.

Filter

The RR_ and RC_ prefixes process repeating data, but you may have rows that you do not want to display. The **xFilter_** prefix allows you to explicitly define which rows are included. You can use this prefix to filter the tables in your template or in just one particular table in your template. You can also use advanced expressions with the xFilter_ prefix; see page 40.

> **TIP**
> WordTemplateConfig rules (set through the Rules Maintenance tool on the System Admin Dashboard) can also be used to filter. Using the rule is generally easier to maintain. See KBA-01323 for more information.

To filter all references to an alias in your template:

1. In some unused area, type

   xFilter_*Alias* = *fieldname operator constant*

   where *Alias* is the Spitfire alias, *fieldname* is the name of each field that you want to filter (remember that each bookmark name is made up of an alias and a fieldname), *operator* is one of the comparison operators (<, >, <=, >=, <>, =) and *constant* is the number or text by which you want to filter.

2. For example, if you had a table with the following bookmarks…

Item No.	***Description***
RR_DocItem_OriginalQuote	RR_DocItem_Description

   …and you wanted to include only those rows with the OriginalQuote not equal to 0, you would type:

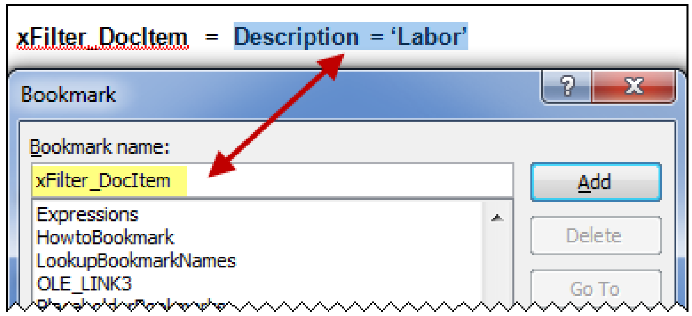
   xFilter_DocItem = OriginalQuote <> 0

   and if you wanted to include only those rows with the Description equal to Labor, you would type:

   xFilter_DocItem = Description = 'Labor'

   Note: text must be contained within single straight quotes **', not ‘or ’**.

3. Hide the line you just typed, as described on page 29.
4. Highlight everything that comes after the = sign.
5. Insert a bookmark. The name of this bookmark will be what you typed in front of the = sign (in this example, **xFilter_DocItem**).

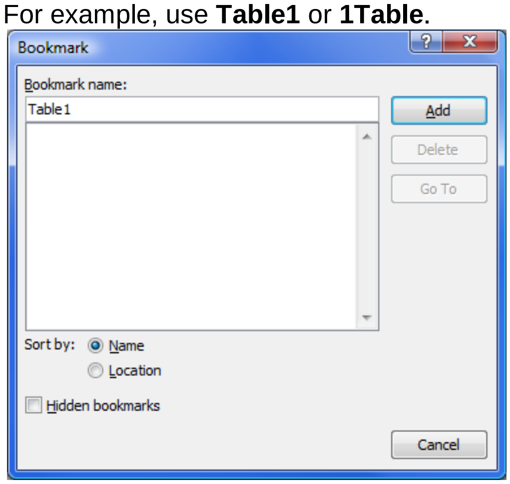


6. Click .

To filter a list in a particular table in your Template:

1. Click  to highlight the whole table that you want filtered, for example:

2. Insert a bookmark. For the bookmark name, use any short name that begins or ends with the word "Table" that will identify this table for you. **Important**: do *not* use underscores in your name. For example, use **Table1** or **1Table**.



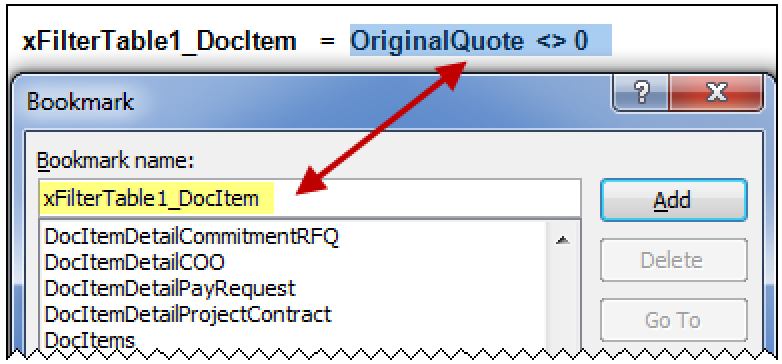
3. Click .

4. Use this bookmark name to create a new prefix by adding it to the xFilter prefix, for example, **xFilterTable1_**.

5. Follow the directions for using the xFilter_ prefix but use your newly created xFilter*Tablename*_ prefix in its place. For example, your hidden text might be:

   xFilterTable1_DocItem = OriginalQuote <> 0

   so the bookmark would be:



6. Repeat this process for other tables that you want filtered in your template.

WordTemplateConfig Rules

Trouble-shooting Rules

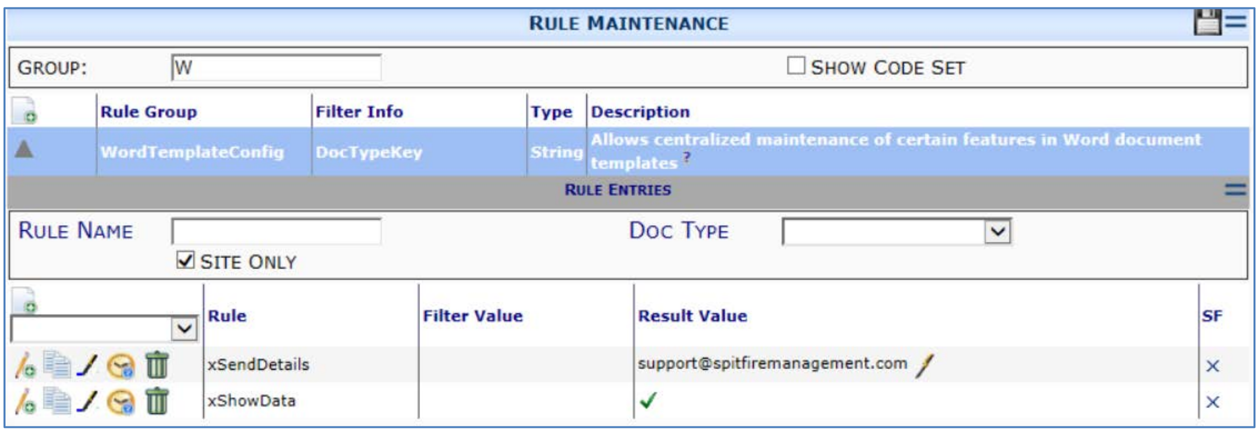
If you have access to the System Admin Dashboard, you can set up rules throught the Rule Maintenance tool. Several rules in the WordTemplateConfig rule group help you troubleshoot your Bookmark Templates.

xSendDetails—this rule sends a copy of the generated file along with template analysis to the entered email address.

xSendExceptionsOnly—this rule is similar to xSendDetails except it only sends details for templates with errors.

xShowData—this rule includes all the data this document template could display

If the Filter Value is blank, all the generated templates will be included in the rule. If you select a Doc type in the Filter Value column, then only generated templates from that Doc type will be included.



User-Defined Bookmarks

The WordTypeConfig rule group allows you to create your own bookmarks. In some cases this can be a simple entry and in other cases, your user-defined bookmark could run a stored procedure and return multiple bookmark values.

Here's one simple example. If you print a list of the Routees on your document at the bottom of the generated template, you must use the RR_ prefix to print the multiple routees. But that also means you have to use a table and put each field in a separate column. In this case, some of your routees could have short names (e.g., Jim Fox) and other could have long names (e.g., Alexandra Pendleton-Walker). When printing the routee name and company, you could get the following (shown on the next page):

Cc'd:

Jim Fox, Acme Construction Inc.

Alexandra Pendleton-Walker, Acme Construction Inc.

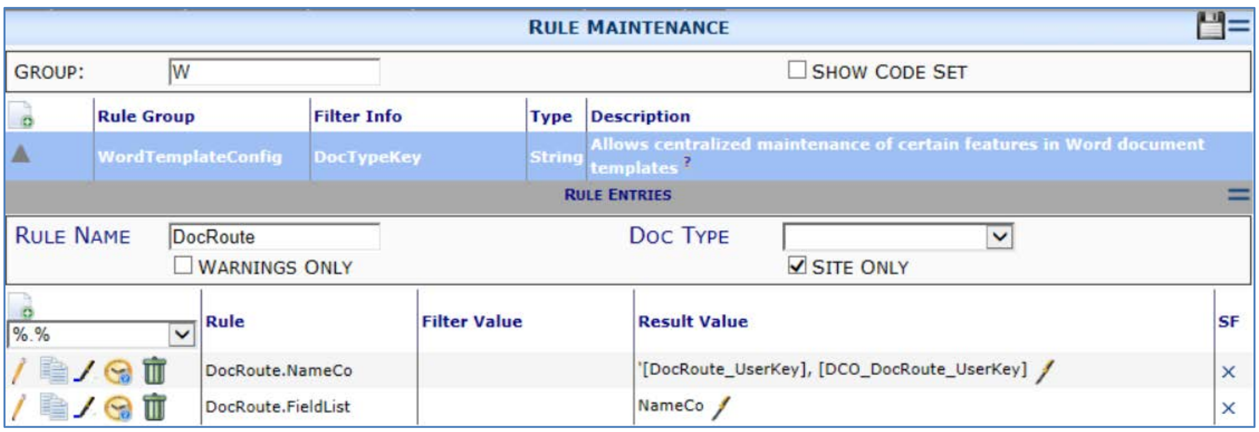
When you really want:

Cc'd:

Jim Fox, Acme Construction Inc.

Alexandra Pendleton-Walker, Acme Construction Inc.

You can achieve your formatting goal by creating a user-defined bookmark in the WordTemplateConfig rule:



Rule = DocRoute.NameCo	DocRoute is the table that stores the data and NameCo is the user-defined name
Filter Value =	a Doc Type (or blank for all Doc Types)
Result Value = '[DocRoute_UserKey], [DCO_DocRoute_UserKey]'	The two separate bookmarks in [ ] square brackets with the , comma in between and the entire expression enclosed in '…' single quotes.

Notice too, the **DocRoute:FieldList** rule with the Result Value = NameCo, the name of our user defined bookmark. By adding the new bookmark to the FieldList, sfPMS will know to gather the data for the bookmark. See also KBA-01348.

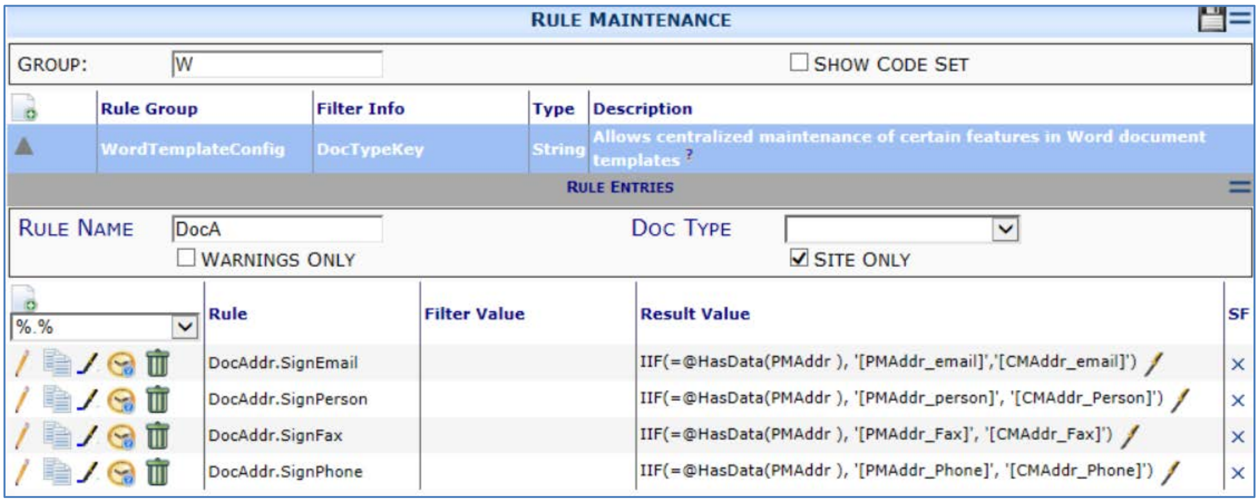
You can use IF statements, too. The user-defined bookmark below was created for projects that didn't have a Project Manager. In these bookmarks, the Project Manager is usually the person who signs off on all the project documents, but on some smaller projects, a Project Manager isn't assigned and the Construction Manager handles all the paperwork. The user-defined bookmarks says "If the PMAddr data exists, print the PMAddr_data, otherwise print the CMAddr_data" The four bookmarks below are used as a set to print the Name, Email address, Phone and Fax numbers on various Project Templates.

DocAddr.SignPerson → IIF(=@HasData(PMAddr), '[PMAddr_person]', '[CMAddr_Person]')

DocAddr.SignFax → IIF(=@HasData(PMAddr), '[PMAddr_Fax]', '[CMAddr_Fax]')

DocAddr.SignEmail → IIF(=@HasData(PMAddr), '[PMAddr_email]', '[CMAddr_email]')

DocAddr.SignPhone → IIF(=@HasData(PMAddr), '[PMAddr_Phone]', '[CMAddr_Phone]')



You can also pull data from one document to another. In the example below, The Invitation to Bid contains a user defined Date Type Subcontractor's Bid Due. Any RFQ sent to potential bidders should contain this Date.

Rule = DocMasterDetail.SubDue	DocMasterDetail refers to the DocHeader info–which is where the Project Number will be found. SubDue is the user-defined bookmark.
Filter Value =	a Doc Type (or blank for all Doc Types)
Result Value = '=@DV(DateStart,0001,[DocHeader_Project], 6d384462-6c13-42c5-a744-8e70dbd7e95d,4bf304c6-8aaf-4ff3-a464-a389fb0c09f2)	Using the @DV function to find the DateStart field of DocNo = 0001, of this project, followed by two GUIDs, one for the Doc Type where the Date is entered and one for the Date Type on that Document. See KBA-01505.

Computed Fields

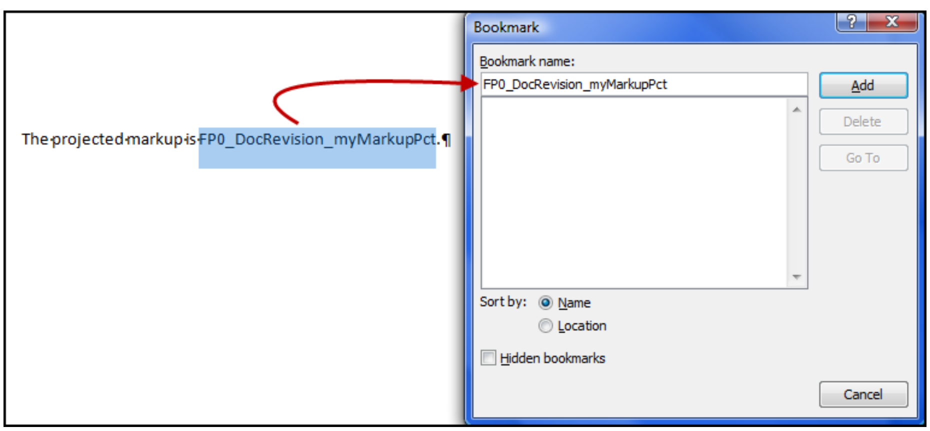
There may be times when you want to use values in your Spitfire document to calculate a new value. Use one of the xCMP prefixes to create a new computed field to include in your Bookmark Template. Use

- the **xCMPDEC_** prefix for a decimal value;
- the **xCMPINT_** prefix for an integer value;
- the **xCMPDAT_** prefix for a date/time value;
- the **xCMPSTR_** prefix for a string value (text).

First, you create a placeholder bookmark for where you want the computed field to appear. Then, you use one of these prefixes to create the computed field. You can also use advanced expressions with these prefixes; see page 40.

To add a placeholder bookmark for your computed data:

1. Find the alias of the fields that you want to use in your calculation. For example, if you wanted to divide your Current Request Amount (DocRevision_cmpToRevenueAmount) by your Net Pay Amount (DocRevision_cmpToExpenseAmount), the alias would be **DocRevision**.
2. In the location where you want the result of your calculation to appear (in a table, paragraph, etc.), type the alias, an underscore, and a new fieldname (which can be whatever you want.) You can include simple prefixes also. You are creating a new placeholder bookmark, for example, **FP0_DocRevision_myMarkupPct**.
3. Highlight this placeholder, copy it, and insert a bookmark, using the full *prefix_alias_fieldname* as your Bookmark Name, for example:



4. Note the alias + fieldname bookmark name you just created (for example, DocRevision_myMarkupPct). You will need it for the xCMP prefix in the following instructions.

To add computed fields in your template:

1. In some unused area, type

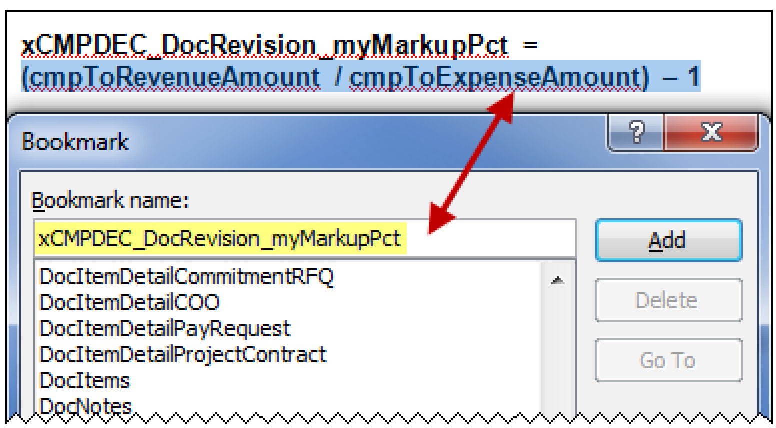
   xCMPttt_Alias_NewFieldName = calculation (including fieldnames)

   where *xCMPttt* is one of the xCMP prefixes mentioned previously; *Alias* is the Spitfire alias of the fields to be used in the calculation (remember that each bookmark name is made up of an alias and a fieldname.); *NewFieldName* is the name you created for your new field; and *calculation (including fieldnames)* is either a mathematical calculation of fields or a concatenation of text strings.

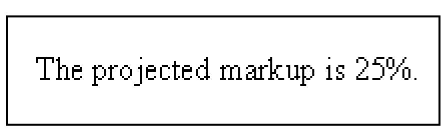
   For example, if you wanted to divide your Current Request Amount by your Net Pay Amount and use the bookmark you created in the previous example for the result, you would type:

   xCMPDEC_DocRevision_myMarkupPct = (cmpToRevenueAmount / cmpToExpenseAmount) – 1

2. Hide the line you just typed, as described on page 29.
3. Highlight everything that comes after the = sign.
4. Insert a bookmark. The name of this bookmark will be what you typed in front of the = sign (in this example, **xCMPDEC_DocRevision_myMarkupPct**).

5. Click . The result of your calculation will now appear wherever the newly created field appears in your Doc Template, for example:

Expressions

TIP

Aggregate functions are outside the scope of this guide. For more information, contact Spitfire support.

Both filters and computed fields use expressions. Expressions enable you to compute and manipulate data. In the filter example, **OriginalQuote <> 0** was the expression; in the computed fields example, **(cmpToRevenueAmount / cmpToExpenseAmount) - 1** was the expression. Those were fairly simple expressions. Expressions can be more complicated.

Expressions can do comparisons, computations, or aggregations. They can include both operators and functions. **Note**: text strings require single quote marks around them. Grouping with ( ) is recommended.

Operators

Operator	***Explanation***	***Example***	***Possible Result***
<	Less Than	`OriginalQuote < 5`	4, 3, 2, etc.
>	Greater Than	`OriginalQuote > 5`	6, 7, 8, etc.
<=	Less Than or Equal	`OriginalQuote <= 5`	5, 4, 3, etc.
>=	Greater Than or Equal	`OriginalQuote >= 5`	5, 6, 7, etc.
<>	Not Equal	`OriginalQuote <> 0`	-1, 1, 2, etc.
=	Equal	`OriginalQuote = 5`	5
IN	In the (list)	`State IN (‘NY’,’NJ’,’CT)`	NY, NJ, CT
LIKE	Like the text and wildcard that follows. Wildcards are * or % and they can be used before or after the text string.	`State LIKE N%`	NE, NM, NY, etc.
+	Concatenation	`City + ‘, ’ + State`	Norwalk, CT
		E.g., OriginalQuote = 1000 in the following:	
+	Plus	`OriginalQuote + 10`	1010
-	Minus	`OriginalQuote – 10`	990
*	Multiplied By	`OriginalQuote * 100`	100,000
/	Divided By	`OriginalQuote / 10`	100
%	Remainder after division	`OriginalQuote % 3`	1

Functions

Function	***Explanation***	***Example***	***Possible Result***
IIF	IIF(test, a,b) If test is true, returns a, otherwise returns b	`IIF(Quantity > 50, ‘Yes’, ‘No’)`	51 = Yes 49 = No
ISNULL	ISNULL(a,b) If a is null (i.e., not specified), returns b, otherwise returns a	`ISNULL(Quantity, ‘n/a’)`	= n/a 20 = 20
LEN	The string length	`LEN(State)`	2
TRIM	Removes leading and trailing blanks, tabs, carriage returns and line feeds	`TRIM(City)`	
SUBSTRING	SUBSTRING(String,start,len) Extracts part of a string starting at the specified character and for the length specified	`SUBSTRING(City,1,4)`	Philadelphia = Phil

Appendix A

Document Parts

This table can help you find where to look for the fields you want. Once you have the part, look at the Part Tables in the next section.

Note: if you want to access information that is not on the document, see also Appendix B and Appendix C.

If the field you want is in:	***Look in this Part Table:***
The Document Header section (most documents)	Doc Header – Standard
The Document Header section (Change Order, CCO or Pay Request)	Doc Header – CO/CCO/PR
The Document Header section (Commitment)	Doc Header – Commitment
The Addr (or Address) tab	Doc Address
The Attendees (or Contacts, Liens or Resources) tab	Doc Attendee
The Attributes (or Info or Instructions) tab	Doc Attributes
The Compliance tab	Doc Compliance
The Dates tab	Doc Dates
The Incl/Excl tab	Doc Inclusion
The Email (Msg) tab	Doc Msg
The Notes (or Scope or Work) tab	Doc Notes
The Details (or Amounts) tab (most documents)	Doc Detail - Standard
The Details tab (CCO)	Doc Detail – CCO
The Details tab (Change Order, PCO)	Doc Detail – CO
The Details tab (Commitment)	Doc Detail – Commitment
The Details tab (Pay Request)	Doc Detail – Payment Request
The Details tab (Project Contract)	Doc Detail – Project Setup/Contract
The Items (or Cost Codes) tab: Item Grid View	Doc Items
The Items (or Cost Codes) tab: Item Detail View on most documents	Doc Item Detail - Standard
The Items tab (Item Detail View) on CCO	Doc Item Detail – CCO
The CI tab (Item Detail View) on Change Order	Doc Item Detail – CO
The Items tab (Item Detail view) on Receipt	Doc Item Detail – Commitment Receipt
The Items tab (Item Detail View) on Commitment, RFQ	Doc Item Detail – Commitment, RFQ
The Items tab (Item Detail View) on Pay Request	Doc Item Detail – Pay Request
The Items tab (Item Detail View) on Production Units	Doc Item Detail – Production Units
Budget Entries window (for an Item)	See page 56
The Attachment tab	See page 51
The Route tab	See page 50

Part Tables

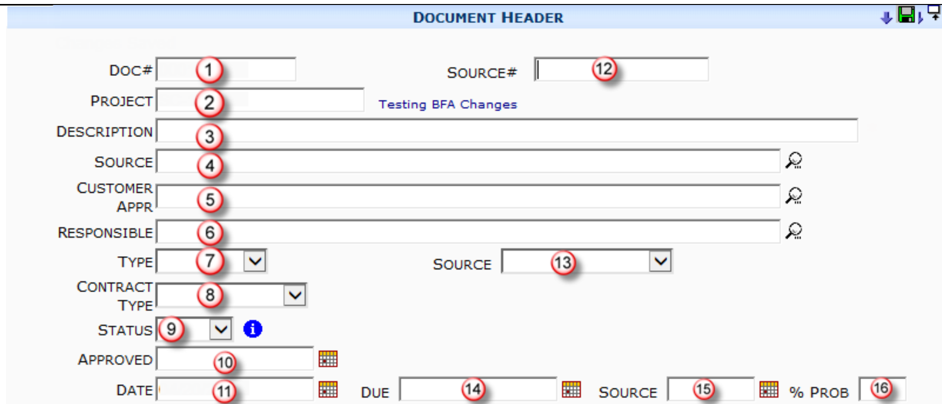
TIP

Items will likely require the RR_prefix. See pages 22 and 60.

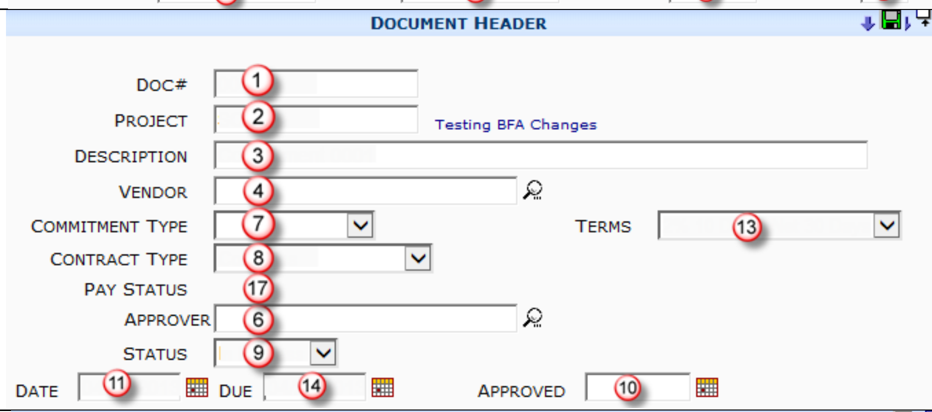
The following tables give the bookmark name (alias + fieldname) for most fields in Spitfire documents. Some fields (and their respective bookmark names) are included in more than one part. And some fields have more than one valid bookmark name. Note that fields may have different labels in your installation of sfPMS. For images of where to find the field in each part, see the UI Configuration tool on the System Admin Dashboard.

Document Header

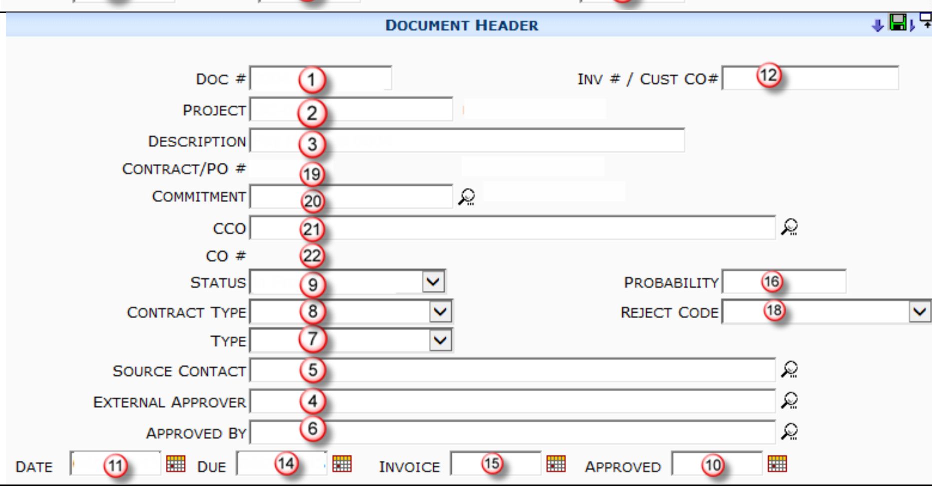
Standard



Commitment



Pay Request / CCO / CO

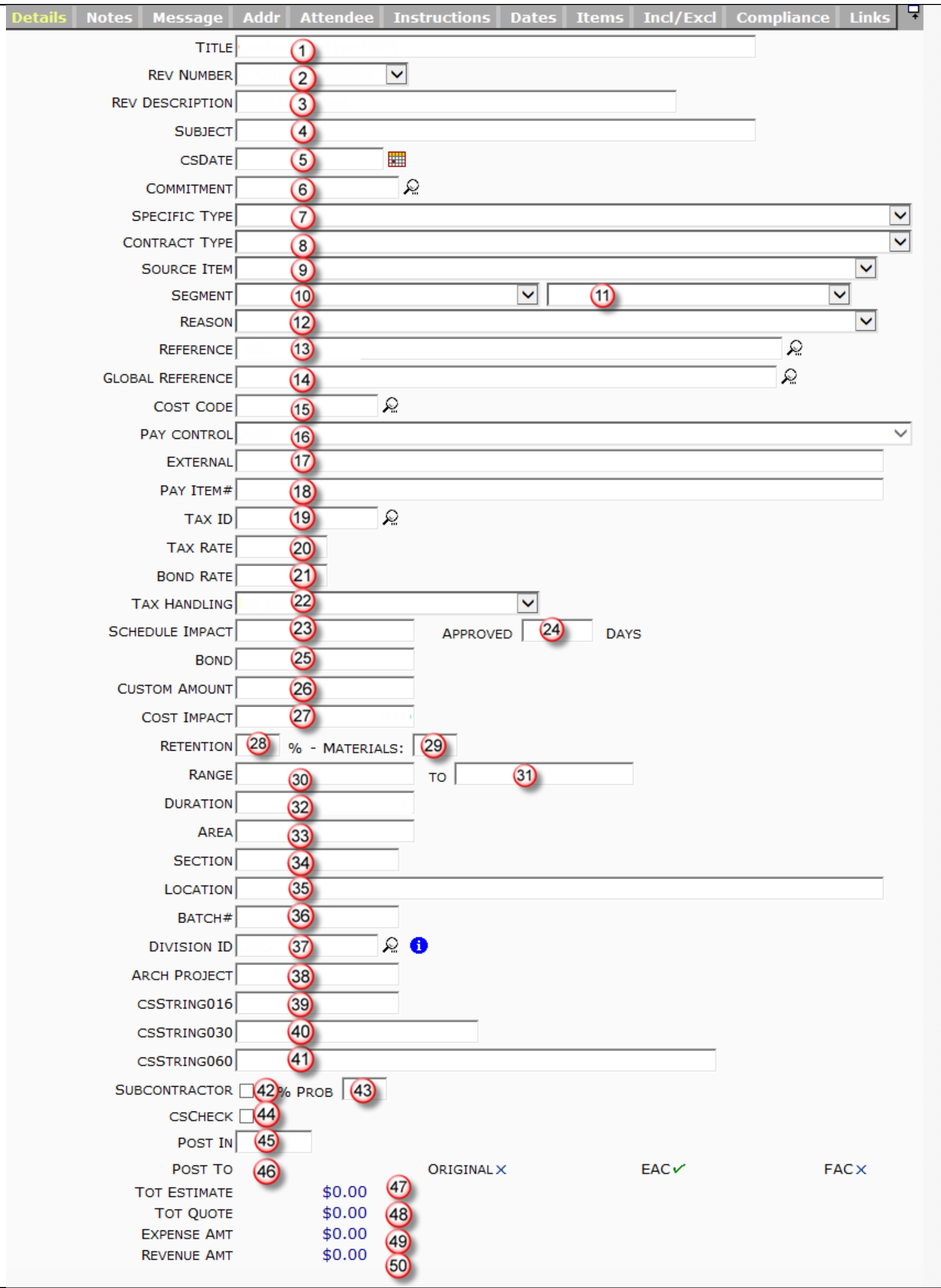


Bookmark Name

1	DocHeader_DocNo
2	DocHeader_Project
3	DocHeader_Title
4	DocHeader_SourceContact
5	DocHeader_OwnerApprover
6	DocHeader_ResponsibleParty
7	DocHeader_SubType
8	DocHeader_ContractType
9	DocHeader_Status
10	DocHeader_Signoff
11	DocHeader_DocDate
12	DocHeader_SourceDocNo
13	DocHeader_Source
14	DocHeader_Due
15	DocHeader_SourceDate
16	DocHeader_Probability
17	DocHeader_ComplianceInfo
18	DocHeader_Reason
19	DV_DocHeader_ProjectContractName
20	DocHeader_Subcontract
21	DocHeader_LinkedDocKey (on a Pay Request)
22	DocHeader_LinkedDocKey (on a CCO)

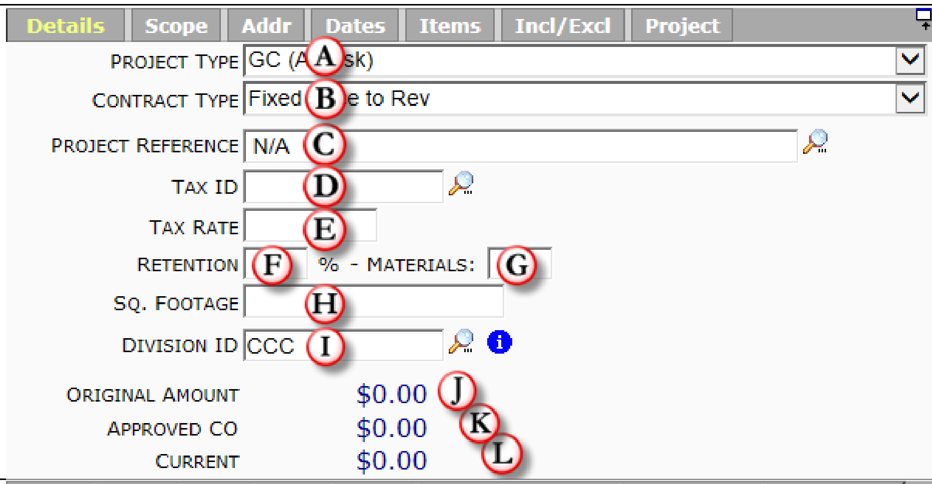
Doc Detail

Standard



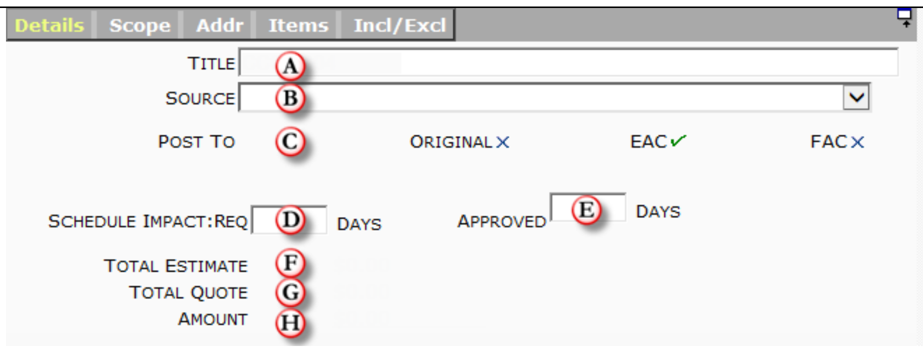
	Bookmark Name
1	DocHeader_Title
2	DocRevision_DocRevKey
3	DocRevision_Description
4	DocRevision_EmailSubject
5	DocRevision_csDate
6	DocHeader_SubContract
7	DocHeader_Subtype
8	DocHeader_ContractType
9	DocHeader_Source
10	DocRevision_Segment
11	DocRevision_SubSegment
12	DocHeader_Reason
13	DocHeader_DocReference
14	DocHeader_UniReferenceKey
15	DocHeader_ProjEntity
16	DocHeader_PayControl
17	DocHeader_ExternalDocNo
18	DocHeader_PayItemNumber
19	DocRevision_TaxID
20	DocRevision_TaxRate
21	DocRevision_BondRate
22	DocRevision_TaxHandling
23	DocRevision_DaysRequested
24	DocRevision_DaysApproved
25	DocRevision_Bond
26	DocRevision_csAmount
27	DocRevision_CostImpact
28	DocRevision_CWRetention
29	DocRevision_SMRetention
30	DocRevision_RangeFrom
31	DocRevision_RangeThru
32	DocHeader_Duration
33	DocHeader_Area
34	DocHeader_Section
35	DocHeader_Location
36	DocHeader_DocBatchNo
37	DocHeader_DivisionID
38	DocRevision_ArchProject
39	DocRevision_csString016
40	DocRevision_csString030
41	DocRevision_csString060
42	DocHeader_DocFlag
43	DocHeader_Probability
44	DocRevision_csCheck
45	DocRevision_InPeriod
46	DocHeader_UpdateMask
47	DocRevision_cmpToOriginalEstimate
48	DocRevision_cmpToOriginalQuote
49	DocRevision_cmpToExpenseAmount
50	DocRevision_cmpToRevenueAmount

Project Setup

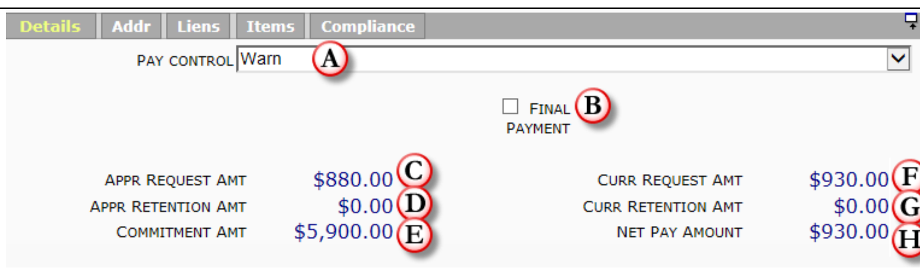


Commitment

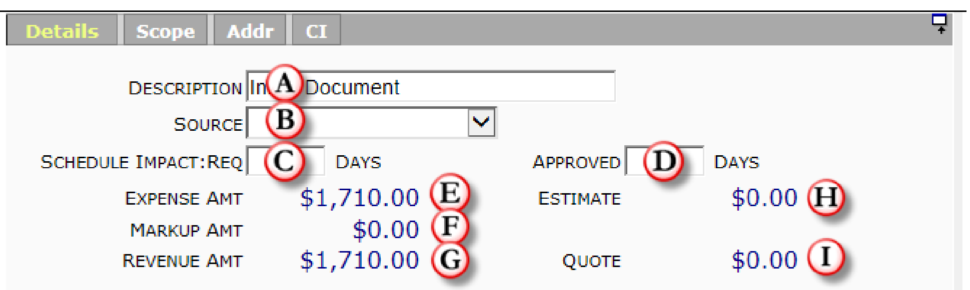
CCO



Pay Request



Change Order



Bookmark Name

Project Setup

A DocHeader_Subtype
B DocHeader_ContractType
C DocHeader_DocReference
D DocRevision_TaxID
E DocRevision_TaxRate
F DocHeader_CWRetention
G DocHeader_SMRetention
H DocHeader_Area
1 DocHeader_DivisionID
J DocRevision_cmpToRevenueAmount
K DocRevision_cmpToApprovedAmount
L DocRevision_cmpToContractAmount

Commitment

A DocRevision_TaxHandling
B DocRevision_CWRetention
C DocHeader_DocFlag
D DocHeader_UpdateMask
E DocRevision_cmpToExpenseAmount
F DocRevision_cmpToApprovedExpense
G DocRevision_cmpToRevised
H DocRevision_cmpToPendingChangeExpense
I DocRevision_cmpToTotal

CCO

A DocHeader_Title
B DocHeader_Source
C DocHeader_UpdateMask
D DocRevision_DaysRequested
E DocRevision_DaysApproved
F DocRevision_cmpToOriginalEstimate
G DocRevision_cmpToOriginalQuote
H DocRevision_.cmpToExpenseAmount

Pay Request

A DocHeader_PayControl
B DocHeader_Final
C DocRevision_cmpToVoucheredAmount
D DocRevision_cmpToVoucheredRetention
E DocRevision_cmpToContractAmount
F DocRevision_cmpToRevenueAmount
G DocRevision_cmpToRetentionAmount
H DocRevision_cmpToExpenseAmount

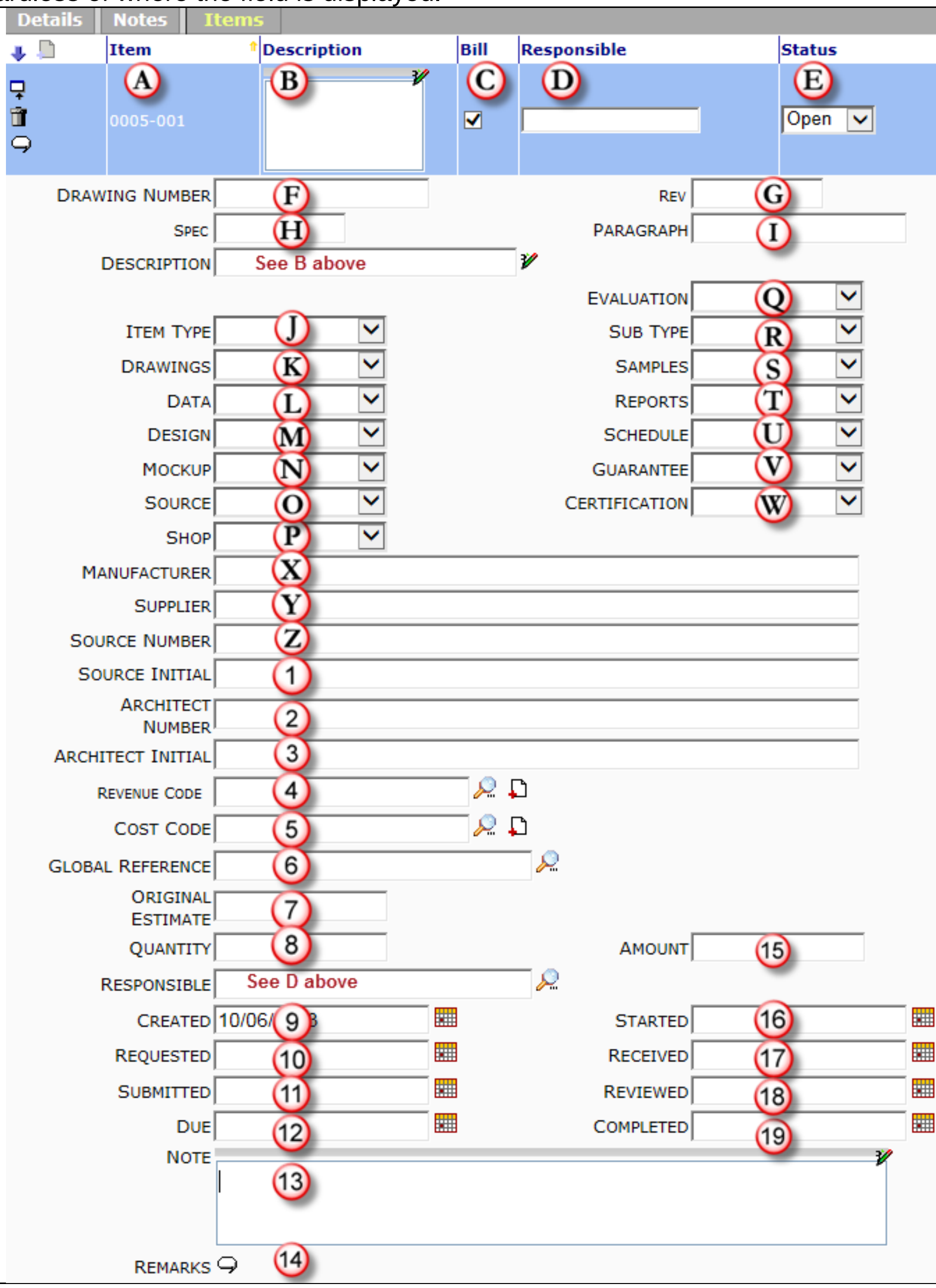
Change Order

A DocHeader_Title
B DocHeader_Source
C DocRevision_DaysRequested
D DocRevision_DaysApproved
E DocRevision_cmpToExpenseAmount
F DocRevision_cmpToMarkupAmount
G DocRevision_cmpToRevenueAmount
H DocRevision_cmpToOriginalEstimate
I DocRevision_cmpToOriginalQuote

Doc Item Detail

Fields displayed in the Doc Item section (top row with Blue Background) are a subset of the fields displayed in the Doc Item Detail. The bookmark for the field is the same regardless of where the field is displayed.

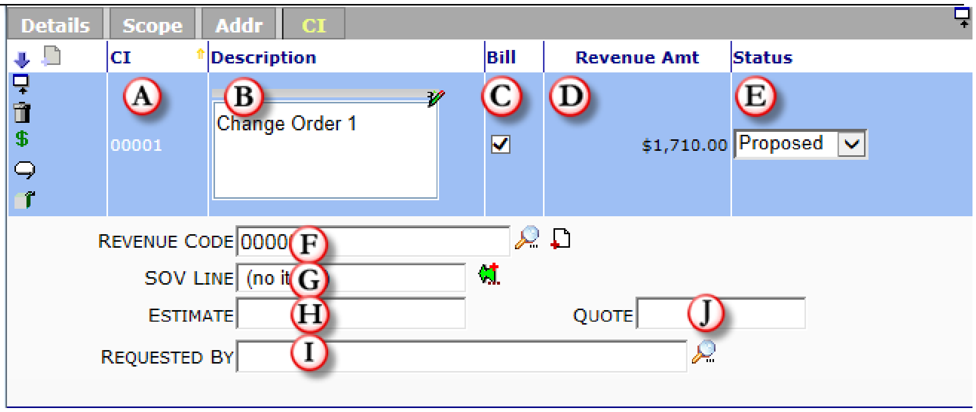
Standard



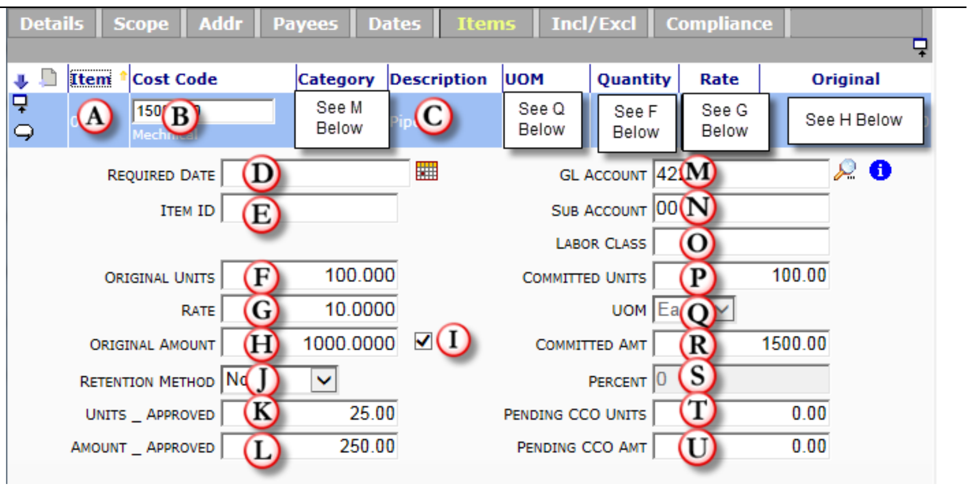
	Bookmark Name
A	DocRevItem_ItemNumber
B	DocItem_Description
C	DocItem_Billable
D	DocItem_ResponsibleParty
E	DocItem_ItemStatus
F	DocItem_DrawingNumber
G	DocItem_RevisionNumber
H	DocItem_Specification
I	DocItem_Paragraph
J	DocItem_ItemType
K	DocItem_Drawings
L	DocItem_ProductData
M	DocItem_MixDesign
N	DocItem_FieldMockup
O	DocItem_ItemSource
P	DocItem_Shop
Q	DocItem_Evaluation
R	DocItem_ItemSubtype
S	DocItem_Samples
T	DocItem_TestReport
U	DocItem_Schedule
V	DocItem_Guarantee
W	DocItem_Certification
X	DocItem_Manufacturer
Y	DocItem_Supplier
Z	DocItem_SourceItemNumber
1	DocItem_SourceInitialNumber
2	DocItem_ArchitectItemNumber
3	DocItem_ArchitectInitialNumbe
4	DocItem_RevenueEntity
5	DocItemTask_ProjEntity
6	DocItemTask_ProjectReference
7	DocItem_OriginalEstimate
8	DocItemTask_Quantity
9	DocItem_TaskCreated
10	DocItem_Requested
11	DocItem_Submitted
12	DocItem_Due
13	DocItemTask_Note or DocItem_TaskNote
14	DocItemComment_TopicKey
15	DocItem_OriginalQuote
16	DocItem_Started
17	DocItem_Received
18	DocItem_Reviewed
19	DocItem_Completed

Doc Item Detail (Continued)

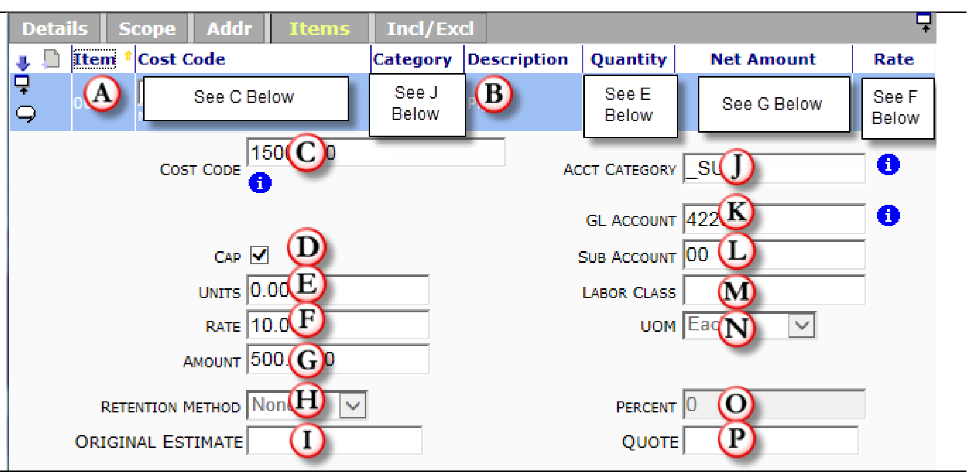
Change Order



Commitment/RFQ



CCO



Bookmark Name

Change Order

- A DocRevItem_ItemNumber
- B DocItem_Description
- C DocItem_Billable
- D DocItemTask_RevenueAmount
- E DocItem_ItemStatus
- F DocItem_RevenueEntity
- G DocItem_SOVLineNumber
- H DocItem_OriginalEstimate
- I DocItem_OriginalQuote
- J DocItem_ResponsibleParty

Commitment / RFQ

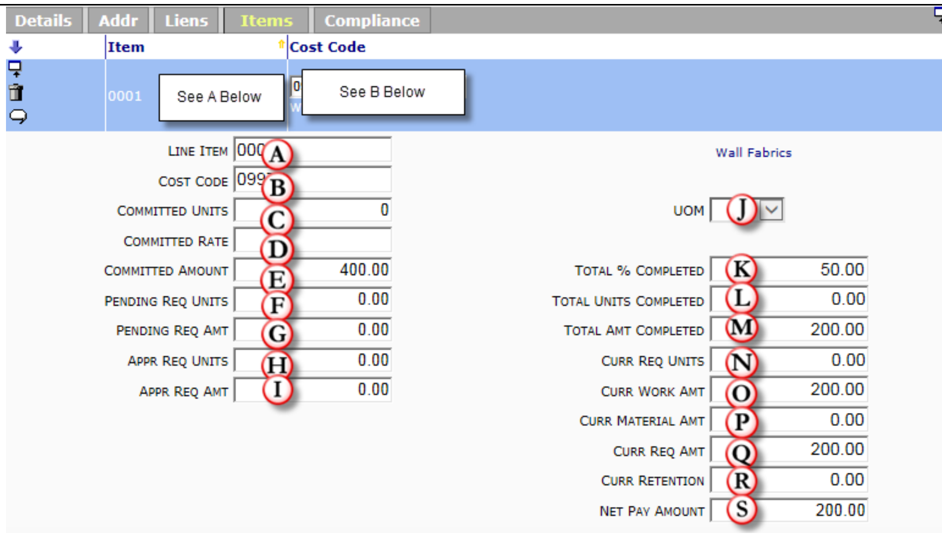
- A DocRevItem_ItemNumber
- B DocItemTask_ProjEntity
- C DocItem_Description
- D DocItem_Due
- E DocItem_SourceItemNumber
- F DocItemTask_Quantity
- G DocItemTask_Rate
- H DocItemTask_ExpenseAmount
- I DocItemTask_MarkupControl
- J DocItemTask_RetentionMethod
- K SPRLineDetails_VoucheredUnits
- L SPRLineDetails_VoucheredAmount
- M DocItemTask_AccountCategory
  DocItemTask_GLAcct
- N DocItemTask_GLSub
- O DocItemTask_LaborClass
- P SPRLineDetails_ContractUnits
- Q DocItemTask_UOM
- R SPRLineDetails_ContractAmount
- S DocItemTask_ItemPercent
- T SPRLineDetails_PendingChangeUnit
- U SPRLineDetails_PendingChangeExp

CCO

- A DocRevItem_ItemNumber
- B DocItem_Description
- C DocItemTask_ProjEntity
- D DocItemTask_MarkupControl
- E DocItemTask_Quantity
- F DocItemTask_Rate
- G DocItemTask_ExpenseAmount
- H DocItemTask_RetentionMethod
- I DocItem_OriginalEstimate
- J DocItemTask_AccountCategory
- K DocItemTask_GLAcct
- L DocItemTask_GLSub
- M DocItemTask_LaborClass
- N DocItemTask_UOM
- O DocItemTask_ItemPercent
- P DocItem_OriginalQuote

Doc Item Detail (Continued)

Pay Request

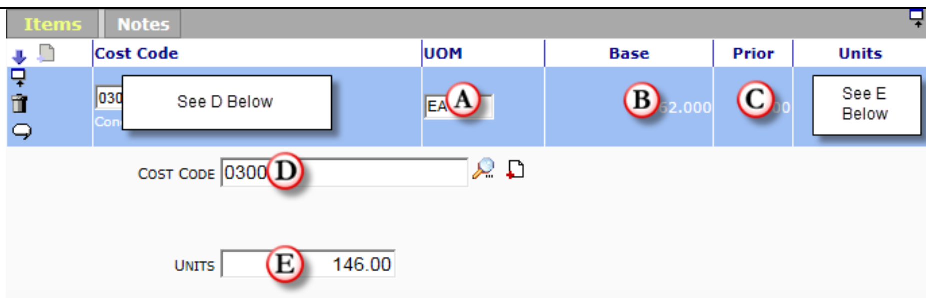


Bookmark Name

Pay Request

- A DocRevItem_ItemNumber
- B DocItemTask_ProjEntity
- C SPRLineDetails_ContractUnits
- D DocItemTask_Rate
- E SPRLineDetails_ContractAmount
- F SPRLineDetails_PendingChangeUnits
- G SPRLineDetails_PendingChangeAmount
- H SPRLineDetails_VoucheredUnits
- I SPRLineDetails_VoucheredAmount
- J DocItemTask_UOM
- K SPRLineDetails_TotalPercentRequest
- L SPRLineDetails_TotalUnitsCompleted
- M SPRLineDetails_TotalAmountCompleted
- N DocItemTask_Quantity
- O DocItemTask_WorkAmount
- P DocItemTask_StoredAmount
- Q DocItemTask_RevenueAmount
- R DocItemTask_RetentionAmount
- S DocItemTask_ExpenseAmount

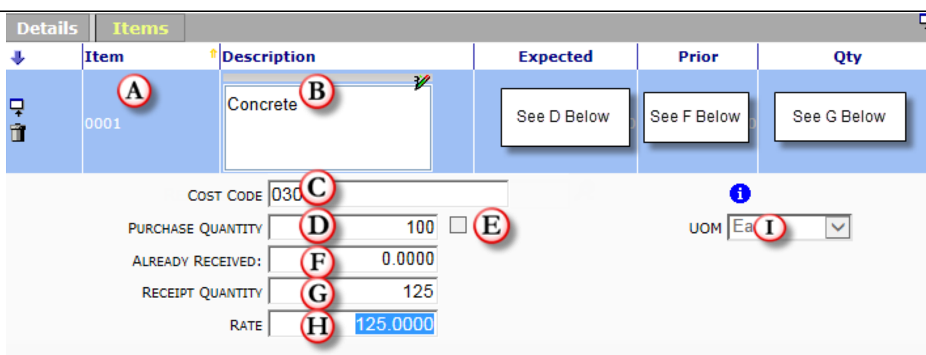
Production Units



Production Units

- A DocItemTask_UOM
- B SPRLineDetails_ContractUnits
- C SPRLineDetails_ReceivedUnits
- D DocItemTask_ProjEntit
- E DocItemTask_Quantity

Receipt

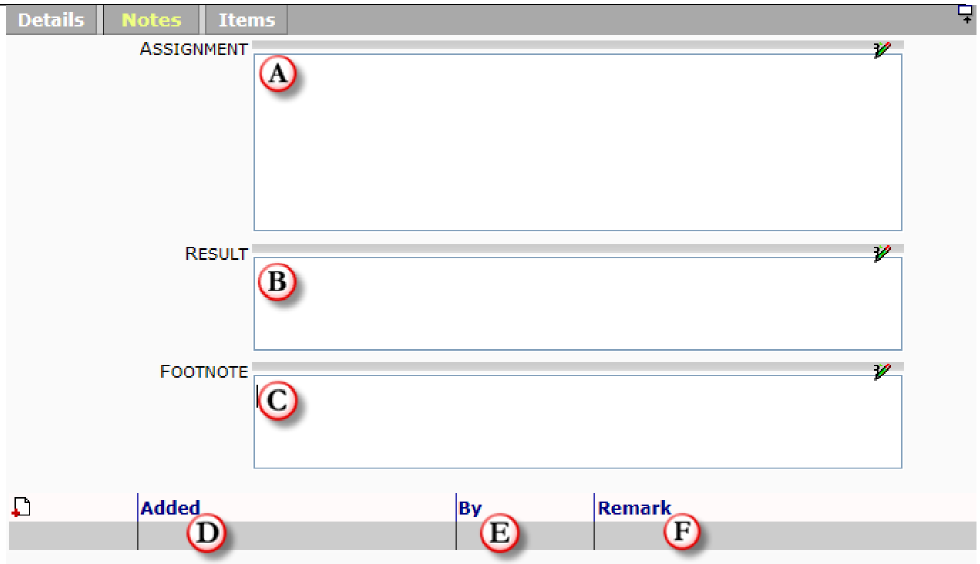


Receipt

- A DocRevItem_ItemNumber
- B DocItem_Description
- C DocItemTask_ProjEntity
- D SPRLineDetails_ContractUnits
- E DocItemTask_MarkupControl
- F SPRLineDetails_ReceivedUnits
- G DocItemTask_Quantity
- H DocItemTask_Rate
- I DocItemTask_UOM

Notes/Scope tab

Standard



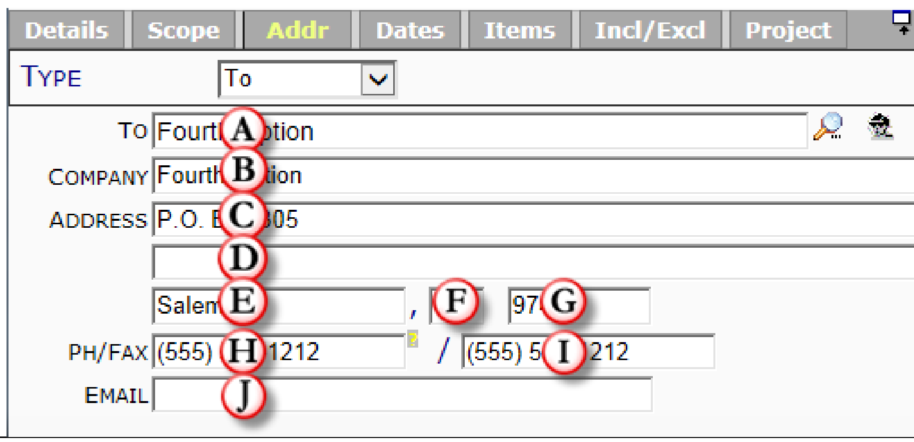
Bookmark Name

Notes tab

A DocRevision_Notes
B DocRevision_NoteA
C DocRevision_NoteB
D CommentList_Created
E CommentList_FromUser
F CommentList_Note

Address tab

Standard



Address tab

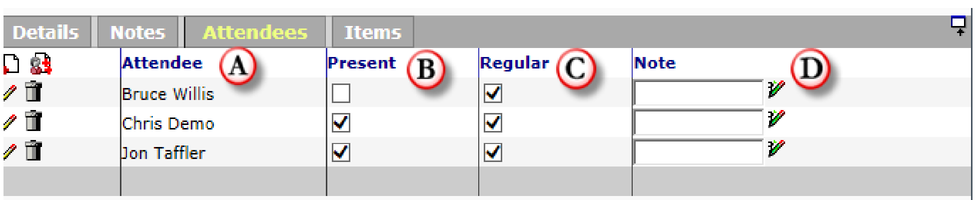
(see the Contact section Page 16)

xxx = Addr Prefix

A *xxx*Addr_Person
B *xxx*Addr _Company
C *xxx*Addr _Addr1
D *xxx*Addr _Addr2
E *xxx*Addr _City
F *xxx*Addr _State
G *xxx*Addr_ZIP
H *xxx*Addr_Phone
I *xxx*Addr_Fax
j *xxx*Addr_email

Attendee tab

Standard



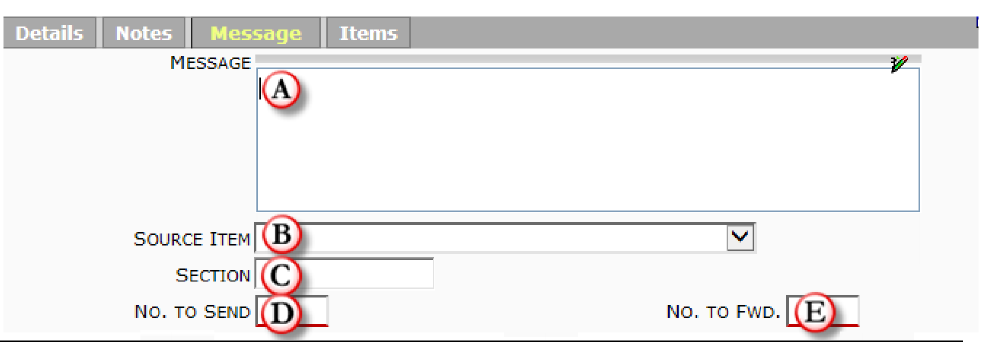
Attendee tab

A DocMeetingAttendee_UserKey
B DocMeetingAttendee_Present
Or
DocMeetingAttendee_YNPresent
C DocMeetingAttendee_IsRegular
Or
DocMeetingAttendee_YNRegular
D DocMeetingAttendee_Note

Additional fields not shown:
DocMeetingAttendee_Resolved (Date)
DocMeetingAttendee_Amount
DocMeetingAttendee_LinkedItemKey

Message tab

Standard

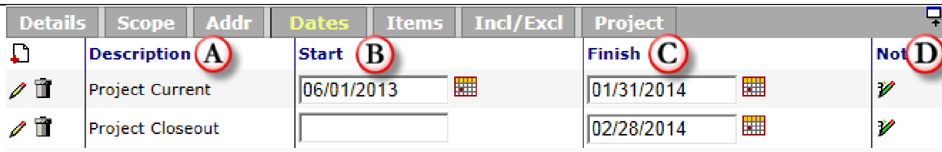


Message tab

A DocRevision_NoteEML
B DocHeader_Source
C DocHeader_Section
D DocHeader_NumToSend
E DocHeader_NumToForward

Dates tab

Standard



Identify which DateType by added DateTypeName or Sequence # to the Bookmark:

*xxxxxxxxx*DocDates_ActStart Or S##Date_ActStart

For example: ProjectCurrentDocDates_ActStart or S60Dates_ActStart

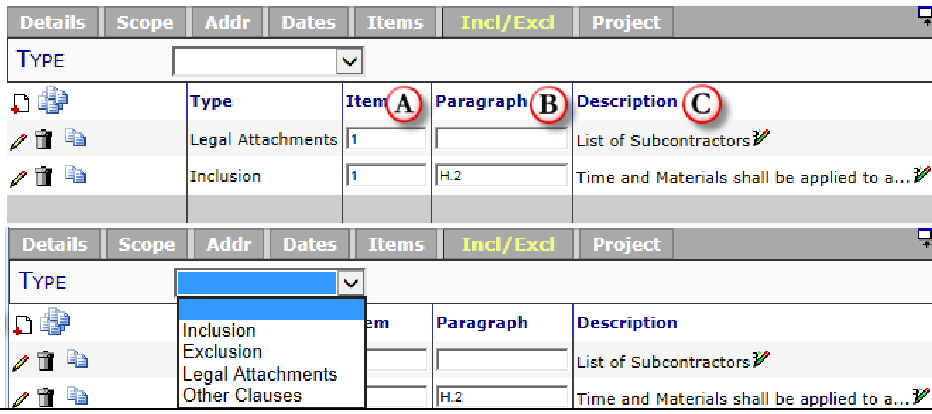
Bookmark Name

Dates tab

A	DocDates_Description
B	DocDates_ActStart
C	DocDates_ActFinish
D	DocDates_Note

Include/Exclude tab

Standard



Include/Exclude tab

A	*xxxxx*_ItemNumber
B	*xxxxx*_Paragraph
C	*xxxxx*_ItemText

Replace xxxxx with Type

Inclusion

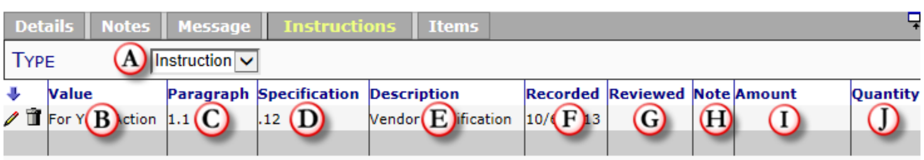
Exclusion

LegalAtt

OtherClause

Instruction/Attributes tab

Standard

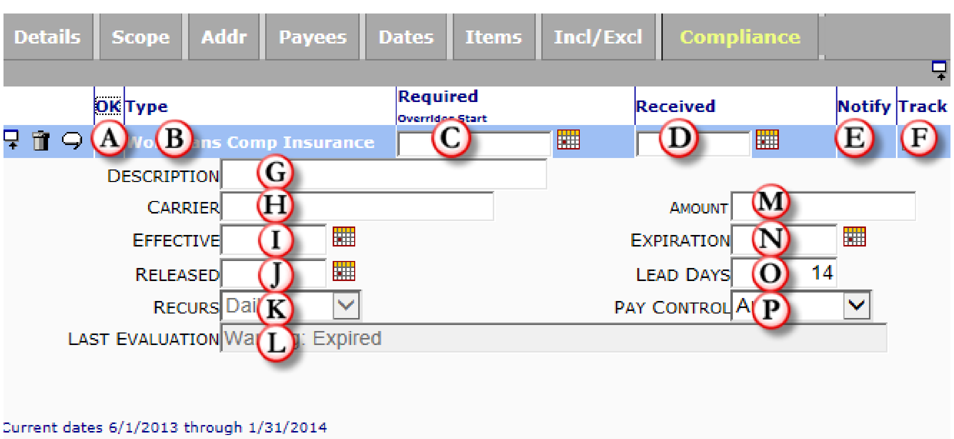


Instruction/Attributes tab

A	DocInstruction_AttrType
B	DocInstruction_AttrValue
C	DocInstruction_Paragraph
D	DocInstruction_Specification
E	DocInstruction_Description
F	DocInstruction_Recorded
G	DocInstruction_Reviewed
H	DocInstruction_Note
I	DocInstruction_Amount
J	DocInstruction_Quantity

Compliance tab

Standard



Compliance tab

A	DocCompliance_Complied
B	(not available)
C	DocCompliance_RequiredBy
D	DocCompliance_Received
E	DocCompliance_Alerts
F	DocCompliance_CertificateReqd
G	DocCompliance_Description
H	DocCompliance_Carrier
I	DocCompliance_Effective
J	DocCompliance_Released
K	DocCompliance_Recurs
L	DocCompliance_LastReason
M	DocCompliance_Amount
N	DocCompliance_Expiration
O	DocCompliance_LeadDays
P	DocCompliance_PayControl

Appendix B: Other Bookmarks

While Appendix A gives you the bookmark names of fields that you can see on your documents, this appendix indicates the bookmark names you should use to access information held in sfPMS about your project that is not necessarily visible on your document.

Data from Route Details

Use the following bookmark names for information related to a document's Route Details tab (i.e., the routee rows on a document):

Since the Route Details tab can have multiple rows, these bookmarks usually include the RR_ prefix (see page 22).

Bookmark with Prefix	***Explanation***
RR_DocRoute_BinType	The type of transmittal file (doc, docx) (Valid only if the routee is marked for transmittal.)
RR_DocRoute_ByUser	The person who specified the use of a transmittal. (Valid only if the routee is marked for transmittal.) Can be used with Contact prefixes. See page 18.
RR_DocRoute_Created	The date a transmittal was specified. (Valid only if the routee is marked for transmittal).
RR_DocRoute_FromUser	The person who added this routee to the route (internal field). Can be used with Contact prefixes. See page 18.
RR_DocRoute_GroupNo	Whether the route is part of a "Pending Any" group. 0 means No; any other number means Yes.
RR_DocRoute_HasBinData	Whether a transmittal has already been generated and saved. 0 means No; 1 means Yes. (Valid only if the routee is marked for transmittal.)
RR_DocRoute_ReplyTo	Whether email routes after this one may reply to this route. 0 means No; 1 means Yes. Note: replies go to the closest preceding route with a true ReplyTo.
RR_DocRoute_RouteVia	The route method. E = Email, F = Fax, W = Web, H = Hard Copy
RR_DocRoute_SendAlerts	Whether the routee will receive any alerts generated for the document. 0 means No; 1 means Yes.
RR_DocRoute_Sequence	The sequence in the routing
RR_DocRoute_Stage	The stage in the routing
RR_DocRoute_Status	The status of the route
RR_DocRoute_TransNumber	The transmittal number. (Valid only if the routee is marked for transmittal).
RR_DocRoute_UserDocEdit	Whether the routee is a collaborator. 0 means No; 1 means Yes.
RR_DocRoute_UserKey	Internal fieldname can be used with Contact prefixes. See page 18.

Route Data for Transmittal Doc Templates

The following bookmarks can be used on Transmittal templates only.

Bookmark	***Explanation***
ToRoute_BinType	The type of the transmittal file (doc, docx)
ToRoute_ByUser	The person who specified the use of the transmittal. Can be used with Contact prefixes. See page 18.
ToRoute_Created	The date the transmittal was specified.
ToRoute_FromUser	The person who added this routee to the route (internal field). Can be used with Contact prefixes. See pages 18 and 58.
ToRoute_GroupNo	Whether the route is part of a "Pending Any" group. 0 means No; any other number means Yes.
ToRoute_HasBinData	Whether the transmittal has already been generated and saved. 0 means No; 1 means Yes.
ToRoute_ReplyTo	Whether email routes after this one may reply to this route. 0 means No; 1 means Yes. **Note**: replies go to the closest preceding route with a true ReplyTo.
ToRoute_RouteVia	The route method. E = Email, F = Fax, W = Web, H = Hard Copy
ToRoute_SendAlerts	Whether the routee will receive any alerts generated for the document. 0 means No; 1 means Yes.
ToRoute_Sequence	The sequence in the routing
ToRoute_Stage	The stage in the routing
ToRoute_Status	The status of the route
ToRoute_TransNumber	The transmittal number.
ToRoute_UserDocEdit	Whether the routee is a collaborator. 0 means No; 1 means Yes.
ToRoute_UserKey	Internal fieldname can be used with Contact prefixes. See page 18.

Data from Attachments

Use the following bookmark names for information related to a document's Attachment tab (i.e., to the files and documents attached to the document):

Bookmark Name	***Explanation***
DocAttachedFile_AttachedItemNumber	The number of the Item to which the attachment is attached, if any
DocAttachedFile_BinSize	The size of the attached file in bytes
DocAttachedFile_Cataloged	The date the attached file was catalogued
DV_DocAttachedFile_CatType	The type according to the attached file's Properties or the Doc type of the attached document
DocAttachedFile_CheckedIn	The date the attached file was last checked in
DocAttachedFile_CheckedOut	The date the attached file was last checked out
DV_DocAttachedFile_CheckOutUser	The name of the person who last checked out the attached file. **Note**: you can use Contact prefixes. (instead of the DV_ prefix) with this alias + fieldname. See page 18.
DV_DocAttachedFile_ContainerKey	The folder (if any) containing the attached file

Bookmark Name	***Explanation***
DocAttachedFile_FileName	The name of the attached file
DocAttachedFile_FileType	The file type according to the file's extension (e.g., .doc, .xls, .pdf, etc.)
DocAttachedFile_Keyword	The keywords according to the attached file's Properties
DocAttachedFile_Note	The note on the Attachment grid for this attachment
DV_DocAttachedFile_MailRoute	The Incl option on the Attachment grid (e.g., Always, PDF, etc.) for this attachment
DocAttachedFile_LinkedItemKey	The GUID of the Item to which the attachment is attached. See note below.
DV_DocAttachedFile_SourceContact	The name of the Source Contact associated with the attachment. **Note**: you can use Contact prefixes (instead of the DV_ prefix) with this alias + fieldname. See page 18.
DocAttachedFile_SourceBatchNo	The Batch number according to the attached file's Properties
DocAttachedFile_RelationshipType	The relationship between the attachment and the document with the attachment. Values can be **P** (for Parent), **C** (Child) or blank. **Note**: this bookmark is mostly used as a filter (see xFilter on page 32).
DocAttachedFile_SourceDocNo	xsfFile.sourceDocNo
DocAttchedFile_Keywords	The Keywords according to the attached file's Properties
DocAttachedFile_Project	The Project according to the attached file's Properties
DocAttachedFile_AttachedRevID	The Revision ID according to the attached file's Properties
DocAttachedFile_AttachSeq	The Sequence Number on the Attachment tab for this attachment
DocAttachedFile_ReferenceDate	The Reference Date according to the attached file's Properties

Note: you can use the following prefixes on **DocAttachedFile_LinkedItemKey**:

DTI_ for the title of the Item to which the Attachment is attached.

DST_ for the description of the Item to which the Attachment is attached.

For example, DTI_DocAttachedFile_LinkedItemKey

TIP

We offer a **List of DV_prefix bookmarks** template that you can use to see how your data will appear when you use (or not use) the DV_ prefix on applicable bookmarks. See KBA-01612.

Data from Project Setup

When you are designing a Bookmark Template for a Doc type other than Project Setup, but want to gather information from that project's Project Setup document, use the following bookmark names. For example, if you want to include the project title on a printout of your Meeting Minutes document, use **DV_DocHeader_Project**.

Bookmark with Prefix	***Explanation***
DV_DocHeader_Project	The Title from the Project Setup
DV_DocHeader_ProjectApprover	The Owner Approver on the Project Setup
DV_DocHeader_ProjectArea	The Area from the Project Setup's Details tab
DV_DocHeader_ProjectCitySZ	The City, State and ZIP code of the Project address
DV_DocHeader_ProjectCompany	The internal company/division ID associated with the project
DV_DocHeader_ProjectCompanyName	The internal company/division name associated with the project
DV_DocHeader_ProjectContract	The ID of the Project Setup (*for integrated sites only*)
DV_DocHeader_ProjectContractName	The name of the Project Setup (*for integrated sites only*)
DV_DocHeader_ProjectCostImpact	The Cost Impact amount from the Project Setup's Details tab
DV_DocHeader_ProjectCustomer	The Customer ID of the Project Setup's Customer
DV_DocHeader_ProjectCW	The Retention on the Project Setup's Details tab
DV_DocHeader_ProjectDuration	The Duration on the Project Setup's Details tab
DV_DocHeader_ProjectFinishDate	The Finish Date from the Project Setup
DV_DocHeader_ProjectGEO	The GEO Latitude from the Project Setup's Project tab
DV_DocHeader_ProjectHasBillingCodes	Whether or not the project's associated SOV has billing codes. 0 means No; 1 means Yes.
DV_DocHeader_ProjectLocation	The Location from the Project Setup's Details tab
DV_DocHeader_ProjectNoteA	The second note from the Project Setup's Scope tab
DV_DocHeader_ProjectNoteB	The third note from the Project Setup's Scope tab
DV_DocHeader_ProjectPayNumber	The Pay Item Number from the Project Setup's Details tab
DV_DocHeader_ProjectPO	The project's PO number from Microsoft Dynamics SL (*for integrated sites only*)
DV_DocHeader_ProjectReason	The reason/reject code from the Project Setup
DV_DocHeader_ProjectSCBudgetMode	The Commitment Budgeting Mode from the Project Setup's Project tab
DV_DocHeader_ProjectScope	The Scope (first note) from the Project Setup's Scope tab
DV_DocHeader_ProjectSignoff	The Approved date from the Project Setup
DV_DocHeader_ProjectSource	The Source Item from the Project Setup's Details tab
DV_DocHeader_ProjectSourceContact	The name of the Customer associated with the Project Setup
DV_DocHeader_ProjectSourceDocNo	The Doc Number on the Project Setup
DV_DocHeader_ProjectStartDate	The Start Date from the Project Setup
DV_DocHeader_Street	The Street of the Project Address
DV_DocHeader_ProjectSubtype	The contract Type from the Project Setup's Details tab
DV_DocHeader_ProjectTaxID	The Tax ID from the Project Setup's Details tab
DV_DocHeader_ProjectTaxRate	The Tax Rate from the Project Setup's Details tab
DV_DocHeader_ProjectType	The Contract Type from the Project Setup's Details tab (as set up in the ProjectConfig rule, for example Data or Equipment).

Data from Project's Parent Project

Bookmark with Prefix	***Explanation***
DV_DocHeader_ProjectParent	The ID of the parent project
DV_DocHeader_ParentPrjTitle	The title description of the parent project

Data from Commitments and Pay Requests

When you create a Bookmark Template for a Change Order or Pay Request document, you can access information found on its corresponding Commitment document or previous Pay Requests. In addition to bookmarks mentioned previously (for information from the Project Setup), you can use the following bookmarks in your Change Order or Pay Request template.

Bookmark Name	***Explanation***
DocHeader_LinkedDocNo	The document number of the linked document (e.g., CCO)
DocHeader_ComCurrEnd	The current end date specified on the parent Commitment
DocHeader_ComCurrStart	The current start date specified on the parent Commitment
DV_DocHeader_Subcontract	Description/Title of the Commitment
SubcontractDetails_Subcontract SPRLineDetails_Subcontract	Number of the Commitment
SubcontractDetails_Subcontractor	The name of the Vendor from the Vendor's Contact details
SubcontractDetails_SubcontractPayStatus	Pay status of the Commitment
SubcontractDetails_SubcontractTerms	Terms of the Commitment
SubcontractDetails_SubcontractDate	Approval date of the Commitment
SubcontractDetails_DocState	Code that indicates the state of the Commitment (A=Active, C=Closed, O=Not Active)
SubcontractDetails_VendId	ID of the Vendor from the Vendor's Contact details
SPRLineDetails_Project	ID of the Project
SPRLineDetails_ItemNumber	Number of the line item
SPRLineDetails_LineCreated	The date the item was created
SPRLineDetails_ApprovedQuantity	Units from the previous approved CCO
SPRLineDetails_ApprovedRetention	*Reserved for future use*
SPRLineDetails_ApprovedExpense	Cost of approved changes to the Commitment
SPRLineDetails_ApprovedAmount	*Reserved for future use*
SPRLineDetails_PendingChangeUnits	Units from any pending CCO
SPRLineDetails_PendingChangeRetention	*Reserved for future use*
SPRLineDetails_PendingChangeExpense	Cost of pending changes to the Commitment
SPRLineDetails_PendingChangeAmount	*Reserved for future use*
SPRLineDetails_VoucheredUnits	Units from the previously approved Pay Request

Bookmark Name	***Explanation***
SPRLineDetails_VoucheredAmount	Amount from the previously approved Pay Request
SPRLineDetails_VoucheredSMAmount	Stored material from the previously approved Pay Request
SPRLineDetails_VoucheredRetention	Retention from the previously approved Pay Request
SPRLineDetails_VoucheredSMRetention	Stored material retention from the previously approved Pay Request
DocItem_TotRetention	Sum of previously Vouchered Retention plus current retention (normally used on a Pay Request)
SPRLineDetails_PRInProgressQuantity	Quantity from previous but not yet approved Pay Request
SPRLineDetails_PRInProgressRetention	Retention from previous but not yet approved Pay Request
SPRLineDetails_PRInProgressAmount	Amount from previous but not yet approved Pay Request
SPRLineDetails_AccountCategory	Account Category of an Item from the Commitment's Item details
SPRLineDetails_Cap	If true, payments are limited to the current contract
SPRLineDetails_cmpNewContractAmount	New Contract Amount computed dynamically
SPRLineDetails_ContractAmount	Current contract amount = SPRLineDetails_ApprovedExpense + original amount)
SPRLineDetails_ContractUnits	Current contract amount = original units + PRLineDetails_ApprovedQuantity
SPRLineDetails_GLAcct	GL Account of an Item from the Commitment's Item details
SPRLineDetails_GLSub	Sub Account of an Item from the Commitment's Item details
SPRLineDetails_ItemPercent	Percent completed of an Item from the Commitment's Item details
SPRLineDetails_LaborClass	Labor Class of an Item from the Commitment's Item details
SPRLineDetails_LineDesc	Description of an Item from the Commitment's Item details
SPRLineDetails_ProjEntity	Cost Code of an Item from the Commitment's Item details
SPRLineDetails_Rate	Rate of an Item from the Commitment's Item details
SPRLineDetails_RetentionMethod	Retention Method of an Item from the Commitment's Item details
SPRLineDetails_TotalPercentRequest	Percentage that will be paid including the current Pay Request (e.g., 5)
SPRLineDetails_Percent	The Total Percent Requested in decimal format (e.g., .05)
SPRLineDetails_TotalUnitsCompleted	Total units that will be paid including the current Pay Request
SPRLineDetails_TotalAmountCompleted	Total amount that will be paid including the current Pay Request
SPRLineDetails_UOM	Unit of Measure of an Item from the Commitment's Item details
SubcontractDetails_VendorTIN	Vendor Tax Payer Identification Number (from Microsoft Dynamics SL for integrated sites and from Spitfire Vendor document's External DocNo for non-integrated sites)
SubcontractDetails_Is1099	Vendor 1099 flag (from Microsoft Dynamics SL for integrated sites and from Spitfire Vendor document's IsSubcontract flag for non-integrated sites.
SubcontractDetails_VendorLicenses	A comma-separated list of vendor license attributes (from the Vendor Contact's Attribute tab)

Note: For information from items that are in the Commitment but not the Change Order or Pay Request use the alias **SubcontractLineIdleDetails_** with the above fieldnames (except for TotalPercentRequest, TotalUnitsCompleted, TotalAmountCompleted and UOM).

Change Order Data

The following bookmarks are for **Change Order** and **Proposed CO** documents only.

Bookmark Name	***Explanation***
CORequestForm_DocMasterKey	The GUID of the Change Order
CORequestForm_DocState	That state (not status) of the Change Order. (I = In Process, P = Pending, A = Approved and C = canceled)
CORequestForm_CORevenueAmt	The amount of billable revenue on the Change Order
CORequestForm_OriginalContractAmt	The Original Contract amount
CORequestForm_PriorApprovedAmt	The sum of all Change Orders with revenue posted and with a DocNo that is less than the DocNo of the Change Order for which the Doc Template is being used.
CORequestForm_NewContractAmt	The sum of the OriginalContractAmt + PriorApprovedAmt + CORevenueAmt
CORequestForm_NewContractTotal	The sum of NewContractAmt +PriorPendingAmt
CORequestForm_PriorPendingAmt	The sum of all Change Orders with a pending state and a DocNo that is less than the DocNo of the Change Order for which the Doc Template is being used.
CORequestForm_PriorTotal	The sum of PriorPendingAmount + PriorApprovedAmt

Change Items and Corresponding Budget Entries

Bookmark Name	***Explanation***
DocItemTask_LinkedContact	The source contact on the child (RFQ, CCO, etc.) document suitable for use with DV_ and all the D*xxx* Contact prefixes
DocItemTask_LinkedEstimate	The sum of line item estimates on the child (RFQ, CCO, etc.) document
DocItemTask_LinkedExpense	The sum of line item expense amounts on the child document
DocItemTask_LinkedLines	The number of lines on the child document
DocItemTask_LinkedQuote	The sum of line item estimates on the child document
DocItemTask_LinkedStatus	The description of the child document status (e.g., Approved or Committed, etc.)
CIAllocSummary_AllocSeq	The Sequence Number of an Allocation in a CI's Budget Entries
CIAllocSummary_Amount	The total revenue amounts from all matching Allocations in a CI's Budget Entries
CIAllocSummary_ExpAmount	The total expense amounts from all matching Allocations in a CI's Budget Entries
CIAllocSummary_Description	The Description of an Allocation in a CI's Budget Entries
CIAllocSummary_SourceCount	The number of CIs with an Allocation
CISummary_AccountCategory	Aggregate Account Categories for the CI Budget Entries
CISummary_Category	The description of the Account Category taken from the Account Category tool
CISummary_LineSeq	The Seq number for the Account Category taken from Account Category tool
CISummary_LineTotal	The number of Budget Entries with corresponding Account Category
CISummary_SumLineTotal	The grand total of all CISummary_LineTotals
CICost_ProjEntity	The Cost Code of a CI's Budget Entry

Bookmark Name	***Explanation***
CIDetail_ProjEntity	Either the Cost Code of a CI's Budget Entry or blank if the printed row contains a CI Description
CICost_Qty	The Units of a CI's Budget Entry*
CIDetail_Qty	Either the Units of a CI's Budget Entry or blank if the printed row contains a CI Description*
CICost_RevenueAmount	The Revenue Amount of a CI's Budget Entry*
CIDetail_RevenueAmount	Either the Revenue Amount of a CI's Budget Entry or blank if the printed row contains a CI Description*
CICost_Subcontract	The Commitment of a CI's Budget Entry*
CIDetail_Subcontract	Either the Commitment of CI's Budget Entry or blank if the printed row contains a CI Description*
CICost_AccountCategory	The Account Category of a CI's Budget Entry*
CIDetail_AccountCategory	Either the Account Category of a CI's Budget Entry or blank if the printed row contains a CI Description*
CICost_CostRate	The Rate of a CI's Budget Entry*
CIDetail_CostRate	Either the Rate of a CI's Budget Entry or blank if the printed row contains a CI Description*
CICost_ItemNumber CIDetail_ItemNumber	The Item Number of the CI*
CICost_ItemSeq	The Seq # of a CI's Budget Entry*
CIDetail_ItemSeq	Either the Seq # of a CI's Budget Entry or blank if the printed row contains a CI Description*
CICost_LineDescription	The description of a CI's Budget Entry*
CIDetail_LineDescription	Either the description of a CI's Budget Entry or the description of the Change Item if the printed row contains the CI Description*
CICost_CostType	The Cost Type of a CI's Budget Entry

* See below for an explanation of the CICost alias vs. the CIDetail alias.

CICost vs. CIDetail

Both the CICost_ and CIDetail_ bookmarks point to information on a Change Item's Budget Entry window. However, when the CIDetail alias is included, logic will be used to show a CI description on its own line. For example, the following template bookmarks will yield results such as shown:

#	***Description***	***Account Category***	***Revenue (Cost to Customer)***
RR_CIDetail_ItemNumber	RR_CIDetail_LineDescription	RR_CIDetail_AccountCategory	RRFC2_CIDetail_RevenueAmount

#	Description	Account Category	Revenue
00001	Additional electrical work required for utility connection including FO cable re-routing	These are blank because it is a Change Item description row.	
00001	Site Work	_LABOR	$1,250.00
00002	2 Days additional work involved in providing additional electrical installation pursuant to attached Meeting Minutes.	These are blank because it is a Change Item description row.	
00002	Subcontract: 16000 Electrical		$1,675.00
00002	Workmen	_LABOR	$17,000.00

On the other hand, if only the ciCost alias is used, the same document would yield the following results:

#	*Description*	*Account Category*	*Revenue (Cost to Customer)*
RR_CICost_ItemNumber	RR_CICost_LineDescription	RR_CICost_AccountCategory	RRFC2_CICost_RevenueAmount

#	Description	Account Category	Revenue
00001	Site Work	_LABOR	$1,250.00
00002	Subcontract: 16000 Electrical		$1,675.00
00002	Workmen	_LABOR	$17,000.00

Bookmarks that Take the Contact Prefixes

You can use any of the Contact prefixes described on page 18 (DCO_, DTI_, DSAL_ etc.) in front of the following bookmark names (for example, DSAL_DocHeader_ResponsibleParty):

Bookmark that takes Contact Prefix	*Who*
DocHeader_ResponsibleParty	Person who is document's Responsible party.
DocHeader_SourceContact	Person who is document's Source Contact.
DocHeader_OwnerApprover	Person who is document's Owner Approver.
DocHeader_LastStatusBy	Person who last changed the document's status (internal field)
DocHeader_EditUser	Person who has the document open at the moment (internal field)
DocRevision_FromUser	Person who created the document (internal field).
DocItem_LastStatusBy	Person who last changed the item's status (internal field)
DocItem_ResponsibleParty	Person who is the Item's Responsible party.
DocRoute_UserKey	Person to whom the document is routed in this step (internal field)
DocRoute_ByUser	Person who specified the use of a transmittal (internal field)
DocRoute_FromUser	Person who added this person to the route (internal field)
DocMeeting_UserKey	Attendee on Meeting Minutes document (internal field)
ToAddr_UserKey	The "To" Addressee on the document (internal field).
FromAddr_UserKey	The "From" Addressee on the document (internal field)
ShipAddr_UserKey	The "Ship To" Addressee on the document (internal field)
AccountantAddr_UserKey	Person who is the project's Accountant (internal field)
AltPMAddr_UserKey	Person who is the project's Alternate Project Manager (internal field)
ArchitectAddr_UserKey	Person who is project's Architect (internal field)
AssociateAddr_UserKey	Person who is project's Associate (internal field)

Bookmark that takes Contact Prefix	***Who***
BonderAddr_UserKey	Person who is project's Bonder (internal field)
CMAddr_UserKey	Person who is project's Construction Manager (internal field)
DevMgrAddr_UserKey	Person who is the project's Development Manager (internal field)
ExecutiveAddr_UserKey	Person who is project's Senior Executive (internal field)
GCAddr_UserKey	Person who is the project's General Contractor (internal field)
LenderAddr_UserKey	Person who is project's Lender (internal field)
OPSMgrAddr_UserKey	Person who is the project's Operations Manager (internal field)
OwnerAddr_UserKey	Person who is project's Owner (internal field)
PMAddr_UserKey	Person who is project's Project Manager (internal field)
StaffAddr_UserKey	Person who is project's Project Staff (internal field)
SuperAddr_UserKey	Person who is project's Superintendent (internal field)
ProjectCustomerAddr_UserKey	Person who is Customer on Project Contract (internal field)
RPartyAddr_UserKey	Person who is document's Responsible Party. (Same as DSAL_DocHeader_ResponsibleParty.)
SrcConAddr_UserKey	Person who is document's Source Contact. (Same as DSAL_DocHeader_SourceContact.)
ExtAppr_UserKey	Person who is document's Owner Approver. (Same as DSAL_DocHeader_OwnerApprover.)
SubcontractDetails_Subcontractor	Person who is the Vendor on a Commitment (Subcontractor)
DocAttachedFile_CheckOutUser	Person who last checked out the file that is attached to the document
DocAttachedFile_SourceContact	Person who is the Source Contact associated with an attachment
ToRoute_UserKey	Transmittal person to whom the document is routed in this step (internal field)
ToRoute_ByUser	Person who specified the use of a transmittal (internal field)
ToRoute_FromUser	Person who added this routee with transmittal to the route (internal field)

Appendix C

The DM_ Prefix

You can use the DM_ prefix in front of the following bookmark names:

Bookmark with Prefix	***Explanation***
DM_DocHeader_Project	Project ID Code with mask
DM_DocHeader_ProjEntity DM_DocItemTask_ProjEntity	Cost Code with mask

The RR_ and RC_ Prefixes

You can use the RR_ (or RC_) prefix in front of any bookmarks that include the following aliases, for example, RR_DocItemTask_GLSub or RR_SPRLineDetails_ItemNumber. **Note**: the RR_ and RC_ prefixes often include prefix extensions; see page 22.

RR_CIAllocSummary_
RR_CICost
RR_CIDetail_
RR_CISummary_
RR_DocAddr_
RR_DocAlert_
RR_DocCompliance_
RR_DocDates_
RR_DocExclusion_
RR_DocInclusion_
RR_DocInstruction
RR_DocItem_
RR_DocItemComment_
RR_DocItemTask
RR_DocMeetingAttendee_
RR_DocRevision_
RR_DocRevisionList_
RR_DocRevItem_
RR_DocRoute
RR_DocRouteTransmittal
RR_SPRLineDetails_
RR_SubcontractLineIdleDetails_

DV_ Bookmarks for Internal Data

Use the **DV_** prefix in front of the following bookmark names to get the following information. (See also the DV_ bookmarks for Project Setup data on page 53.)

Bookmark with Prefix	***Explanation***
DV_DocAttachedFile_CatType	The type according to an attached file's Properties or the Doc type of an attached document
DV_DocAttachedFile_CheckOutUser	The name of the person who last checked out an attached file
DV_DocAttachedFile_ContainerKey	The folder (if any) containing an attached file
DV_DocHeader_DocTypeKey	The site-given name of the Doc Type
DV_DocHeader_Priority	The priority level of a document
DV_DocHeader_ProjectCompany	The company/division code on the Project Setup
DV_DocHeader_ProjectCompanyname	The internal company/division name associated with the Project Setup
DV_DocHeader_ProjectPO	The purchase order number (*for integrated sites only*)
DV_DocHeader_ProjEntity DV_DocItemTask_ProjEntity	Description of the Cost Code
DV_DocHeader_Source	Description of the Source Code
DV_DocHeader_Status	Description of the Status
DV_DocHeader_Subcontract DV_DocItemTask_Subcontract	The title of the commitment
DV_DocHeader_SubcontractVendor	The Vendor ID
DV_DocHeader_SubcontractVendorCompany	The Vendor Company name
DV_DocHeader_SubcontractExpenseAmount	The amount of the commitment
DV_DocHeader_SubcontractStatus	The Commitment status code
DV_DocHeader_SubType	Description of the Subtype
DV_DocItem_Drawings	Description of the Item's Drawings field
DV_DocItem_FieldMockup	Description of the Item's Mockup field
DV_DocItem_Guarantee	Description of the Item's Guarantee field
DV_DocItem_ItemStatus	Description of the Item Status
DV_DocItem_ItemSource	Description of the Item Source
DV_DocItem_ItemType	Description of the Item Type
DV_DocItem_MixDesign	Description of the Item's Design field
DV_DocItem_ProductData	Description of the Item's Data field
DV_DocItem_Samples	Description of the Item's Samples field
DV_DocItem_Schedule	Description of the Item's Schedule field
DV_DocItem_TestReport	Description of the Item's Reports field

Appendix D

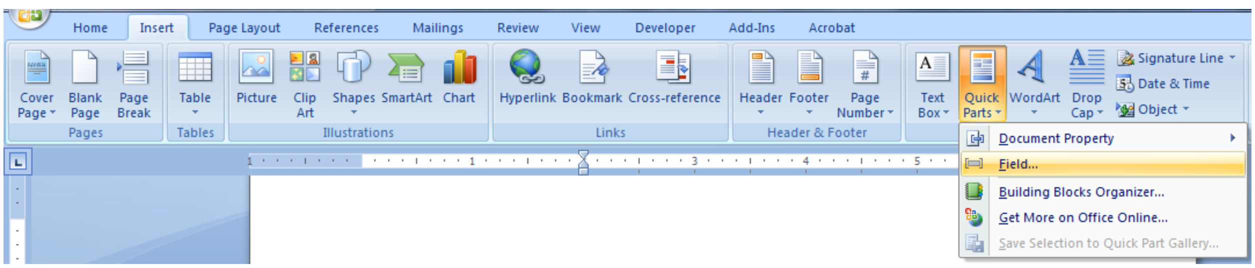
Additional Microsoft Word Features

Using Field Codes for Bookmarks

In Microsoft Word, each bookmark must have a unique name. Therefore, you can insert a Spitfire bookmark only once per document. You can use prefix extensions (described on page 22) in order to insert a bookmark more than once. However, there is also another process that will give you the results you need. After you insert your Spitfire bookmark as usual for the first occurrence of the data, add a field code to refer back to your original bookmark.

To enter a field code in Microsoft Word:

1. Place your cursor at the location where you want the second use of the bookmark to appear.
2. In Word, select **Quick Parts | Field** from the **Insert** ribbon.



3. Select the fieldname **Ref**.
4. Select the bookmark name.
5. Click **OK**.
6. Repeat to add more locations for the bookmark.

For example,

Acme Construction • 80 Business Park • Chicago, IL 60613

Date: May 15, 2006
Memo to: Mr. John Smith
From: Mary Jones
RE: Project GC003 Northern Lights Office Bldg

Beginning June 1st the Northern Lights Office Bldg job site will secured at 9:00 pm and patrolled by Ace Security Guards until 6:00 am. If you require access to the Northern Lights Office Bldg

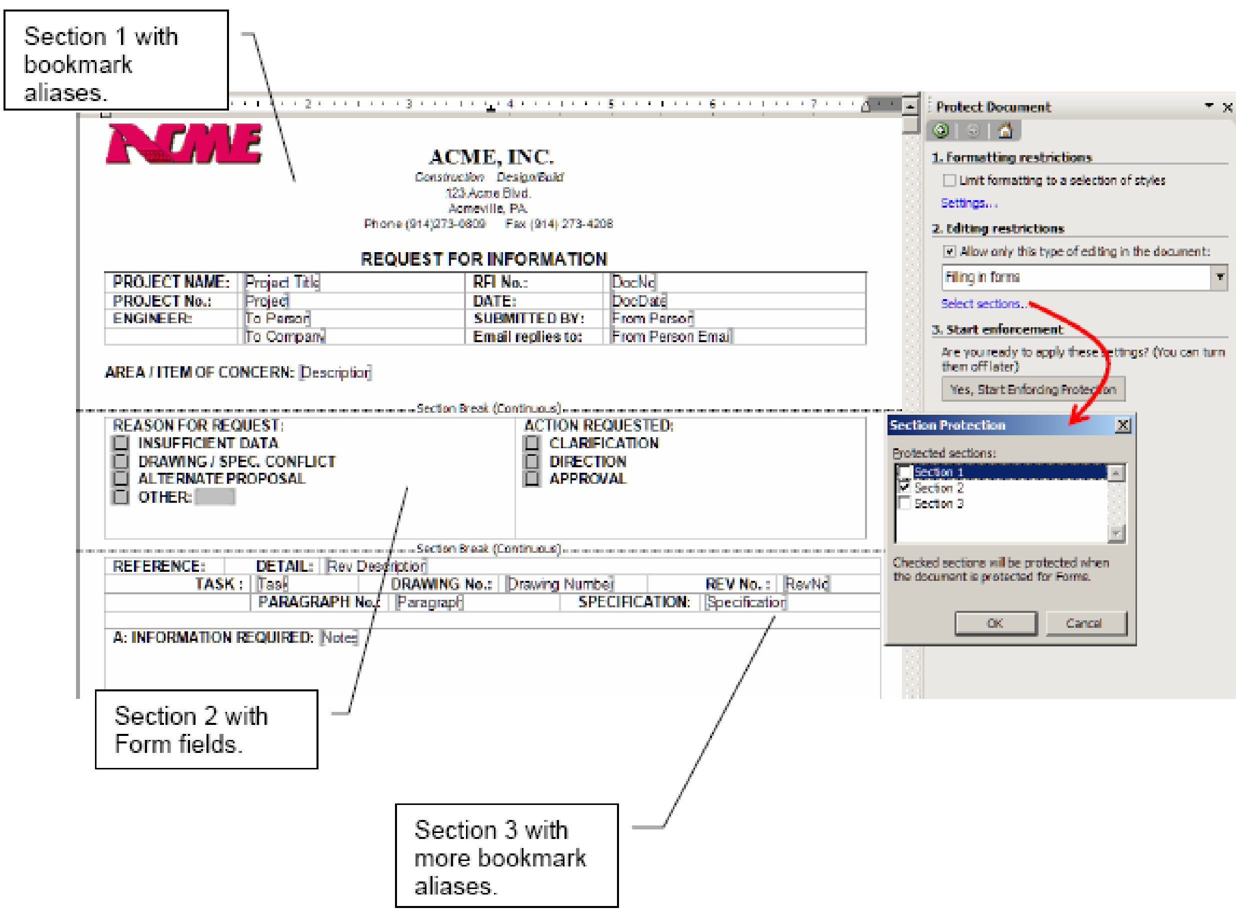
In the example above, the Project Description in the RE: line is a bookmark (**DV_DocHeader_Project**).

In the paragraph, the project is referred to a second and third time using the field code to display the data from the bookmark.

Using Bookmarks with Document Protection

You can use bookmarks in Microsoft Word documents that are protected. However, Spitfire bookmarks require data to be updated by Spitfire whenever you create a new printout from a Bookmark Template. Microsoft Word's document protection prevents this updating **if you password protect the entire document**. The tip here is to password protect only sections of the document and leave other sections (the ones with the Spitfire bookmark names) unprotected. You can protect more liberal sections of the document if you omit the password—Spitfire will then detect the protection, unprotect during replacement and re-enable protection before presenting the document to the user.

Example: Spitfire's sample RFI Form template contains bookmark names in Sections 1 and 3 and Section 2 contains form fields. Therefore, only Section 2 is protected.



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